

## EXECUTIVE SUMMARY

An **people management** expert with 11 years of experience in sales, customer service, vendor management, and claims management roles. An energetic leader with a passion for cultivating a culture of success and for leveraging technical knowledge of products and services to develop lasting relationships with clients.

## FUNCTIONAL EXPERTISE

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- **Delegating Responsibilities and Coaching People**
- **Improving Organizational Effectiveness**
- **Sales Planning and Consultative Selling**
- **Managing Relationships with Clients**
- **Analyzing and Negotiating Contracts**
- **Translating and Explaining Technical Concepts**

## FUNCTIONAL EXPERTISE DEMONSTRATED

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### JONES INSURANCE

December 2019 – Present

*A retail branch of Jones Insurance, the Fortune 500 insurance and financial services firm, in Indio CA.*

#### **Agency Sales and Team Lead**

Recruited to help launch a branch by training salespeople, building strategic sales partnerships with local organizations, coaching on best practices, and helping the office develop an initial book of business.

- **Delegating Responsibilities and Coaching People:** Successfully implemented best practices in the sales area of the business, coaching three salespeople to increase their effectiveness handling inbound requests from customers, to ensure the team had the requisite knowledge pertaining to prevailing State and Federal laws and statutes, and to provide word tracks to help cultivate successful relationships with customers. E.g. spent weekly one-to-one time with a struggling salesperson that resulted in a 400% increase in sales within 30 days.
- **Sales Planning and Consultative Selling / Translating and Explaining Technical Concepts:** Achieved top sales in the region by developing trust with customers and by sharing technical knowledge of relatively complex insurance concepts with customers. Secured an average of 35 policies per month with an average annual contract value of \$1,000, resulting in \$35,000 in annualized billings per month. Delivered key referral arrangements with local non-profit, for-profit, and civic organizations.

### PRODUCTIVE INSURANCE

October 2012 – November 2019

*The Austin TX claims center of Productive Insurance, the insurer with ~\$15billion/yr. in revenues, responsible for resolving an average of ~260 auto, injury, and other claims per month.*

#### **Claims Supervisor** (August 2007 – November 2012)

Successfully managed full responsibility for the claims center, supervising a team of 8 service people and adjusters, implementing Company programs, finding operational efficiencies, managing strategic negotiations with claimants and vendors, and compiling regular reports for the regional office.

- **Delegating Responsibilities and Coaching People:** Successfully supervised, coached, and delegated tasks to a team of 8 employees. Responsible for tracking the progress of claims, personally handling escalated customer service concerns, cultivating increased technical knowledge of the claims resolution process in junior employees, sharing best negotiation practices, and approving high-value payouts. Recognized for superior performance and named California Supervisor of the Month three times in 2012.
- **Improving Organizational Effectiveness:** Implemented a daily, weekly, and monthly personal planning system for all members of the Austin team. This initiative was instrumental in improving quality and volume

scores at the Petaluma claims center and was rolled out to all 40 Claims Supervisors in California.

**Claims Adjuster** (October 2005 – August 2007)

Performed all duties necessary for successful processing of insurance claims. Regularly debriefed claimants, negotiated terms with vendors and service providers, and made liability assessments while providing outstanding customer service.

- **Managing Relationships with Clients / Translating and Explaining Technical Concepts:** Served as the point of contact for claimants, leveraging extensive technical knowledge about the claims process, about vendors and service providers, and about insurance regulations to cultivate a sense of partnership through the claims process. Awarded Progressive Insurance’s Customer Service Star three times.
- **Analyzing and Negotiating Contracts:** Successfully led negotiations for and resolved ~35 claims per week, frequently performing site visits to vendors and service providers (e.g. automotive repair shops) to cultivate healthy partnerships and to build understanding of vendors’ cost drivers, enabling Progressive to negotiate prices and terms from an informed perspective.

**ALL-STAR TACK SHOP**

October 2009 – June 2012

*An online, mail order, and 18,000 square foot brick-and-mortar tack shop offering specialty products for riders, horses, and facilities owners with annual revenues of ~\$2 million located near Columbus, Ohio.*

**Store Manager** (June 2004 – June 2005)

Managed a team of 5 salespeople, performed inventory management and purchasing functions, led creative selling initiatives, created marketing collateral, and implemented operational improvements.

- **Delegating Responsibilities and Coaching People:** Successfully managed a team of 5 salespeople, overseeing personnel scheduling and reviewing employees’ performance. Made special efforts to coach floor staff on selling the customer experience and creating an inspirational retail environment.
- **Sales Planning and Consultative Selling:** Led the Company in sales and implemented a variety of selling strategies, achieving ~160% overall year-on-year revenue growth between 2004 and 2005. E.g. leveraged niche marketing strategies focused on retaining customers: first to implement a customer loyalty program and to launch a regular newsletter for equine enthusiasts.

**Sales Associate** (October 2002 – June 2004)

Provided excellent customer service, performed inventory management functions, and assisted at industry trade fairs.

**EDUCATION**

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**Bachelor of Arts (Double Major: Business Administration & Equine Administration) *Magna Cum Laude***

Otterbein College—Westerville, OH