



Hannah Glenn

Retention Agent, Personal Lines

☎ (317) 555-6842 ✉ hannah.glenn@example.com

🌐 linkedin.com/example/hannahglenn 📍 Indianapolis, IN 46204

STRENGTHS

- 💬 **Retention conversations**
Reviewed account history with policyholders, then found practical coverage or service paths that kept suitable business active.
- 📄 **Coverage clarity**
Explained provisions and endorsements in plain language. Customers often stayed engaged when difficult insurance details became easier to follow.
- 🗣️ **Sales through service**
Turned qualified service contacts into thoughtful quotes and bindings. A helpful question often opened a useful cross sell conversation.
- ⚙️ **Workflow support**
Shared system defects and recurring friction with peers and supervisors. Small job aid changes made daily work easier.
- 👤 **Customer follow up**
Used post claim calls to gather candid feedback and route unresolved coverage questions for appropriate licensed review.

SKILLS

Policy Retention Insurance Sales

Property and Casualty

Quote Preparation

New Business Binding

Policy Maintenance

Coverage Explanations

Underwriting Follow Up

SUMMARY

Licensed personal lines insurance professional with four years supporting policy retention, **property and casualty sales**, account servicing, and high volume customer contact. Handles cancellation risks with calm, clear conversations that connect policyholder needs, underwriting requirements, and suitable coverage options. Explains policy provisions, endorsements, billing concerns, and state specific requirements in plain language, then records accurate transactions across insurance processing and customer relationship systems. Prepares quotes, binds eligible new business, processes policy changes, follows up on missing documents, and conducts **post claim service** reviews. Brings practical call center experience across phone, chat, email, and internal transfers, plus hands on support for **user acceptance testing**, system releases, peer guidance, and workflow improvements. Maintains active **property and casualty** licensing and continuing education while building trust with customers, agents, underwriting partners, and technology teams.

EXPERIENCE

Personal Lines Retention Specialist

Summit Grove Insurance Services 📅 January 2025 - Present 📍 Indianapolis, IN

Supports personal auto and homeowners policyholders through inbound and outbound service, retention, sales, claims follow up, and policy administration. Provides peer guidance during system releases and **user acceptance testing** while connecting frontline observations with underwriting, technology, and **call center** partners.

- Reviewed account history and underwriting actions, preserving suitable personal auto and homeowners policies.
- Translated **policy provisions** and endorsements into clear guidance, building confidence during difficult service calls.
- Collected missing underwriting documents and coordinated requirements with underwriting teams for compliant account resolution.
- Conducted post claim calls, capturing feedback and routing coverage questions for licensed review.
- Prepared **personal lines quotes** and completed binding steps after customer authorization and required disclosures.
- Tested system releases, documented workflow defects, and guided colleagues through approved process changes.

Licensed Personal Lines Sales and Service Agent

Blue Meadow Coverage Group 📅 October 2022 - December 2024 📍 Carmel, IN

Managed phone and digital contacts for personal lines prospects and **policyholders** across sales, service, retention, and **policy maintenance**. Applied state requirements, product knowledge, and accurate documentation practices while sharing recurring customer friction with supervisors and peers.

- Managed phone and digital contacts, balancing **sales** conversations with accurate policy service.
- Built **property and casualty** quotes from verified risk details, supporting eligible new business.
- Resolved renewal concerns by reviewing payment status, account changes, and underwriting requests.
- Processed vehicle, driver, address, and coverage updates in carrier systems with accurate records.
- Applied **state regulations**, product updates, and **continuing education** knowledge across multi state interactions.
- Shared customer friction points with supervisors, improving job aids for document follow up.

PROJECTS

Retention Workflow Review 📅 2026

[Cancellation Prevention](#)

[Post Claim Service](#)

[Call Center Operations](#) [Online Chat](#)

[Multi State Servicing](#)

[State Regulations](#)

[Customer Service](#)

LANGUAGES

English Native

Spanish Beginner

MY CAREER

3.8
YEARS

● Personal Lines Retention Specialist at Summit Grove Insurance Services (1.7 Years)

● Licensed Personal Lines Sales and Service Agent at Blue Meadow Coverage Group (2.2 Years)

Mapped cancellation risk conversations, document follow up, and escalation paths through frontline observations. Recommended clearer handoffs for smoother policy servicing and stronger customer confidence.

Policy Service Testing Support 📅 2024

Supported user acceptance testing for insurance system updates by recording defects, validating policy transactions, and sharing practical guidance with service colleagues.

LEADERSHIP & AWARDS

- Recognized by peers as a dependable resource during insurance system releases and workflow updates.
- Selected to support user acceptance testing and translate approved process changes into clear call center guidance.

EDUCATION

Bachelor's Degree in Communication

Indiana University Indianapolis 🎓 GPA: 4.0 📅 2022 📍 Indianapolis, IN

Coursework: *Customer communication, Business communication, Persuasion, Organizational communication*

CERTIFICATIONS

- Property and Casualty Producer License 📅 2026
- State Insurance Continuing Education 📅 2026

TECHNICAL SKILLS

- **Insurance Products:** Personal Lines, Property Insurance, Casualty Insurance
- **Policy Servicing:** Policy Changes, Policy Maintenance, Endorsements
- **Sales Operations:** Quote Preparation, New Business Binding, Cross Selling
- **Customer Contact:** Inbound Calls, Outbound Calls, Online Chat
- **Underwriting Support:** Risk Information, Trailing Documents, Underwriting Guidelines
- **Claims Service:** Post Claim Calls, Claims Feedback, Service Reviews
- **Insurance Systems:** Policy Administration Systems, Customer Relationship Systems, Carrier Systems
- **Testing Practices:** User Acceptance Testing, Defect Documentation, Workflow Validation
- **Regulatory Knowledge:** State Regulations, Producer Licensing, Continuing Education
- **Communication Tools:** Telephone, Email, Internal Transfers
- **Process Improvement:** Workflow Analysis, Job Aids, Escalation Routing

PROFESSIONAL AFFILIATIONS

- Active property and casualty producer license holder with current continuing education.
- Regular collaborator with underwriting, claims, sales, service, technology, and supervisory partners.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST