

# SAMANTHA MARTINEZ

*Insurance Sales Manager*

✉ s.martinez@email.com

📞 (123) 456-7890

📍 Montgomery, AL

🌐 [LinkedIn](#)

## EDUCATION

Bachelor of Science

Business Administration

**The University of Alabama**

📅 2014 - 2018

📍 Tuscaloosa, AL

## SKILLS

- Pipedrive
- Applied Epic
- CallRail
- Xactware
- Zoom
- Salesloft
- HelloSign
- Tableau
- Vesta Insurance
- Marketo

## WORK EXPERIENCE

### Insurance Sales Manager

#### MetLife Insurance

📅 2024 - current

📍 Montgomery, AL

- Supervised 12 agents, helping them **surpass quarterly sales targets by \$258K** through targeted training programs and client acquisition strategies
- Developed a training module for Applied Epic software, improving policy processing speed by 22% and reducing errors by 13%
- Analyzed sales performance data using Tableau, identifying six underperforming products
- Systematized client referral tracking in SalesLoft, increasing referral-based sales by 14% in the first year of implementation

### Insurance Broker

#### Blue Cross and Blue Shield of Alabama

📅 2020 - 2024

📍 Birmingham, AL

- Implemented CallRail to monitor leads from online campaigns, driving an additional \$62,984 in premium sales over three months
- Evaluated marketing campaigns through Marketo, driving a 17% bump in lead-to-sale conversion rates over two quarters
- Harnessed HelloSign to store, sign, and send essential documents, reducing policy issuance time by 12 hours/month
- Processed complex claims using Xactware, achieving a resolution rate that **exceeded industry benchmarks by 6%**

### Customer Service Representative

#### State Farm Insurance

📅 2018 - 2020

📍 Tuscaloosa, AL

- Managed a caseload of 350+ clients, maintaining a 98% policy renewal rate and adding \$72,398 in retained premiums per year
- Expanded the use of Zoom for virtual consultations, completing 29 remote claims assessments per month with a 94% satisfaction rate
- Utilized Pipedrive to track over 354 client interactions, ensuring timely follow-ups and boosting policy renewal rates by 11%
- Capitalized on Vesta Insurance to process complex client inquiries, **resolving 96% of cases within 48 hours** and exceeding service benchmarks