

Kathleen M Oliver, CISR

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Education:

Hardbarger Business School Raleigh, North Carolina August 1979- May 1981

Relevant Experience:

BB&T Insurance Services Durham, North Carolina October 1998- September 30th, 2017
Insurance Commercial Lines Account Manager II

- Build and maintain key client and carrier relationships by phone, email and in person
- Assist assigned clients and staff with service questions related to administration, billing, claims issues and problem-solving, upon request
- Continually seek cross-sell opportunities and suggest new lines of coverage.
- Work with producer, and/or Account Executive, to monitor and manage the renewal process for assigned clients.
- Prepare marketing information or provide required information to a marketing person.
- Review claims reports monthly and deliver reports to clients on monthly or quarterly basis, as required
- Provide administrative support on other tasks such as assigned special projects and development of new ideas/services, as requested
- Become proficient in the Agency Management System, specifically to update policies that are written or renewed.
- Log activities to document client meetings, carrier follow-up, service issues.
- Establish follow-up date and daily manage of follow-up in Agency Management System
- Understand how to use the system to acquire information to assist clients.
- Attend seminars, classes and carrier meetings to keep abreast of new products available for clients and acquire expertise in legislative changes, as opportunities occur.
- Mentor and train new Account Managers.

Medical Mutual Insurance Raleigh, North Carolina January 1990-October 1996
Account Manager

- Oversaw daily operations between insurance and Dentist/Physicians
- Managed 300- 400 Dentist and physicians business insurance
- Managed 300-400 Dentist and Physicians workers compensation coverages
- Communicated via phone and email with an average of 50 clients per day
- In charge of invoicing, processing and mailing policies directly to clients on daily basis
- Oversaw necessary updates and changes to client policies, daily
- Responded to customer service inquiries

Moore&Johnson Insurance Agency Raleigh, North Carolina October 1996- October 1998
Personal Lines Processor

- Invoiced and checked coverages regarding their matching policies
- Made necessary changes and updates to all personal policies

- Oversaw that policies made direct contact with clients
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Technical Experience:

Excel, PowerPoint, Word, Sagitta, Outlook

Professional Affiliations:

Certified Insurance Service Representative

Awarded on December 7th 2005