

SHANON WINKELMAN

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BUSINESS DEVELOPMENT | B2B SALES & MARKETING | BUSINESS OPERATIONS | PHONE SALES

Highly motivated, licensed business professional with a wide array of experience and a proven track record driving business growth through client relationship, defining and exceeding sales and revenue goals, and meeting long-term business outcomes. Revenue generator with a unique talent for delivering results in difficult conditions. Strong personal drive to succeed, managing up to \$5mm in business revenue and building a business from scratch with revenue up to \$.75mm annually. Recognized for strong work ethic and committed to a high level of customer service to build trust and enhance business reputation. Extensive background includes commercial and residential remediation and restoration services, requiring unique set of service skills in dealing with challenging and emotional emergency situations.

PROFESSIONAL EXPERIENCE

AUGUST 2023 TO PRESENT

LICENSED HEALTH & LIFE INSURANCE AGENT

I take inbound and make outbound calls helping clients acquire health insurance. I am licensed for ACA and open market under 65. I was able to enroll 800 clients on only 40 hours a week during last year's open enrollment.

AUGUST 2021 TO AUGUST 2023

DIRECT SALES SR ACCOUNT EXECUTIVE, DISH

As a retention specialist I took inbound calls from Dish customers needing technical assistance, discounts, billing questions and mostly wanting to disconnect services. I would assist to resolve issues and convince the clients not to disconnect service and ideally commit to another 1-2 year agreement. I was consistently one of the top performers earning Annual Platinum recognition in my first full year and earning my first promotion only four months into my tenure.

JULY 2020 TO JULY 2021

SR. TAX CONSULTANT, OPTIMUM WEALTH MANAGEMENT

Onboarding clients for tax debt resolution and tax preparation services using Logics CRM software and the IRS Fresh Start Initiative application process. Fielding 50-100 calls per day. I am consistently on top of the weekly leader board for weekly activities.

OCTOBER 2019 TO MARCH 2020

SETTLEMENT OFFICER/SALES, TAXRISE

Onboarding clients for tax debt resolution and tax preparation services using Logics CRM software and the IRS Fresh Start Initiative application process. Fielding hundreds of calls per day.

- Set the record for fastest Promotion from Junior Settlement Officer to Settlement Officer
- Top tier sales person current quarter with highest customer retention and quality measures in the department.

FEB 2019 TO SEPT 2019

RESTORATION DIVISION MANAGER, SERVICEFIRST RESTORATION

SHANON WINKELMAN, CONTINUED

Provided leadership and oversight for the company's emergency response team. Responsible for a team of 16 technicians covering Orange County and surrounding regions.

- Mitigated and remediated complex projects including customer service challenges, insurance adjuster, property manager and referral partner relations.
- Identified and addressed opportunities for improved team effectiveness by coordinating onsite protocol and innovative approaches to emergency response.

ACCOUNT EXECUTIVE/SALES, SERVICEFIRST RESTORATION

Account lead for a territory that covers north Orange County and south Los Angeles County, representing 40% of the company's accounts

- Build, cultivate, and develop relationships with key customer, vendors, and strategic partners in ((insurance agents, HOA's, ??)) Deliver the sales and marketing strategy that and implement internal and external strategies to deliver service and drive growth.
- Experience with Luxor and Dash software.

JAN 2018 TO FEB 2019

ON RETAINER, CONVERGENCE WIRELESS

Relocated to Southern California to support a startup organization that leverages patented technology to manage lighting and lighting controls wirelessly, currently in funding stage

- Acquired certifications and licenses, generated investor interest, and provisioned business operations to enable anticipated and accelerated growth plan

MARCH 2012 – JULY 2017

OWNER, WINKELMAN INC (FLORIDA)

Water damage and mold remediation company in the southwest Florida region. Oversaw nearly 3,000 structural dry outs, personally performing on 1500; supervised 500-1000 remodeling jobs; managed 12- 20 employees

- Defined company philosophy, initiated business and service model, determined market viability and presence, and established business practice within a highly competitive landscape
- Responsible for all aspects of business operations, including accounts receivable/payable, advertising and intra-company relationships, prospecting, client relations, payroll, inventory control, marketing, final quality inspection of completed projects, dispute resolution and dealing with insurance companies.
- Hired and developed a highly skilled service team, providing on-the-job training in the regulated methods of the Institute for Inspection, Cleaning, and Restoration Certification and indoor Air Quality (IICRC & IAQA).

2002 – 2012

VICE PRESIDENT, SALES AND OPERATIONS, DRYWIZARD (FLORIDA)

Began as a water damage technician and worked up to Vice President in charge of operations, sales, and marketing in less than 2 years for an independently operated mold and water remediation company

- Earned 3 certifications (IIRC Water Damage Technician, IAQA Certified Mold Remediator, IAQA Certified Indoor Environmentalist) and completed license as General Building Contractor
- Identified a need to better track client needs and contractor contributions and created a database to provide analytics, tracking jobs from lead to bidding process and to completion;

SHANON WINKELMAN, CONTINUED

maintaining employee/subcontractor earnings; and tracked vehicles/inventory and controlled marketing.

- Additional responsibilities included being on call for emergency response (water extraction/dryout), locking in jobs, writing estimates and invoices for damage repairs, dispatching, afterhours phone response, interviewing/hiring/ training/and termination of all employees and subcontractors

CREDENTIALS & SKILLS

- Licensed Producer health/life in 17 States
- IAQA Indoor Environmentalist
- IICRC Water Damage Technician
- IAQA Mold Remediation Technician
- Lutron RadioRa 2 Certified
- Quickbooks
- Bilingual Spanish (fluent)
- Title 24 Certified Acceptance Test Technician
- 13 Lighting Control Assoc. certifications
- Certified Welder
- Microsoft Office
- Ex-Certified Personal & Group Trainer

EDUCATION

BUSINESS ADMINISTRATION, UNIVERSITY OF CALIFORNIA RIVERSIDE

1992 NCAA 5000 Meter Champion and 5 time NCAA All American on a 4 year full ride athletic scholarship.

I have performed tons of business to business marketing. I have set up and tended booths at trade shows and organized customer appreciation days. I designed all marketing materials for Drywizard and Winkelman Inc. I was instrumental in taking Drywizard from \$300,000 to over \$4 million within 5 years. Winkelman Inc was able to produce \$760,000 in its second year. I was able to grow these companies while managing and/or performing all the jobs. As a former NCAA distance running champion and current competitive masters runner I understand the keys to success are having/following a good plan, long term and consistent hard work, not being afraid to hear no and always finding a way to say yes to the customer.