

JAKE R. WEISS

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PROFESSIONAL SUMMARY

Detail-oriented project manager with 6 years in team leadership, data management, data analysis, customer service management, and a skill for learning new software, operations, and problem solving.

EDUCATION

University of North Carolina Charlotte
Business Analytics, B.S.B.A.

08/2019 - 05/2021

EXPERIENCE

Director of Implementation and Marketing

09/2018 - Present

Smart Insurance Strategies, Mooresville, NC

- Built a thriving customer base through lead generation techniques.
- Achieved a 48x improvement in lead generation efficiency through Python scripts and Excel.
- Managed all marketing and cold email outreach via Constant Contact, Mail Gun, Lead Connector, and Brevo (Sendinblue).
- Developed lead tracking systems and client databases in Google Sheets, now full CRM implementation with GoHighLevel.
- Performed data cleaning and record validation utilizing Excel and Python.
- Designed intake forms and surveys in Google G Suite to collect client information to integrate into company developed data tracking systems.
- Analyzed email marketing and website traffic reports using statistical techniques for the purpose of increasing click-through rate.
- Developed familiarity with Domain Name System (DNS) records and Search Engine Optimization (SEO).
- Calculated quotes and insurance plans via proprietary quoting software based on applicant assessment.
- Performed data entry and submitted forms for insurance policies in Top Broker CRM and other companies proprietary software.

Salary Cap Efficiency Analysis

University of North Carolina Charlotte

- Served as Team Lead for Charlotte FC sponsored project.
- Investigated the relationship between money spent and points-per-game for 23 soccer teams to determine future budgets and planning.

INVOLVEMENT

New Member Educator

Alpha Epsilon Pi

SKILLS

• Microsoft Excel	• Microsoft Access	• Python	• SQL
• Microsoft Word	• Google G Suite	• R	• Tableau
• Microsoft Powerpoint	• IBM SPSS	• STATA	• SAS