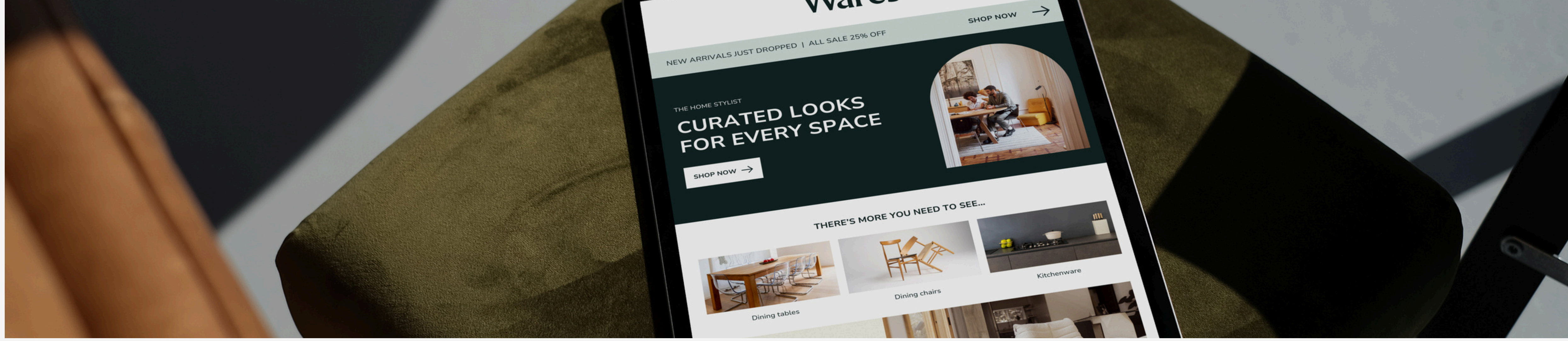
Customer service representative/Appointment setter (Entry Level)

portfolio

Neo Tsofela dineotsofela@gmail.com +27678455149

hello, i'm Neo Tsofela!

I am a dedicated professional with over four years of remote experience teaching English online. Driven to pivot into customer service and appointment booking, I have proactively taught myself and honed my skills in CRM platforms such as Salesforce, HubSpot, as well as scheduling tools like Calendly. Through this self-directed learning, I have developed proficiency in lead engagement, case management, data entry, and appointment setting, positioning myself to contribute effectively as a first point of contact for clients. I am eager to expand my expertise through a hands-on experience, positively represent a company, and deliver efficiency and results with my "get it done" mindset while growing alongside the organization.



skills and expertise

1. Lead Engagement

Ability to capture, qualify, and convert leads into accounts/contacts, ensuring smooth pipeline management.

2. Case Management

Skilled at creating, prioritizing, and resolving cases, with escalation workflows and SLA awareness.

3. Data Entry

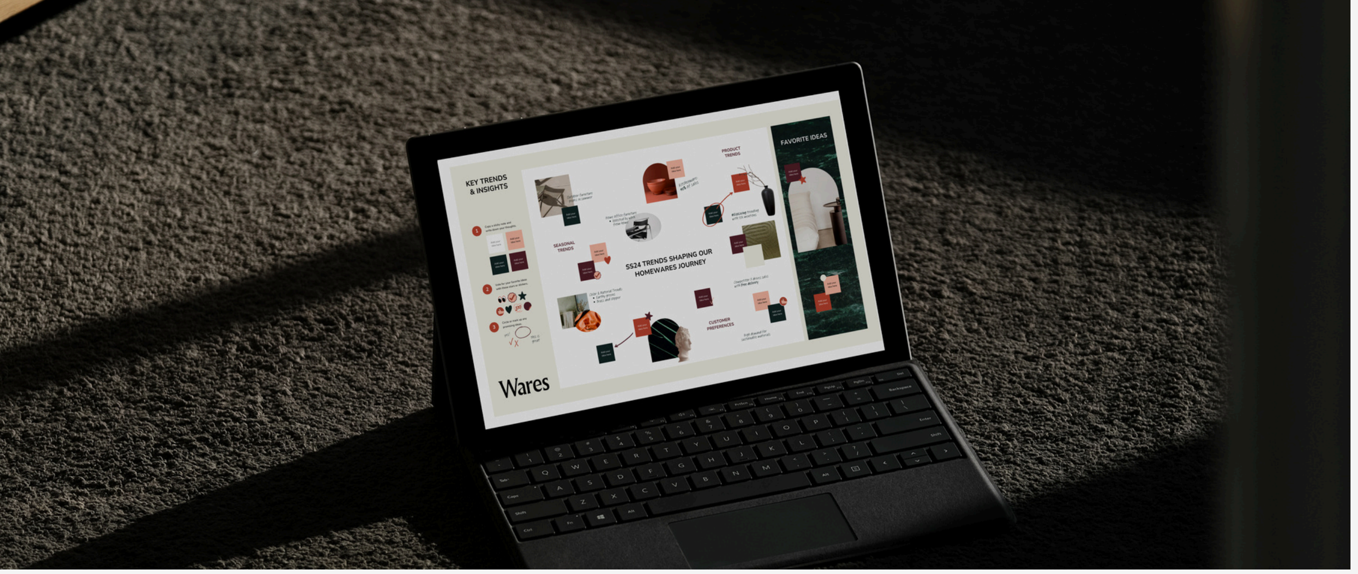
Accurate and efficient record creation, updates, and maintenance across CRM systems.

4. Appointment Setting

Experienced in scheduling demos, meetings, and follow-ups, linking them to accounts and contacts.

5. CRM Proficiency

End-to-end workflow: leads, accounts, contacts, cases, tasks, calendar events, and Slack integration.



my work experience

CRM & Customer Service Simulation Projects (Portfolio Work)
Independent Practice

•Salesforce: Created and managed leads, accounts, contacts, cases, tasks, and calendar events; documented workflows with Slack updates; demonstrated SLA-based prioritization and escalation.

•HubSpot: Added and linked contacts to companies, communicated with clients via CRM, created and prioritized tasks, scheduled meetings, and updated company records.

•Calendly: Scheduled demos, negotiation meetings, and client pitch calls; integrated with CRM records for seamless workflow.

• Developed realistic case studies (billing issues, password resets, demos, negotiations) to demonstrate end-to-end customer lifecycle management.

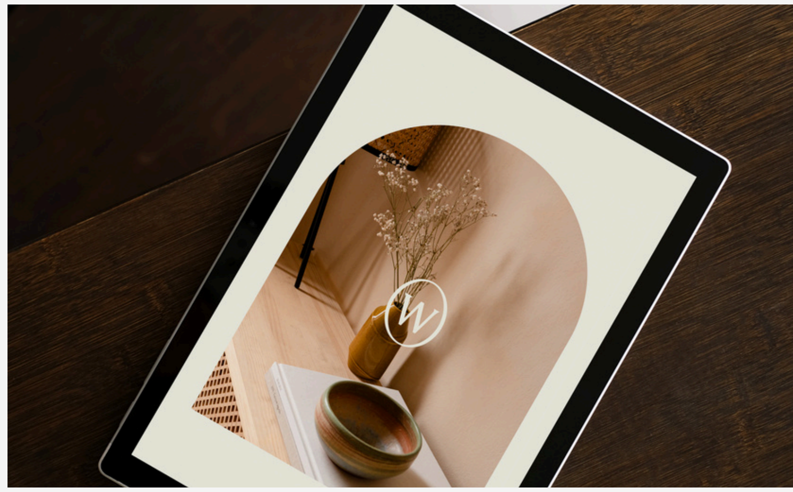
First project

Mock Salesforce Tasks

Mock Salesforce Project: Customer Service Workflow Simulation

Scenario:

I am simulating the customer journey for a fictional company called Momentum Marketing. The company provides digital marketing services and wants to track leads, accounts, contacts, cases, tasks, and calendar events in Salesforce. I'll demonstrate how I manage the entire workflow.



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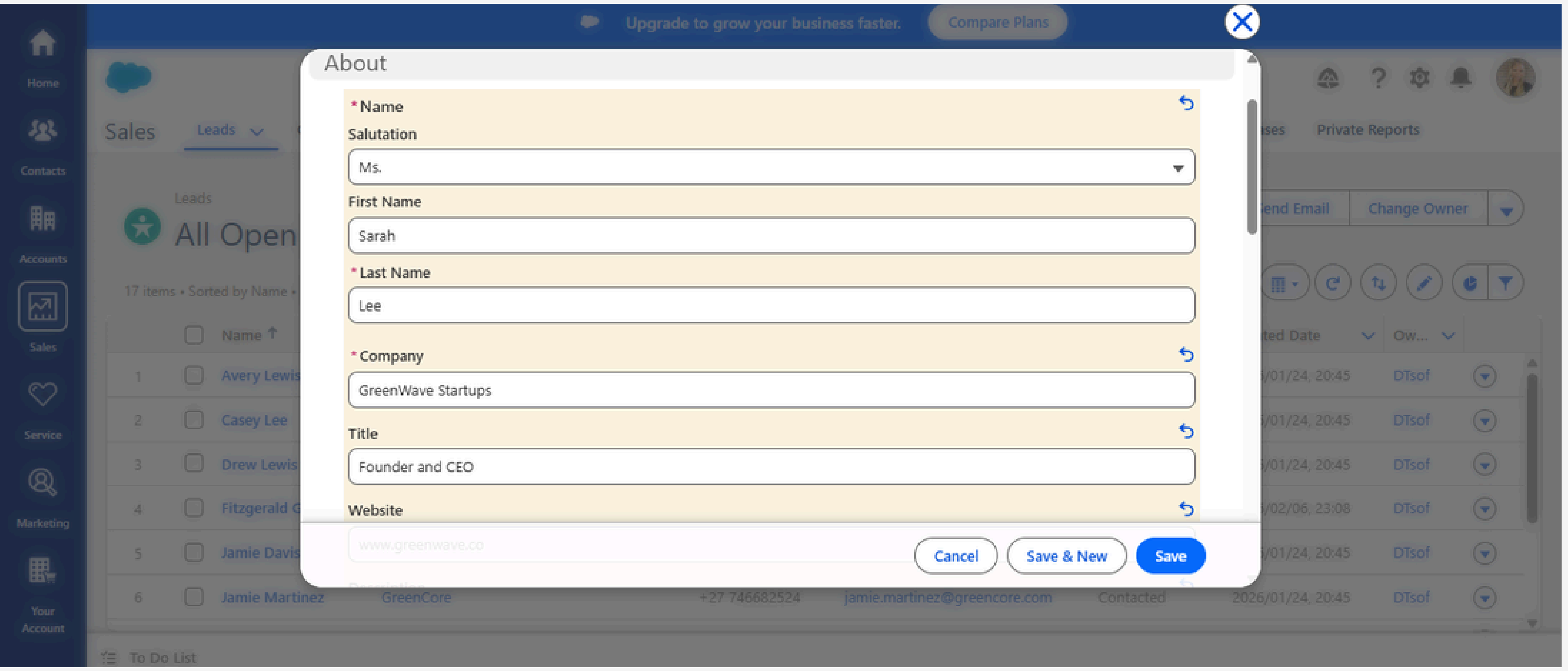
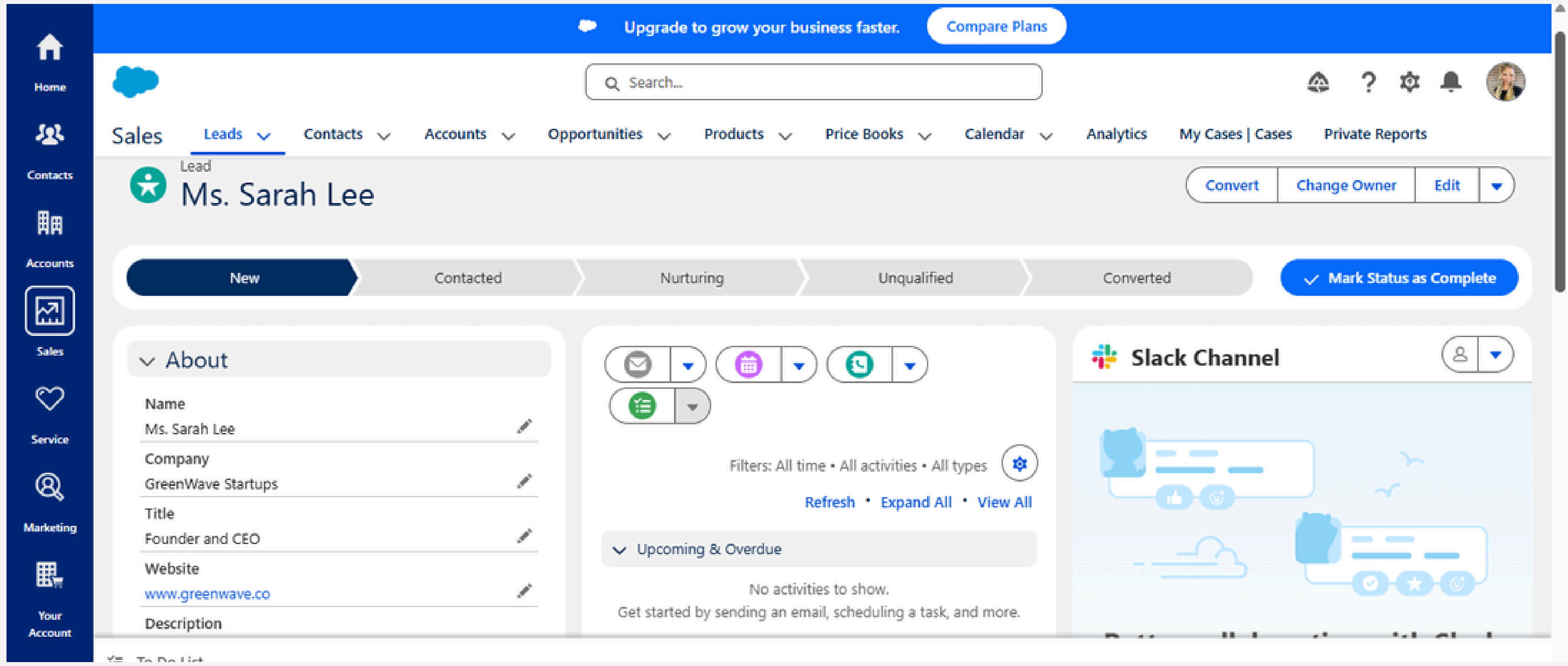
1. Leads Management: Create 4 new leads

