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## WORK EXPERIENCE


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March. 2003 – Present

*Various Individual Life Roles and Promotions*

*Business Support Specialist – Strategic Projects*

August 2012 - Present

- Business oriented but technical role focusing on large scale strategic initiatives, legacy system updates, current system maintenance and enhancements, as well as breakages and release fallout items.
- Sole new business representative for SPR efforts across multiple systems.
  - Submit requests, complete scoring activities, sign-off on requirements, and partner with IT support and development teams.
  - Participate in business validation activities, responsible for securing production resources, and communicate with leadership and affected business areas.
- Critical role in a multi-year \$6.5M system implementation using a variety of methodologies such as Agile and Waterfall leading to a 75% reduction in admin platforms, consolidated workflow and administrative systems, created a simplified IT environment and improved business processes through the use of a Business Rules Engine.
- UAT Lead for 5 associates on a \$1.5M strategic initiative to rewrite a critical admin platform which resulted in ease of use in a VDI environment and rewrote 82 application windows.
  - Created documentation and training materials, facilitated virtual training sessions and provided support to BPO trainers.
- Served as SME and project coordinator for multiple business efforts relating to system enhancements/bug fixes and breakaway tasks on larger strategic projects.
  - Defined business needs, documented requirements, obtained approval and signoff, communicated with business leaders when milestones were reached and confirmed acceptance of delivered solutions.
- Interim  Business Owner
  - Managed SPR/RITM prioritization process which included grooming the issues backlog, facilitating meetings with business and IT teams, and approving technical requirements and Agile stories.
  - Coordinated with business leaders to schedule resources to assist with monthly releases.
- Expert at managing multiple projects simultaneously, identifying project risks and inconsistencies, balancing immediate fixes with long term solutions, and adept at pulling together multiple viewpoints to maximize benefits.
- Familiar with enterprise Change Management practices and competent with the SDLC.
- Administrator for multiple SharePoint sites responsible for creating document libraries, task lists, workflows, and performing quarterly audits.

*Operations Specialist – New Business*

2011 – 2012

- Created and updated complex reports in Excel using formulas, macros, and VBA to analyze trends, evaluate performance, and monitor quality.
- Responsible for leading small project groups; coordinating resources; project status reports to process and business owners; as well as creating and maintaining project plans, task lists, agendas, and meeting notes.
- Created training documents and worked with managers and directors to roll out process improvement solutions and new initiatives.
- Facilitated multiple training classes for new and existing employees on all Life New Business processes ranging from application receipt to policy placement.
- Responsible for consistent and accurate reporting on workflow, Service Level Agreement status, error rates, productivity, and Case Manager Workload for all Life New Business processing teams.

██████████ *Advanced Case Manager*

2009 – 2011

- Responsible for life insurance application processing, customer service to clients and agents, policy issue, and placement for all lines of Individual Retail Life business.
  - Advanced Concepts, Foreign Nationals, Large Cases defined as \$10,000,000 and over, Specialized National Accounts, and Express Processing Cases.
- Provided support via written, electronic, and phone communications to: National Account Executives, Individual Insurance Agents, General Agents and their office personnel, Sales VP's, Regional Account Managers, Underwriting, and Management teams.
- Participated in multiple process improvement projects to reduce cycle times and simplify workflow.
- Researched I2I files and communicated with vendors regarding missing or incomplete information.
- Performed QC and mentored other case managers throughout New Business.
- Created training documents, updated system documentation, and conducted one-on-one training.

██████████ *DataEntry/FirstReview Coordinator*

2007 – 2009

- Conducted initial review of incoming application paperwork and corresponded with Agent/GA offices regarding incomplete or missing documents.
- Created job aids, updated documentation, trained new team members and performed QC for junior team members.

*Shared Services Coordinator – Imaging*

2003 – 2007

- Opened and sorted incoming paperwork; prepped, scanned, and indexed business documents; retrieved and imaged microfiche and paper files from offsite storage locations; and researched policies on mainframe applications.
- Collected and reported a variety of statistics from the teams that comprise Shared Services to create a department wide metric dashboard.

## SKILLS, TRAINING, & INTERESTS

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- **Skills:** MS Office Suite: Outlook, Access, PowerPoint, SharePoint, Visio, advanced Excel and Word; Cross-Functional Collaboration; Vendor Relationship Management; User Acceptance Testing (UAT); Process Improvement; Technical Writing; Service Delivery; SDLC; Business Analysis;
- **Trainings:** LOMA Level I Certification; Six Sigma Green Belt; Continuous Improvement; Agile; Mentoring Advantage/Masterful Coaching; Effective Professional Communications (Written, Verbal, and Electronic); ██████████ Lead Program;
- **Interests:** Cooking and Baking;