

CARLOS STEPHENS

Deerfield Beach, FL

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Highly skilled, broadly knowledgeable, organized and detail-oriented professional. 15-year proven track record in high-ticket sales, administration, management, training & development. Exceptional customer & client satisfaction aptitude with passion. Expertise in establishing and maintaining local and long distance partner, client and customer relationships. Adept in client and customer retention, working under pressure, swiftly overcoming new and ever-changing obstacles and challenges. Reliable team member with outstanding organizational and communication paired with in-depth knowledge and practice of organizational psychology methodologies.

Work Experience

2-15 Licensed Life and Medical Insurance Agent

Independent Contractor - Remote

August 2019 to Present

Currently working in ACA Marketplace plan sales in 28 states with all major carriers.

Sold Medigap, Medicare Advantage, and Prescriptions drug Plans from several major carriers including United Healthcare, Humana, CarePlus, Aetna, Blue Cross Blue Shield, Wellcare, Cigna, Simply, and FloridaBlue. Maintained high standards of customer service by building relationships with clients. Provided coverage option information to assist clients in protecting assets. Assisted Medicare beneficiaries in search and application process for different aid programs and determined qualification criteria to meet beneficiary needs. Licensed and conducted business in over 43 states. Followed Center for Medicare and Medicaid Services (CMS) guidelines, regulations, policies, and procedures within full compliance. Utilized proven retention practices to maintain book of business and retain client loyalty. Attended continuing education courses, workshops, and networking events to gain additional insurance industry knowledge and partnerships.

Patient Success Consultant

IntuneHealth - ChenMed

July 2022 to July 2023

IntuneHealth is for Medicare Advantage seniors seeking PCP-led, high-quality care.

Roles and Responsibilities included: generate sales leads and grow memberships by nurturing productive relationships with senior citizens, key local community partners and senior-focused businesses to enroll patients in IntuneHealth. Design and orchestrate sales events, effectively communicate IntuneHealth value proposition and hold accountability for service excellence. Continuously gather and incorporate member feedback to enhance brand experience and increase patient engagement and retention. Build and nurture direct-to-seniors and business-to-business partnerships to identify and enroll new IntuneHealth patients. Educate prospective patients about IntuneHealth's virtual-first offerings and facilitate center tours to demonstrate the brand's value proposition and care delivery model. Cultivate strong relationships with health plan agents, broker agents, senior centers, and community providers to make IntuneHealth their primary care provider of choice. Partner with community officials, businesses, and senior outreach programs to develop initiatives and plan local events that will drive new patient

growth. Create penetration plans and initiatives in key target markets and channels. Leverages marketing and sales tools to identify solutions and sell to new customers. Maintains up-to-date client information in designated customer relationship management in Salesforce to ensure effective management of leads. Engage with new patients through and beyond their first appointment.

Maintain relationships with enrolled patients to understand their needs and resolve concerns. Reduce member dis-enrollment by collaborating with patients' care team to ensure consistent, market-wide best practices of excellent service. Supports implementation of patient programs and activities such as surveys, physician meet and greets, and New Patient Orientation. Perform other duties as assigned and modified at manager's discretion.

Knowledge, Skills and Abilities in this role include:

Strong verbal communication skills including active listening. Customer First approach, fostering trust and confidence with potential members. Collaboration and teamwork, demonstrating a commitment to team goals through attitude, contribution & cooperation. Consultative selling, qualifying potential customers, building rapport and establishing trust. Achievement focus, setting and achieving challenging goals, demonstrating persistence and overcoming obstacles. Prioritization using ability to manage multiple tasks, prioritize them and pay attention to detail. Creativity and Innovation, developing innovative approaches & ideas to achieve goals. Knowledge of Medicare and Medicare Advantage programs. Proficiency in Microsoft Office Suite products including Word, Excel, PowerPoint and Outlook. Ability and willingness to travel locally, regionally and nationwide up to 50% of time. Spoken and written fluency in English and Spanish.

Use and exercise of independent judgment.

Admissions Advisor/Associate Director of Admissions

Kaplan University - Purdue University Global - Fort Lauderdale, FL

January 2009 to August 2019

Advised students and sold them into enrolling and starting various online degree and certificate programs at

Kaplan University - now known as Purdue University Global - in a multitude of majors, including undergraduate and graduate certificate and degree programs. Consistently met and exceeded student enrollment, start and matriculation goals. Achieved sales metrics consistently by creating SMART goals based on available sales data. Received Top Dog Award for most enrollments and starts of January 2009 new-hire class. Served as Team Lead and Advisor Mentor for entirety of tenure. Reported sales projections to upper management for review. Completed Kaplan Admissions Management Program of 2010. Served as Associate Director of Admissions during organization restructuring. Trained, coached, and mentored new sales associates for maximum performance. Designed, facilitated, and delivered admissions advisor continuing education and best practices training sessions and learning materials. Successfully guided and advised students to meet educational and career goals. Monitored sales team performance and provided constructive feedback. Identified and acted on growth opportunities and development options for business.

Worked closely with other departments to understand full scope of available offerings and provide top-notch salesmanship to customers. Streamlined team sales processes increase productivity and decrease closing time.

Trained, coached and mentored new sales associates for maximum performance. Provided exceptional customer service to foster student retention. Coordinated solutions for new and existing customers to meet unmet needs and resolve various issues. Acquired and maintained full knowledge of online education platform technical and functional aspects to better serve customers' needs. Promoted company's brand and cultivated new relationships by delivering expert presentations. Managed proprietary CRM system and Salesforce to coordinate information from lead sources.

Education

Master of Science in Industrial And Organizational Psychology

Purdue University Global

December 2023

Bachelor of Science in INFORMATION TECHNOLOGY

Kaplan University

February 2012

Skills

- Consultative Sales In-depth information technology and product Quick Study knowledge
Team Player Proficiency in all Microsoft Suite, Salesforce, Negotiation Google Suite, and various CRM applications
Thrives working under pressure and Accurate production analysis and projections
time-sensitive tasks delivery
Maintain cooperative, positive relationships with Successful coaching and mentoring individuals at all levels
Creating and facilitating training and Experienced in working within start-up development sessions
environments Change management
- Marketing
- CRM software
- Salesforce (10+ years)
- Negotiation
- Customer relationship management
- Sales
- Relationship management
- SaaS
- Presentation skills
- Analysis skills
- Google Suite
- Outside sales
- Leadership
- Conflict management
- Google Docs
- Customer service
- Mentoring
- Training & development (10+ years)
- Supervising experience
- Classroom experience
- Inside sales (10+ years)
- Business development
- Project management
- Academic advising

- Continuous improvement
- Teaching
- Operations management
- Insurance Sales (4 years)
- Account Management
- Strategic Planning
- Management
- Sales Management
- Recruiting
- Analytics
- Quality Assurance

Certifications and Licenses

Life & Health Insurance License

September 2019 to November 2026

Insurance Producer License