

Millie Chang

Insurance Sales Agent

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STRENGTHS

- 👥 **Relationship Building**
During walk-in conversations, focused questions opened honest coverage discussions and helped customers feel comfortable choosing next steps.
- 🗣️ **Consultative Sales**
Quote conversations became clearer after connecting vehicle details, household needs, and coverage choices instead of pushing one option.
- 📅 **Follow-Up Discipline**
A structured contact plan kept busy prospects visible; scheduled reminders turned scattered inquiries into dependable customer conversations.
- 📊 **Transaction Accuracy**
Balancing premiums and scanning deposit records made branch handoffs smoother, with supervisors relying on organized documentation.
- 🗣️ **Bilingual Service**
Switching naturally between English and Spanish helped customers grasp limits, deductibles, payments, and policy decisions with confidence.

SKILLS

- Personal Lines
- Property and Casualty
- Customer Service
- Sales Production Goals
- Relationship Building Follow-Up
- Multi-Tasking
- Written Communication
- Verbal Communication

SUMMARY

Customer-focused insurance sales professional with more than three years supporting **personal lines** and nonstandard auto customers through inbound leads, **walk-in traffic**, renewals, and policy service requests. Licensed Illinois **Property and Casualty** Producer who explains coverage options clearly, asks focused questions, and recommends products aligned with customer needs. Builds lasting relationships through **timely follow-up**, bilingual English-Spanish service, accurate documentation, and dependable payment processing. Current work includes CRM workflows, agency management systems, currency reconciliation, scanned deposit records, quote preparation, and production-focused pipeline management. Recognized for customer connection, service quality, and peer mentoring. Ready to bring consultative sales discipline, careful transaction handling, and a strong appetite for training and advancement to HarborPoint Auto & Home Insurance.

EXPERIENCE

Insurance Sales Agent

Prairie Shield Insurance Group 📅 January 2024 - Present 📍 Elgin, IL

Own inbound and walk-in sales activity for nonstandard auto and personal lines customers. Guide discovery, quoting, coverage selection, payment processing, documentation, and follow-up within CRM and agency management systems. Apply coaching from weekly reviews while supporting **production goals**, renewal relationships, and accurate branch operations.

- Converted inbound and walk-in inquiries into nonstandard auto coverage recommendations through focused discovery conversations.
- Explained liability, physical damage, deductibles, and policy conditions for clear customer decisions.
- Managed more than 100 monthly opportunities through **CRM** records, contact plans, and scheduled **follow-up**.
- Balanced premium transactions and prepared scanned **deposit documentation** for timely bank delivery.
- Reviewed driving history, vehicle details, and household needs before presenting suitable **personal lines** products.
- Applied weekly coaching on objections and close planning, strengthening production performance and customer trust.

Customer Service and Sales Representative

Lakeside Coverage Center 📅 May 2023 - December 2023 📍 South Elgin, IL

Supported personal lines customers across quoting, policy questions, documentation, referrals, and renewal communication. Used agency management systems for accurate records and underwriting handoffs while building **bilingual** service skills and completing foundational Property and Casualty licensing coursework.

- Prepared auto quotes and answered policy questions during high-volume **personal lines** service periods.
- Followed web, phone, and referral leads using documented call plans and timely customer **follow-up**.
- Explained limits, deductibles, payment schedules, and policy changes in **English** and **Spanish**.
- Updated customer records and scanned identification and policy documents before underwriting review.
- Built repeat-customer relationships through renewal reminders and clear next-step communication.
- Completed **Property and Casualty** licensing coursework while applying supervisor feedback on compliant documentation.

Inbound Sales Leads

Walk-In Traffic Coverage Education

Currency Transactions

Agency Management Systems

Bilingual English-Spanish

LANGUAGES

English Native

Spanish Proficient

MY CAREER



Insurance Sales Agent at
Prairie Shield Insurance Group
(2.7 Years)

Customer Service and Sales
Representative at Lakeside
Coverage Center (7 Months)

PROJECTS

Bilingual Customer Follow-Up Workflow 📅 2025

Created a practical follow-up workflow for English- and Spanish-speaking customers, combining CRM contact plans, renewal reminders, quote status checks, and clear next actions.

Deposit Documentation Control 📅 2024

Strengthened premium transaction records through balancing routines, receipt checks, scanned documentation, and organized bank-delivery preparation within agency operations.

LEADERSHIP & AWARDS

- Prairie Shield Customer Connection Recognition, 2025
- Lakeside Coverage Center Service Excellence Recognition, 2023
- Peer Mentor, Prairie Shield New Representative Study Group, 2025 - Present

EDUCATION

High School Diploma

Larkin High School 🎓 GPA: 3.5 📅 2022 📍 Elgin, IL

Coursework: English, Spanish, Business Communication, Personal Finance

CERTIFICATIONS

- Illinois Property and Casualty Producer License 📅 2024
- Insurance Fundamentals Certificate, Insurance Institute of America 📅 2023

TECHNICAL SKILLS

- **Insurance Products:** Nonstandard Auto Insurance, Personal Lines, Liability Coverage
- **Sales Operations:** Inbound Sales Leads, Walk-In Traffic, Production Goals
- **Customer Management:** Customer Relationships, New Business, Existing Business
- **Policy Servicing:** Policy Quoting, Renewals, Policy Changes
- **Coverage Analysis:** Driving History, Vehicle Details, Coverage Needs
- **Agency Systems:** CRM, Agency Management Systems, Customer Records
- **Financial Processing:** Currency Transactions, Premium Payments, Bank Deposits
- **Document Control:** Scanned Documentation, Receipts, Identification Records
- **Communication Tools:** Microsoft Office, Email, Telephone
- **Training Development:** Property and Casualty Training, Mentorship, Sales Coaching

PROFESSIONAL AFFILIATIONS

- Volunteer Spanish-English Tax and Benefits Information Assistant, Elgin Community Resource Fair, 2024 - Present
- Peer Mentor, Prairie Shield New Representative Study Group, 2025 - Present

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST