

CRM/ Database Administrator CRM/Database Administrator AINS Designation Acton, MA
Authorized to work in the US for any employer Work Experience CRM/ Database Administrator
Erland Construction Inc - Burlington, MA October 2017 to January 2019 - Handled the migration and
implementation of all Client and Project data for use in Cosential, a CRM designed for the
Architecture, Engineering and Construction Industry. - Responsible for all data cleanup in original
CRM and Microsoft Access database to ensure that all data is accurate and formatted correctly to
ensure the successful implementation of Erland Construction s new Cosential account. - Worked
closely with Executive Management, the Marketing department and the Business Development team
to assist in training new users and working to keep all Lead and Opportunity data up to date. -
Recreated all original reports using built-in Cosential report tools and Microsoft Excel. - Assisted
the Preconstruction department by completing Estimating Takeoffs of planned construction projects
for Mechanical, Electrical, Plumbing and Fire Protection systems. Dispatcher AMERICAN GAS
PRODUCTS - Everett, MA November 2016 to May 2017 - Assisted Customer Service team with
weekly calling schedule to gather orders. - Processed all customer orders and created and routed
product deliveries in New England, NY, NJ and Western U.S. - Acted as a point of contact for long
range truck drivers during their delivery route. - Worked with depot staff to ensure all necessary
products and equipment are loaded for each truck. - Supported multiple customer accounts to
ensure high level of service. - Performed all ad hoc reporting as requested. Marketing Project
Administrator VoltDB - Bedford, MA August 2016 to September 2016 - Assisted the Marketing Team
in transitioning all Marketing Data in to Hubspot. - Ensured the integrity of all web site links and the
accuracy of all content being migrated. Insurance Compliance Analyst Berkeley Point Capital -
Boston, MA February 2016 to June 2016 - Responsible for the review of all Property, General
Liability and Excess Liability Policies for commercial multifamily and senior living properties within a
portfolio to ensure that investor requirements were met regarding coverages in place, coverage
limits, required catastrophe coverage (Flood, Wind, etc.), and all other details that would cause a
financial loss for the investor in the event of a loss due to property damage or liability claims. -
Worked closely with both borrowers and insurance agents to ensure that errors were corrected and

insurance coverages set up with the required coverage limits. - Performed reviews for audits by the investors and produced all correct insurance certificates in a timely manner. - Acted as a point of reference for insurance with other departments internally for the purposes of escrow and underwriting.

Sales Operations Specialist SmartBear - Somerville, MA January 2016 to February 2016 - Created Renewal Opportunities in Salesforce for multiple software products to ensure that all Renewal Opportunities for 2016 were set up. - Ensured that all data relating to the product and sale were accurate; cleaned up existing data that was incorrect. - Worked with the Customer Success Team to ensure that high priority Renewals were set up in Salesforce in a timely manner.

Customer Care Representative Fleetmatics Ltd - Waltham, MA February 2015 to December 2015 - Worked on the Customer Support Team for Fleetmatics WORK; a Workforce Management Solution specializing in Scheduling, Dispatching, Invoicing and Inventory Control. - Handled inbound calls and emails from our customers (comprised of Owners of the company, office staff and field technicians) who had questions about using the WORK solution and who reported technical issues with the WORK solution. - Collaborated with the Development Support Team and Product Team to troubleshoot issues and pinpoint areas of the solution that could be improved, using both feedback from our customers and internal testing. - Provided high level support to our customers ranging from answering basic questions about the solution to providing creative solutions to create processes to help accomplish their daily work flow in a more efficient manner. - Assisted our customers with importing their client and inventory data in to WORK, integrating their WORK account with their QuickBooks account and by customizing forms, such as quotes and invoices, to these forms automatically produced based on data entered in to the solution. - Acted as a point of reference for the team regarding complicated processes and issues.

Project Administrator Pegasystems Inc September 2014 to November 2014 Worked with the Global Sales Operations team on a project highlighting untargeted sales opportunities for the international sales force. - Assisted in organizing, changing and cleaning data in preparation for entry into the sales database. - Performed all other ad hoc duties that were assigned both inside and outside the scope of the project.

