JAKE R. WEISS

jakeryanweiss@gmail.com | (704) 929-4700 | Mooresville, North Carolina

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 and operations.

EDUCATION

University of North Carolina Charlotte   08/2019-05/2021

Business Analytics, B.S.B.A.

EXPERIENCE

Director of Implementation and Marketing   09/2018 - Present
Smart Insurance Strategies, Mooresville, NC

- Built a thriving customer base using personal lead generation techniques.
- Achieved a 48x improvement in lead generation system efficiency through automation 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.
- 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.
- 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.
- Familiarity with Domain Name System (DNS) records and Search Engine Optimization (SEO).

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	Tableau	Python	STATA
Microsoft Word	Wordpress	SQL	Google G Suite
Microsoft Powerpoint	R	IBM SPSS	Adobe Suite