# Mateo Rodríguez

*Licensed Insurance Service Agent*

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| **Profile**  Dynamic, customer‑centric professional with 17 years of progressive experience in high‑volume service environments, account management, and insurance operations. Proven track record of delivering “white‑glove” support, driving Net Promoter Score (NPS) improvements, and leading cross‑functional teams to exceed productivity and retention targets. Skilled at rapid mastery of complex carrier platforms, Salesforce CRM, and omnichannel communication tools. Recently obtained a state‑licensed insurance service agent credential and eager to apply deep problem‑solving expertise to enhance client experiences at a fast‑growing organization.  **Skills**  Customer Experience, Communication, Leadership, Sales & Account Management, Technology Proficiency, Process Improvement, Regulatory Knowledge, Analytical Skills, Project Management, Soft Skills  **Languages**  Spanish — Native proficiency  English — Full professional proficiency  Portuguese — Conversational  **Awards**  Top Performer – Q2 2024 | 2024-06-30  Summit Assurance Corp.  Highest client satisfaction rating (96 % CSAT) among a cohort of 35 agents.  Allied Excellence Award | 2019-01-01  Allied Financial Services  Outstanding client satisfaction and revenue growth.  Employee of the Month  MetroCall Solutions  Received three times for exemplary service and teamwork.  **Certifications**  Illinois Licensed Insurance Service Agent | 2024-01-01  State Department of Insurance  Certified Customer Service Professional (CCSP) | 2020-01-01  Customer Service Institute  Salesforce Administrator Credential (ADM 201) | 2019-01-01  Salesforce  Lean Six Sigma Green Belt (LSSGB) | 2018-01-01  ASQ  **Interests**  Marathon running: Completed Chicago Marathon 2022  Classical guitar: Performer in local community events | **Experience**  **Licensed Insurance Service Agent at Summit Assurance Corp.**  01 Apr 2024 – Present   * Provide unscripted, high‑touch service to a portfolio of 1,400+ personal and commercial policyholders via phone, chat, and SMS. * Navigate and update information across 12 carrier portals, Salesforce Service Cloud, and internal policy management systems to resolve client inquiries within an average of 4.2 minutes per call. * Achieved a first‑call resolution (FCR) rate of 92 % during the first quarter, surpassing the departmental target of 88 %. * Mentor two junior agents, delivering weekly “micro‑coaching” sessions that have increased their individual NPS scores by +8 points. * Recognized as “Top Performer – Q2 2024” for the highest client satisfaction rating (96 % CSAT) among a cohort of 35 agents.   **Client Services Manager at BrightPath Insurance Group**  01 Jul 2021 – 01 Mar 2024   * Led a team of 9 service representatives supporting multi‑line insurance products, overseeing schedules, performance metrics, and professional development. * Implemented a new “service excellence” script and a real‑time dashboard that reduced average handling time (AHT) by 15 % and boosted agent productivity by 12 %. * Partnered with product and underwriting teams to streamline policy amendment processes, cutting amendment turnaround from 3 days to 1.2 days. * Conducted quarterly training on regulatory updates and emerging digital channels, maintaining 100 % compliance in internal audits. * Drove client retention to 98 % over 24 months, contributing an estimated $3.2 M in retained premium revenue.   **Senior Account Manager at Allied Financial Services**  01 Jan 2018 – 01 Jun 2021   * Managed a portfolio of 750 high‑value commercial accounts, delivering renewal strategies, policy reviews, and cross‑sell opportunities. * Exceeded annual renewal targets by an average of +13 % and generated $1.1 M in new business through upselling. * Introduced a “client health check” initiative, providing quarterly risk assessments that decreased claim frequency by 9 % for key accounts.   **Account Manager at Allied Financial Services**  01 May 2015 – 01 Dec 2017   * Served as primary point of contact for small‑to‑mid‑size business clients, handling policy issuance, endorsements, and service inquiries. * Consistently achieved a Net Promoter Score (NPS) of 78, ranking in the top 10 % of the region. * Developed a streamlined onboarding workflow that reduced new‑client setup time from 7 days to 4 days.   **Combined Role Award at Allied Financial Services**  – Present   * Recognized with the “Allied Excellence Award” (2019) for outstanding client satisfaction and revenue growth.   **Team Lead – Customer Support at MetroCall Solutions**  01 Mar 2013 – 01 Apr 2015   * Supervised a team of 6 agents handling inbound calls for a Fortune 500 tech client, ensuring adherence to service level agreements (SLAs) and quality standards. * Designed a peer‑review quality assurance program that lifted average QA scores from 84 % to 92 % within six months. * Coordinated schedule optimization that improved team’s on‑time attendance to 98 %.   **Senior Customer Support Analyst at MetroCall Solutions**  01 Jul 2009 – 01 Feb 2013   * Acted as subject‑matter expert for complex technical issues, achieving a first‑contact resolution rate of 89 %. * Authored and maintained knowledge‑base articles, reducing average training time for new hires by 30 %.   **Customer Service Representative at MetroCall Solutions**  01 Jun 2005 – 01 Jun 2009   * Handled high‑volume inbound calls (average 65 calls/shift) for billing and account inquiries, maintaining an average CSAT score of 91 %. * Received “Employee of the Month” recognition three times for exemplary service and teamwork.   **Education & Training**  **MBA, Marketing**  Northwestern University – Kellogg School of Management  – 01 May 2014  **Bachelor, Finance**  University of Illinois at Urbana‑Champaign  – 01 May 2005  **References**  **References**  Available upon request. |