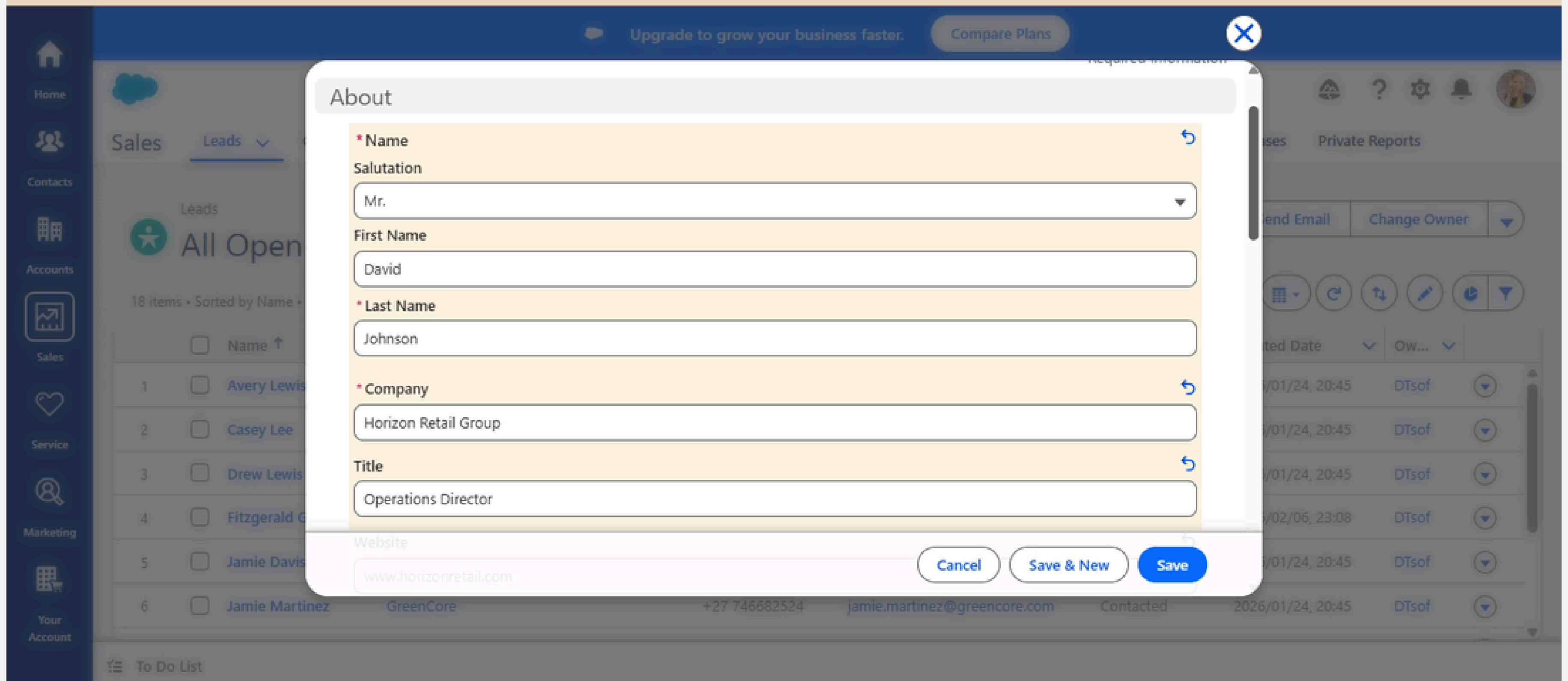
Creating new lead: Sarah Lee



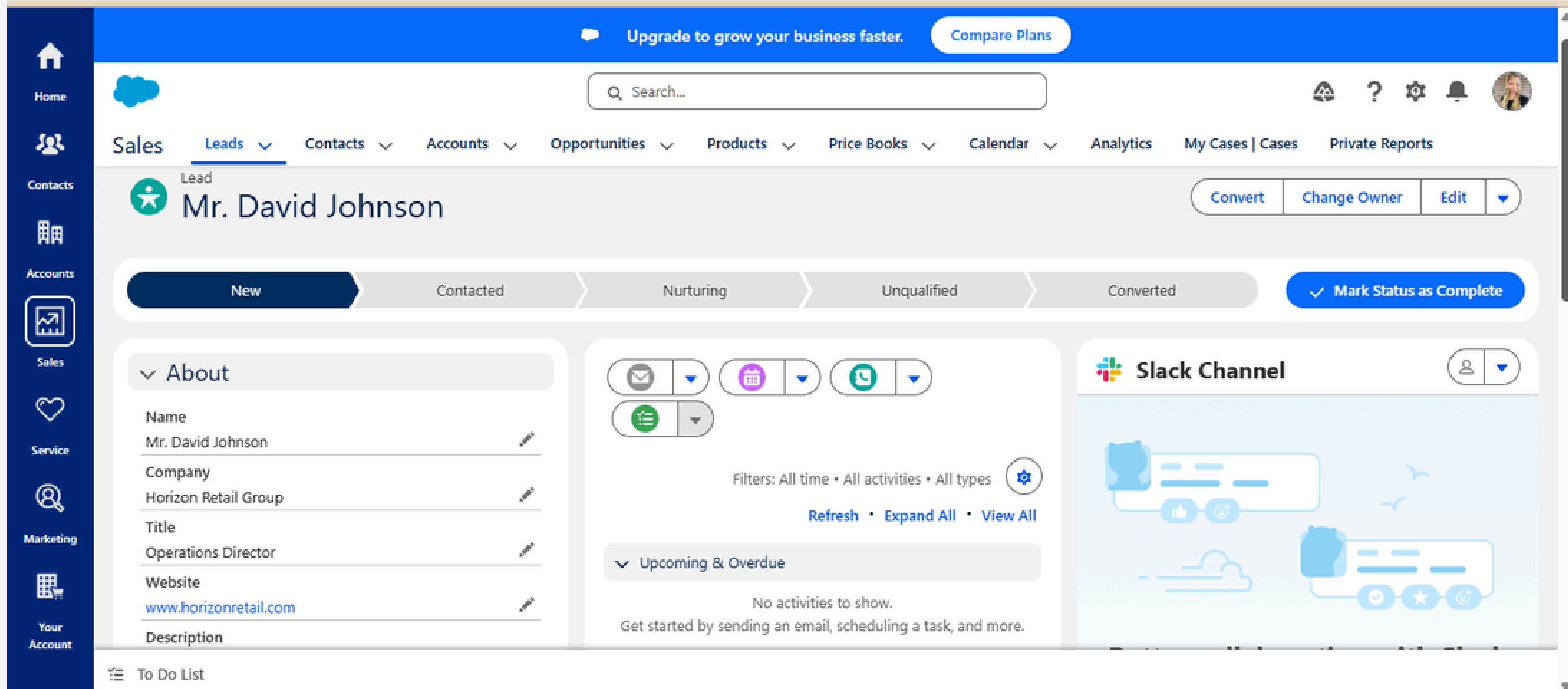
Sarah Lee added to the CRM



Creating new lead: David Johnson

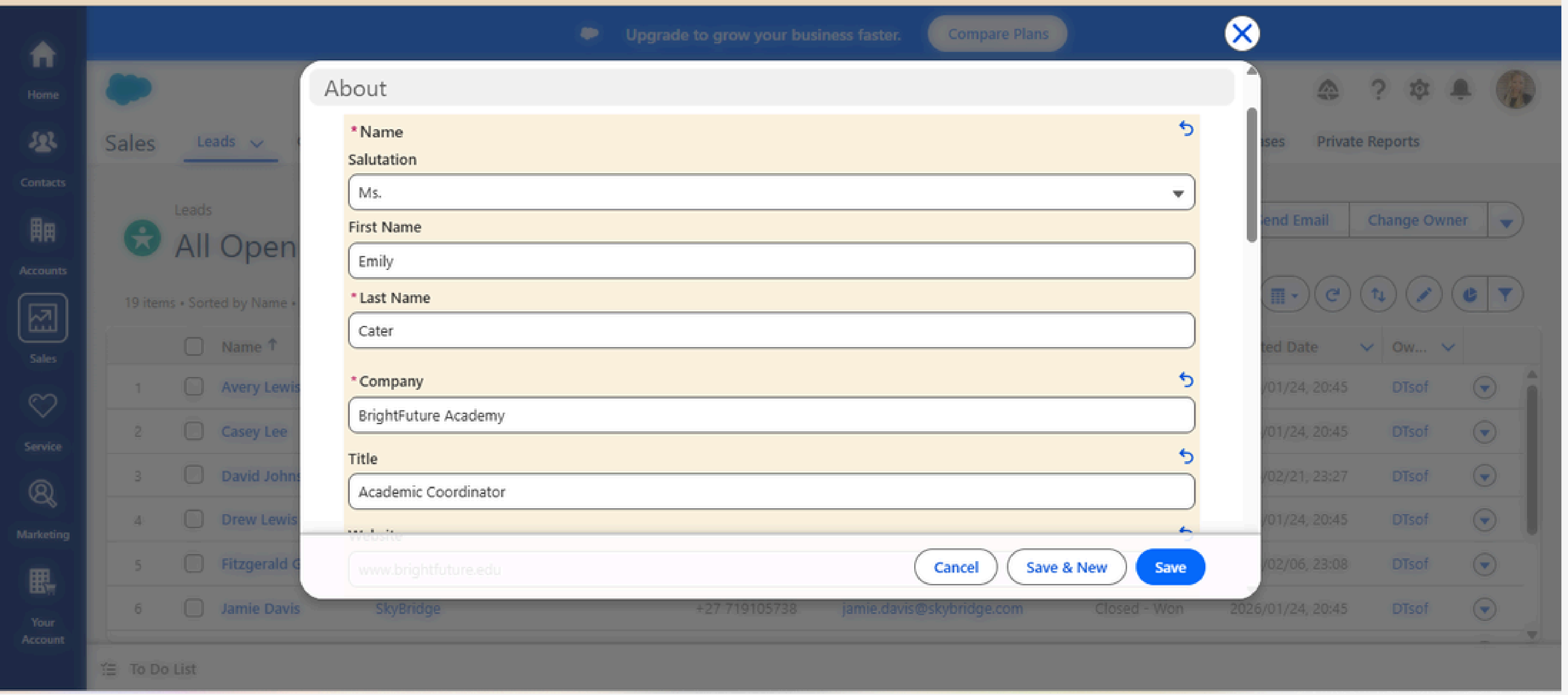


David Johnson added to the CRM

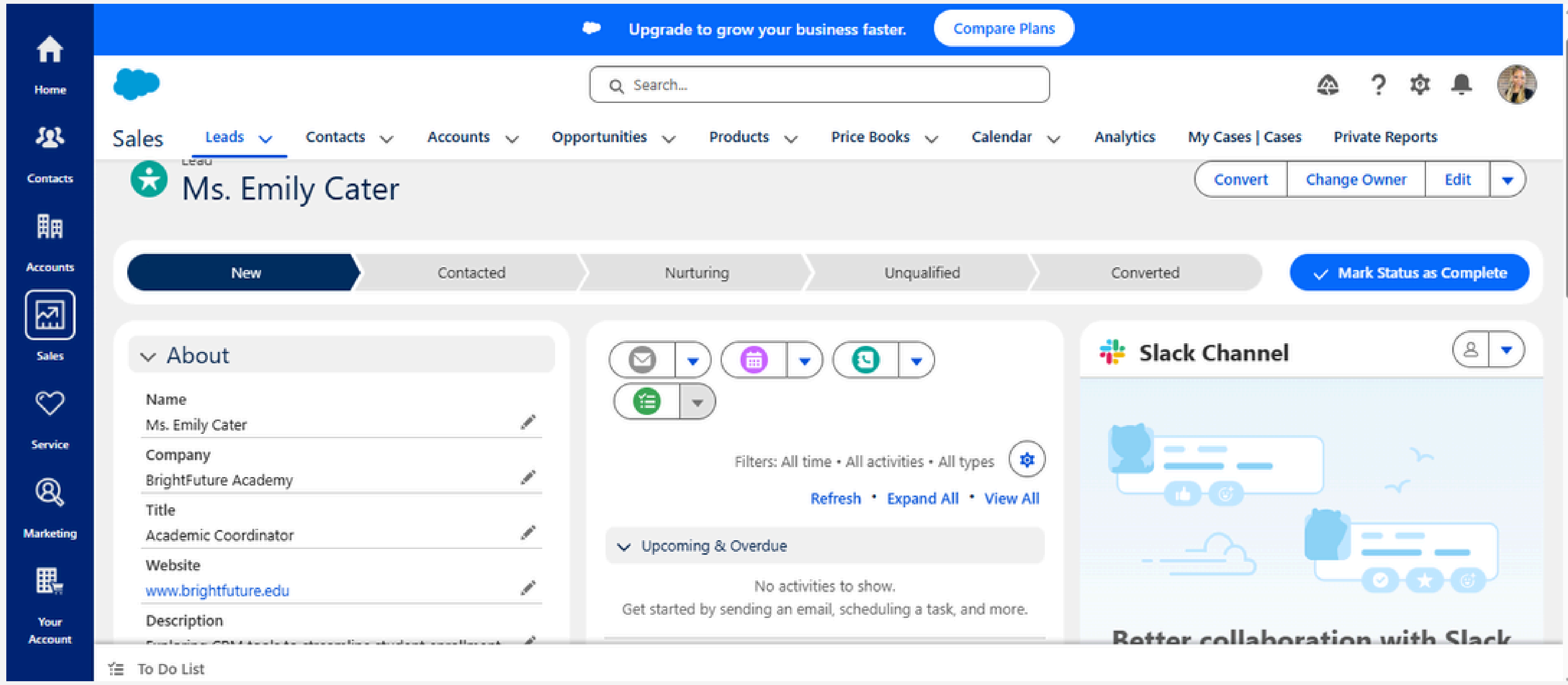


1. Leads Management: Create 4 new leads

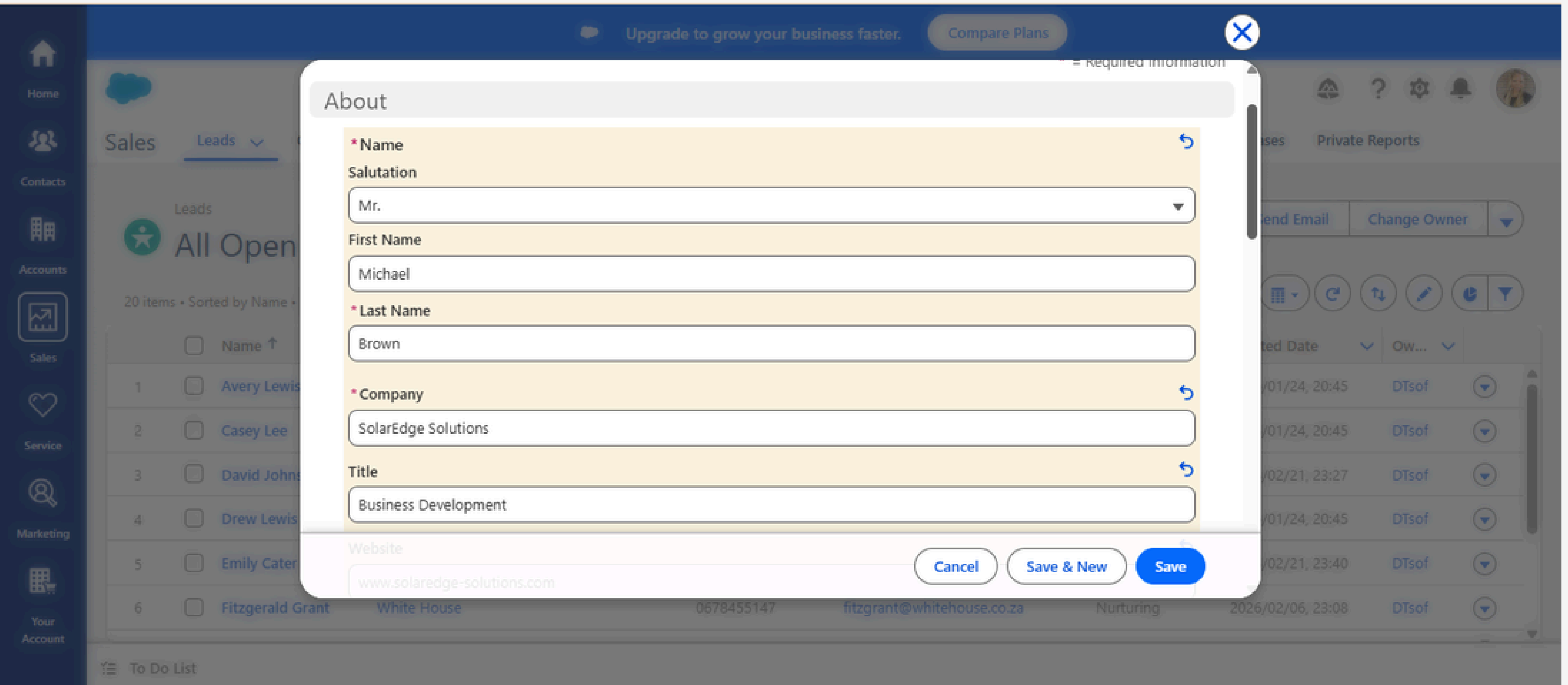
Creating new lead: Emily Cater



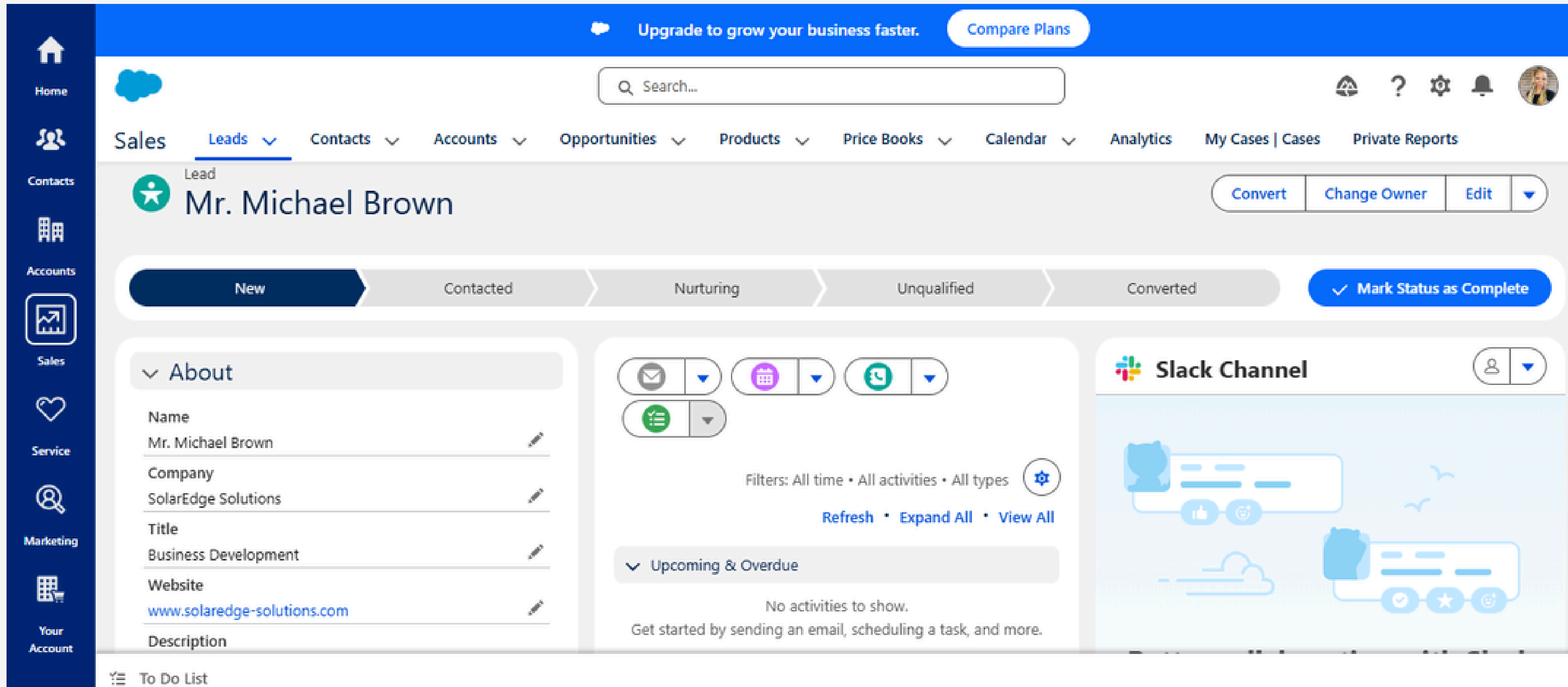
Emily Cater added to CRM



Creating new lead: Michael Brown

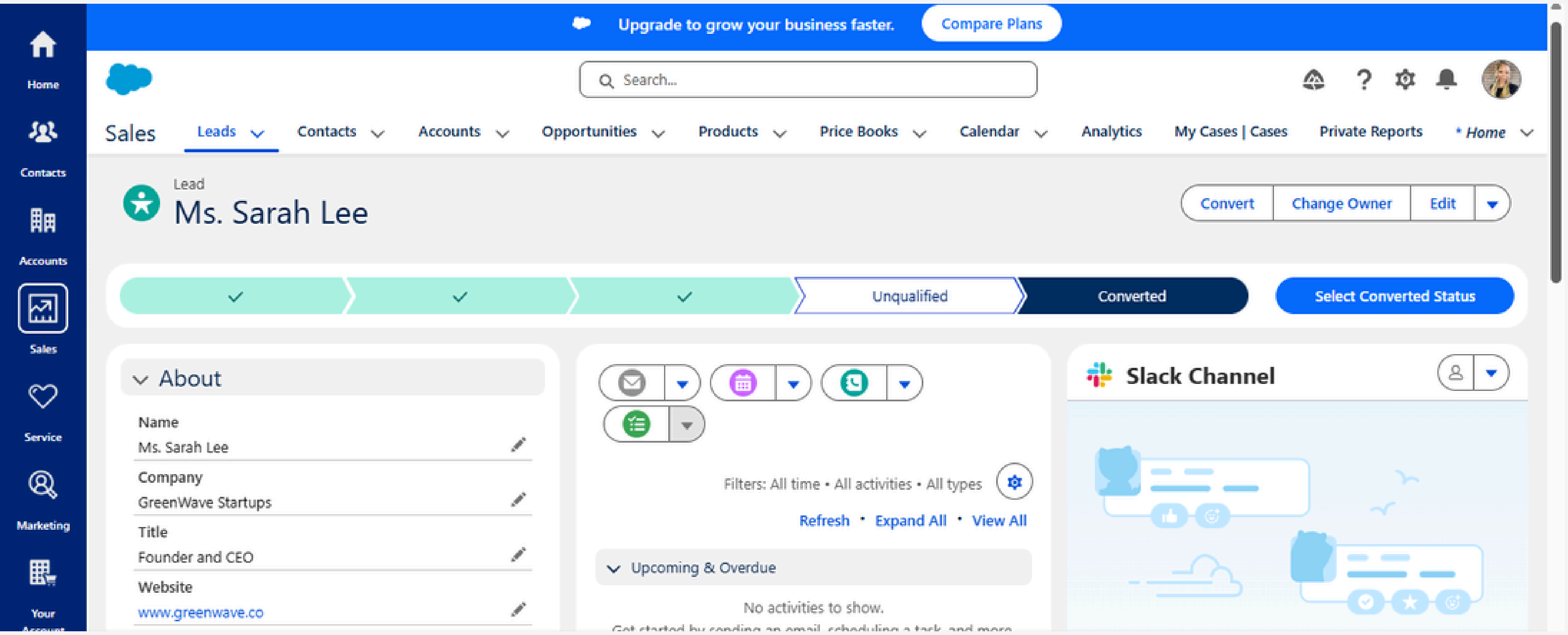


Michael Brown added to CRM

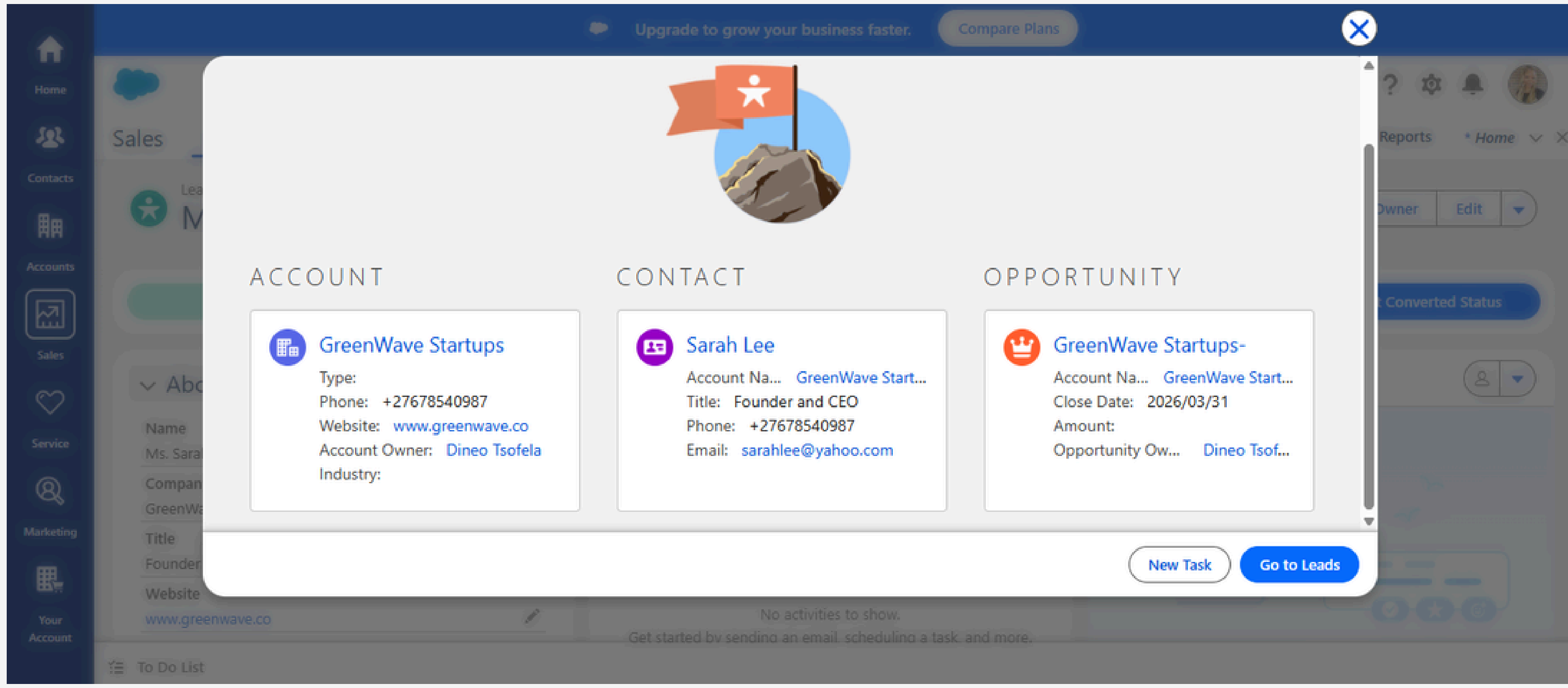


2. Leads Management: Update lead statuses as they move through the pipeline

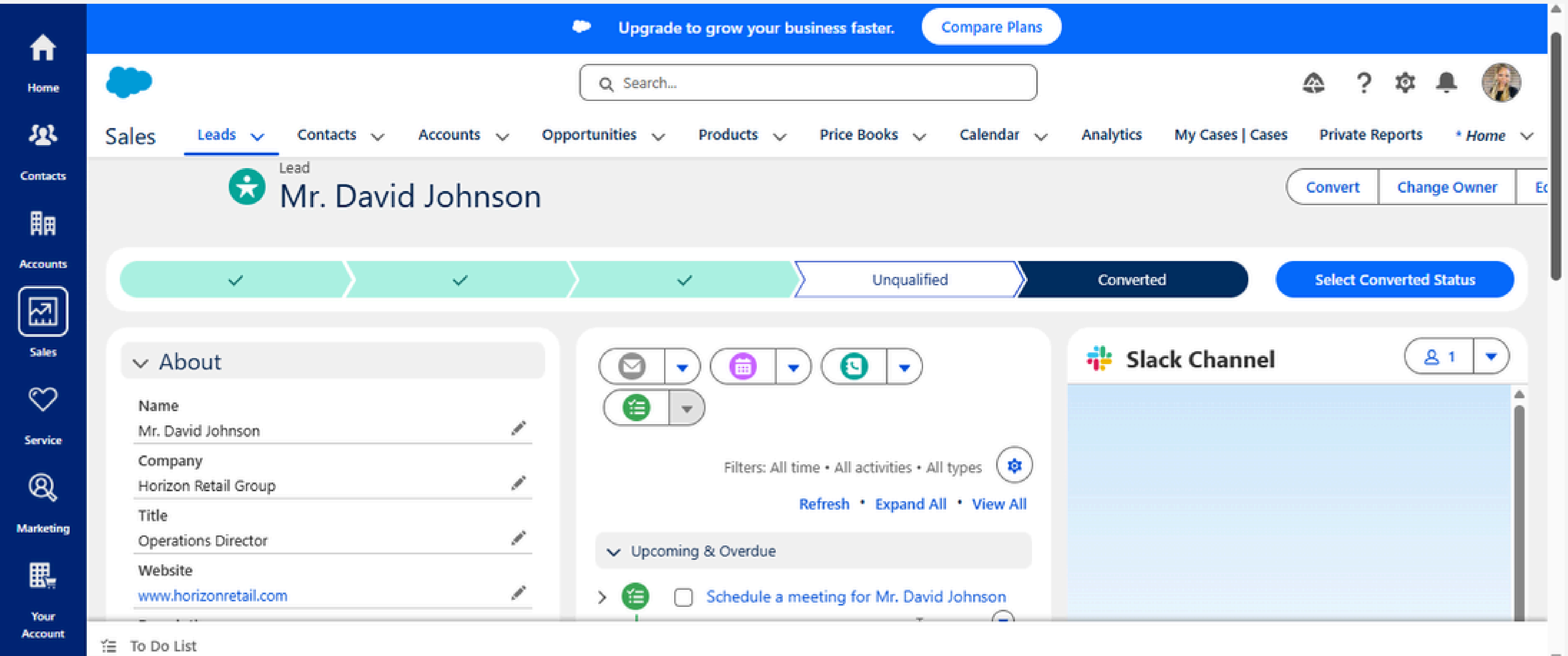
Updated lead status through the pipeline



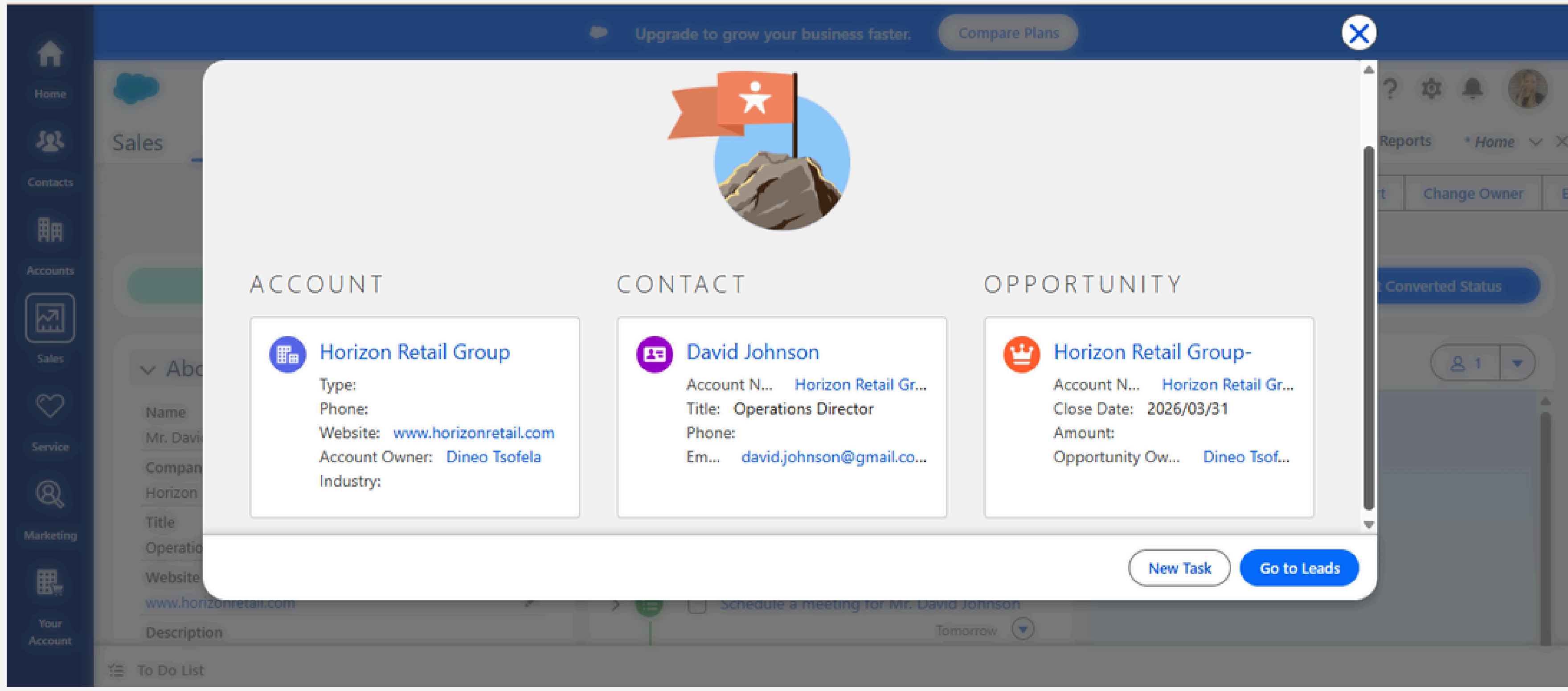
Lead converted



Updated lead status through the pipeline

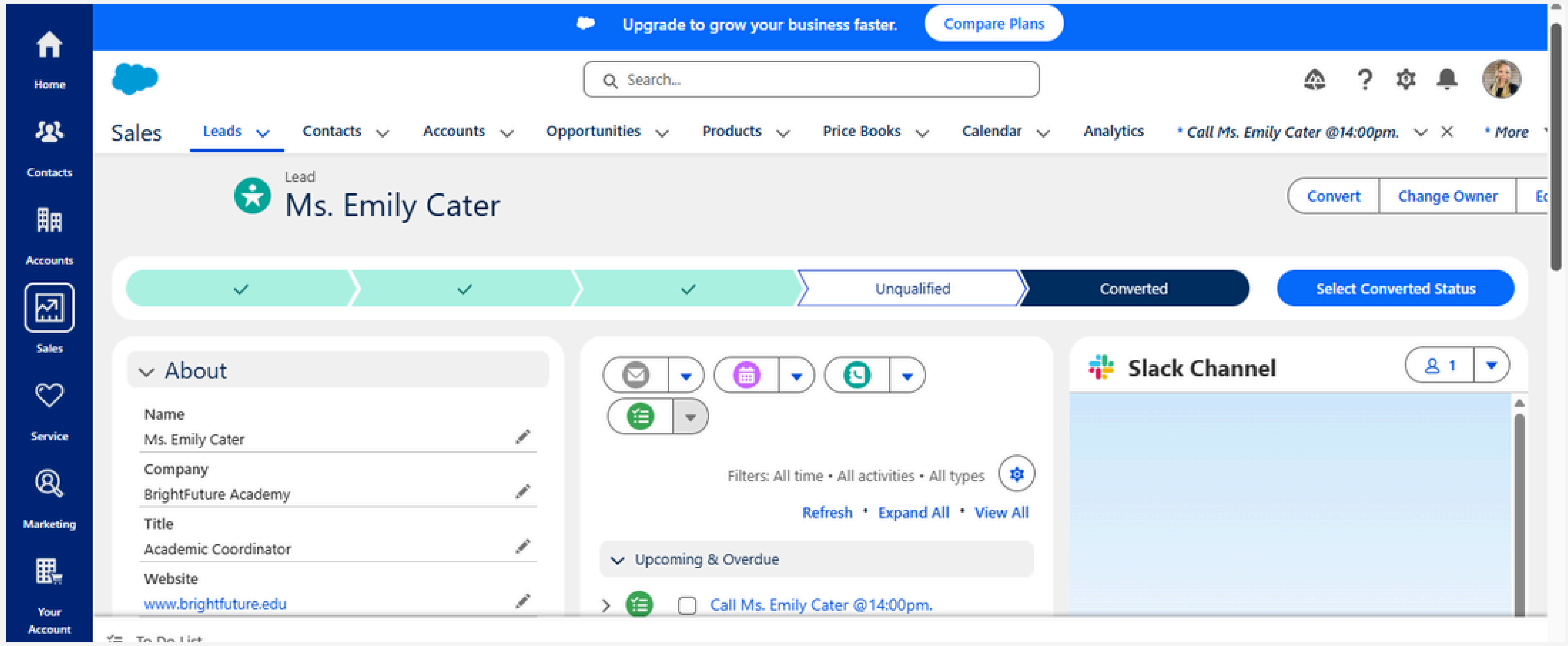


Lead converted

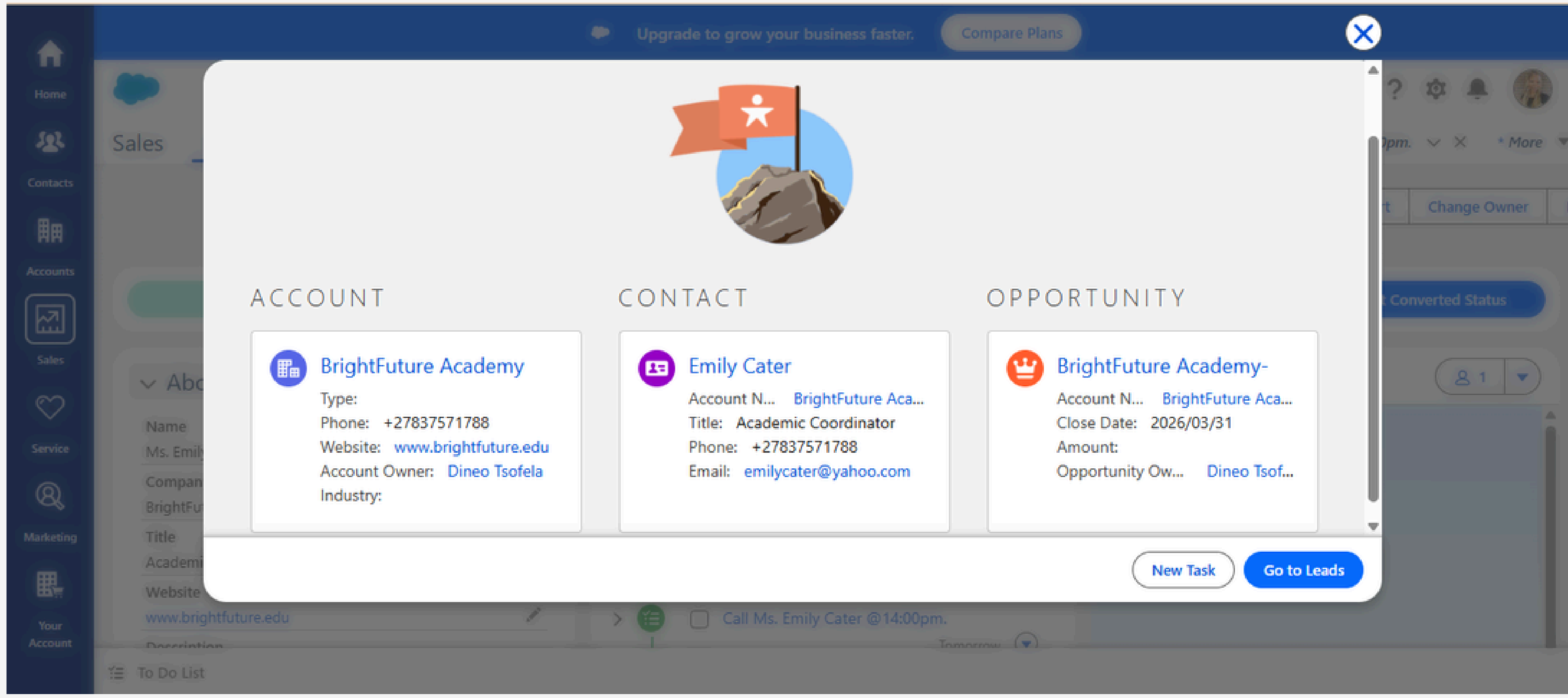


2. Leads Management: Update lead statuses as they move through the pipeline

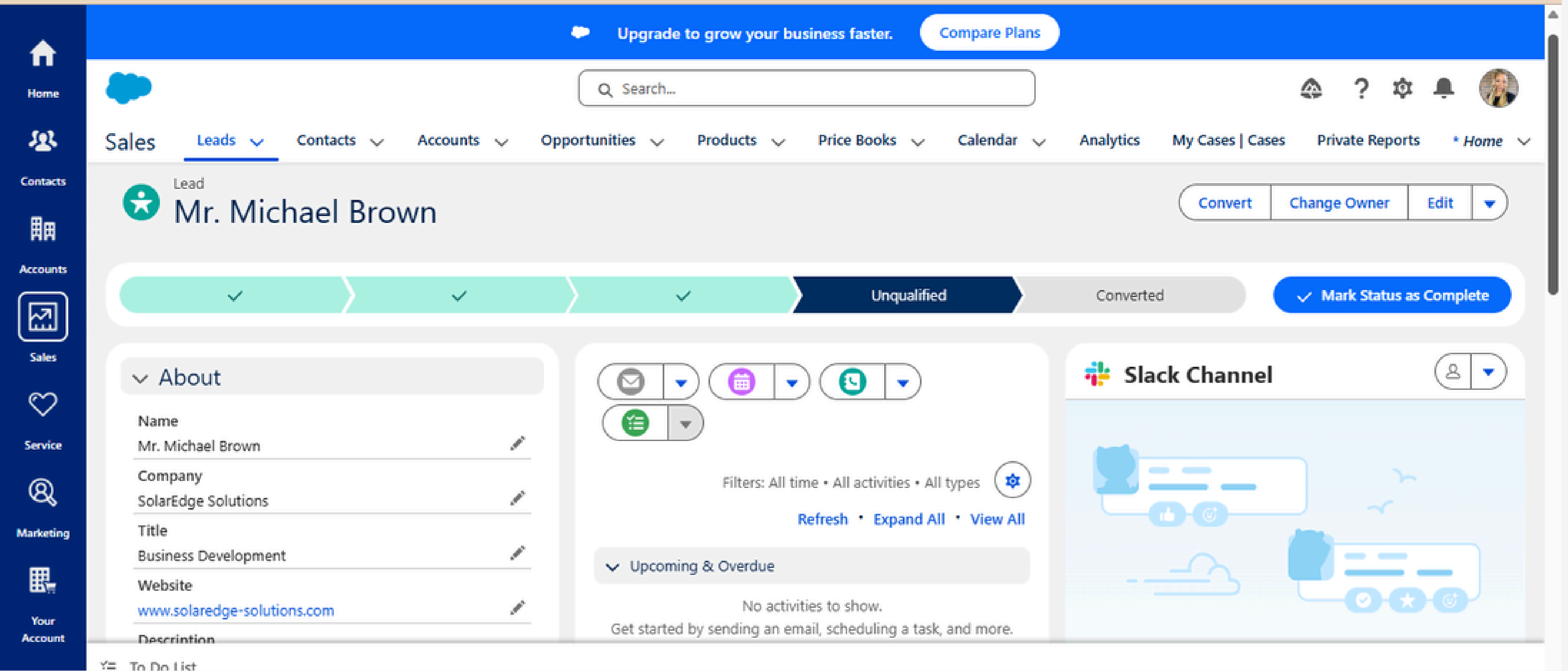
Updated lead status through the pipeline



