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| Glenn Grafton, MBA |  |
| Lake Mary, Florida  |
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Education

**Webster University** ▪ *Master of Science Finance (In Process)*

**Webster University** ▪ *Master of Business Administration*

**Allegheny College** ▪ *BA Sociology/Anthropology with a Minor in Religious Studies*

Licenses/Skills

*Life, Health, and Variable Annuities (215), Personal Lines Insurance (2044)*

Experience

**OneSource Sales Manager ▪︎** August 2018 – October 2019

**Aon Corp. ▪︎** Orlando, Florida

* Performed Operations Manager/Director Level tasks associated with the management of up to 150 Insurance Sales Agents (Contractors and FTE’s) for start-up division, Aon OneSource, a division of Aon Corp.
* Program designed to provide customized services to client, Mutual of Omaha, for their Medicare Prescription Drug and Medicare Supplement products via the Aon OneSource Sales Platform utilizing CRM and SFDC.
* Provided ongoing performance management reporting regarding Sales Metrics, Call Handling Metrics, Conversion Rate Metrics and Average Handle Time and Speed to Answer.
* Established relationships with internal and external business partners to ensure program profitability.
* Managed all details regarding internal Processes and Procedures, Escalations, Stack Rankings for staff, scheduling and onboarding/interviewing.
* Participated in the development of Sales Training for newly hired staff.

**Account Manager II** ▪ January 2018 – June 2018

**Staples** ▪ Maitland, Florida

* Manage a book of business of approximately $5 million in annual revenue.
* Negotiates pricing, sales, project management, pricing bids, coordinates with account team to increase customer satisfaction. Perform monthly, quarterly, semi-annual, and annual reviews of accounts to assess performance and determine potential areas of opportunity.
* Coordinates with management team to determine best methods of further deepening relationship with customer base.
* Manage the logistics related to products and services requested by customers.

**Benefits Advisor (Seasonal)** ▪ October 2017 – December 2017

**Aon** ▪ Maitland, Florida

* Received inbound calls to enroll employees in their employee benefits during the 2017 Open Enrollment period. Benefits included Medical, Dental, Vision, Short-Term Disability, Long-Term Disability, Supplemental Benefits.
* Counseled employees on core and supplemental benefits, educated customers on filling gaps within insurance plans to enable them to make informed decisions.

**Account Executive** ▪ May 2016 – May 2017

**Insurance Office of America** ▪ Longwood, Florida

* Underwrote, quoted and issued personal insurance policies for high net worth clients including homeowner’s insurance, auto insurance, flood insurance, earthquake insurance, wind insurance, personal/commercial umbrella insurance, personal article floaters, collectibles and life insurance.
* Generated new business personal and commercial insurance accounts, including condominium associations.
* Worked in conjunction with commercial insurance representatives with the underwriting and servicing of large commercial accounts.
* Underwrote all new business with binding authority up to $10 million for specific high net worth clients.
* Maintained regular contact with clients, as needed, including high net worth clients, executive level individuals, small business owners, and highly complex accounts.
* Responsible for devising creative solutions to meet client needs, with regards to coverage and costs.
* Regularly exercised underwriting discretion and independent judgment on significant accounts including but not limited to: negotiation of product pricing, interviewing clients; collecting and analyzing information via client Needs Assessment.
* Assisted in product and pricing determinations; affecting, interpreting, and implementing various company policies regarding the specific factual circumstances of each client.

