

JANE T. DOE

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ACCOUNT EXECUTIVE | LIFE INSURANCE AGENT | SALES DEVELOPMENT REPRESENTATIVE

Resourceful, results-achieving sales and business development professional with experience in managing client accounts with highly effective capabilities in direct customer/client-facing roles and closing new business. Experience includes project management, direct sales, and prospecting with a keen ability to leverage creative objections handling skills to assist clients in the buying process. Exceptional work ethic, maintains schedules and provides support and guidance while providing the highest level of customer service to internal and external customers.

CORE COMPETENCIES

- ♦ Client Account Management / Sales
- ♦ Cross-selling / Upselling / Negotiation
- ♦ Project Management / Coordination
- ♦ Strategic Planning / Execution
- ♦ Customer / Client Services Management
- ♦ Prospecting / Cold Calling / Sales Closing
- ♦ Market Research / Competitive Advantage
- ♦ Objection Rebuttals / Problem Resolution
- ♦ Client Relationship Management (CRM)
- ♦ Sales Presentations / Demonstrations
- ♦ Top Sales Representative Recognition
- ♦ Microsoft Office / Hubspot / Databases

PROFESSIONAL EXPERIENCE

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Sep 2018 – Present

Select Quote (Mar 2022 – present)

Health IQ (Sep 2018 – Mar 2022)

- ♦ Recognized as top sales executive consistently ranked 6–10 out of 82 sales agents, including #1 inforce sales for 4 months in first year with top rookie inforce premium of \$810,000 and 635 inforce sales over 1 year.
- ♦ Key Sales Metrics
 - Generated \$1.6M in revenue from sales of 1,434 policies in 2.5 year span (during pandemic)
 - Set all-time company records: 21 sales in 1 day and 60 in 1 week
 - Ranked #3 in accidental policy cross-sells
 - Top revenue in 1 month: \$94,200
 - Top sales in 1 month: 171 against 80–100 average
 - Top inforce policies in 1 month: 80 against 30–40 average
- ♦ Manage high-volume call center responsibilities, including placing/dispositioning 50+ cold calls, completing 17+ transfers, and averaging 7+ hours of talk time (highest company average).
- ♦ Top agent for term life risk analysis and underwriting in matching clients with carriers for approval at the most favorable risk categories, resulting in decreased attrition and lower lapse rates.
- ♦ Oversee/complete full sales cycle process, including initial sale, application, underwriting, approval, and high-premium placements.
- ♦ Facilitate client retention during rate increases by providing best carrier options through rebuilding value, pivoting, and down selling.
- ♦ Manage VIP existing client database utilizing cross-selling, upselling, and referral generation skills.

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Jul 2017 – Jan 2018

Any Corp

- ♦ Promoted to Account Executive following 30-day sales competition and recognition for top sales of 22 over 30 days.
- ♦ Managed client account portfolio and facilitated new business through conducting 100+ warm/cold lead calls daily to car dealerships around the country to set-up demos and sell computer software.
- ♦ Presented software demos based on analysis of customer's competitive landscape and dealerships' specific needs.
- ♦ Employed Hubspot CRM to manage full sales cycle process from qualifying/prospecting for customers to final close/customer retention.

EDUCATION

University of California, Berkeley

Bachelor of Science in Economics (2015)

Bocconi University, Milan

Studied Abroad