Patricia Williams

Insurance Sales Agent

Licensed insurance sales agent with 6 years of experience prospecting personal and commercial lines, acquiring 164 new clients across three agencies, and maintaining satisfaction scores above 93% through thorough needs analyses and clear policy explanations during annual reviews. Grew policy renewals by 29.13% year over year by introducing a pre-renewal outreach calendar and sending personalized coverage summaries to each policyholder.

Contact Information

(330) 555-0111

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Wooster, OH 12345

Education

- BBA in Marketing

  University of Akron, Akron, OH

  2016 – 2020

Key Skills

- CRM software
- Vertafore AMS360
- Microsoft Excel
- Policy needs analysis
- Personal and commercial lines
- Regulatory compliance
- Risk assessment
- Client retention strategies
- New business development
- State insurance licensing regulations

Professional Experience

INSURANCE SALES AGENT | MUSKINGUM VALLEY INSURANCE GROUP, WOOSTER, OH
2023 – PRESENT

- Achieved a 96.04% customer satisfaction score across 217 policyholder surveys by conducting thorough needs analyses and delivering clear policy explanations during annual reviews.
- Acquired 73 new clients in 2025 by prospecting local businesses and tailoring commercial packages covering property, liability, and workers' compensation risks.
- Grew policy renewals by 29.13% year over year by introducing a 60-day pre-renewal outreach calendar and sending personalized coverage summaries to each policyholder.
- Customized insurance programs for individual and small-business customers, coordinating required medical examinations and verifying completion of all underwriting forms.

INSURANCE SALES AGENT | MOHAWK CREEK FINANCIAL SERVICES LLC, ORRVILLE, OH
2021 – 2023

- Acquired 57 new personal-lines clients in the first 12 months by calling on referrals and community contacts, generating $267,400 in first-year written premium.
- Earned a customer satisfaction score of 93.27% on quarterly post-interaction surveys by explaining policy terms, premium breakdowns, and claim filing steps during each appointment.
- Tracked all client interactions and follow-up tasks in CRM software, reducing missed appointment callbacks from 9 per month to 1.

INSURANCE SALES ASSOCIATE | STILLWATER BEND INSURANCE PARTNERS, MASSILLON, OH
2020 – 2021

- Acquired 34 new homeowner and auto clients within 8 months by cold-calling prospect lists and presenting customized coverage options.
- Maintained a customer satisfaction score of 93.82% on post-sale surveys by walking each policyholder through declarations pages and endorsement details.
- Ensured policy requirements were fulfilled for 146 new applications, collecting medical exam results and completed forms within an average of 3 days per file.