

# William M. Agee

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## EDUCATION

### UNIVERSITY OF CENTRAL FLORIDA

Orlando, FL

*Bachelor of Science in Business Administration, Finance, Concentration: Corporate Finance*

Dec 2020

**GPA:** 4.00

**Awards:** President's Honor List Spring 2019

### SANTE FE COLLEGE

Gainesville, FL

*Associate of Arts*

Aug 2018

**GPA:** 3.56

**Awards:** Dean's List Fall 2017 and Summer 2018

**Relevant Coursework:** Business Finance, Financial Accounting, Managerial Accounting, Calculus 2, and Physics 1

## EXPERIENCE

### CONGA

Orlando, FL

*Business Development Intern*

May 2019 – Present

- Lead a campaign targeting underperforming accounts, increasing engagement by 47% and client referrals by 12%
- Tailor outreach with 75+ potential clients by researching industry needs and educating customers based on product fit
- Input and update information within 1000+ Leads, Opportunities, and Accounts and 3300+ Contacts in Salesforce
- Extract relevant data from conversations with C-level executives to simplify the sales pipeline and drive conversion
- Implemented a process on day one to enable scale by consolidating client data to drive KPIs

### PUBLIX

Orlando, FL

*Customer Service Staff*

May 2013 – Present

- Supervise a team of 15-20 customer service associates by facilitating duties to provide premier customer service
- Regulate daily cash office assets totaling \$90,000 to verify cash and inventory levels are satisfactory
- Generate weekly cash reports summarizing \$70,000 of money services rendered in accordance with GAAP
- Mitigate customer complaints by actively communicating empathy to ensure customer satisfaction
- Alleviate risk of safety hazards by consistently monitoring sales floor to sustain a safe environment for customers

## LEADERSHIP

### ASSOCIATION OF LATINO PROFESSIONALS FOR AMERICA

Orlando, FL

*Treasurer*

Apr 2019 – Present

- Develop a budget of \$40,000 to fund the attendance of 50+ members to ALPFA's national convention
- Assemble documents regarding financial activity to submit to the SGA to receive additional funding
- Maintain and establish 7+ cash flows to ensure proper portfolio diversification
- Oversee AR and AP accounts through the accrual method of accounting to ensure accurate bookkeeping

*Lead, Revenue Committee*

Jan 2019 – Apr 2019

- Manage a concession stand with 1500+ customers and \$25,000 in inventory to raise over \$4,000 in a 6-hour window
- Supervise operations, including 20+ team members, that account for 73% of all fundraising revenue generated
- Contact fundraising partners and relay information to members regarding fundraiser details

## SKILLS

### Technical Skills

Salesforce | Tableau | Word | Excel (VLOOKUP, PivotTables) | PowerPoint | Outlook | SalesLoft