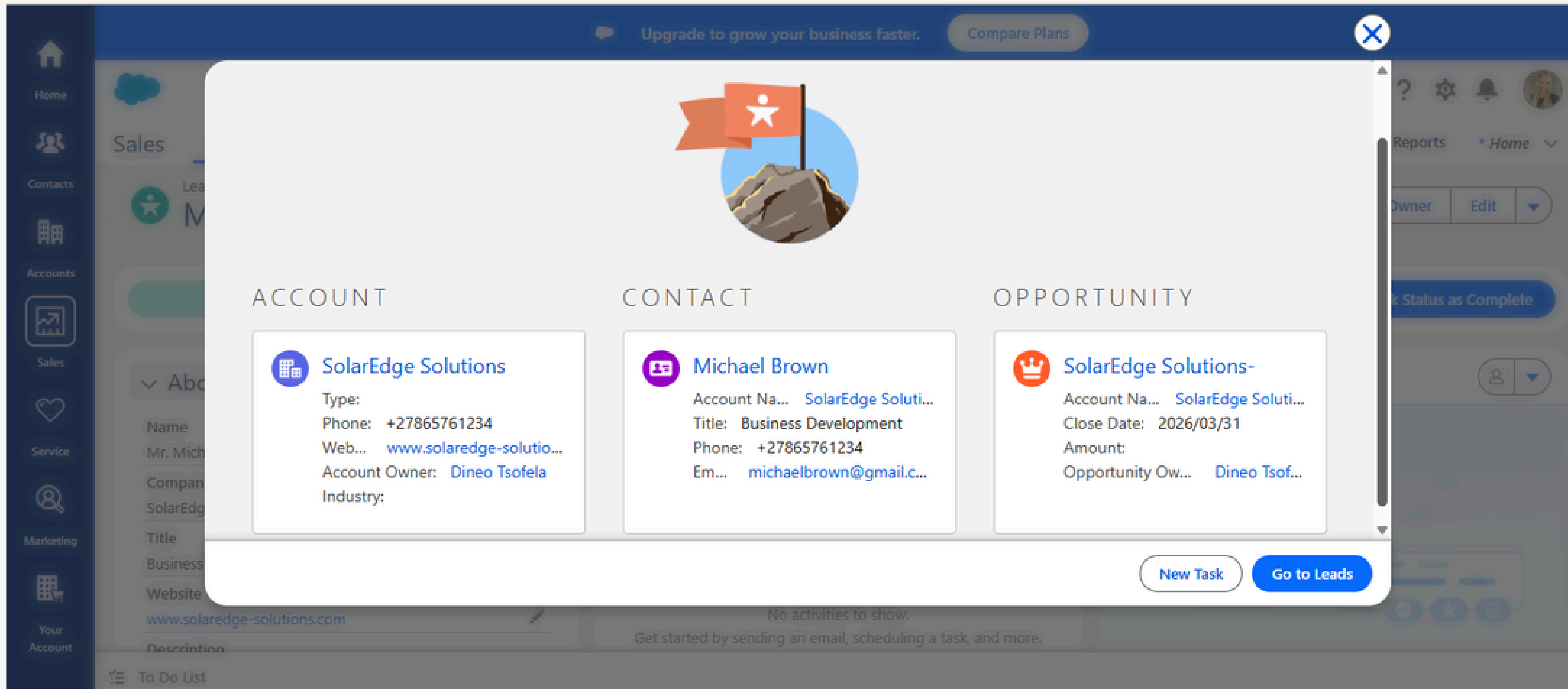
Lead converted



Updated lead status through the pipeline

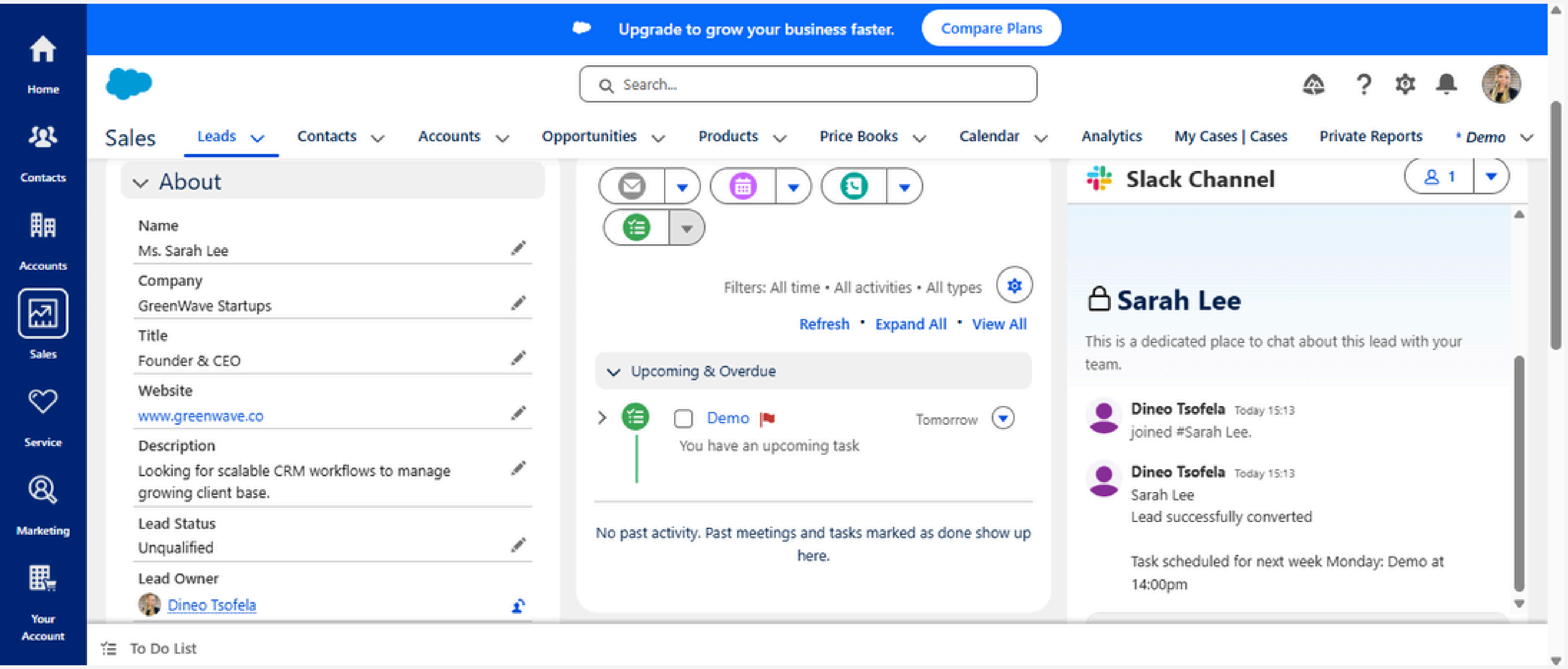


Lead converted

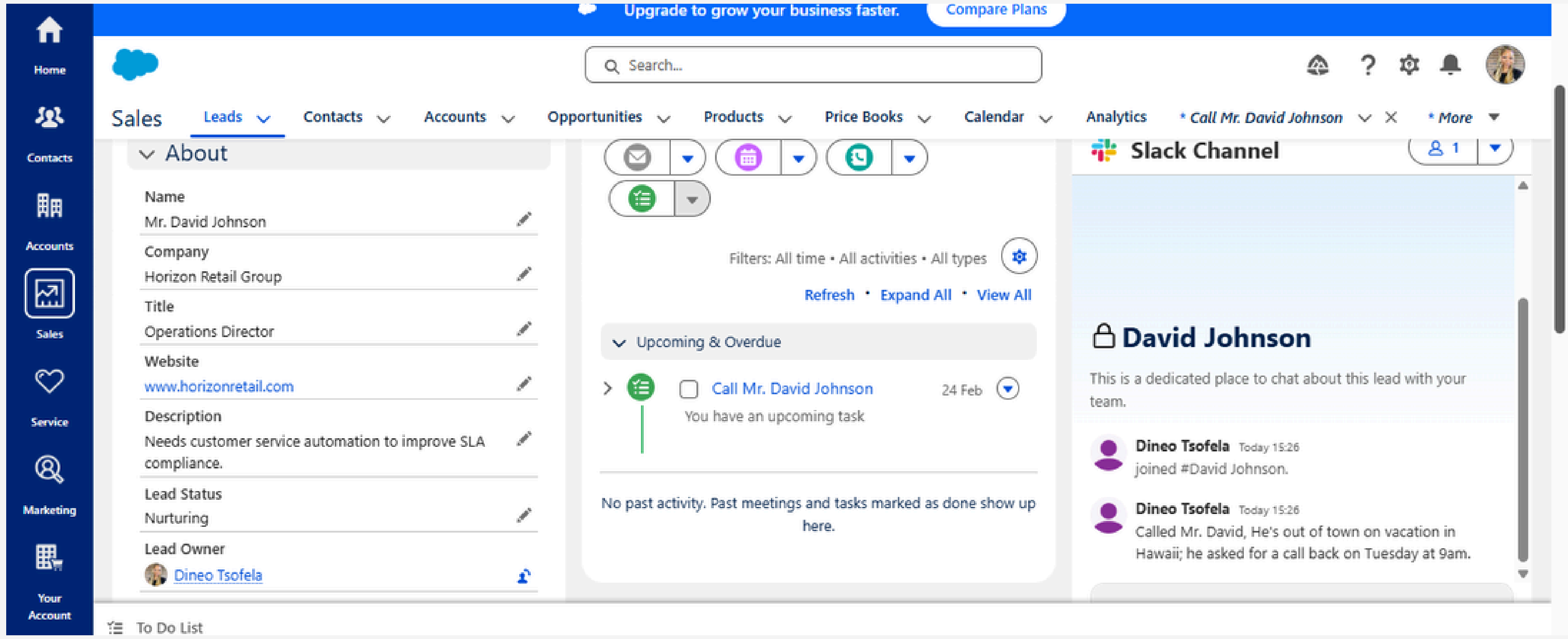


3. Leads Management: Interaction in Slack for each lead

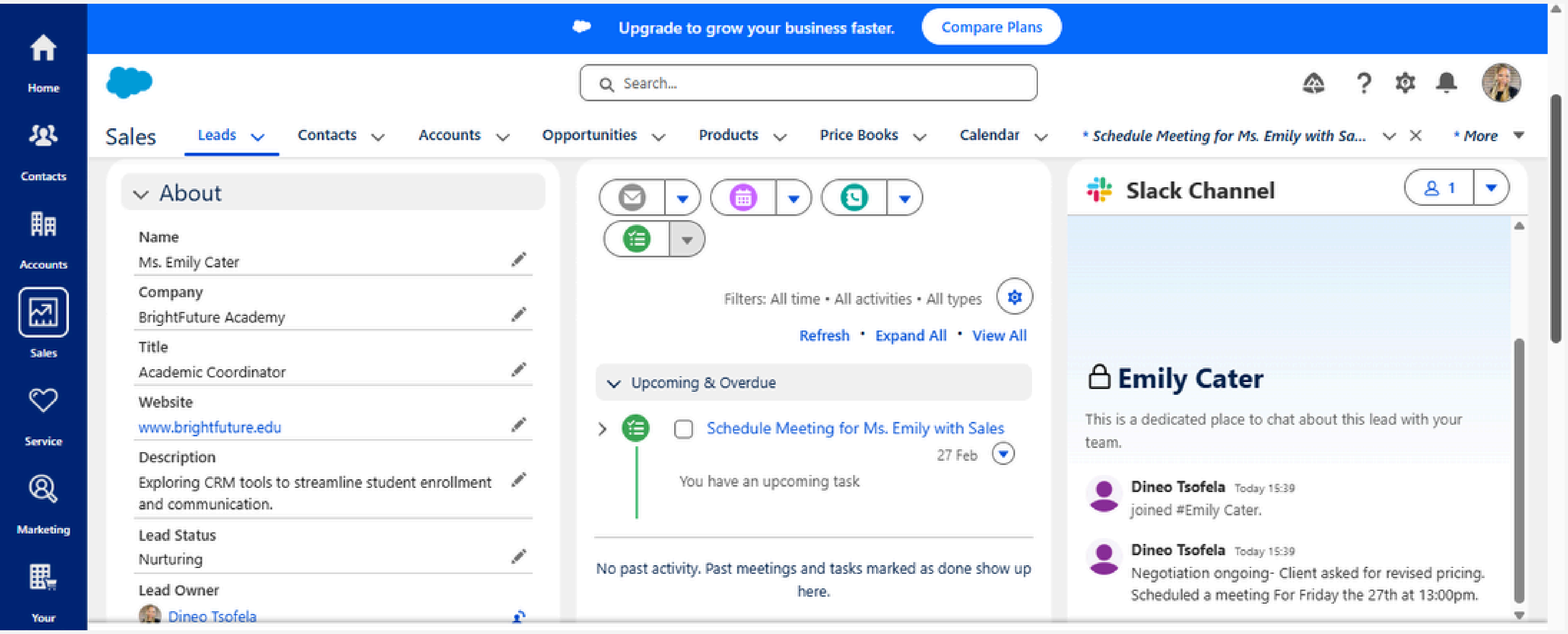
Slack update for lead: Sarah Lee



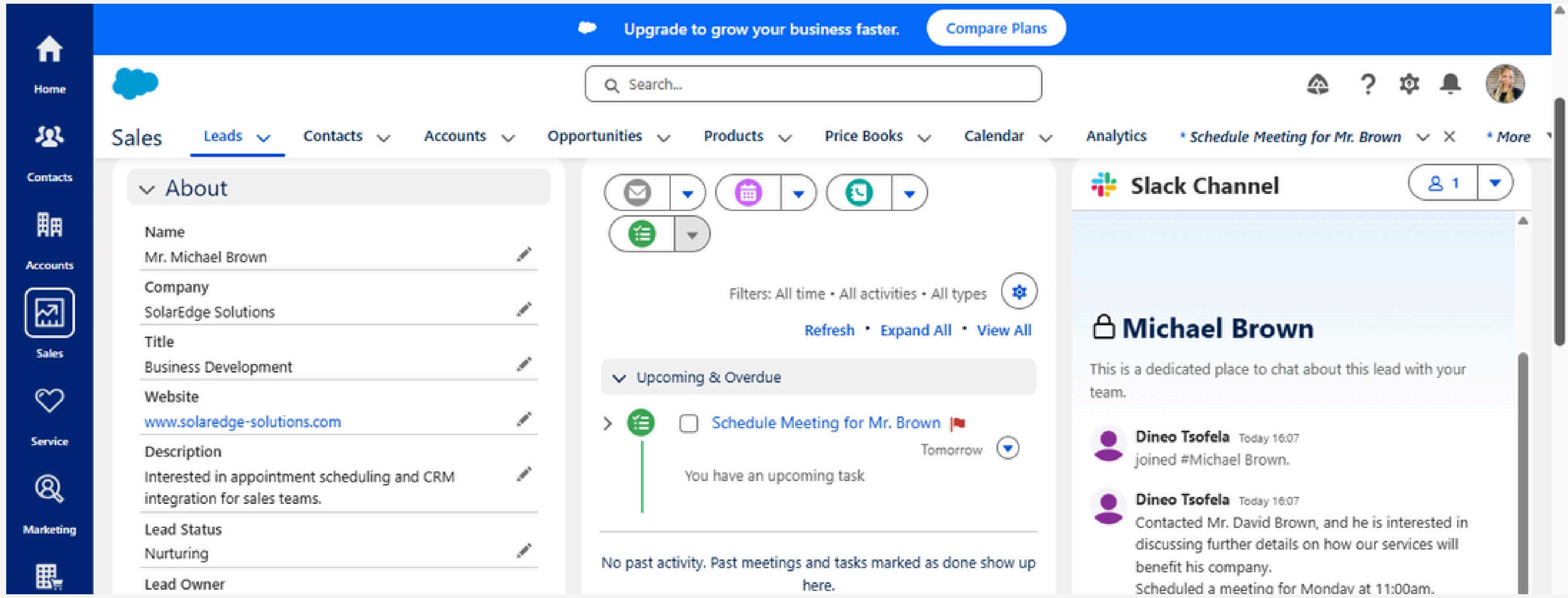
Slack update for lead: David Johnson



Slack update for lead: Emily Cater

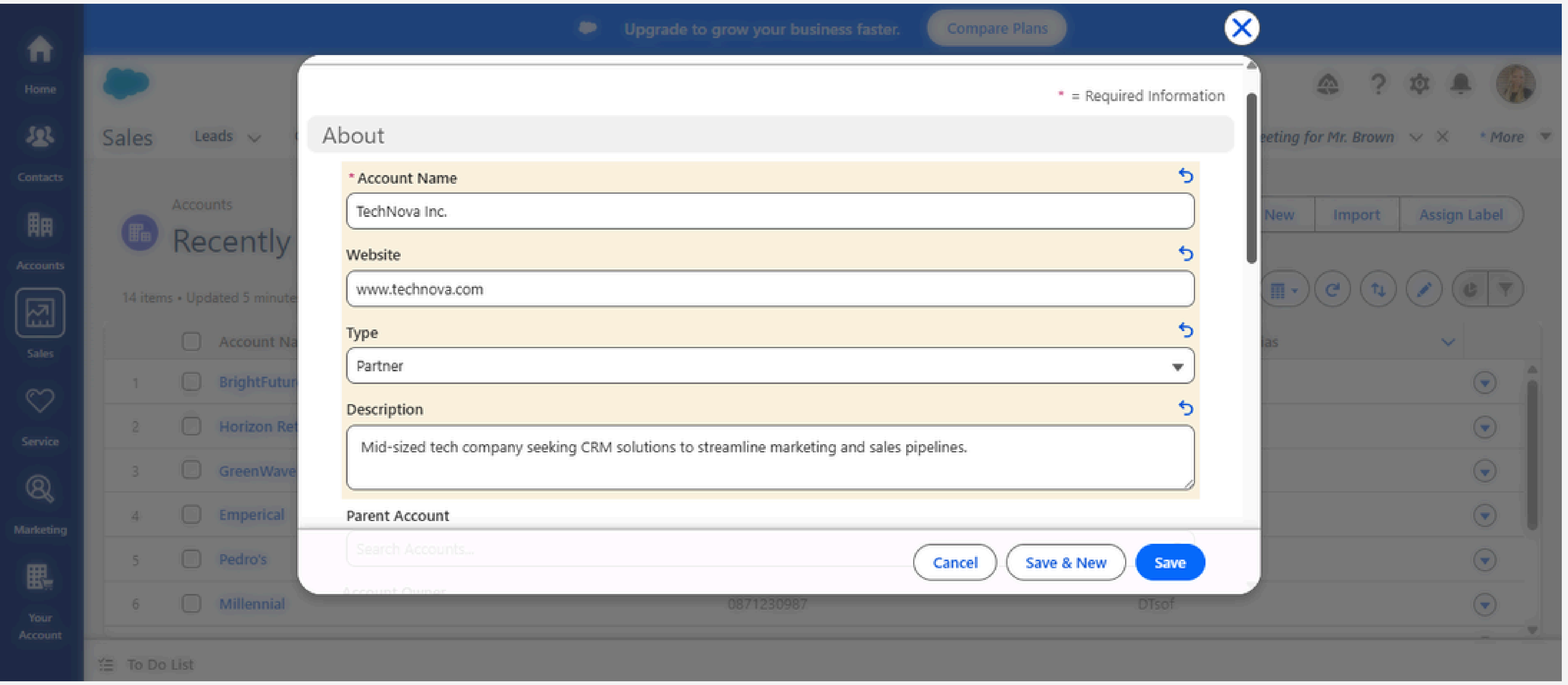


Slack update for lead: Michael Brown

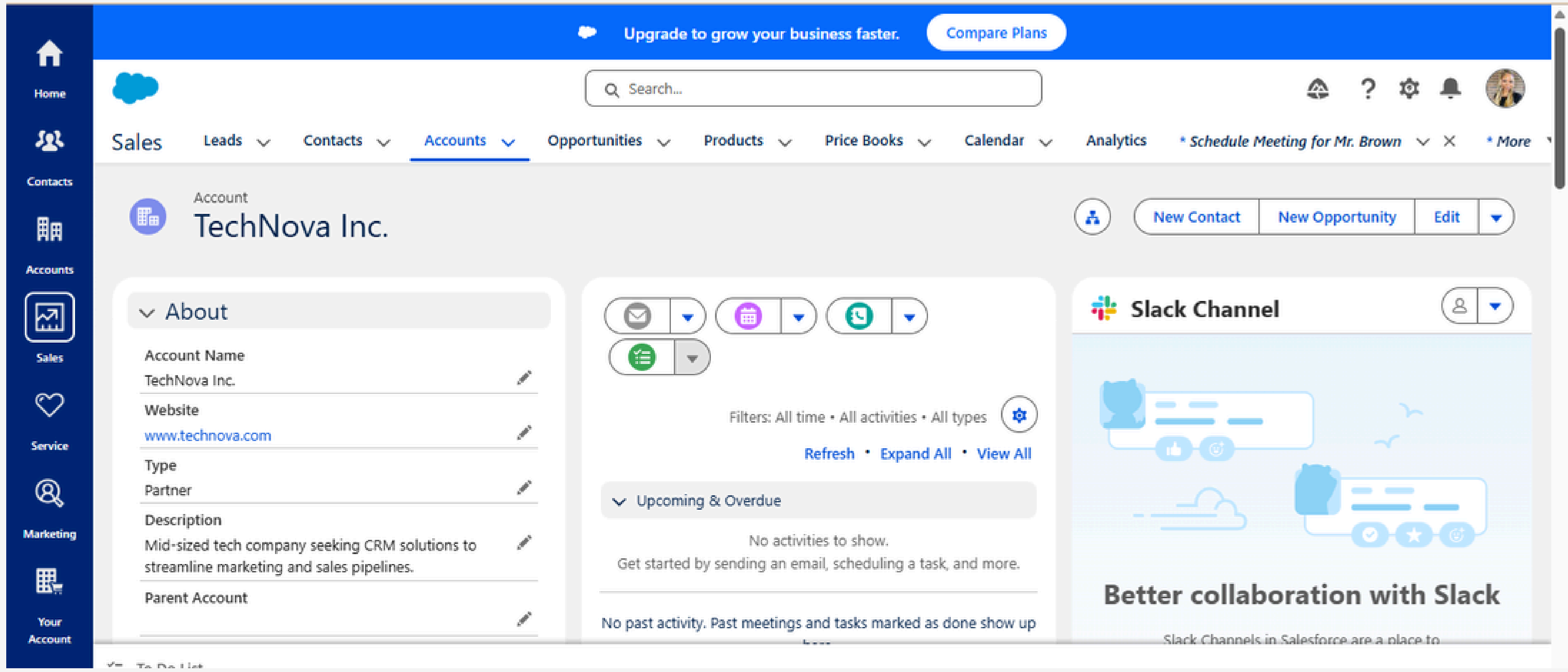


4. Accounts Management: Create 4 new accounts

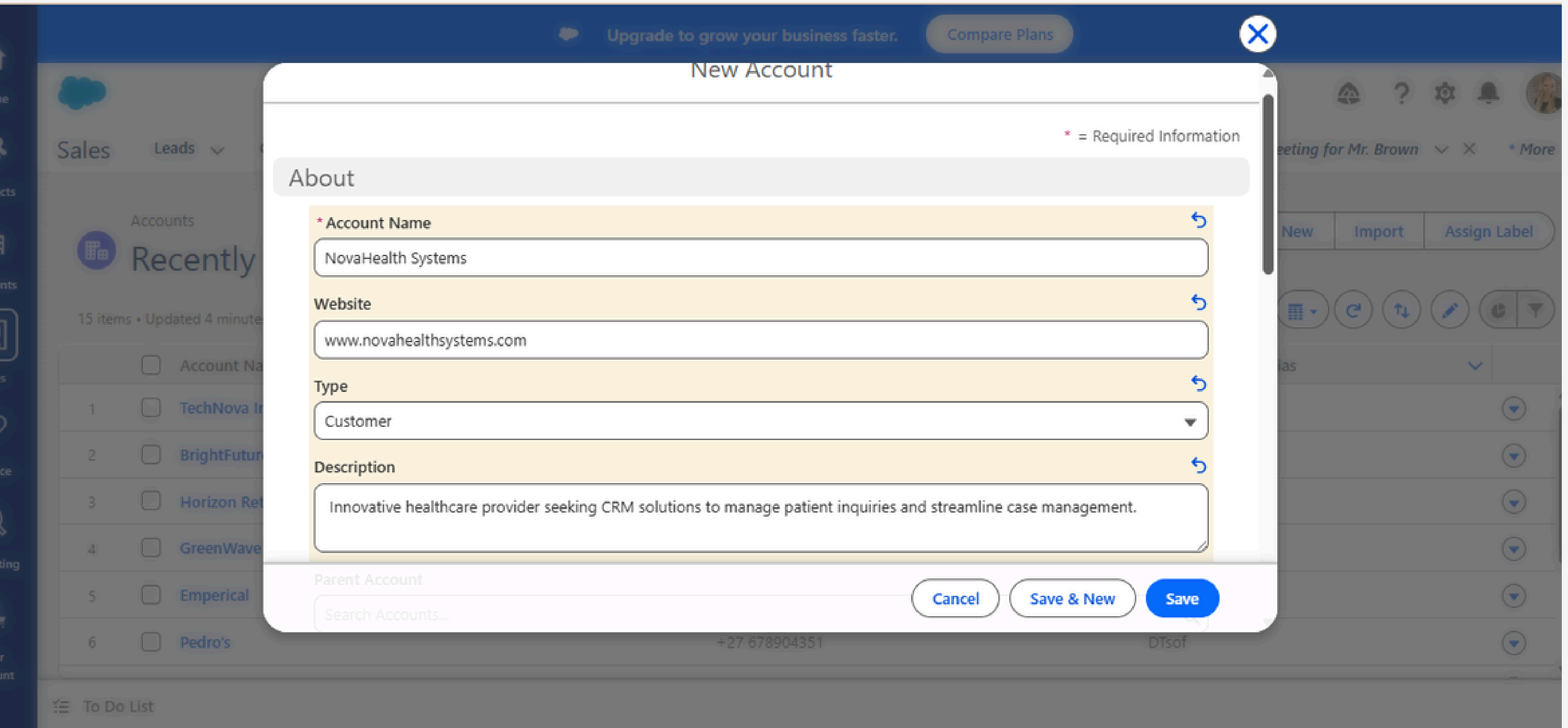
Creating new Account: TechNova Inc.



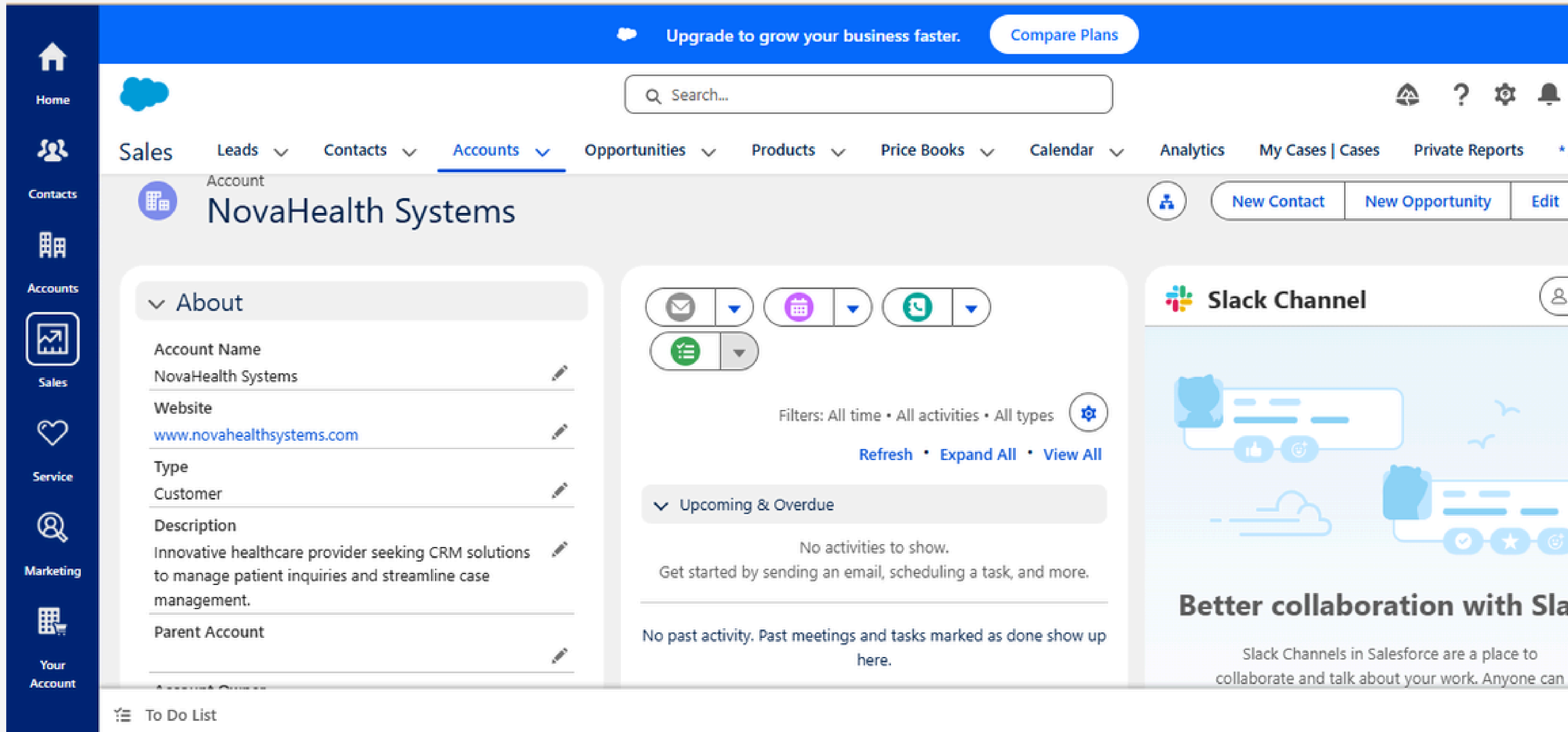
NovaTech added to the CRM



Creating new Account: NovaHealth Systems.

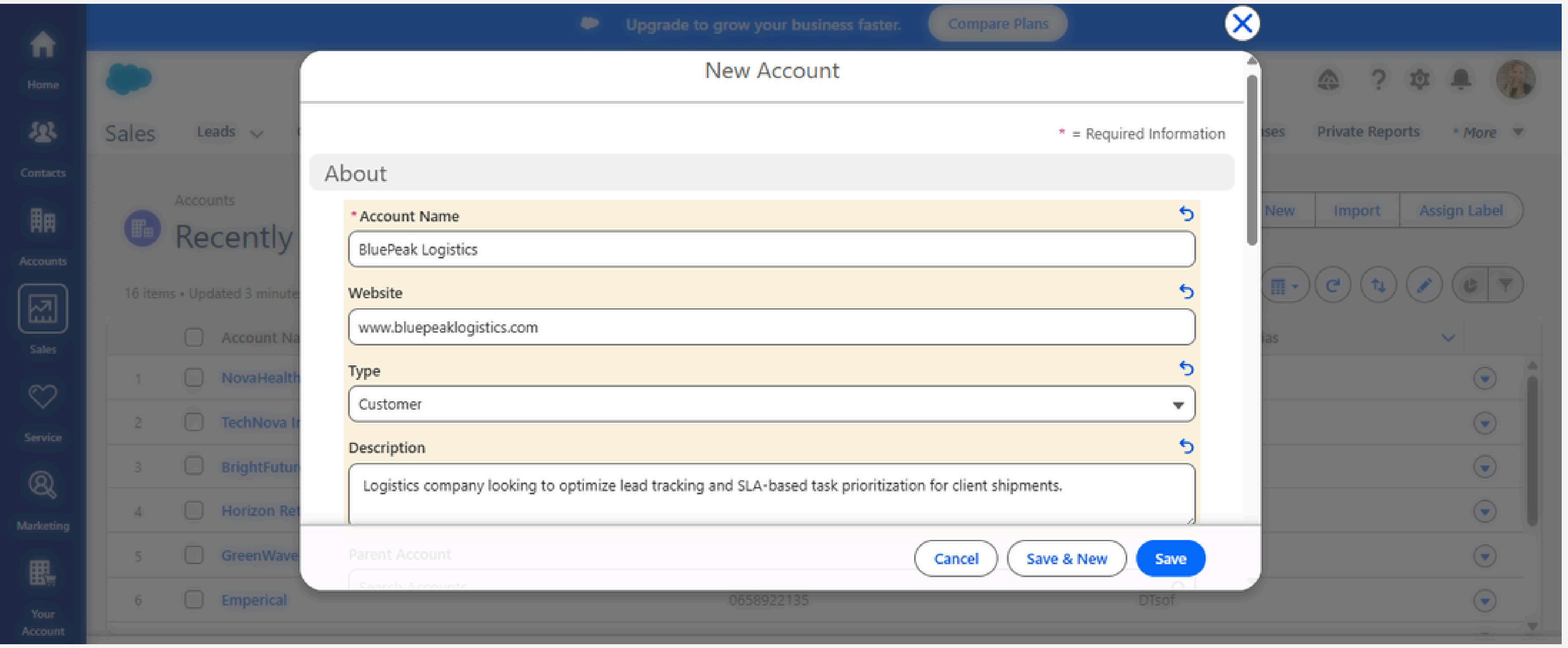


NovaHealth Systems added to the CRM

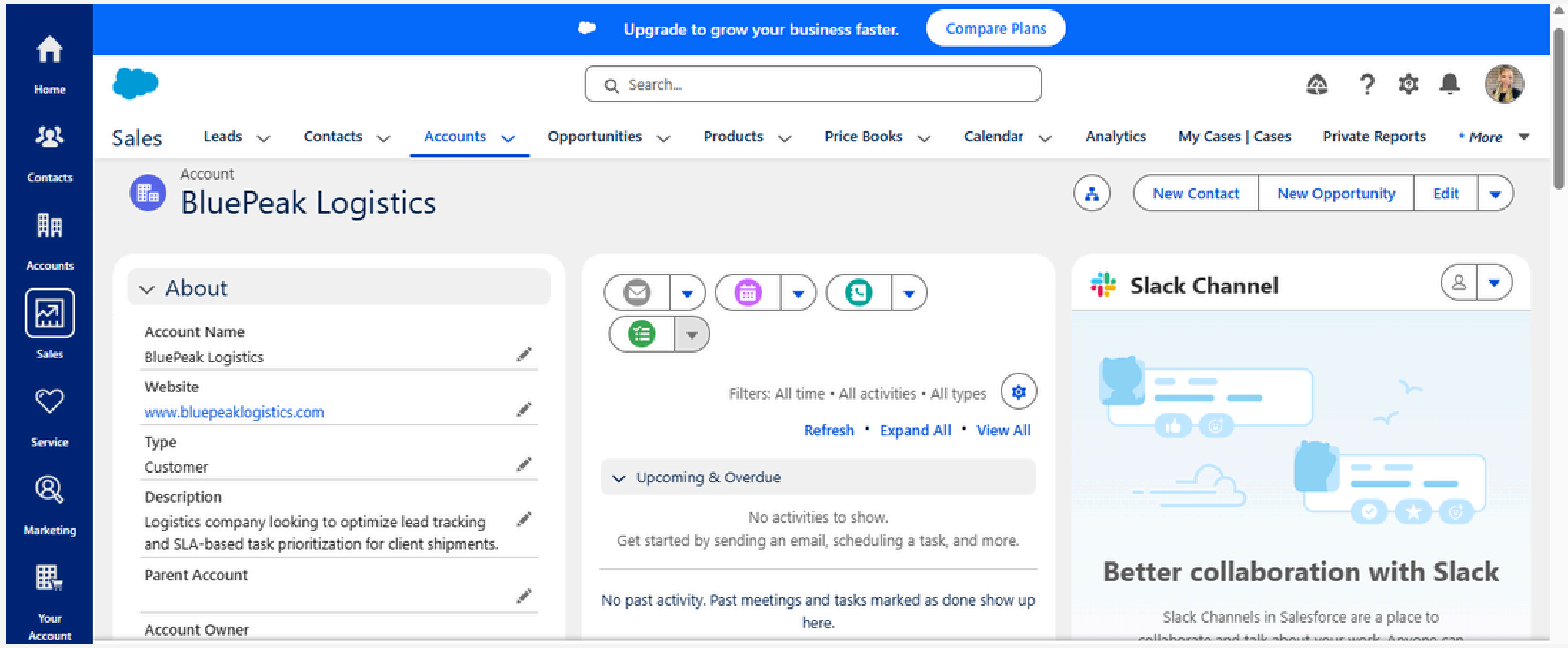


4. Accounts Management: Create 4 new accounts

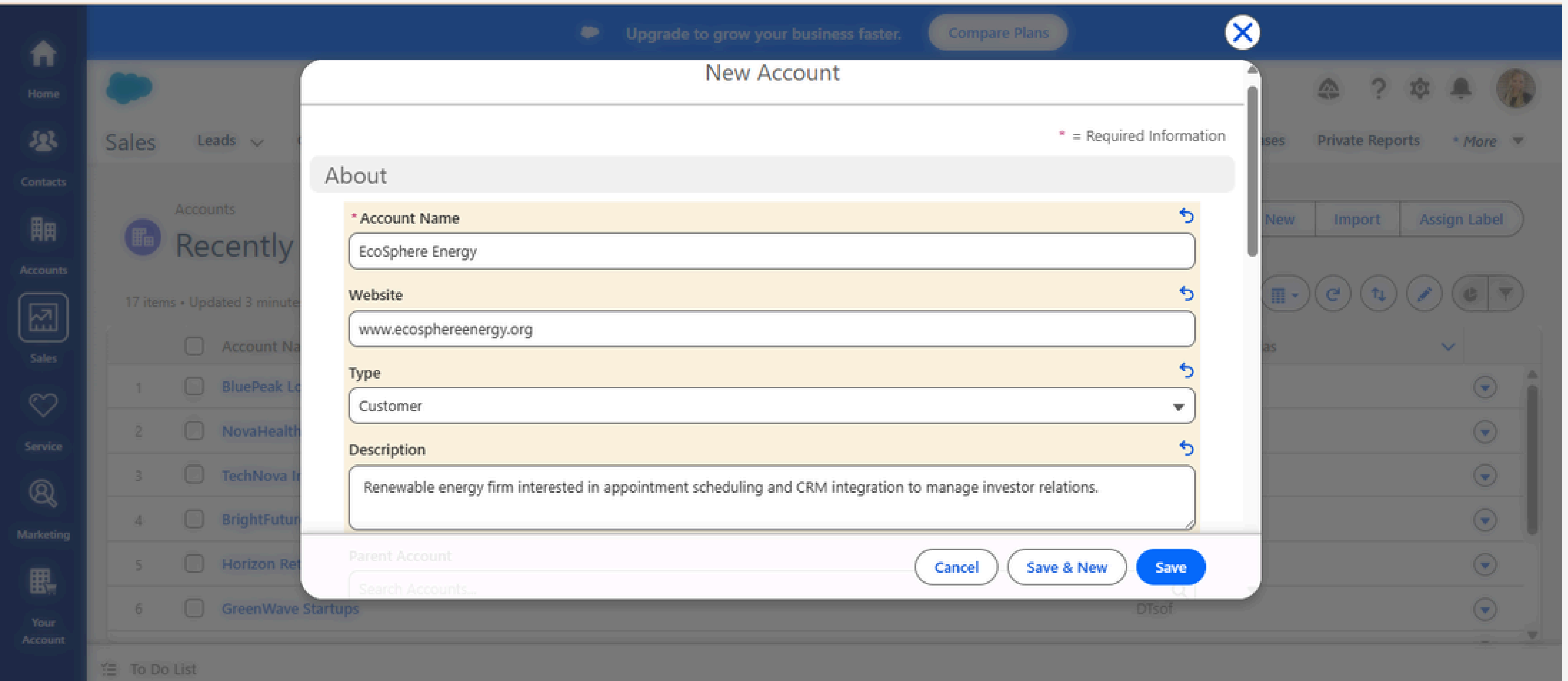
Creating new Account: BluePeak Logistics



