

Zan Thuong

Senior Insurance Account Manager

New Haven · Connecticut · US

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Summary

Results-oriented Insurance Account Manager with over 17 years of progressive experience in property & casualty insurance, excelling in both client-facing and team leadership roles. Expertise in managing high-volume books of business for individual, family, and corporate clients throughout Connecticut. Renowned for meticulous attention to client retention, cross-functional collaboration with sales teams, and process optimization that leads to measurable improvements in team efficiency and profitability. Holds a valid State of Connecticut Property and Casualty Insurance License, and adept at navigating the demands of hybrid and remote environments. Known for empathetic client communication and a track record of mentoring junior staff, driving both client and team satisfaction.

Experience

New Haven Insurance Associates, LLC

Senior Insurance Account Manager | May 2018 – Present

Lead account management for a \$3.8M+ book of personal and commercial property & casualty business, supporting over 400 active clients. Supervise and mentor two administrative assistants; oversee daily workflow, training, and professional development. Serve as main contact for top-tier clients, managing renewals, mid-term adjustments, claims, and ongoing policy servicing to ensure >96% client retention annually. Act as liaison between underwriting, sales, and admin teams to deliver prompt and accurate client solutions. Implemented new digital documentation processes, improving administrative efficiency by an estimated 18%. Recognized as “Employee of the Year” (2021) for exceeding renewal targets and exceptional client satisfaction scores. Key Promotion: Hired as Insurance Account Manager (2018-2021), promoted to Senior Insurance Account Manager (2021–present) following outstanding performance.

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Hartford Mutual Group

Insurance Account Manager | Jul 2012 – May 2018

Managed an active book totaling \$2.1M in property & casualty policies for personal lines, with a focus on home, auto, and renter's coverage. Coordinated closely with producers to identify cross-sell opportunities, increasing average premium per account by 17% over five years. Facilitated client onboarding and regular policy reviews, ensuring complete adherence to State of Connecticut insurance regulations. Supported claims intake and advocated for clients during settlements, helping to reduce claim cycle times by 12%. Conducted regular in-person client meetings throughout Greater Hartford, occasionally working remotely to support out-of-office requests.

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Coastal Coverage Solutions, Inc.

Insurance Customer Service Representative | Sep 2009 – Jun 2012

Processed endorsements, answered client inquiries, and performed policy changes for over 90 clients per month, specializing in homeowners and small business insurance. Developed template scripts for initial client intake, reducing onboarding time for new team members. Instrumental in digitizing 500+ legacy client files during transition to an electronic policy management system. Supported a team of senior account managers and collaborated directly with underwriting departments.

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CT Surety & Casualty

Insurance Assistant (Temporary Assignment) | Mar 2008 – Jun 2009

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Education & Training

Bachelor of Science, Business Administration

Southern Connecticut State University

Sep 2003 – Jun 2007

Continual Professional Development

– Present

Skills

Client Relationship Management, Property & Casualty Insurance, Policy Review & Coverage Analysis, Risk Assessment & Evaluation, Regulatory Compliance (CT Specific), Insurance Quoting & Renewals, Cross-Selling & Upselling, Account Retention Strategy, Claims Management & Advocacy, Team Leadership & Mentorship, Book of Business Oversight (\$3M+ Value), Process Optimization, Salesforce & Vertafore AMS360, Microsoft Office Suite (Excel, Word, Outlook), Communication & Negotiation, Presentation & Training, E&O; Prevention & Documentation, Customer Needs Assessment, Conflict Resolution, Time Management & Prioritization, Remote Work Platforms (Teams, Zoom), Data Analysis & Reporting

Languages

English | – Present

native proficiency

Vietnamese | – Present

conversational, professional working proficiency

Certifications & Credentials

State of Connecticut Property & Casualty Insurance License | 2023

State of Connecticut

Certified Insurance Service Representative (CISR) | 2016

The National Alliance

Notary Public, State of Connecticut | – Present

State of Connecticut

Awards

Employee of the Year | 2021

New Haven Insurance Associates, LLC

Recognized as “Employee of the Year” (2021) among 45 employees for highest client satisfaction scores (Net Promoter Score: 92).

Projects

Achievements | – Present

- Increased client retention rates in New Haven Insurance Associates from 90% to 96%+ (2020–2023) through proactive account reviews and relationship management.
- Instituted a digital workflow process leading to an annual savings of 180+ staff hours in documentation at New Haven Insurance Associates.
- Recognized as “Employee of the Year” (2021) among 45 employees for highest client satisfaction scores (Net Promoter Score: 92).
- Grew cross-sell revenue by 22% in 2022 by launching targeted coverage awareness campaigns with the sales team.
- Successfully managed complex multi-property claim for key client, achieving \$1.4M recovery and positive media coverage for the agency.

Interests

Local history and architecture | – Present

Community cycling events | – Present

Cooking Southeast Asian cuisine | – Present

References

Available upon request.