



JOSE

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WORK EXPERIENCE

LEAD MANAGER/APPOINTMENT SETTER

Alevo Financial and Insurance Agency | February 2025 – November 2025 (10 months)

- Generated and qualified leads through cold calling and lead nurturing, setting high-quality appointments to support client acquisition in the financial and insurance sectors.

LEAD MANAGER/APPOINTMENT SETTER

Harvest Delegation | March 2024 – January 2025 (11 months)

- Managed outbound calling and lead nurturing for construction clients, setting appointments to present demolition services and drive new business opportunities.

REAL ESTATE LEAD MANAGER

Carbon Group LLC | May 2022 – February 2024 (1 year, 10 months)

- Prequalified and nurtured seller leads, assessed property conditions using real estate criteria, and scheduled acquisition appointments to support deal negotiations.

CUSTOMER SERVICE REPRESENTATIVE (Part-Time)

Holland Mortgage Advisers | May 2021 – October 2023 (2 years, 6 months)

- Maintained client relationships by conducting follow-up calls with past mortgage clients and supporting customer retention efforts.

ACQUISITIONS MANAGER

Headquarters Home Offer | May 2020 – April 2021 (1 year)

- Evaluated warm real estate leads, analyzed property values, prepared contracts, and coordinated deal handoffs to disposition teams.

CLIENT CARE MANAGER

Home Experts Realty – David Garcia Team | June 2019 – March 2020 (10 months)

- Managed client records, supervised daily sales operations, and ensured high customer satisfaction while supporting revenue growth and team productivity.

OUTBOUND COLD CALLER / APPOINTMENT SETTER

Upcallers.com | June 2016 – May 2019 (3 years)

- Executed high-volume outbound calls across multiple industries to generate leads and book appointments for diverse B2B and B2C campaigns.

SKILLS/AREAS OF EXPERTISE

- Customer Service & Client Support
- Cold Calling & Lead Qualification
- Appointment Setting & Lead Nurturing
- Email Marketing & Campaign Support
- Creative Writing & Copywriting
- Research & Data Gathering
- Social Media Management
- Coaching

TECHNOLOGY

- Follow Up Boss
- Google Workspace
- Podio
- Zillow
- RingCentral
- Canva
- Mailchimp
- Mojo Dialer (Mojo Calling)

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