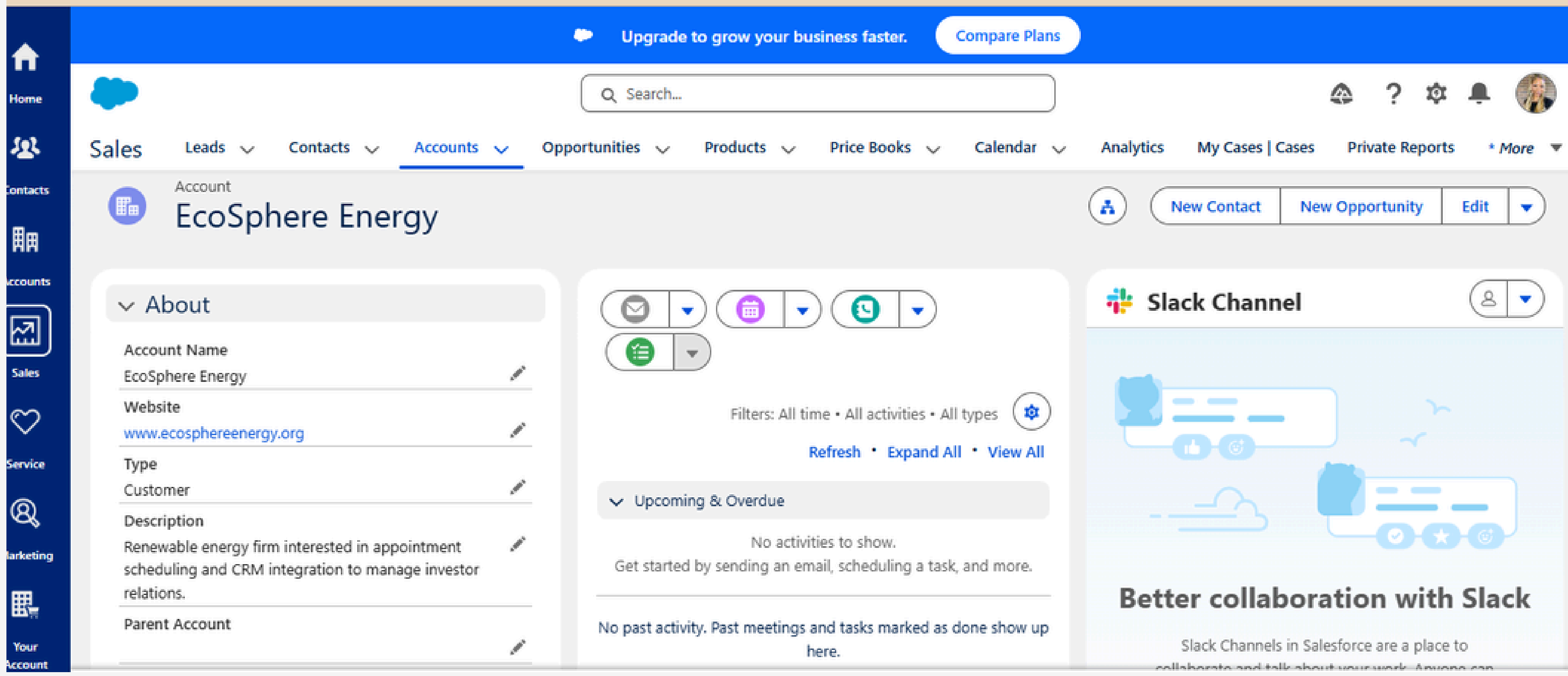
BluePeak Logistics added to the CRM



Creating new Account: EcoSphere Energy

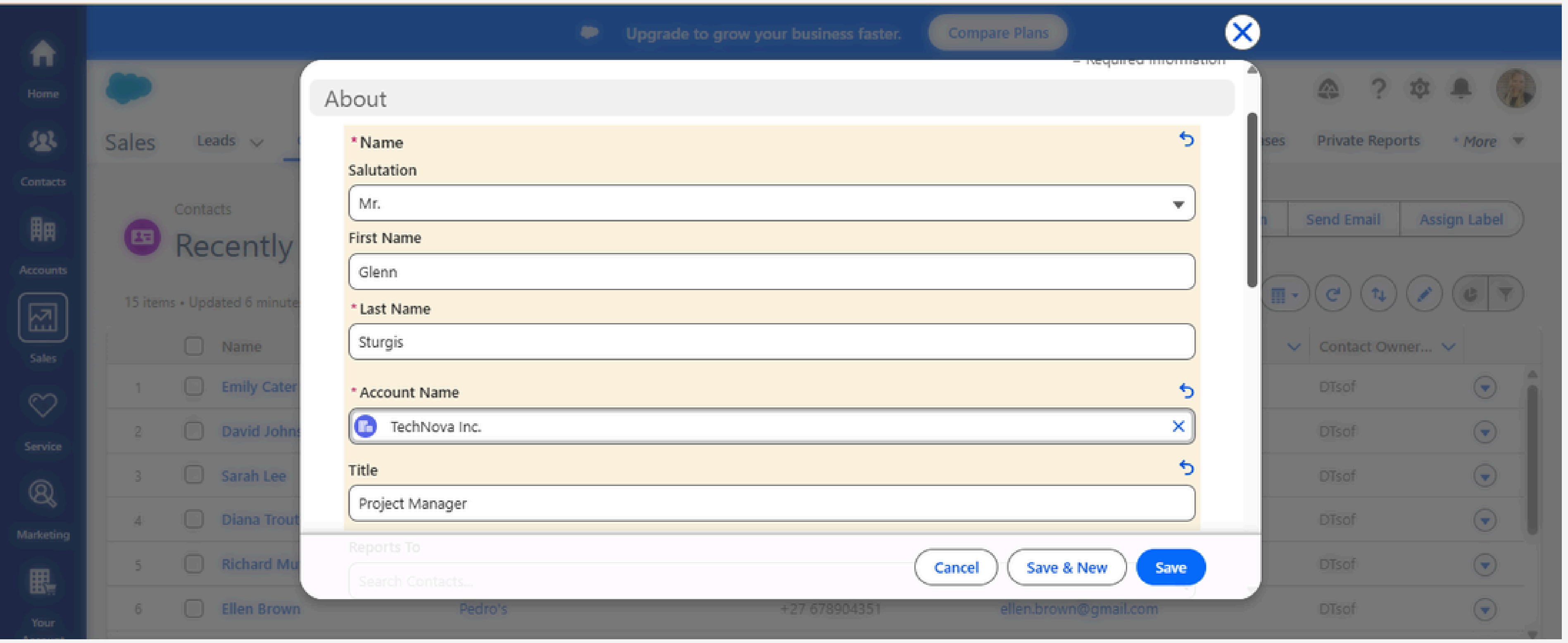


EcoSphere added to the CRM

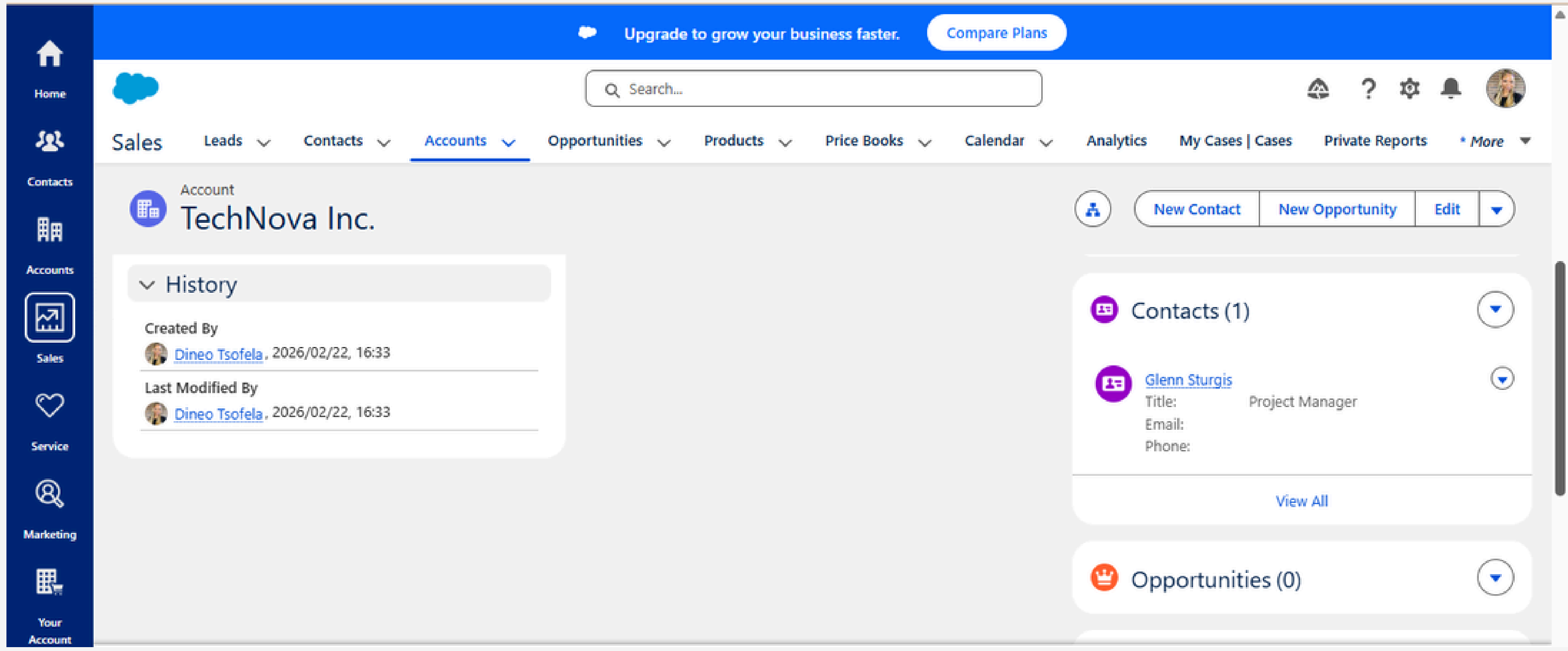


5.Contacts: Create 4 new contacts and link them to previous accounts

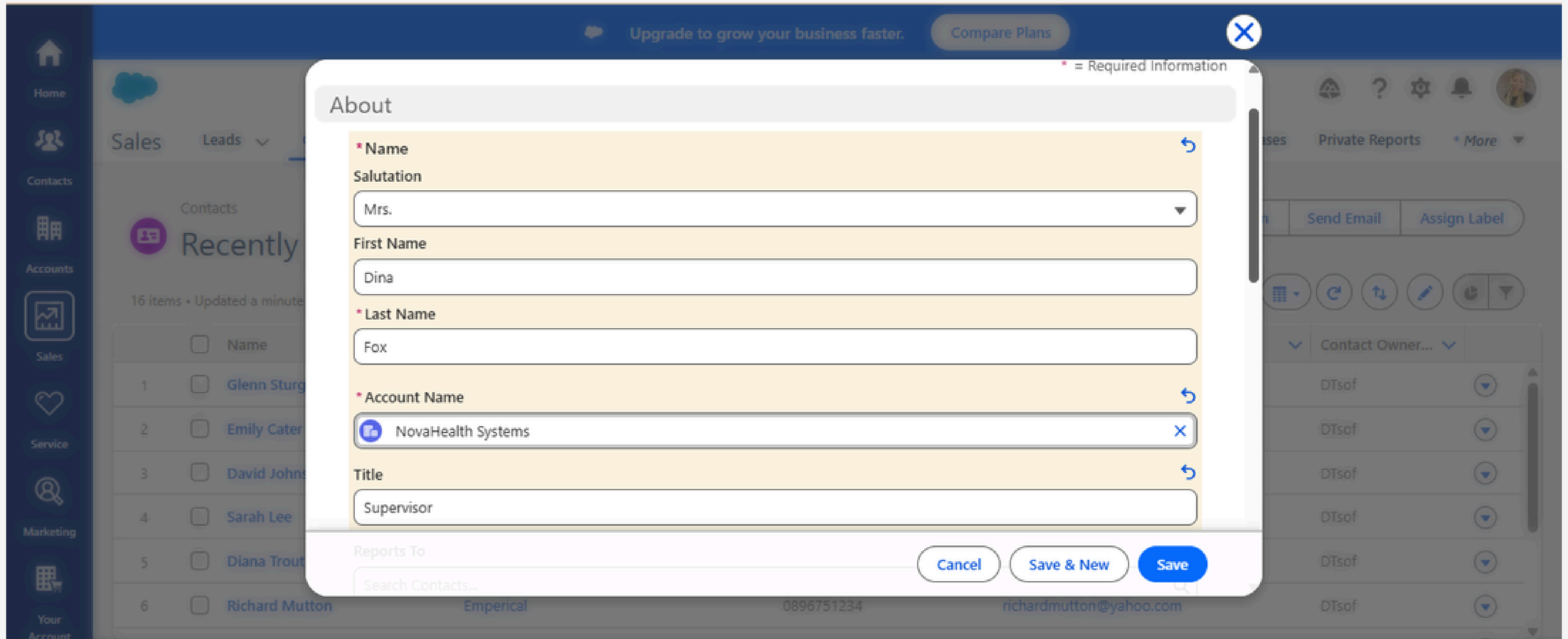
Created contact: Glenn Sturgis



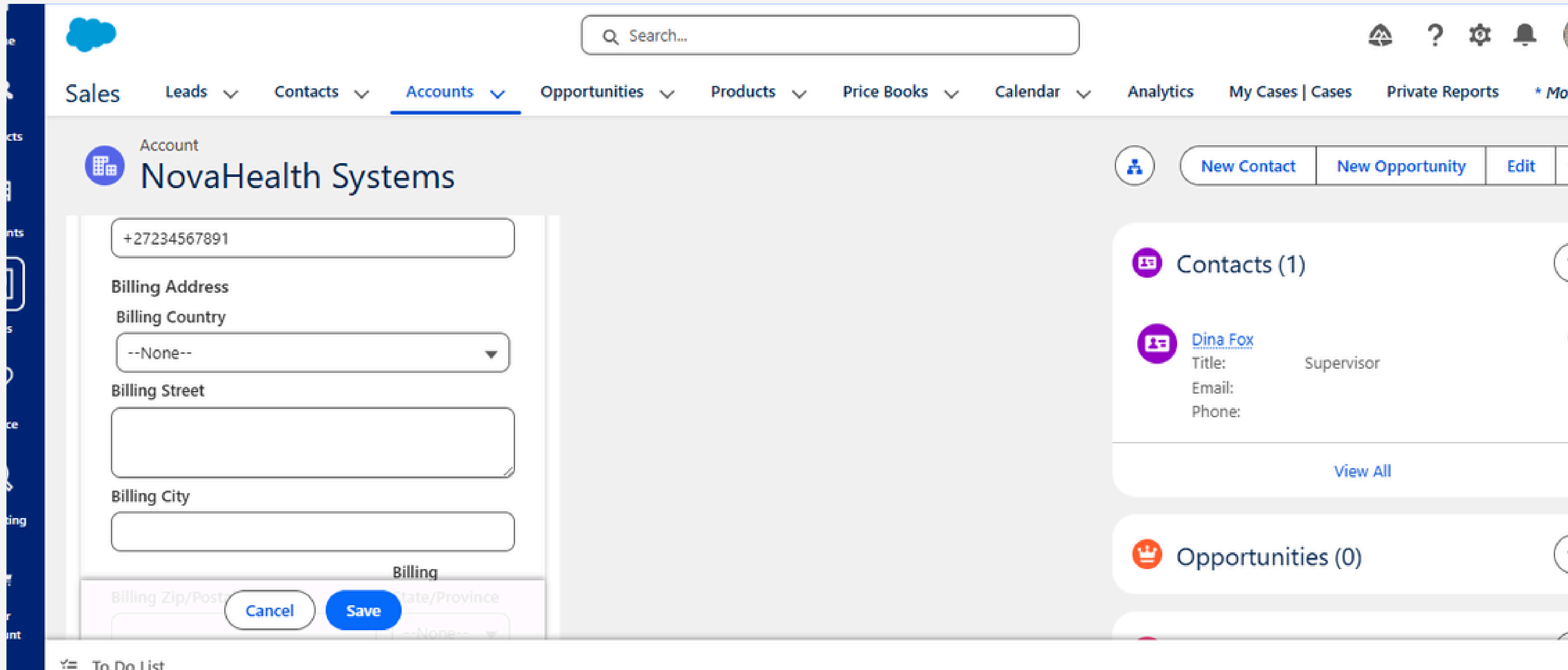
Glenn Sturgis associated with TechNova Inc.



Created contact: Dina Fox

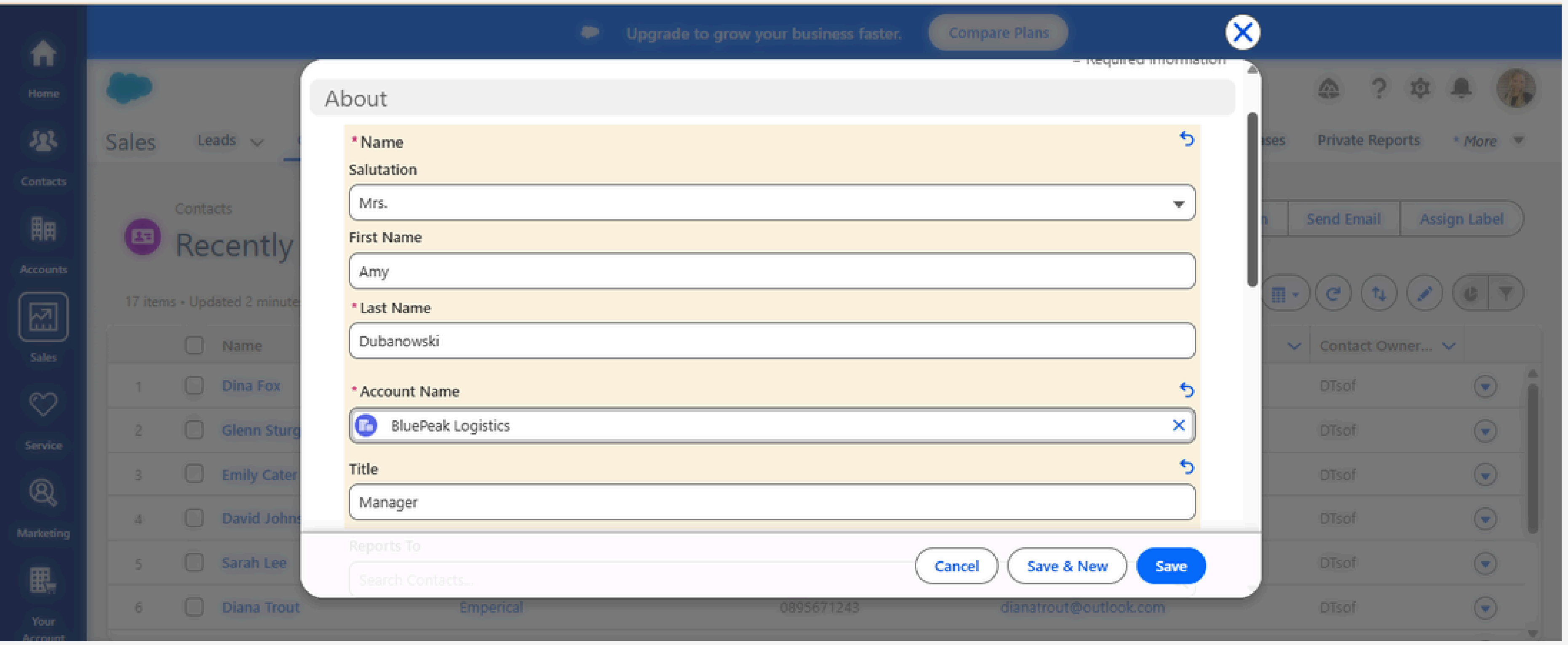


Dina Fox associated with NovaHealth Systems

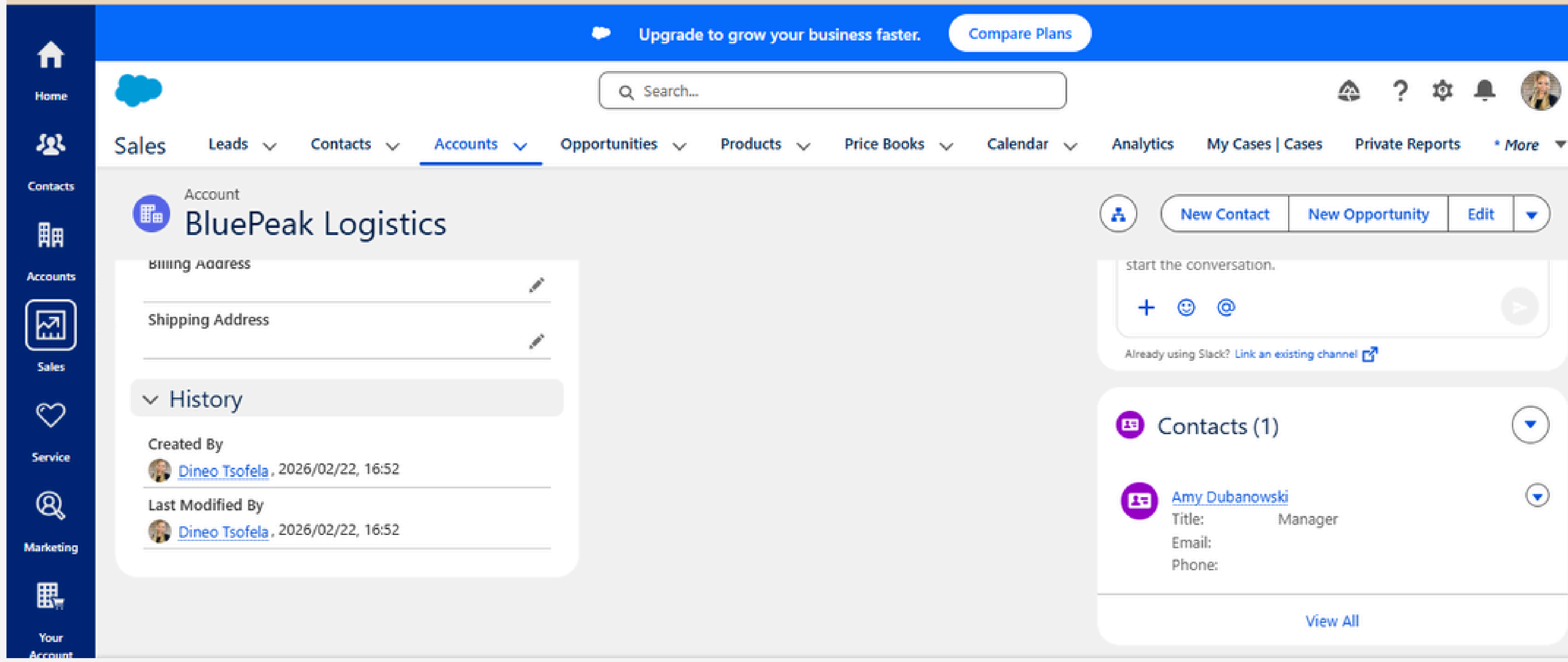


5. Contacts: Create 4 new contacts and link them to previous accounts

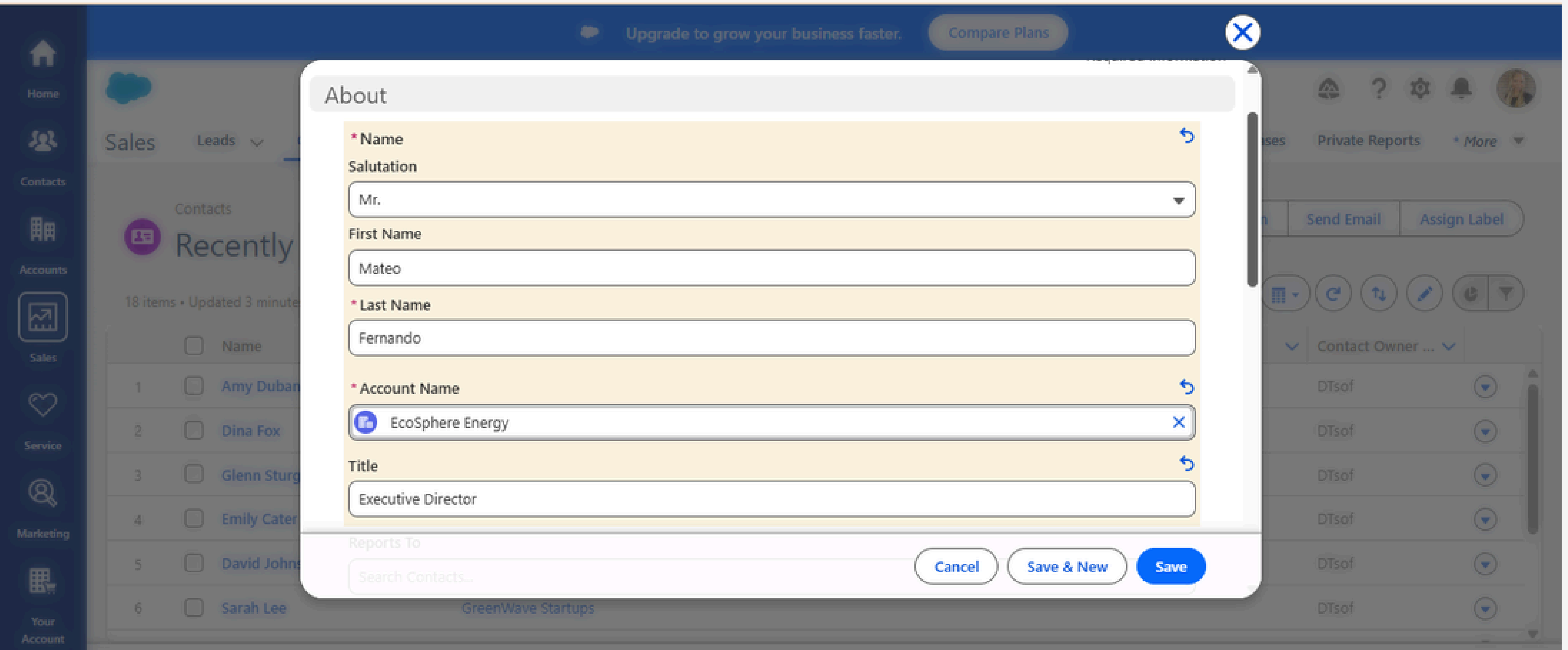
Created contact: Amy Dubanowski



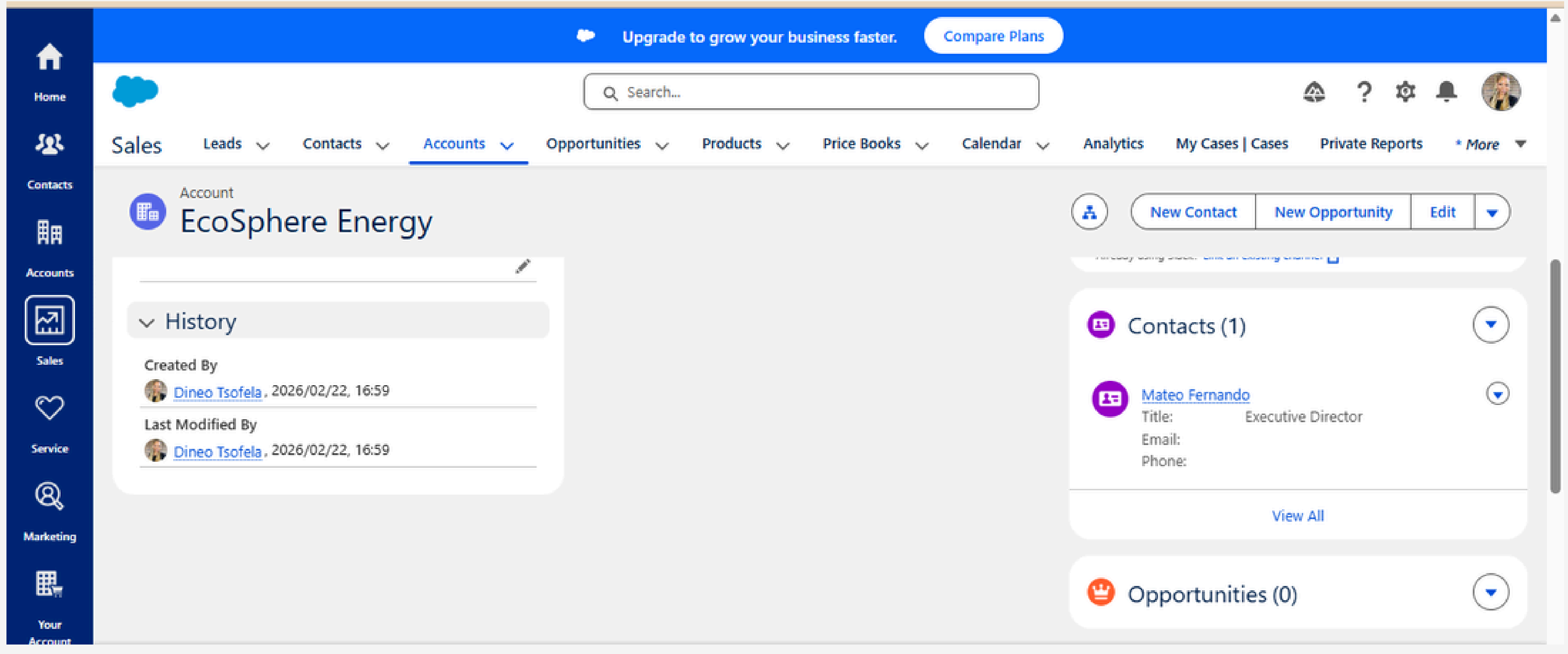
Amy Dubanowski associated with BluePeak Logistics



