Lindsey M. White

25292 Rutledge Drive
Athens, AL 35613
615-504-0861
LMWhite1015@me.com

SUMMARY OF QUALIFICATIONS

Degreed, results-oriented achiever with 10+ years of experience in challenging fast-paced environments. Versatile, adaptable, and quick learner, with broad-based experience in:

- **Administrative/Office Management**
- **Financial Planning**
- **Medical Sales**
- **Patient Business Services**
- **Sales Rep Training**
- **Customer Service**

Solid analytical, problem solving and customer relations skills. Track record of accuracy, efficiency and compliance with corporate, regulatory, and quality assurance standards.

PROFESSIONAL EXPERIENCE

Ingersoll Rand/Trane, (Huntsville, AL) July 2016-Present
Service Coordinator/Project Administrator—Commercial HVAC July 2016-Present

- Efficiently and Effectively coordinate service technicians to meet customers' needs
- Consistently manage and communicate with customers, sales teams, and management while adhering to all other management and operational requirements
- Successfully schedule preventative maintenance contracts as well as new service requests
- Scheduling and tracking of service technicians to maximize their operating efficiency and effectiveness
- Ensuring timely and accurate invoicing
- Continue to earn customer loyalty by effectively and efficiently managing customer interactions and ensuring customer satisfaction
- Coordinate with various team members for accurate and timely recording of project costs, including time sheets, daily reports, etc.
- Responsible for general administrative functions to support the Service Fulfillment process to include service agreements, purchase orders, initiating invoicing, concessions, ship product defects, retrofits, labor warranty's and various reports

Fidelity Investments, (Westlake, TX) June 2014-April 2016
Managing Director—401(k) Relationship Manager July 2015-April 2016

- Successfully built and developed strong internal working relationships with Fidelity personnel in support of service delivery
- Consistently made decisions that were consistent with client and Fidelity goals and objectives
- Drove towards optimal plan design and client self-sufficiency which included utilization of products, services, and client tools, and RPR adoption and delivery
- Provided plan consultation on overall plan design such as; Fidelity's product and services offerings, plan administration, and investments
- Identified and established open lines of communication with Advisors and Key Decision Makers to build a partnership based on trust and loyalty
- Provided fiduciary support for plan sponsors regarding Department of Labor and Internal Revenue Service Compliance Rules
- Licenses: Series 6 and Series 63

Financial Associate Retirement and Benefits June 2014-July 2015

- Provided outstanding customer service to inbound callers while responding to their inquiries and requests on employee benefits plans throughout their employment lifecycle
- Searched for opportunities to educate customers to take ownership of their needs and maximize their retirement benefits
- Consulted and educated customers to achieve beneficial outcomes for their retirement savings
- Referenced multiple on-line resources effectively while simultaneously conversing with customers
- Mitigated risk while adhering to quality procedures and ensuring compliance with regulatory requirements

- Obtained and captured feedback from customers to help identify customer experience improvement opportunities
- Partnered across the organization to deliver world-class service and ensure continuous process improvements

Bioventus Global/Smith & Nephew, (Dallas/Fort Worth, TX) Jul. 2005 - Nov. 2013 Corporate Account Product Specialist, Clinical Therapies Division (Mar. 2008 – Nov. 2013)

- Developed and executed business plan to contribute to the achievement of sales quota for Exogen
- and Supartz in excess of $1.2 million
- Strategized to maximize sales for products and how they benefit each practice including Exogen and Supartz to Podiatrist, Orthopedic Surgeons, Rheumatologists, and Primary Care doctors
- Responsible for obtaining and submitting all necessary paperwork to seek authorization through the insurance carriers for each Exogen order, in compliance with CMS

July 2005 - April 2009
Internal Reimbursement Specialist, Clinical Therapies Division (Memphis, TN)

- Contributed to solving reimbursement obstacles facing field sales
- Educated customers on coding, coverage and payment relating to key western region Commercial and Medicare accounts
- Specialized in reimbursement for Exogen, an ultrasound bone growth stimulator with sales
- grossing in excess of $80 million dollars annually
- Verified medical benefits for every order out of Northern California region
- Managed reimbursement for the Northern California team and Colorado consisting of approximately 12 of 250 Exogen Sales Reps, which goaled at an average of 120% to quota
- Negotiated favorable pricing of Exogen product with healthcare providers and patients
- Assisted in training sales reps. on the Exogen ordering process
- Strategized with account managers to market and develop medical policy guidelines for the Exogen product so that it is recognized as a covered benefit with the local health plans, medical groups, and IPA's in California

Peoplemark, (Memphis, TN) April 2005 – July 2005 St. Jude Children's Research Hospital
Clerical Assistant

- Clerked in Patient Business Services under the Department Director, e.g. mailings, filings
- Dispersed research protocols, checklists and consents to proper consultant
- Managed office mailings, filing tasks, and supplies

EDUCATION

University of Memphis (Memphis, TN) – Bachelor of Arts in Psychology, 2004

ACCOMPLISHMENTS

Internal Reimbursement Specialist of the year 2006

Sales expertise as Top Gun Leader – Myriad Marketing 2005

Computer Expertise in MS Word, Excel, Outlook, PowerPoint, Explorer, Windows XP, and Internet