

# Charlie Burnett

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## SUMMARY

Licensed health insurance sales support professional with seven years of progressive customer service and broker facing experience across Medicare operations, onboarding, campaign administration, reporting, and regional coordination. Supports brokers and sales leaders through clear telephone, written, in person, and webinar communication. Recruits producers new to Medicare, coordinates training logistics, prepares welcome kits, and tracks follow through across competing priorities. Experienced with co op advertising, **Health Risk Assessment** campaigns, **requests for information**, disenrollment inquiries, **outbound call campaigns**, and recurring sales reports. Builds trust by researching records carefully, documenting commitments, and routing exceptions promptly. An active Wisconsin **life and health Insurance license** supports accurate communication in regulated environments. Brings practical territory support and service discipline that can strengthen broker engagement, organized regional execution, and responsive customer care.

## EXPERIENCE

### Senior Broker Sales Support Specialist, Medicare Operations

April 2024 - Present

Lakeview Medicare Solutions

*Milwaukee, WI*

Supports regional Medicare brokers and sales leaders across service requests, onboarding, **training coordination**, campaign activity, reporting, and broker communications.

- Managed Medicare **broker requests** across phone, email, meetings, and webinars, maintaining dependable regional follow through.
- Recruited producers new to Medicare, explained onboarding steps, and coordinated training before sales activity began.
- Organized broker training and **face to face meetings**, aligning invitations, materials, attendance, and follow up.
- Tracked **co op advertising** and **HRA campaigns**, reconciling submissions for accurate regional reporting.
- Resolved disenrollment inquiries and RFI requests through record research, documentation, and appropriate escalation.
- Coordinated welcome kits and **outbound call campaigns**, keeping broker communications aligned with multiple deadlines.

### Broker Service Representative, Health Insurance Support

January 2022 - March 2024

Great Lakes Benefit Advisors

*Green Bay, WI*

Delivered daily broker service across product questions, enrollment administration, **onboarding** checkpoints, **reporting**, webinars, outbound engagement, and territory coordination.

- Managed high volume broker service through phone and written channels, resolving product and enrollment questions.
- Coordinated producer onboarding checkpoints, organized documentation, and scheduled training with sales representatives.
- Prepared recurring sales reports and researched enrollment questions, giving field teams accurate broker responses.
- Scheduled **webinars** and regional meetings, confirming presenters, materials, attendee communication, and follow up.
- Organized outbound broker campaigns, documented responses, and routed sales opportunities to territory representatives.
- Applied life and health insurance knowledge during broker conversations, escalating matters outside authorized support scope.

### Customer Service Specialist, Health Benefits

June 2020 - December 2021

Prairie Health Coverage Services

*Appleton, WI*

Served members and insurance producers through phone and email while supporting enrollment research, operational reporting, virtual sessions, and approved outbound initiatives.

- Researched enrollment status and coverage administration questions, providing timely answers for members and producers.
- Documented customer and broker interactions, creating clear records that supported consistent team responses.
- Prepared broker request information and operational reports after checking source records for accuracy.
- Coordinated appointment calendars and virtual information sessions, updating participants when schedules changed.
- Supported seasonal outbound calls with approved scripts, recording outcomes and directing prospects to licensed resources.
- Balanced simultaneous inquiries and deadlines while protecting sensitive insurance information through courteous service.

### Customer Service Representative, Health Benefits

October 2019 - May 2020

Midwest Member Services

*Racine, WI*

Provided foundational health benefits service through telephone and written channels, supporting information requests, enrollment handoffs, scheduling, and documentation.

- Responded to health benefit inquiries through **telephone** and written channels during regulated service operations.
- Verified internal records before sharing updates, reducing follow up caused by incomplete information.
- Logged **RFI** requests and routed complex enrollment matters with complete notes and supporting details.
- Maintained organized correspondence, enabling timely handoffs among enrollment, service, and **sales support** teams.
- Supported meeting scheduling and administrative tasks during peak enrollment periods with shifting priorities.
- Developed issue triage practices that supported progression into broker facing insurance service roles.

## LEADERSHIP & AWARDS

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- Recognized by sales partners for dependable broker follow through and accurate regional service support.
- Selected for senior broker support responsibilities after consistent performance across onboarding, campaigns, and reporting.

## EDUCATION

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### Bachelor's Degree in Business Administration

2019

University of Wisconsin Milwaukee GPA: 3.5

Milwaukee, WI

**Coursework:** Customer Service, Sales Management, Business Communications, Marketing

## CERTIFICATIONS

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- Active Life and Health Insurance License, Wisconsin 📅 2020
- Medicare Product Training 📅 2020

## TECHNICAL SKILLS

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- **Insurance Operations:** Medicare products, life insurance, health insurance
- **Broker Engagement:** Broker recruitment, broker onboarding, territory support
- **Campaign Administration:** Co op advertising, HRA campaigns, outbound call campaigns
- **Sales Reporting:** Regional reporting, enrollment reports, activity tracking
- **Customer Service Channels:** Telephone support, written communication, face to face meetings
- **Training Delivery:** Training logistics, webinars, attendance records
- **Information Requests:** RFI support, record research, request documentation
- **Enrollment Services:** Disenrollments, enrollment status, coverage administration
- **Communication Systems:** Email communication, phone communication, webinar platforms
- **Service Documentation:** Follow up records, correspondence, escalation notes

## SKILLS

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|------------------------|---------------------|---------------------------|-------------------------|
| • Medicare products    | • Customer service  | • RFI support             | • Training logistics    |
| • Broker sales support | • Territory support | • Disenrollments          | • Webinars              |
| • Broker recruitment   | • Co op advertising | • Reporting               | • Written communication |
| • Broker onboarding    | • HRA campaigns     | • Outbound call campaigns |                         |

## PROFESSIONAL AFFILIATIONS

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- Supports collaborative coordination among brokers, regional sales leaders, training partners, and operations teams.
- Contributes practical insurance service knowledge during broker onboarding, campaign planning, and issue handoffs.

## LANGUAGES

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- English (Native)
- Spanish (Beginner)

## ADDITIONAL INFORMATION

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**Work Status** : Authorized to work in United States. No sponsorship required.

## REFERENCES

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AVAILABLE ON REQUEST