Created contact: Mateo Fernando

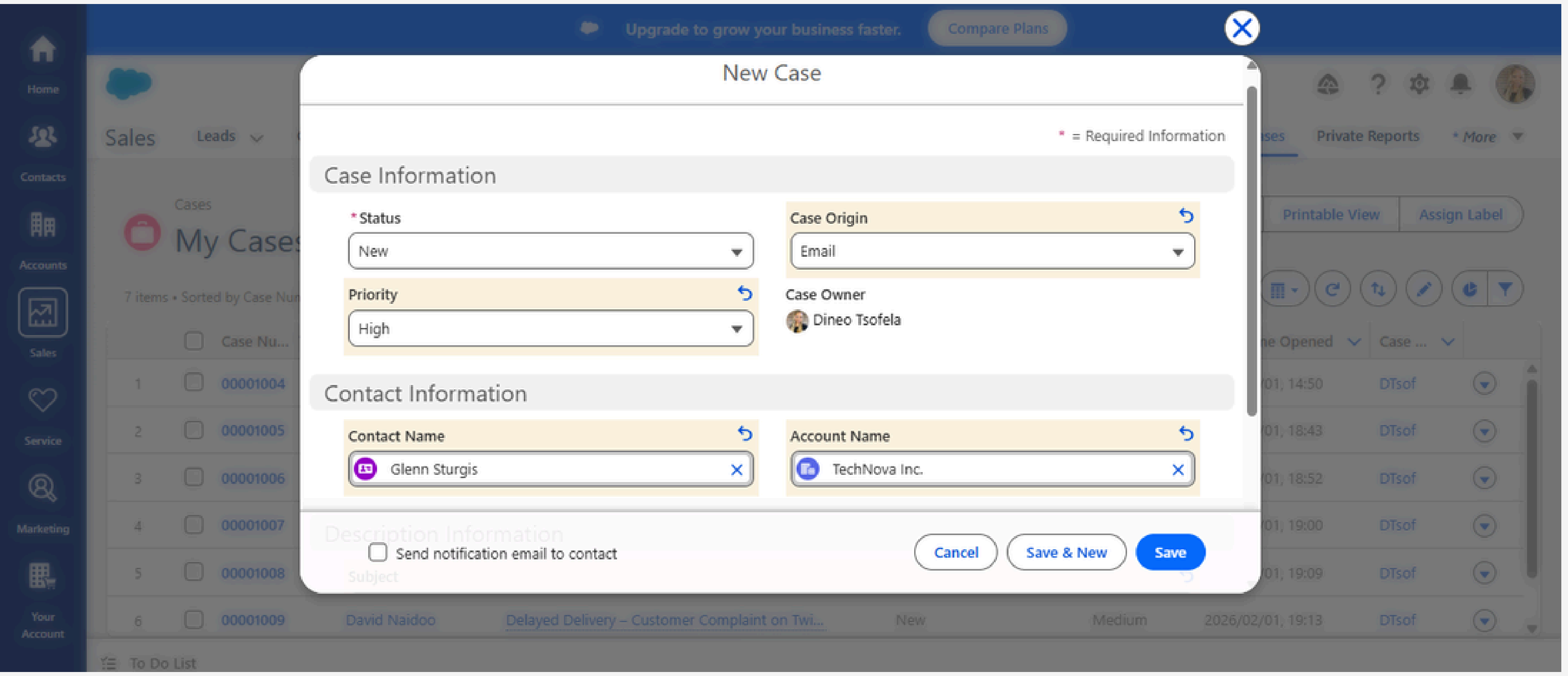


Mateo Fernando associated with EcoSphere Energy

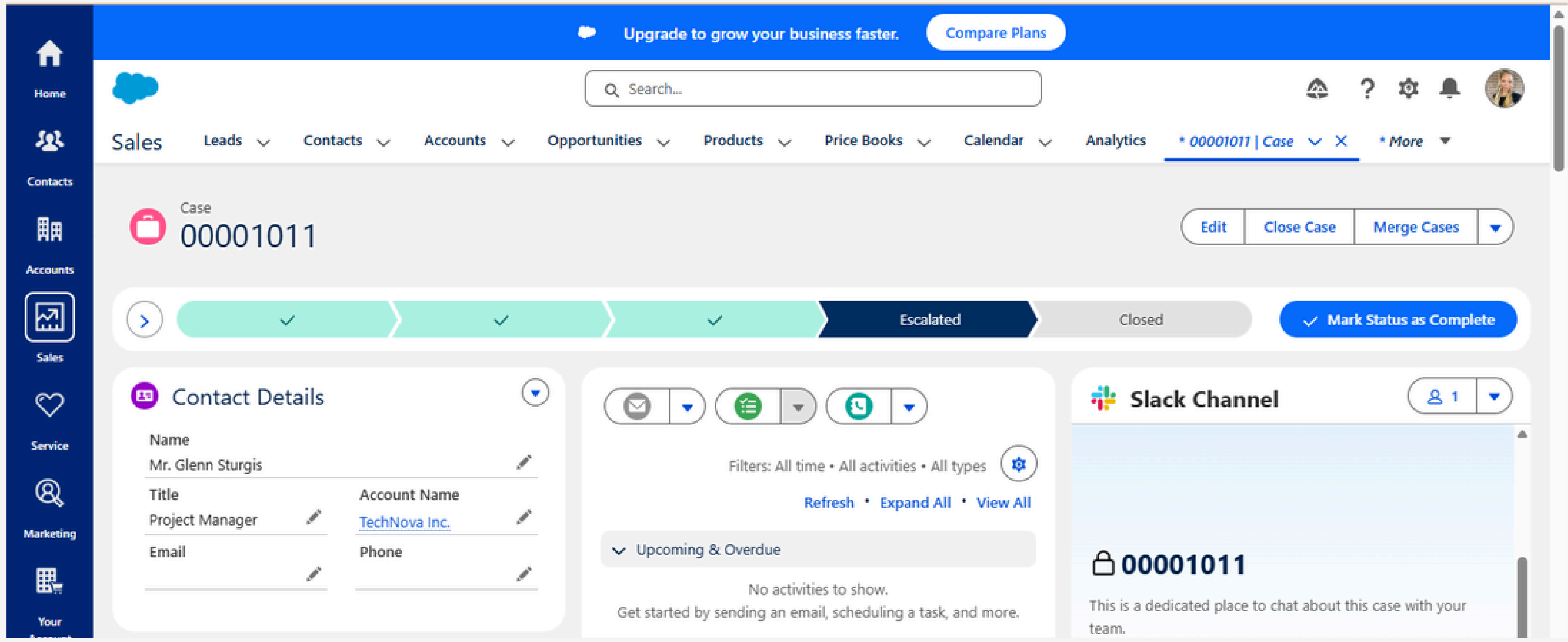


6. Case Management: Create 2 customer cases

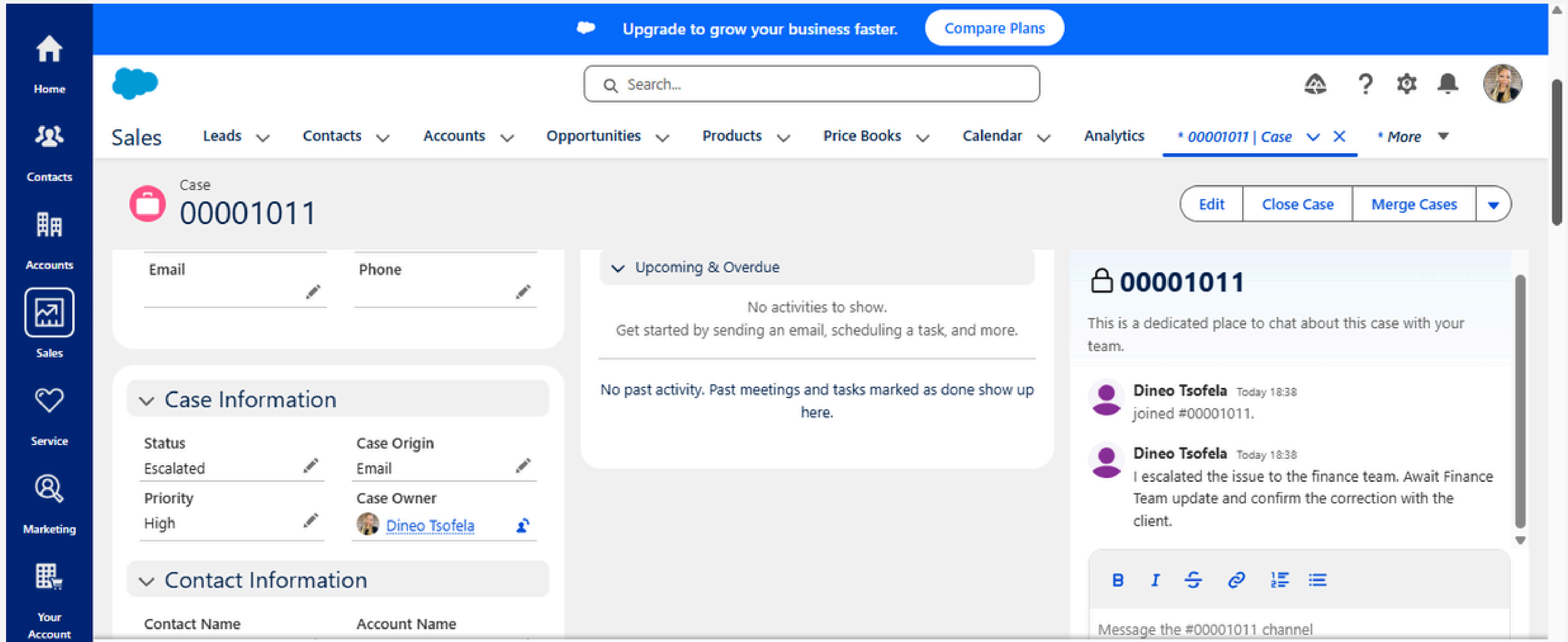
Created a new case billing issue "High Priority"



Escalated the issue to Finance team

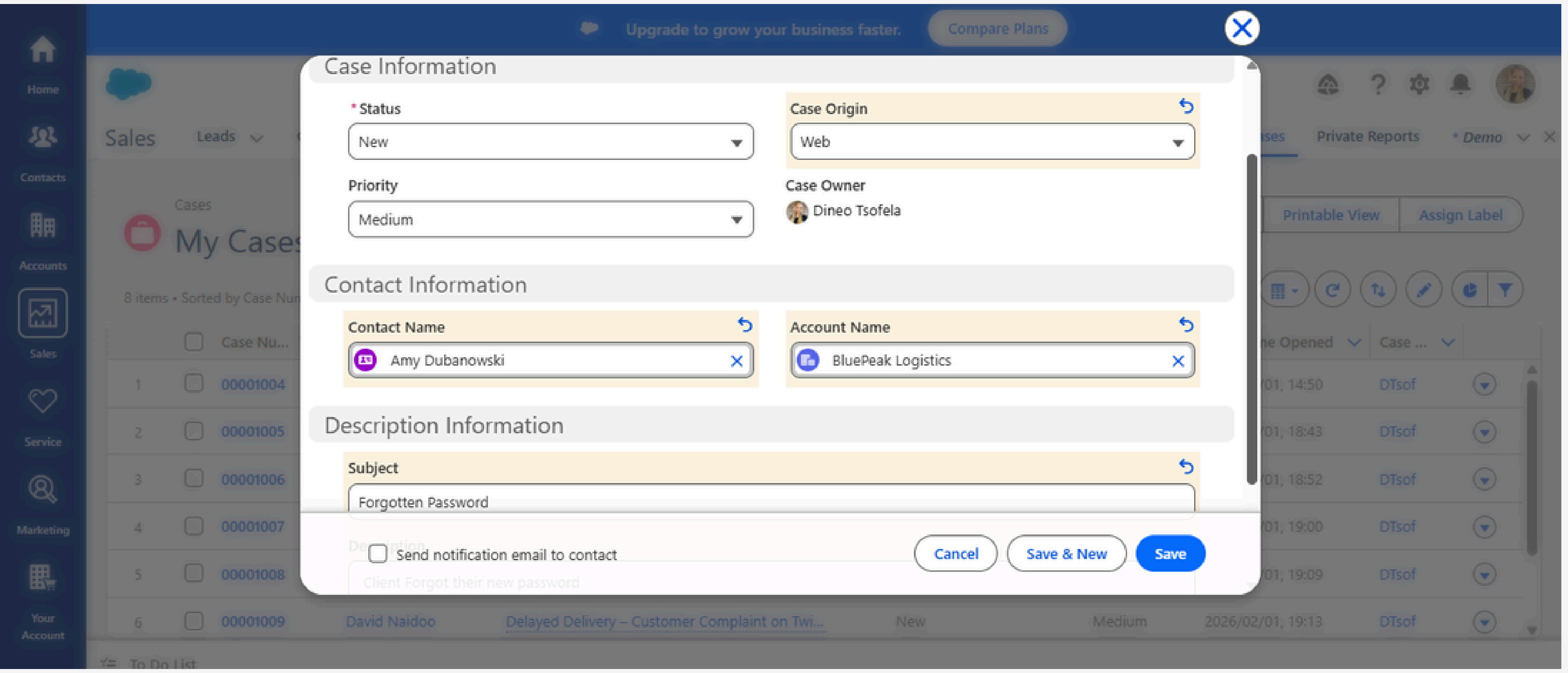


Updated Slack

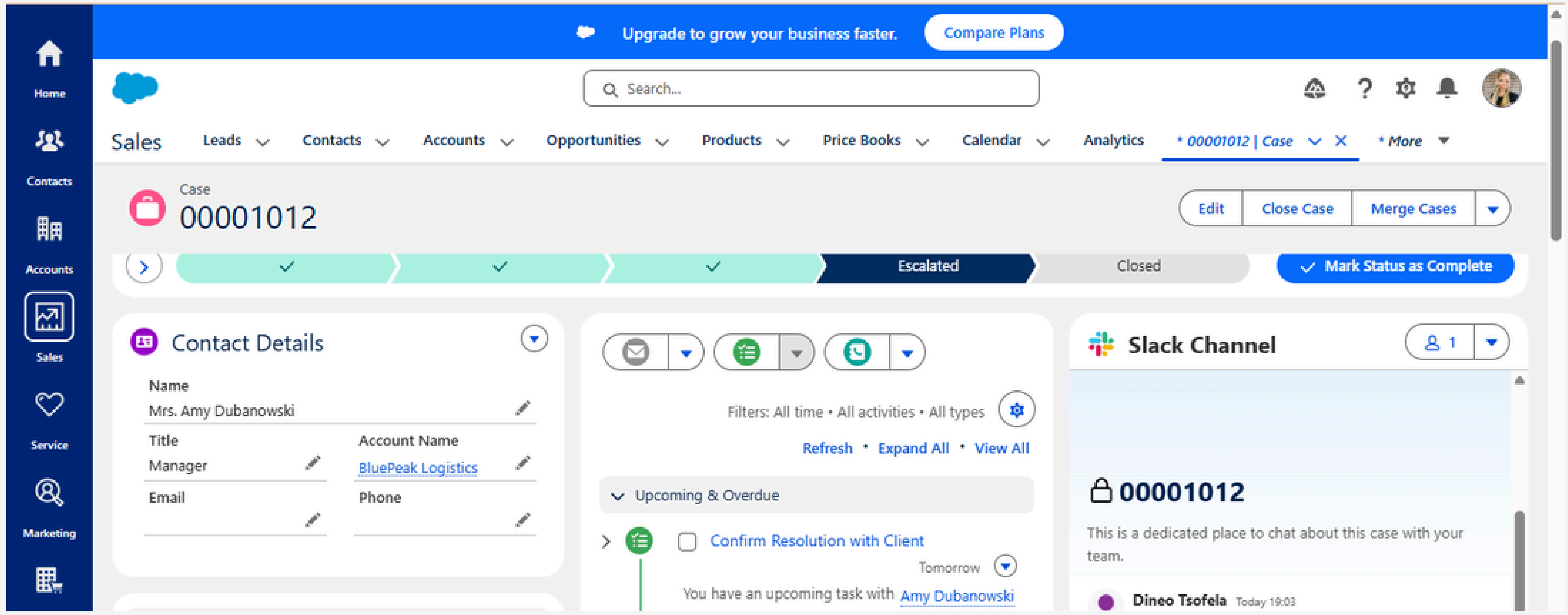


6. Case Management: Create 2 customer cases

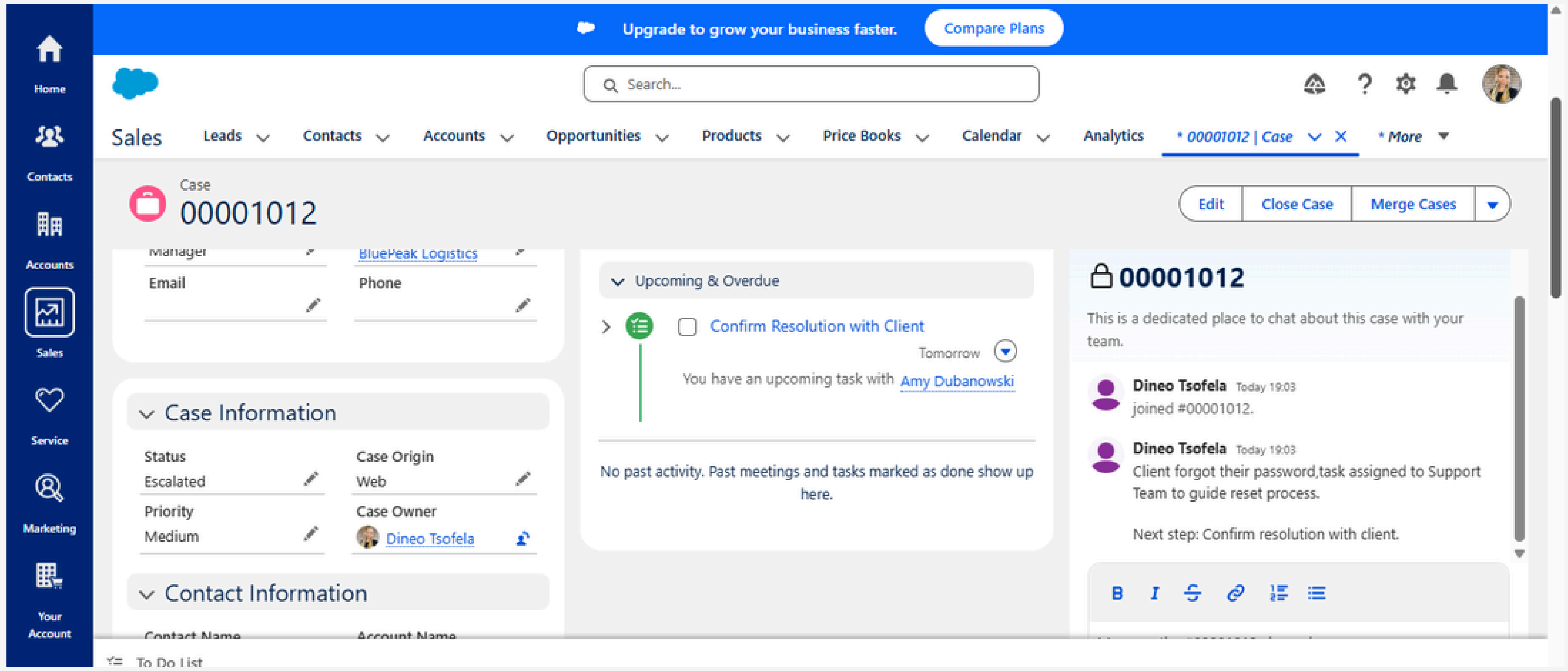
Created a new case “Password Reset”