**Benefits Center Manager (Supervisor)**

 ▪ August 2014 – December 2015

**Univers Workplace Solutions *(Now Aon Corp.)*** ▪ Maitland, Florida

* Supervised approximately 30 HUB Benefit Specialists and Analyst.
* Monitored workload and ensured processes and protocols were followed.
* Developed and monitored work/training schedules.
* Structured and managed rest periods (breaks) to comply with agency service level agreements.
* Monitored and reinforced company attendance policies and procedures.
* Monitored, coached, and motivated direct reports and provided feedback to ensure customer service, quality and performance metrics were met.
* Provided suggestions for process improvements, resulting in higher quality, revenue and reduced expenses.
* Worked closely with Quality Assurance Team to review direct report’s Quality Assurance metrics and attended monthly Quality Assurance calibration meetings.
* Prepared for and lead client calls and team meetings, in addition to coordinating and/or conducted new hire trainings.
* Provided updates to direct reports on program, process and/or plan design changes.
* Developed and monitored progress and productivity reports (monthly and annual), in addition to call handling service level reports.
* Managed voicemail system settings; ensured messages are retrieved and customers are called back within specified timeframes.
* Serviced case-specific issues and forwarded to Subject Matter Experts via the outlined company/client escalation process.
* Handled opening and closing of the call center.
* Handled escalated calls.
* Served as role model for the team, projecting a professional image.

**Business Consultant**

 ▪ July 2014 – August 2014

**Alorica** ▪ Lake Mary, Florida

* Worked in a business to business sales environment, serving as a 3rd Party marketer of communication services and devices, with an emphasis on the small business market.
* Cold calling perspective clients to uncover business needs and marketing product features.

**Property Insurance Specialist/Property & Casualty Insurance Agent**

 ▪ June 2013 – January 2014

**Quinstreet Inc**. ▪ Altamonte Springs, Florida

* Developed training program and trained new/current Insurance Agents on sales techniques designed to increase business retention and increase profitability in the Personal Lines Property & Casualty Insurance market.
* Focused on educating agent’s underwriting personal homeowners insurance risks according to company guidelines and binding authority, product knowledge, state specific underwriting guidelines and cross selling techniques.
* Products included homeowner’s insurance, auto insurance, flood insurance, personal umbrella insurance, and valuable items.

**Call Center Sales Supervisor/Operations Team Lead**

 ▪ May 2009 – December 2012

**Bank of America Corporation (Banc of America Insurance Services Inc.** ▪ Lake Mary, Florida

* Monitored, trained, coached, recruited and interviewed a team of insurance agents in the Personal Lines property & casualty insurance market.
* Products offered were Homeowners insurance, auto insurance, personal umbrella insurance, valuable items, earthquake insurance and flood insurance.
* Focused on having agents reach and exceed monthly sales quotas as a means of deepening customer relationships with the bank.
* Monitored, coached, and motivated direct reports.
* Provided feedback to ensure customer service and quality and performance metrics were met.
* Ensured staff maintained a professional demeanor.
* Provided suggestions for process improvements, resulting in higher quality, revenue and reduced expenses.
* Worked closely with Quality Assurance Team to review direct report’s Quality Assurance metrics.
* Handled opening and closing of the call center.
* Handled escalated calls.

**Senior Insurance Sales Consultant**

 ▪ March 2006-March 2009

**AIG/21st Century** ▪ Lake Mary, Florida

* Underwrote, quoted, and issued personal lines auto insurance policies for consumers in a call center environment.
* Focused on establishing relationships with consumers and maintained a thorough product knowledge to ensure sales goals were met or exceeded, and underwriting guidelines and binding authority was adhered to.
* Member of the company’s Million Dollar Roundtable with writing $1.7 million in annual premium.

**Regional/Area Sales Leader**

 ▪ June 2005 – March 2006

**AffordableONE Insurance LLC** ▪ Longwood, Florida

* Worked as an independent insurance agent specializing in individual and group health insurance, life insurance, supplemental insurance, Medicare Advantage and Medicare Supplemental insurance, as well as annuity products.
* Recruited, trained and developed Insurance Agents in determining market segments, product placement, pricing determination, needs based selling, and business retention.
* Attended networking events to establish business to business relationships within the Central Florida community.

**Dependency Case Manager**

 ▪ October 2001 – January 2005

**Children’s Home Society of Florida** ▪ Orlando, Florida

* Risk Management for At-Risk Youth/Families placed under the monitoring of the Florida Department of Children’s and Families.
* Implemented court ordered and voluntary action plans to ensure reunification between child and parent, in addition to reducing risk of child removal.
* Assessed and Analyzed the risk placed under my supervision.
* Served as a 3rd Party to and worked in conjunction with the Florida Department of Children and Families.
* Conducted seminars for families seeking community assistance.