Agency Analyst Homesite Group Incorporated - Boston, MA July 2011 to October 2013 Worked under the General

Manager of the Homesite Insurance Agency within the operations department. - Responsible for sending out all applications, payment forms and applicable state forms for all new homeowners insurance policies (owner occupied, landlord, condo and vacant policies), which were products of an Agency's partner company, sold by Homesite sales agents. - Produced a weekly report for Homesite's sales team to show sales volume for individual agents selling the Agency partner's homeowners policies. - Produced a daily report of customers who did not qualify for Homesite policies and forwarded the list to Homesite sales agents to follow up and write policies through the Agency's partners. - Provided sales support to Homesite's sales team (administrative and logistical assistance, advice on state requirements, etc.) and support for the Agency partner's customer service department by acting as a direct point of contact to assist policyholders with policy issues and changes after the agent has completed the sale of the policy. - Utilized our Agency Management system to download and store entries for newly sold policies, policy changes, cancellations and reinstatements from the Agency's partners. - Processed all incoming and returned agency mail and forwarded proper documentation and premium payments to the appropriate Agency partner. - Reviewed all incoming signed applications to ensure there are no significant changes to information or underwriting questions and to report such changes to the Agency's partner. - Maintained a database of all signed applications for our partner's homeowners policies as well as documentation for all other policies sold through the Agency's other partners (Flood insurance, Umbrella coverage, etc.). - Monitored all of the Agency partner's policies that are at risk of cancellation for various reasons and worked directly with Homesite Sales agents, the Agency partner's customer service and underwriting departments and the policyholders to resolve property and policy issues to prevent cancellation. - Worked closely with the Licensing Supervisor and assisted with licensing projects as needed to ensure that the state licenses and appointments for all Homesite sales agents and all of the partners' agents are renewed prior to expiration. - Coordinated with the accounting department's billing team to resolve any premium payment issues relating to customers with policies through both Homesite Insurance and the Agency's partners. - Assisted the accounting department, data warehousing team and the sales teams to produce

monthly commission reports for all Agency partners. - Organized and facilitated the review, cleanup and off-site storage of more than ten years of Agency files in basement storage in preparation for the company's move to a new office. - Performed all state audits as requested by the Agency's partners and assisted the Agency's partners in the claims process regarding their policies which were sold by Homesite sales agents. - Performed all ad hoc reporting, projects and administrative duties as requested by the Agency's Partners and Homesite Management. Customer Service Representative Public Sector Partners - Worcester, MA March 2011 to May 2011 - Performed administrative duties regarding Prescription Advantage: a state pharmaceutical assistance program available to Medicare recipients. - Handled questions and resolved pharmacy issues of program members through inbound calls. - Contacted program members through outbound calling projects. Lead Qualifier - Channel Media Group TechTarget - Newton, MA October 2010 to January 2011 - Followed up with site users and event attendees to produce leads for TechTarget's clients. - Surveyed site users as a method of fine tuning and marketing online media delivery. Sales Agent BBWireless - Woburn, MA June 2010 to October 2010 - Represented Verizon Wireless as an authorized Business Agent. - Drove customers to Verizon Wireless from other carriers through cold calling small businesses. - Sold Verizon Wireless equipment and upgrades to existing Verizon Wireless small business accounts. Gardener Rehl Gardens - Natick, MA March 2010 to May 2010 - Performed gardening and landscaping duties for many clients in Greater Boston Suburbs. Logistics Service Representative OnProcess Technology - Ashland, MA October 2009 to March 2010 - Worked as part of the Asset Recovery team for Cisco Systems, Inc. - Coordinated returns of defective parts after installation of advanced replacement parts. - Assisted Cisco customers with inquiries or issues dealing with shipping and logistics. Education Minor in Business Management Roger Williams University - Bristol, RI 2004 to 2008 BS in Criminal Justice Roger Williams University - Bristol, RI 2004 to 2008 Skills Microsoft Excel (8 years), Microsoft Access (3 years), SQL (Less than 1 year), CRM and Agency Management Systems (6 years), Software Troubleshooting (Less than 1 year) Links <http://www.theinstitutes.org/> Certifications/Licenses Driver's License Additional Information Professional Designation: AINS from The Institutes (AICPCU), including INS 22 Personal

Insurance and INS 23 Commercial Insurance.

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