Assigned the case to Support Team

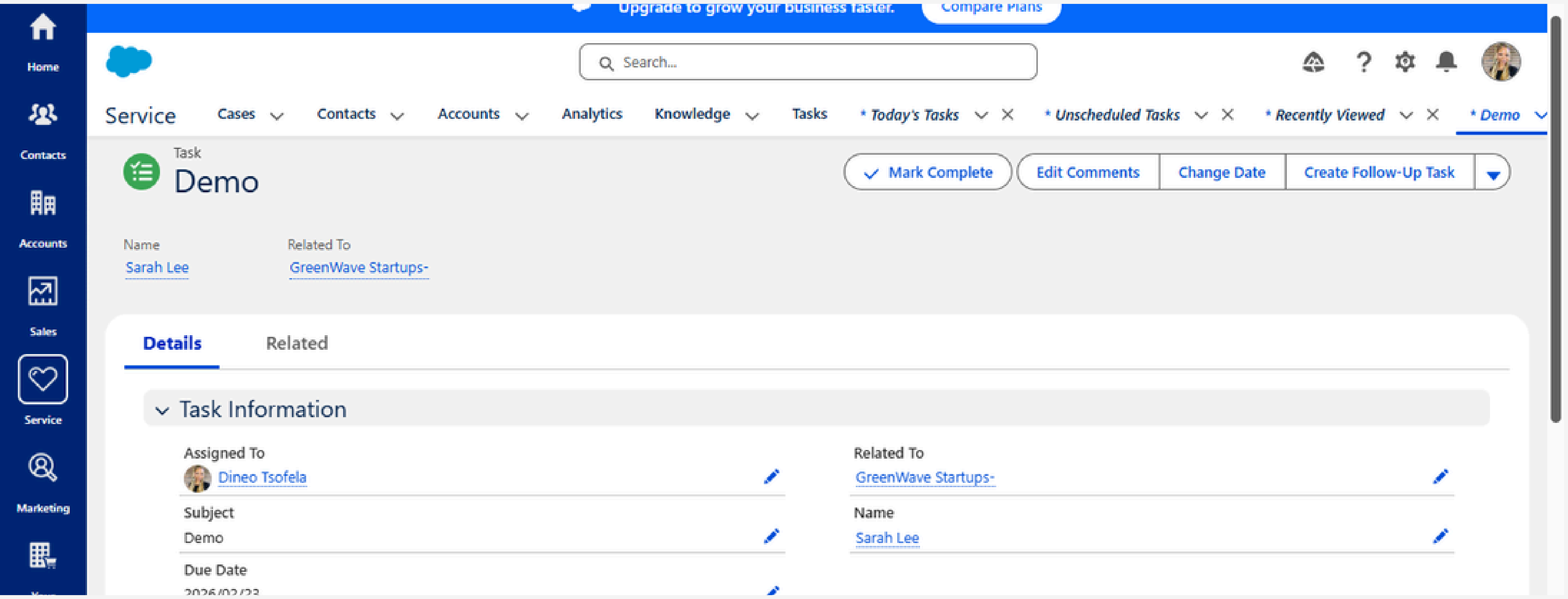


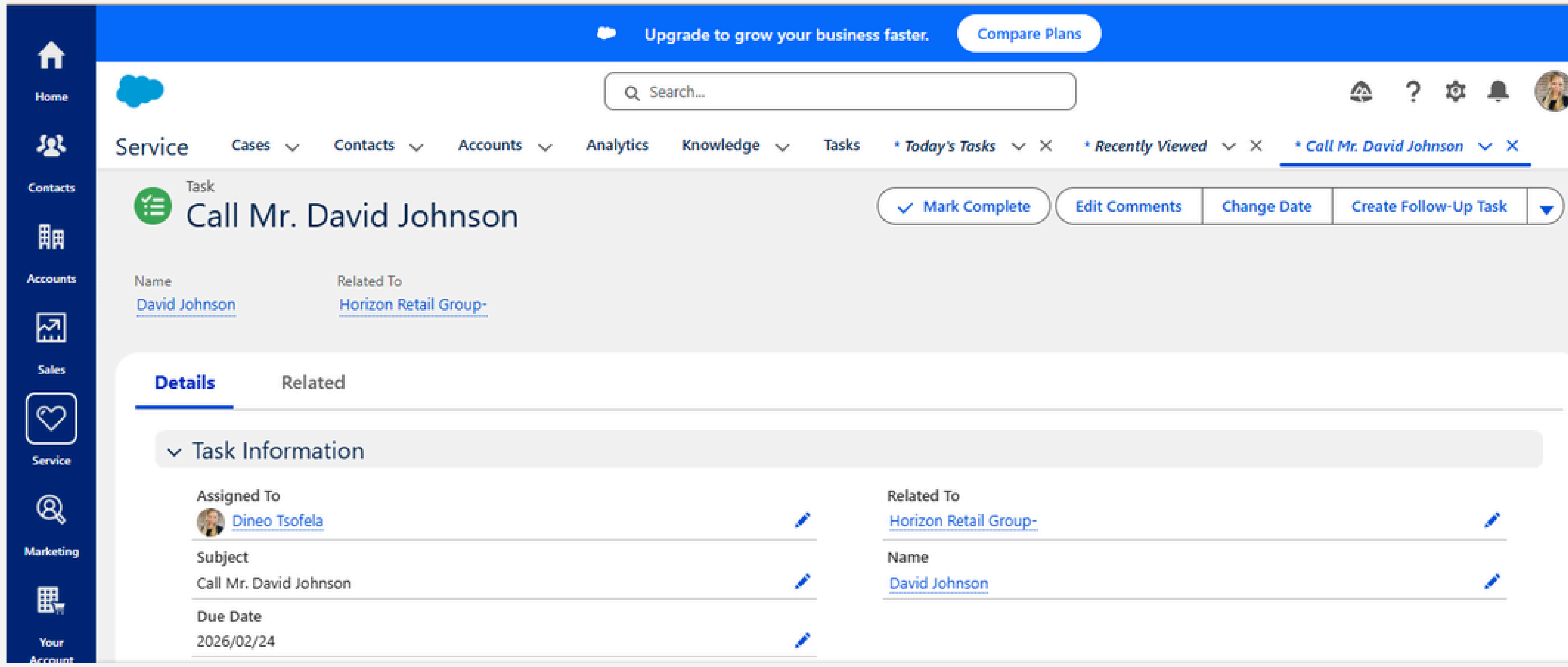
Updated Slack

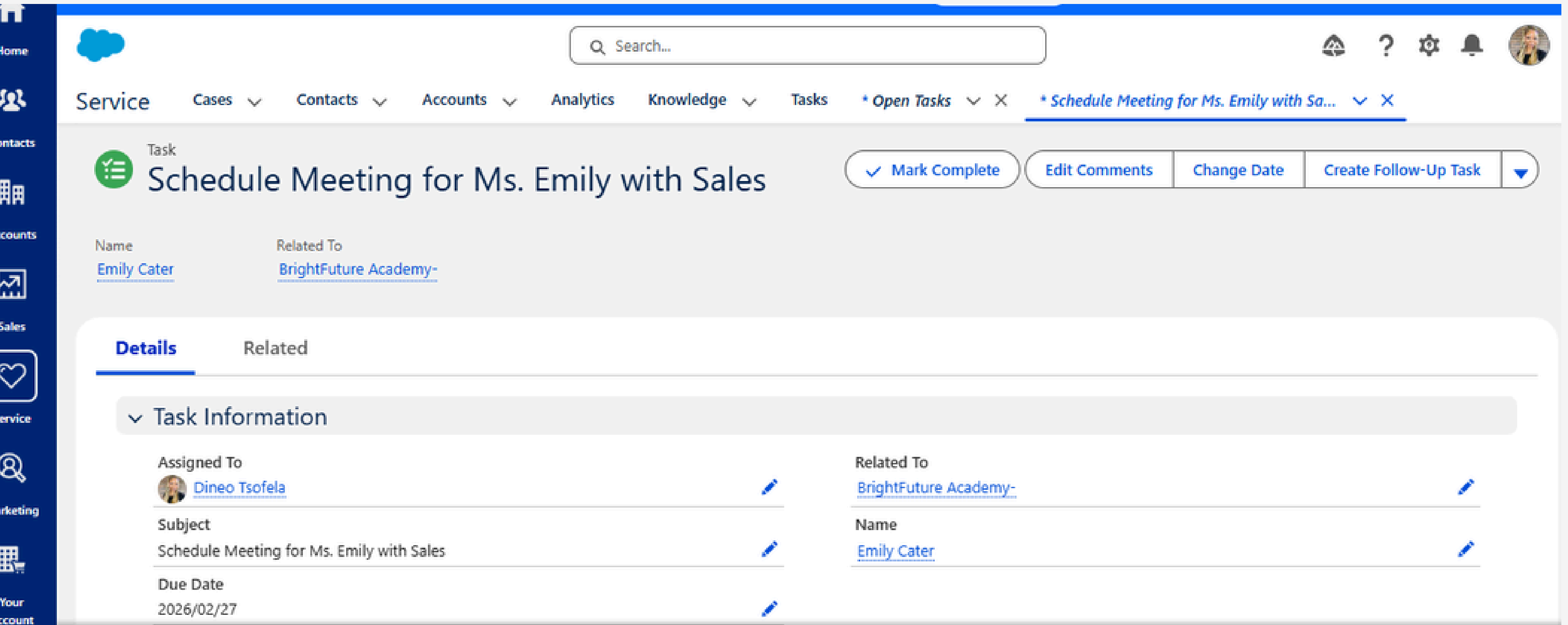


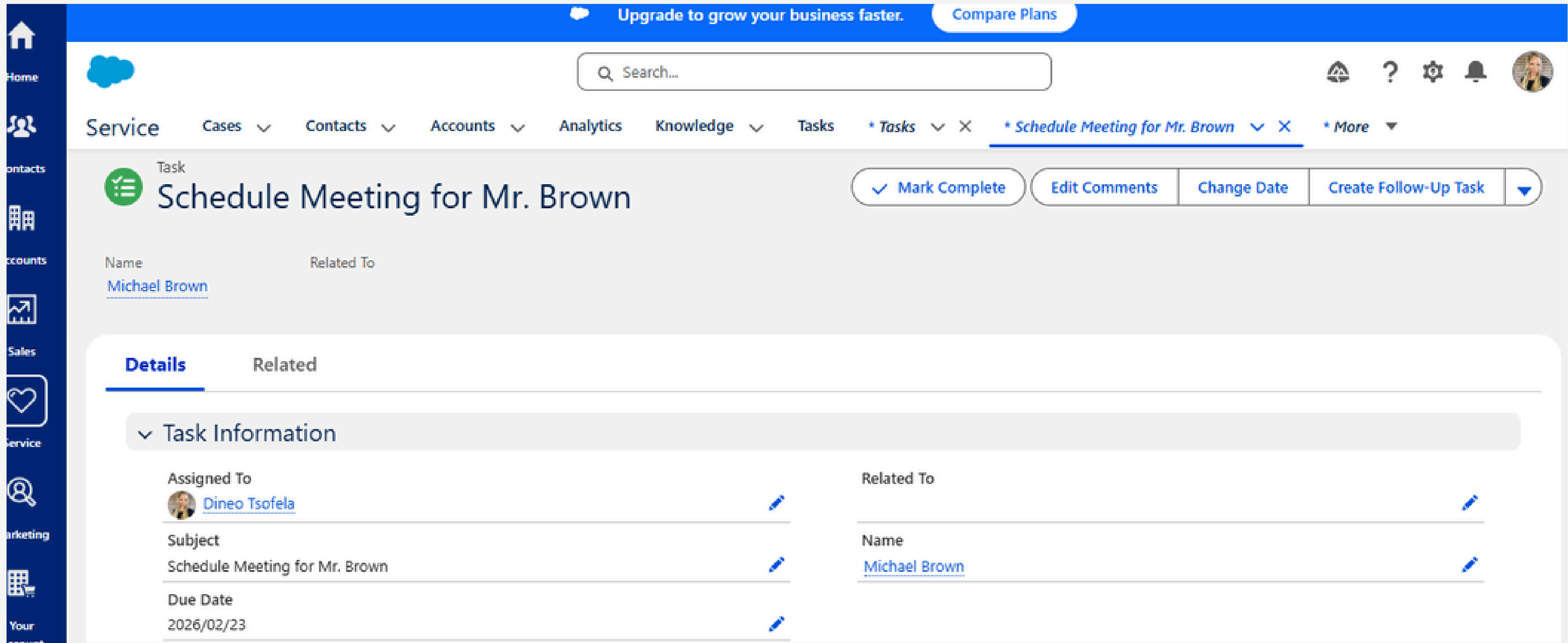
7.Tasks

Tasks created while creating new leads



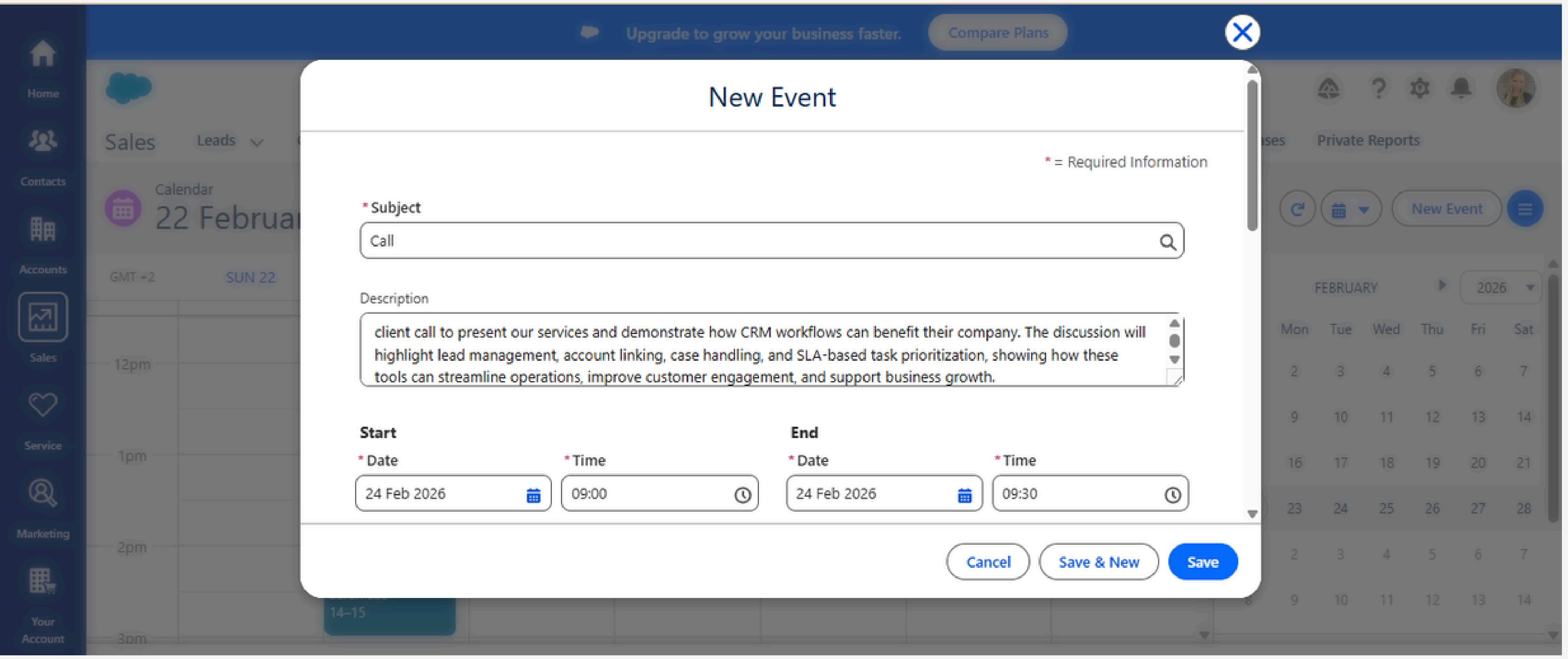


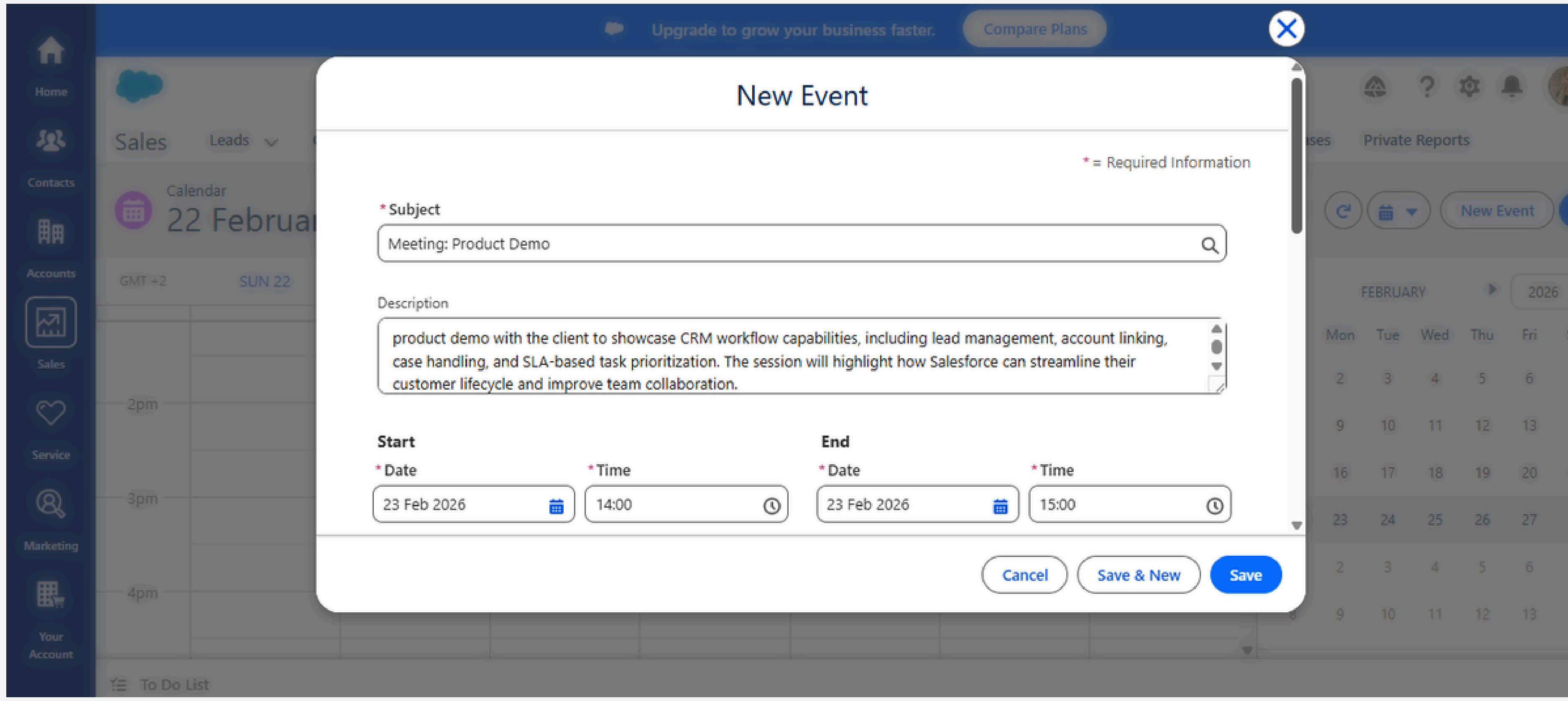


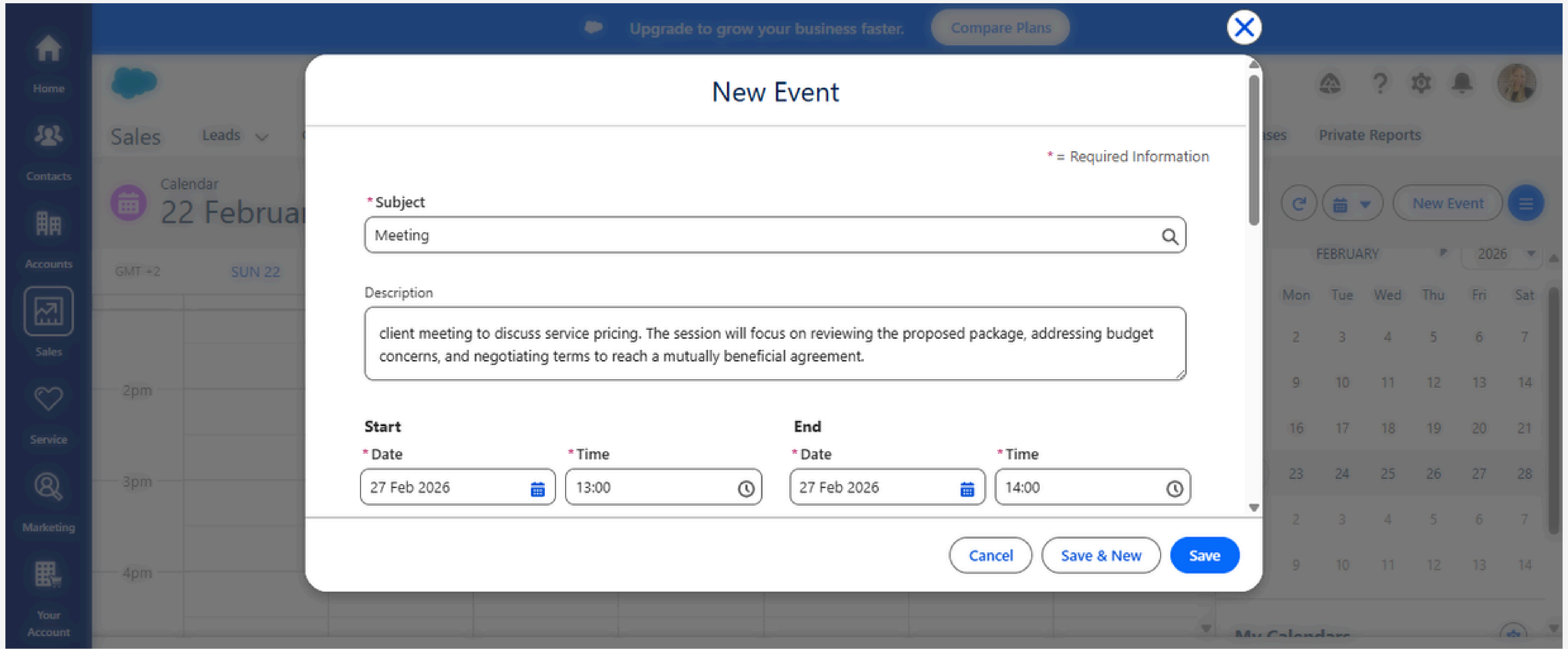


8. Calendar

Schedule events for client







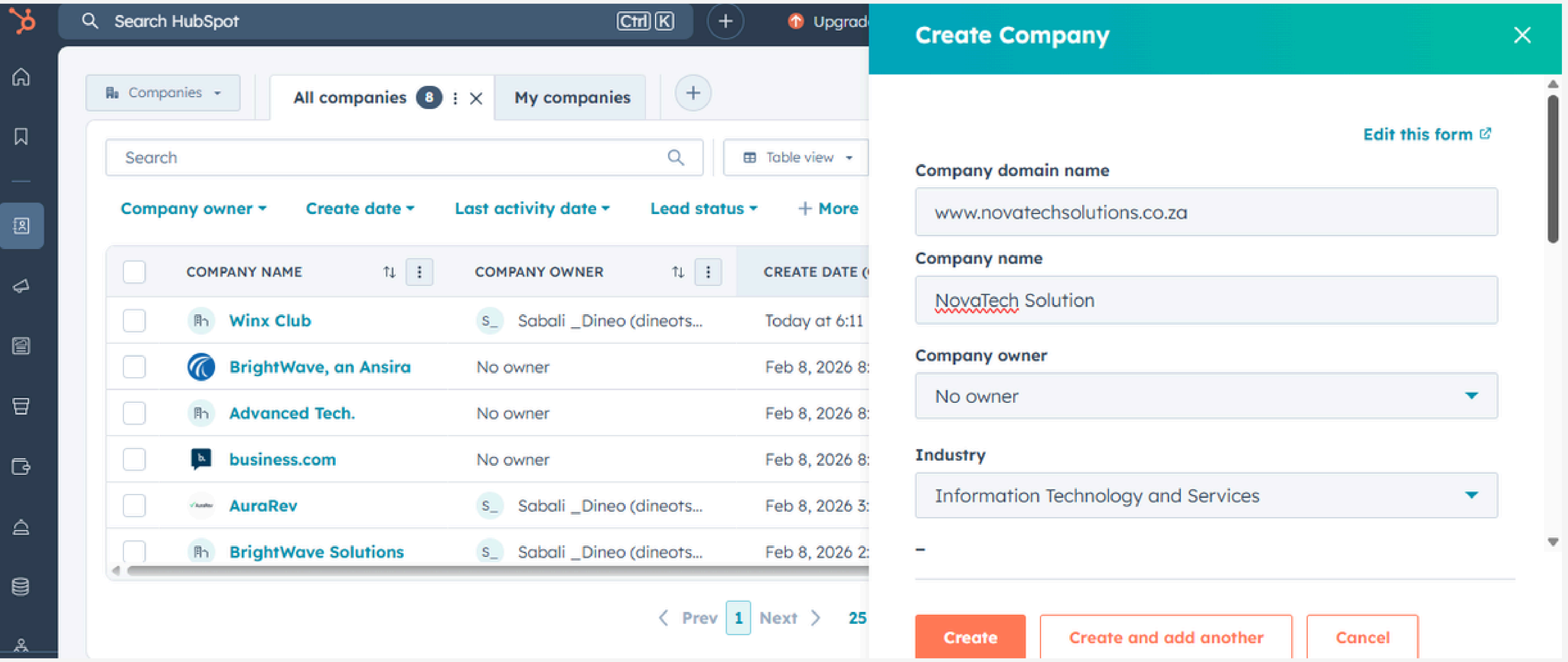
second project

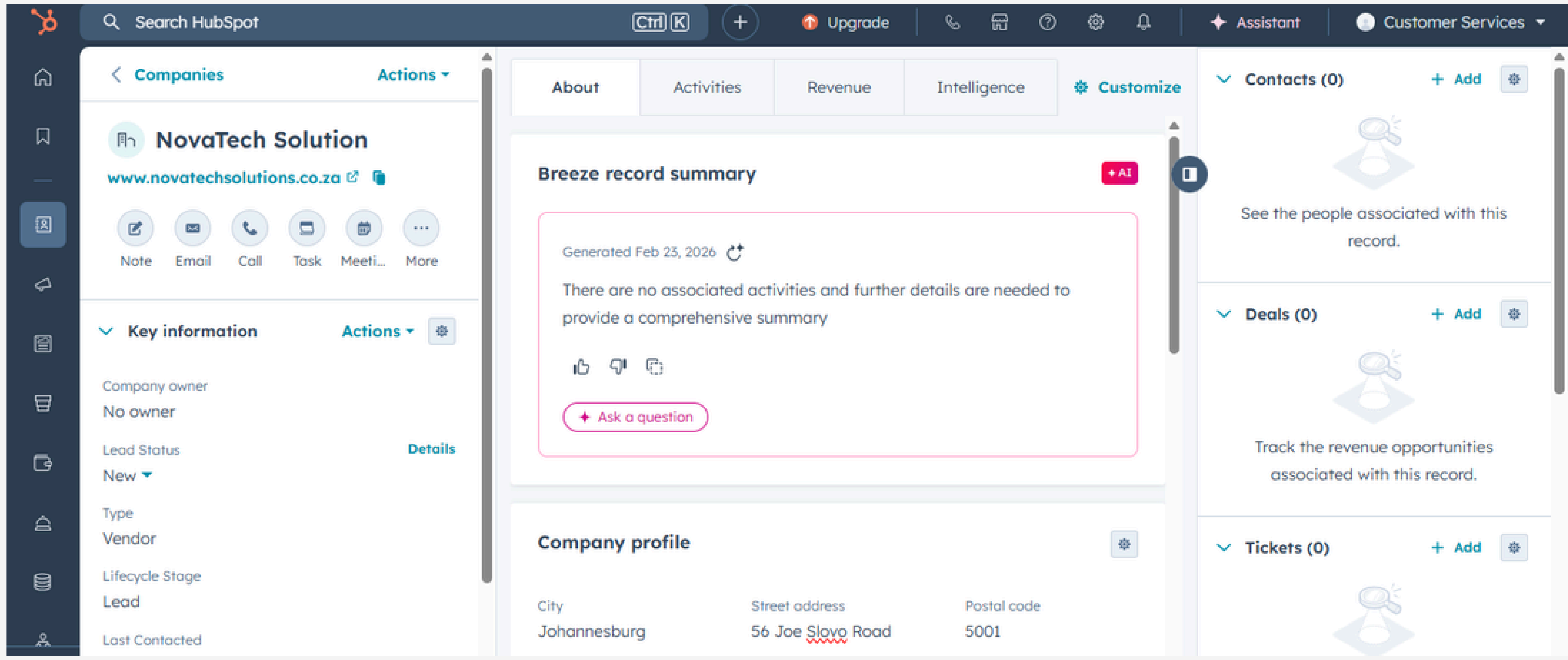
Mock HubSpot Tasks

1.Companies: Add 2 new companies

