Jasmine Ortiz

Appointment Setter

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SUMMARY

Appointment setter with 1.5 years of outbound and inbound calling for a residential solar installer, booking in-home consultations for 9 field sales consultants. Sets 72 appointments a month with a 78% show rate, keeps every lead current in CRM software, and handles price and timing objections calmly on the first call.

EXPERIENCE

Appointment Setter

04/2024 - Present

Sonoran Bright Solar

Phoenix, AZ

Residential solar installer serving the Phoenix metro with 9 in-home sales consultants.

- Conduct 120 cold calling and follow-up dials a day to web and mailer leads, setting **72** appointments a month.
- Run lead qualification on roof age, utility bill and home ownership before booking, cutting no-sale visits by 22%.
- Coordinate visits across 9 consultant calendars by ZIP code, holding average drive time between stops to 25 minutes.
- Secure each visit with a text and phone reminder 24 hours ahead, raising the show rate from 64% to 78%.

Customer Service Representative

06/2022 - 03/2024

Valley Comfort Heating & Air

Tempe, AZ

Part-time role during college at a 40-technician HVAC repair and installation company.

- Answered 60 inbound calls a day from homeowners booking repair, tune-up and installation visits with 14 technicians.
- Booked 300 spring tune-up appointments in 2023 by calling past customers from the service list before the busy season.
- Sold annual maintenance plans to callers after each repair booking, adding 85 new plan members in 12 months.
- Tracked open repair estimates in Microsoft Excel and followed up on each one within 3 days of the visit.

SKILLS

- Appointment Setting
- CRM Software
- Cold Calling
- Lead Qualification
- Sales
- Objection Handling
- Calendar Management
- Microsoft Excel
- Communication Skills
- Attention to Detail

EDUCATION

Bachelor of Arts

05/2024

Arizona State University

Tempe, AZ

Communication