

Charlie Burnett

Regional Sales Support Representative, Medicare Products

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STRENGTHS

- 🔗 **Broker relationship support**
Built trust with lower producing brokers through patient outreach, clear follow up, and practical Medicare guidance.
- 📅 **Training coordination**
Kept onboarding sessions organized through invitations, materials, attendance records, and follow up that sales teams could rely on.
- 📋 **Campaign administration**
Tracked co op advertising and HRA activity carefully, giving regional partners clearer records and smoother campaign follow through.
- 🔍 **Service judgment**
Researched difficult enrollment questions before responding, a habit that earned confidence from brokers and internal sales partners.
- 📋 **Priority management**
Balanced requests, meetings, reports, and outbound campaigns without losing promised communications or important handoffs.

SKILLS

Medicare products

Broker sales support

Broker recruitment

Broker onboarding

Customer service Territory support

Co op advertising HRA campaigns

RFI support Disenrollments

Reporting

Outbound call campaigns

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

Lakeview Medicare Solutions 📅 April 2024 - Present 📍 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

Great Lakes Benefit Advisors 📅 January 2022 - March 2024 📍 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

Prairie Health Coverage Services 📅 June 2020 - December 2021 📍 Appleton, WI

Training logistics Webinars

Written communication

LANGUAGES

English Native

Spanish Beginner

MY CAREER



● Senior Broker Sales Support Specialist, Medicare Operations at Lakeview Medicare Solutions (2.5 Years)

● Broker Service Representative, Health Insurance Support at Great Lakes Benefit Advisors (2.2 Years)

● Customer Service Specialist, Health Benefits at Prairie Health Coverage Services (1.5 Years)

● Customer Service Representative, Health Benefits at Midwest Member Services (7 Months)

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

Midwest Member Services 📅 October 2019 - May 2020 📍 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

- 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

Bachelor's Degree in Business Administration

University of Wisconsin Milwaukee 📅 GPA: 3.5 📅 2019 📍 Milwaukee, WI

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

CERTIFICATIONS

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

TECHNICAL SKILLS

- **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

PROFESSIONAL AFFILIATIONS

- 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.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST