

◆◆ Robert L. Regalado

Concepcion Pequeña, Naga City

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Professional Summary

Goal-driven customer service and sales professional with over a decade of experience in the BPO industry and virtual appointment setting. Strong background in handling North American clients across retail, finance, telecom, and insurance. Skilled in sales conversion, lead generation, and problem resolution. Adaptable, tech-savvy, and committed to delivering top-tier customer experiences.

Work Experience

Clear Nexus Inc.

Serve-up and Loan officer

◆◆ September 2025 – June 2026

- Qualify customer's applications
- Process loans and follow-up campaigns

Digitalminds, Naga City

Appointment Setter

◆◆ February 2025 – March 2025

- Scheduled qualified leads for international clients
- Managed CRM records and follow-up campaigns

Freelance – Remote

Appointment Setter (QuickBooks Credit Card Processor)

◆◆ July 2024 – February 2025

- Set appointments with small business owners to discuss payment processing solutions •

Provided initial product information and pre-qualified prospects

Freelance – Remote

Appointment Setter (Real Estate)

◆◆ March 2024 – July 2024

- Coordinated showings and consultations for U.S.-based real estate agents •

Pre-screened potential buyers and ensured appointment attendance

Quantrics, Naga City

Customer Service & Sales Representative

◆◆ May 2018 – January 2024

- Handled billing, technical support, and service inquiries for Canadian telecom customers
- Consistently met and exceeded upsell and cross-sell targets
- Promoted additional services during customer calls, improving client retention and satisfaction

PBQ Solutions, Naga City

Appointment Setter – Auto Insurance

◆◆ November 2017 – March 2018

- Scheduled and confirmed appointments for auto insurance agents • Contacted warm leads, verified customer details, and maintained accurate logs

Concentrix, Naga City

Customer Service & Sales Specialist – Canada-Based Retail Store

◆◆ November 2016 – July 2017

- Assisted customers with product selection, returns, billing, and promotions •
- Drove revenue through effective upselling and product recommendations

Sutherland Global Services

Customer Service Specialist – U.S. Financial Institutions

◆◆ November 2011 – April 2012 (First Account)

◆◆ July 2012 – July 2013 (Second Account)

- Provided front-line support for major U.S. banks and credit institutions •
- Assisted customers with account inquiries, transactions, and fraud concerns •
- Maintained high call quality scores and adhered to security protocols

Education

Concepcion Pequeña National High School

◆◆ High School Diploma (2005 – 2009)

Julian B. Meliton Elementary School
(1999 – 2005)

Skills

- Customer Service & Complaint Resolution
- Sales, Upselling & Cross-Selling
- Appointment Setting & Lead Qualification
- CRM Tools (e.g., Salesforce, Zoho, HubSpot)
- Phone Etiquette (Inbound & Outbound)
- Technical Support (Telecom, Retail, Finance)
- Communication: English, Tagalog, Bicol
- Time Management & Accuracy

Character References

Karen Nina Reyes – EPP Trainer
Juan Francis Mendoza – Barangay Captain
Hon. Nelson Legacion – City Mayor, Naga City

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Applicant