

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
- Inbound Sales Leads
- Walk-In Traffic
- Coverage Education

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.

PROJECTS

Bilingual Customer Follow-Up Workflow 2025

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)

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