

Josele Batista, Account Manager

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PROFILE

Licensed insurance professional with over 6 years of experience in the industry, specializing in account management, customer service, and operations. Adept at delivering tailored insurance solutions, maintaining strong client relationships, and driving customer satisfaction. Skilled in policy administration, endorsements, renewals, and claims support, with a proven ability to streamline workflows and improve efficiency. Hold a 2-20 Florida insurance agent license, with extensive knowledge of personal insurance products and regulatory compliance. Known for being resourceful, detail-oriented, and committed to excellence in client service and organizational success.

EMPLOYMENT HISTORY

May 2023 — Aug 2024	Excess and Surplus Manager, Great Harbor Insurance	Boca Raton
	<ul style="list-style-type: none">Directed and oversaw the daily operations of excess and surplus to ensure efficiency, compliance, and client satisfaction.Collaborated with other departments to align processes, share insights, and achieve organizational goal.Streamlined departmental workflows and implemented new standard operation procedures increasing productivity and reducing errors.Acted as a key point of contact for high-profile clients, addressing inquiries and resolving issues to maintain strong relationships.	
Dec 2021 — May 2023	Customer Service Manager Service , Great Harbor Insurance	Boca Raton
	<ul style="list-style-type: none">Led the customer service department, overseeing daily operations to ensure prompt, accurate, and professional service to clients.Managed a team of 15 customer service representatives, including training, performance monitoring, and career development.Designed and implemented workflows to improve efficiency, reducing processing time increasing client satisfaction.Collaborated with sales and account management teams to support seamless client on boarding and ongoing account maintenance.Resolved escalated customer concerns and complaints, providing effective solutions while maintaining a high level of client satisfaction.	
Oct 2019 — Dec 2021	Account Manager, Seeman Holtz Property & Casualty	Boca Raton
	<ul style="list-style-type: none">Managed a portfolio of personal lines insurance accounts, serving as the primary point of contact for clients and ensuring exceptional service delivery.Conducted comprehensive coverage reviews and risk assessments to recommend tailored insurance solutions that aligned with client needs and goals.Processed policy renewals, endorsements, cancellations, and claims support while maintaining accuracy and compliance with regulatory standards.Built and maintained strong relationships with clients, addressing inquiries and resolving issues promptly to enhance satisfaction and retention.Experience quoting, binding and servicing Florida insurance carriers.	
Oct 2018 — Oct 2019	Administrative Assistant , Seeman Holtz Property & Casualty	Boca Raton
	<ul style="list-style-type: none">Provided administrative support within the department, including answering the phone, coordinating client meetings, and data entry.Assisted in servicing clients by preparing certificates of insurance, mortgagee changes.	
Sep 2012 — Jul 2014	Office Manager, Lauri's TV	Lake Worth
	<ul style="list-style-type: none">Supervised daily office operations, creating a well-planned schedule for service technicians.Oversaw accounts payable and receivable. Ensured prompt processing of invoices, managed payment schedules, and reconciled accounts.Conducted administrative duties, including answering the phone, and supporting customers.	

- Prospected and cultivated relationships with small business owners to identify security needs and provide customized alarm system solutions.
- Conducted on-site assessments to evaluate client requirements and recommend tailored products, including alarm systems, surveillance cameras, and monitoring services.
- Prepared and presented proposals, highlighting system features, benefits, and cost-effective packages to secure new sales.
- Provided training and demonstrations on system use, ensuring clients understood functionality and features.
- Delivered excellent post-sale customer service, resolving issues promptly and fostering long-term client relationships.
- Generated referrals and repeat business by establishing trust and providing top-tier service.

LICENSE

2-20 Insurance Agent

Florida Public Notary

SKILLS

Leadership and Teamwork

QuoteRush

Microsoft Office

Carrier Relationships

Applied Epic

Carrier Relationships

LANGUAGES

English

Spanish

Portuguese

REFERENCES

Patrick Hath from ADT

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Helton Oliveira from ADT

holiveira@adt.com · 561-712-5424

Steve Roth from Seeman Holtz/Great Harbor

steveroth@gmail.com · 561-702-8991