

Marion Hartman

South Windsor, CT ♦ Mehhartman@gmail.com ♦ 860-508-7932

SUMMARY

Extremely self-motivated client service professional with experience in insurance, automotive, retail, and publishing services. Expertise in account servicing, account management, customer service, inbound and outbound calls, and educating customers about products and services. A creative thinker with a proactive attitude, taking initiative and pride in work. Flexible, collaborative and high-energy team player with a strong desire to learn and grow! Core competencies include:

- Customer Service
- Problem Resolution
- Organization and Time-Management
- Account Management
- Proficient in MS Office Suite Including Excel
- Data Mining
- Desk Top Services
- Meeting and Event Planning

KEY ACCOMPLISHMENTS

- Learned all facets of group insurance business and supporting systems ahead of project schedules, allowing for delivering outstanding customer service from day one of each assigned project.
- Continually showed initiative by participating in company based e-learning courses focusing on email and phone best practices and time management techniques.
- Led initiative to process Benefit Highlighters for Policy Holders during Transition with updated information so account managers could continue to serve non-Transition Policy holders without interruption.
- Prepared educational materials of Group Benefits for Team. Saved training time and costs for project.
- Worked with Transition Operations on moving data and did this within guidelines of 95 to 100% accuracy.

PROFESSIONAL EXPERIENCE

Sun Life Financial, Windsor, CT

Leading global provider of financial planning, life insurance, disability insurance and investments.

Client Service Professional / Conversion – Transition Teams 2012 – 2015

- Underwent extensive training to become an expert on Sun Life's Group Employee Benefits to communicate with group offices, sales reps, client relationship executives, brokers, benefit administrators and other business partners throughout large and complex group insurance transitions, touching on multiple lines of Life, AD&D, Dental, STD and LTD Insurance.
- Assigned one to two hundred cases within 6 months which included special handling cases.
- Effectively communicated changes to continue business flow without interruption of services.
- Created a caseload management strategy with a minimum of thirty daily communications via phone and email, meeting timelines and customer expectations.
- Answered incoming inquiries as part of phone and email queue, adhering and often exceeding twenty-four hour response times to all customers and necessary caseload touch points.
- Demonstrated a use of problem solving skills, recognizing errors in information, reporting to appropriate individuals and diffusing escalations.
- Created, translated and documented all necessary legal document changes and standards throughout transition process with high accuracy.
- Provided end-user support for escalated web-based questions that arose through end-user changes.
- Trained and utilized nine internal Sun Life Systems so that data-based systems were consistently updated and information was documented in detail for each phase of the conversion process.
- Hired as a temporary employee through Adecco and was hired to full-time status after 12 months.

Data-Mail Inc., Newington, CT

One of the nation's largest full-service Direct Mail Lettershop production facilities.

Account Manager / Billing Specialist

2011 – 2012

- Processed incoming print quotes and assisted Team of Account Managers with ongoing projects.
- Prepared rate calculators for pre-and final billing for clients including Fortune 500 companies.
- Became expert on Internal Immedia Software for quotations via internet, and Excel format for billing and quote proposals.

Hartford Toyota Super Store, Hartford, CT

One of the leading Toyota Dealerships in the State of Connecticut.

Service Advisor

2009 – 2011

- Met, greeted and responsible for servicing approximately fifteen customers daily.
- Documented concerns, asked pertinent questions. Recommended services based on customer needs.
- Provided accurate cost estimates in person or via phone.
- Resolved customers' concerns, reported status of vehicle including completion time.
- Served as liaison between customer, technician and external warrantee companies.
- Finalized customers' documentation on computer software, kept accurate records of technicians' time.
- Processed Internal and external warrantee claims.
- Functioned at a high level with customers in order to receive and improve service scores for Dealership.

Hartford Direct Inc., Berlin, CT

A Direct Mail and Product Fulfillment Service Organization.

Mail Processing Manager

1993 – 2009

- Managed Mail Processing Department for Direct Mail facility.
- Processed up to 25 Mailings Daily for Fortune 500 and smaller companies.
- Efficiently supervised, while encouraging employee diversity.
- Directed the production team to meet customer needs and achieve standards related to cost, line efficiencies, waste, safety and productivity.
- Met weekly with clients and crew to report progress and implement new procedures.
- Worked with senior managers to implement Corporate Strategic planning initiatives.
- Worked with Sales Department and CSR's on incoming mailings.
- Managed the logistics, including company, USPS, outside vendors for all aspect of mail shipments.
- Acted as USPS liaison and served as a member of Postal Customer Council Executive Board.

EDUCATION

Completed Business Course Work:

University of Connecticut, West Hartford, CT

Northwest Community College, Winsted, CT

Tunxis Community College, Farmington, CT