

Omar Javier Lacayo

PROFESSIONAL SUMMARY

Highly ambitious and entrepreneurial minded business professional. Have consistently become a top performer throughout career by being self-motivated and having a selfless attitude. Many years of experience in leadership, sales, management, project management, and marketing. Now I train others how to reach the same level of success or higher!

SKILLS

Sales and Marketing	Call Center Operations	Innovative Thinker
Organizing	Leadership	Problem Solver
Campaign Strategy	Customer Service	Process Improvement
Quality Assurance	Management	Project Management

WORK EXPERIENCE

All Web Leads/Medicare Genius – Medicare Policy Sales Manager **Austin, TX – April 2021-Present**

- Lead, train, manage and motivate an individual team of over 40 agents creating a top performing team YoY
- Create motivational content on a weekly basis for a team of over 150 agents to help exceed our daily revenue targets
- Assisted in exceeding annual rev target of 2021 and 2022 by over 15% generating millions in revenue for the company
- Far exceeded yearly plan target in 2023 by over 25% of our original target
- Implemented a positive team culture that is constantly recognized and had lowest turnover in 2021, 22, and 23
- Develop and train future leaders who continue to be promoted within and to other departments
- Provide support to other departments such as Service, IT, HR, Marketing, and Recruiting

All Web Leads/Medicare Genius – Medicare Sales Agent/Team Lead **Austin, TX – Jul 2019-April 2021**

- Handled inbound calls and provide prospects with an array of Medicare/Health insurance products based on needs
- Promoted from Level 1 to Level 4/Team Lead within 1 year for high performance on team
- Efficiently worked in a full-time remote environment staying focused by learning about sales daily
- Continuously stayed at 40+% closing rate month after month on inbound/outbound calls
- Awarded Newcomer of the quarter Q3 2019 for highest revenues on the new sales team
- Top 3 in sales revenue at over \$130K for Q4/Medicare AEP 2019
- #1 on team in sales revenue Jan 2020 at over \$40K when team average was \$17K
- Ranked #2 in total rev 2020 selling \$620k in revenues when Team average was under \$200k
- Assisted colleagues as a subject matter expert when questions on sales tactics or carriers arise
- Provided weekly coaching sessions to members on the team helping increase team revenues

The Karis Group – Experience Owner **Austin, TX – Feb 2019-Jul 2019**

- Improved all aspects of a member experience by collaborating with different departments, and quickly implementing solutions to issues members may face during interactions with Karis resulting in higher survey scores in 2019
- Updated our Five9 IVR systems in 2019 resulting in a 50% decrease month over month in call abandons
- Renegotiated contracts with Five9 resulting in thousands of dollars per month in savings for the company
- Assisted with successfully implementing career levels program resulting in a 70% decrease in employee turnover
- Created Spanish translated training decks for our clients and trained their bi-lingual reps on our Karis360 services
- Recognized as employee of the month Mar 2019 for hard work ethic and dedication to Karis employees/members

The Karis Group - Quality Assurance Manager **Austin, TX - Jul 2018-Feb 2019**

- Evaluated calls weekly for the entire service delivery department to ensure high quality is always provided on calls
- Managed Team Leads and Member Advisors on prioritizing escalations
- Supported management team by attending team meetings and providing important client updates
- Trained Member Advisors on handling calls efficiently and how to stay compliant
- Provided monthly reports to stakeholders on individual and team performance
- Motivated team members by continuously creating a positive workforce culture
- Created training materials for different team's department depending on the need
- Successfully implemented the Karis Group Quality Assurance program in 2018
- Coached individuals on a bi-weekly cadence to help with continued professional growth
- Led team by example by learning how to negotiate medical bills for members saving millions on medical bills

USAA- Business Advisor II/Health **San Antonio, TX - Aug 2017-Jun 2018**

- Assisted with multiple Health projects as a subject matter expert and business consultant

- Mentored by leaders such as Retired General's/VP's/SVP's throughout USAA career on leadership
- Developed business strategies to optimize efficiencies in the call center
- Influenced Reps by providing daily tips on how to sell insurance products
- Followed up and assisted with fixing health platform defects to ensure Reps had tools needed to take care of members
- Sent daily communications to over 200 employees and ensured everyone had most current health updates

USAA- Marketing Manager III/Campaign Strategy & Development/Health **San Antonio, TX - Oct 2016-Aug 2017**

- Created and kicked off new marketing campaigns which introduced new marketing channels for Health Solutions
- Optimized Health budget by frequently reviewing data and analytics
- Increased Medicare AEP call volume by 48% YOY
- Surpassed Medicare AEP call plan for Health Solutions in 2017 hitting 114% of call volume plan
- Helped support product plan which lead to hitting 120% of plan for 3rd party Medicare products
- Managed the changing environment of Health Insurance projects amid ACA challenges
- Oversaw marketing day to day operations for all Health products
- Communicated weekly updates to keep key stakeholders informed
- Facilitated Lay of the Land meetings to bring stakeholders together and gain insights for campaign strategies
- Handled over 2 million in marketing dollars to help meet product and call plans

USAA- Marketing Manager III/Campaign Strategy & Dev./Military Affinity **San Antonio, TX - Feb 2016-Oct 2016**

- Collaborated with stakeholders to create and implement marketing campaigns for our Military Affinity groups
- Oversaw campaigns and day to day operations for Military Affinity Alumni Associations and Academy groups
- Executed the Army/Navy and Navy Athletics Football campaigns in 2016
- Provided direction to our marketing agency to ensure all campaigns moved forward
- Organized Affinity Database periodically to ensure all tactics are being prioritized based on deadlines
- Managed over 100 marketing tactics per quarter resulting in over 2.5 million impressions quarterly and strong results

USAA- Life/Health Advisor I **San Antonio, TX - July 2013-Feb 2016**

- Served members by providing Medicare, Long Term Care and Life Insurance products and expert guidance
- Evaluated as Fully Exceeded Expectations (highest perf. eval) in 2015 for top performance and teamwork efforts
- Trained colleagues on best practices in closing business effectively and setting up referrals
- Led department of 100+ Reps on Medicare Supplement Sales in 2014 selling over 384 policies exceeding quota of 280

USAA- Financial Foundations Specialist II/Deployment and PCS Team **San Antonio, TX - Feb 2011-July 2013**

- Handled inbound calls regarding property and casualty sales/service and facilitated member's insurance needs
- Facilitated our member's security by taking care of insurance needs for deployments and PCS's all over the world
- Built rapport and uncovered financial needs by asking open ended questions to our members
- Rated top referral producer and top metrics on weekly basis, such as having referral rate of 92% when average was 45%

State Farm Javier Fernandez/Crystal Fuller- Insurance agent **San Antonio, TX- Feb 2009-Feb 2011**

- Managed office on daily basis and tended to customers and prospects
- Generated on average 2-5 leads hourly by making 50-80 cold calls per hour and going door to door for leads
- Led office in insurance product sales on a monthly basis
- Setup Marketing events in the community to promote the office and acquire new leads

EDUCATION

The University of Texas at San Antonio December 2010
 Bachelor of Business Administration in Marketing

LICENSES & DESIGNATIONS

Life and Health License Active
 Property & Casualty License Active
 Yellow Belt Six Sigma Training in 2018

LANGUAGES

Spanish Fluent