Adding Company: NovaTech

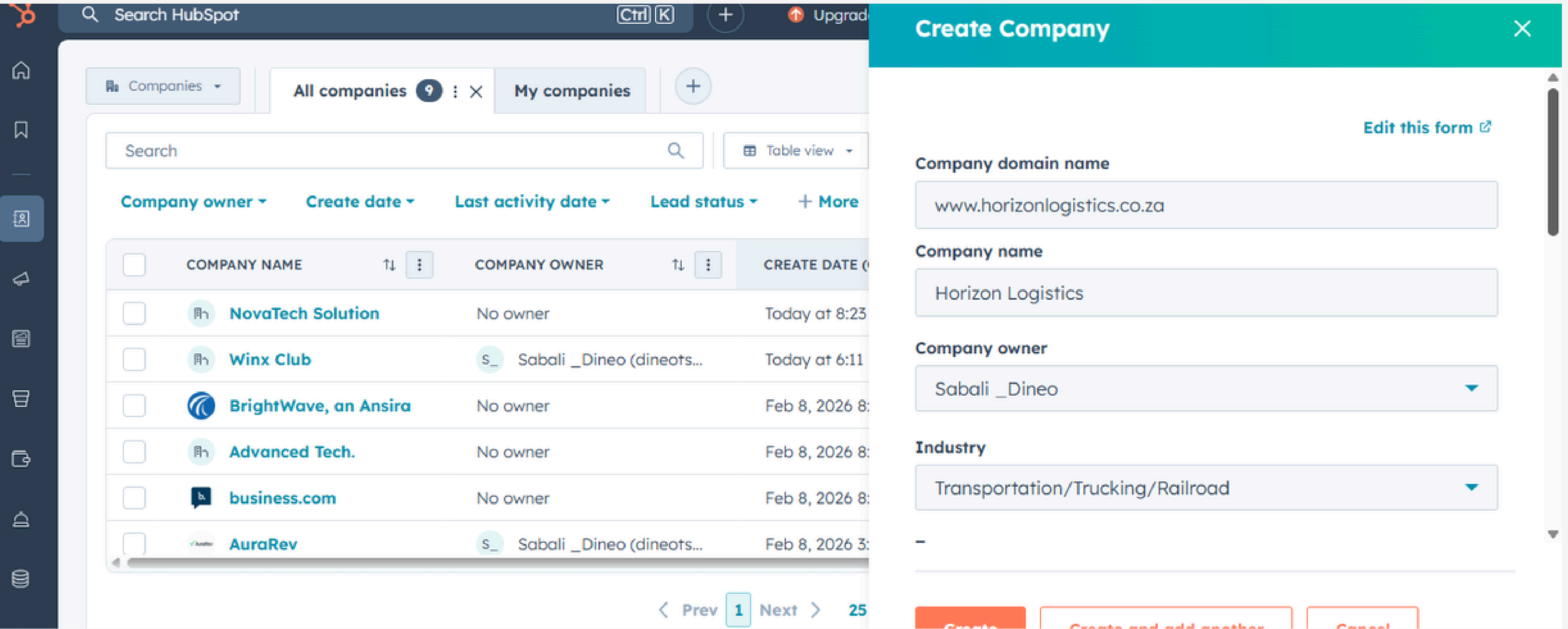
Company added to CRM

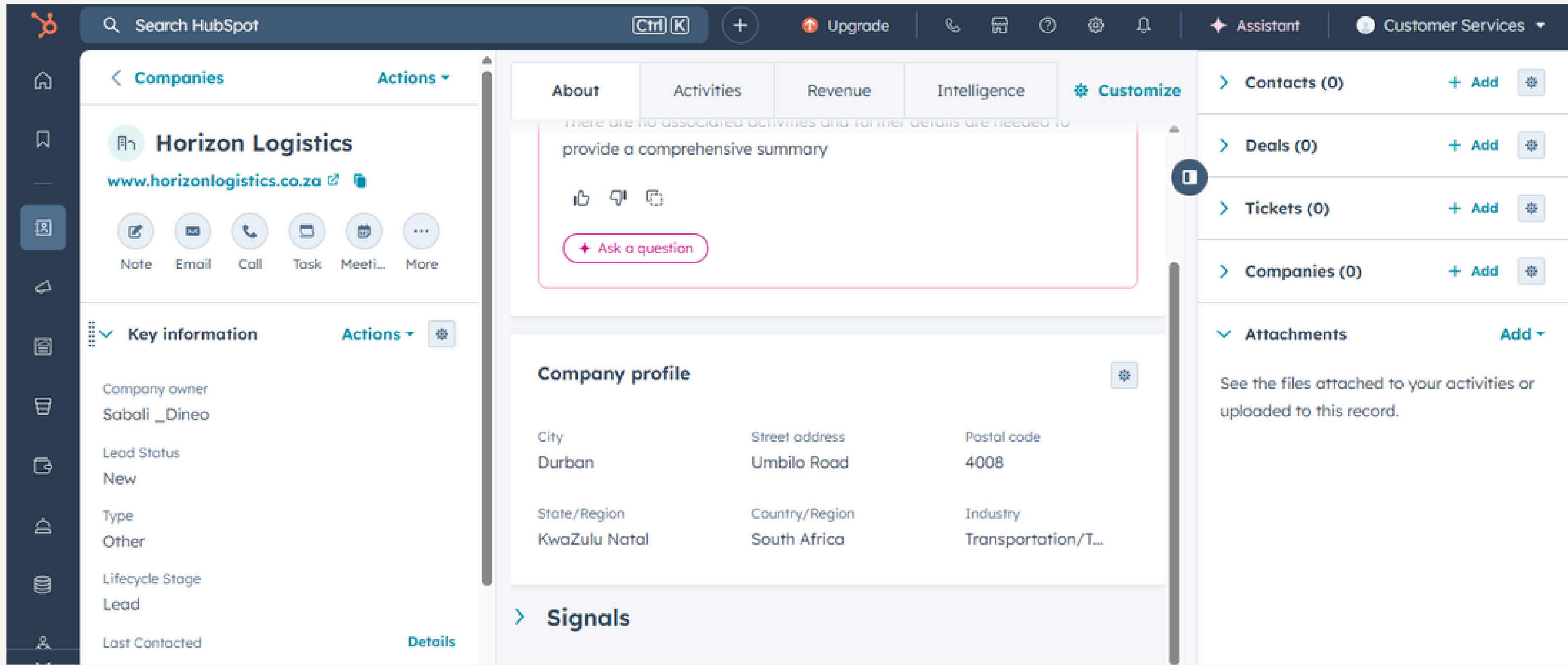




Adding Company: Horizon Logistics

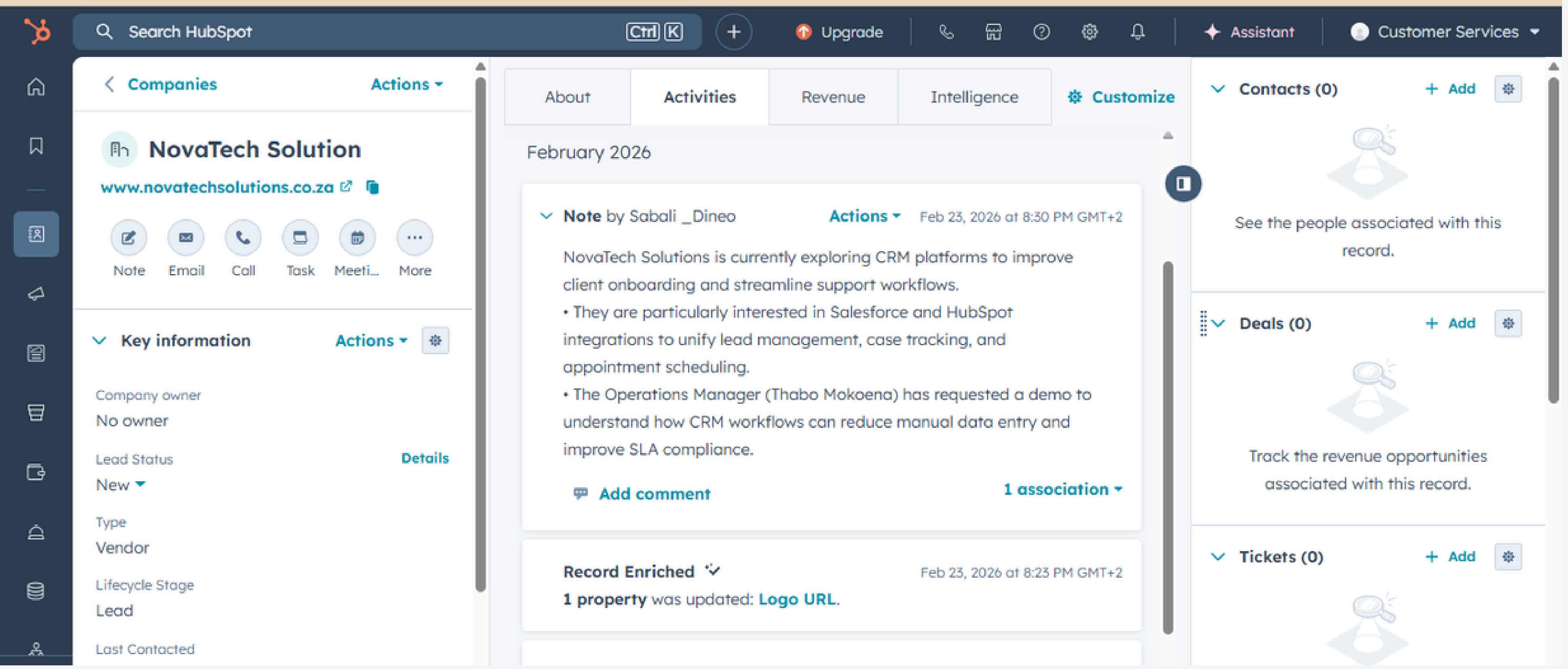
Company added to CRM



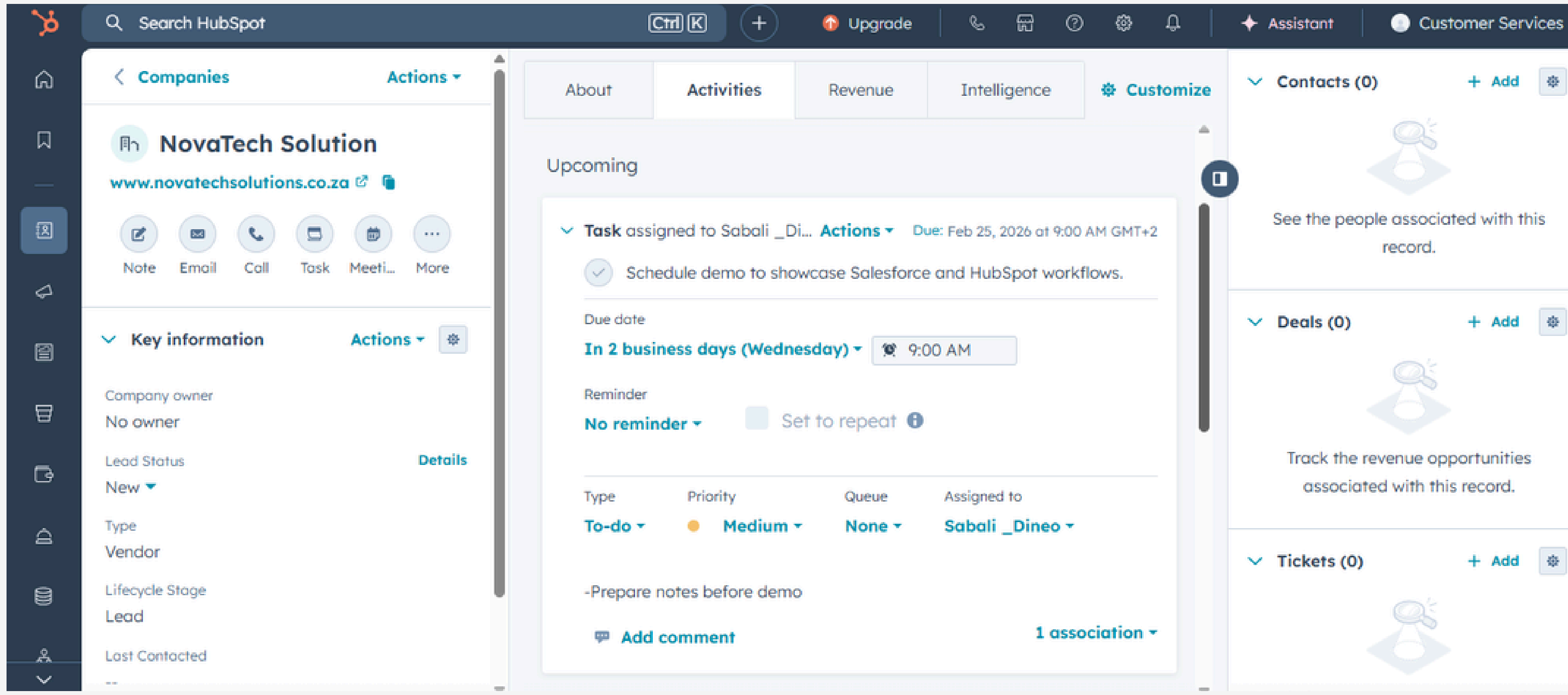


2. Companies: Update company record with latest engagement notes and tasks

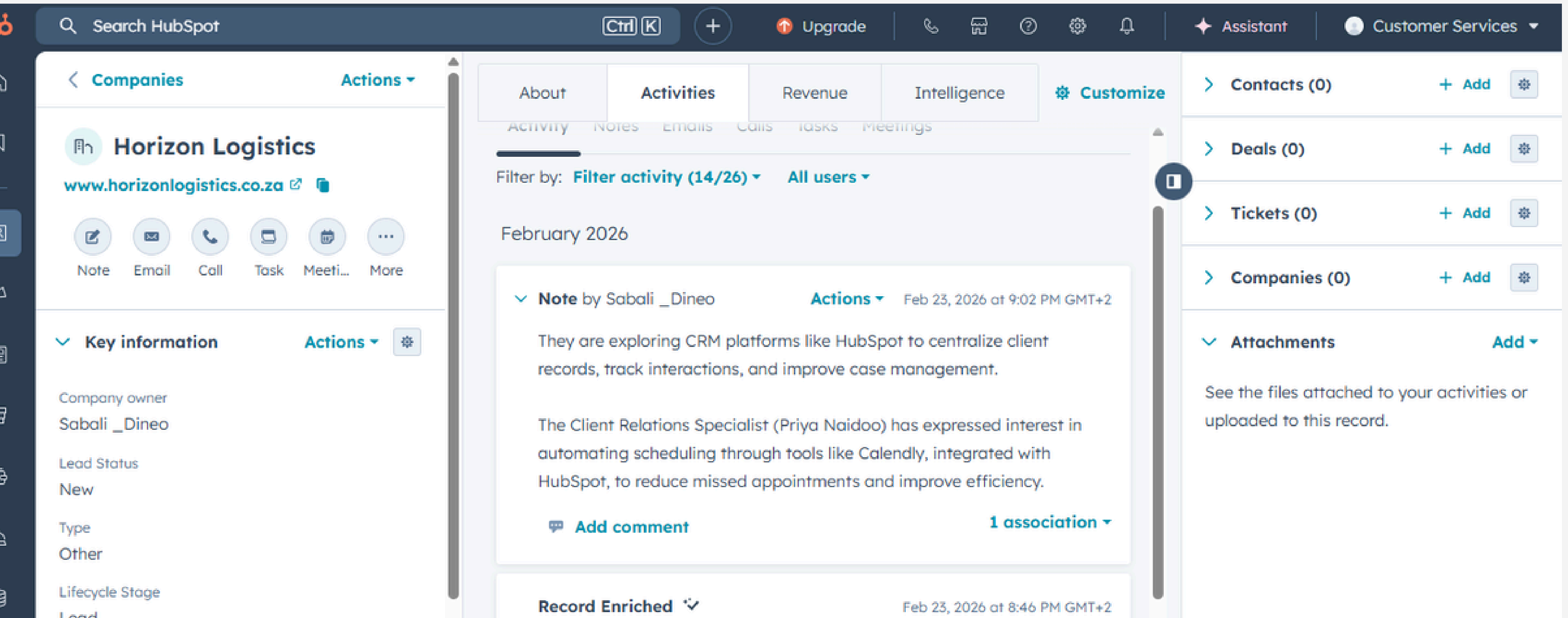
Created Notes: NovaTech Solutions



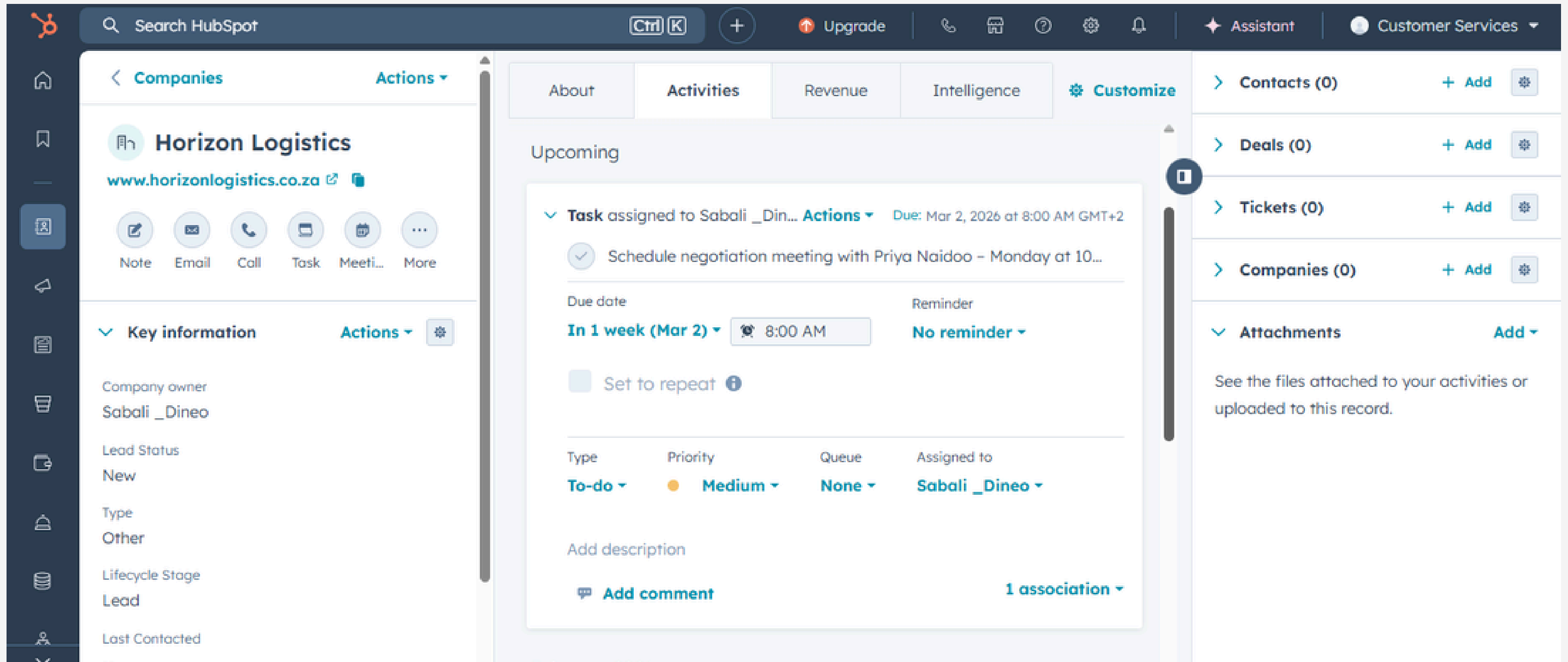
Created Task: NovaTech Solutions



Created Notes: Horizon Logistics

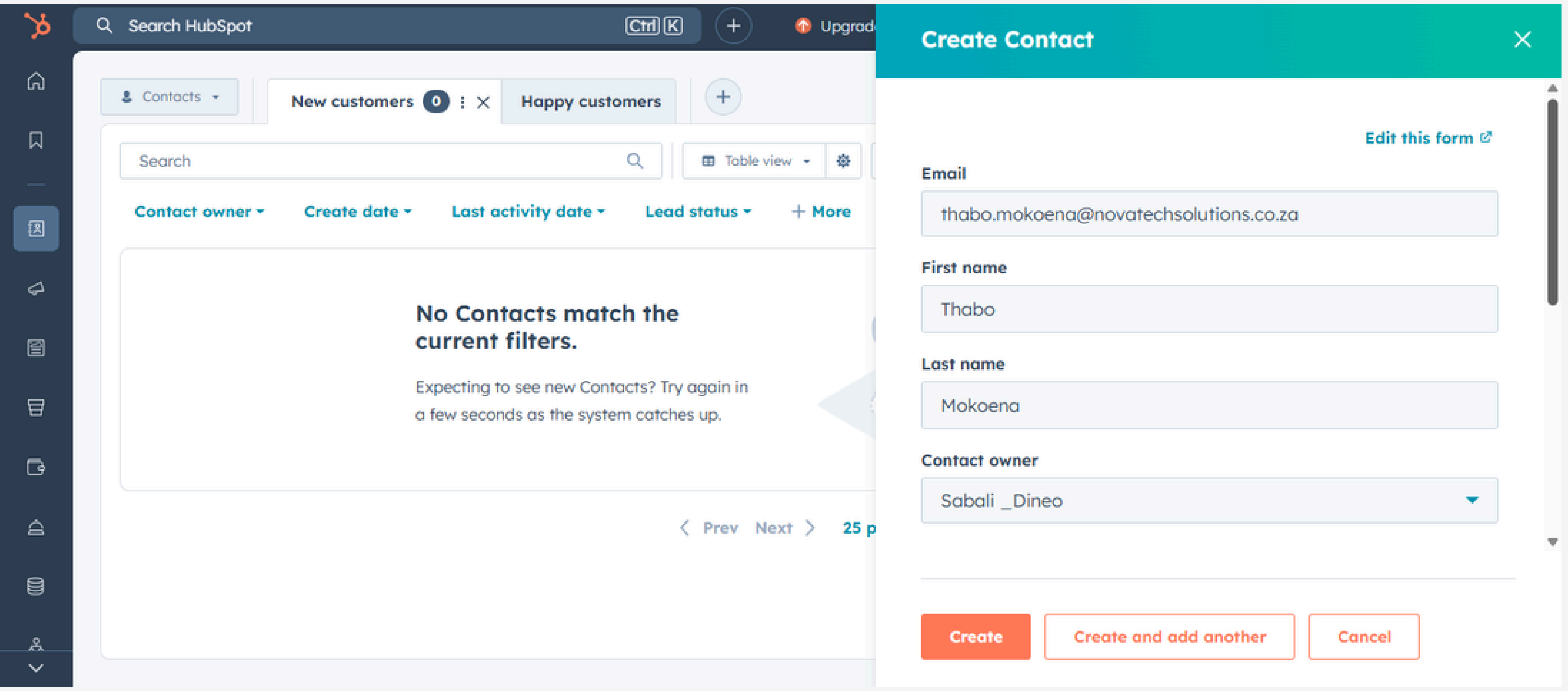


Created Task: Horizon Logistics

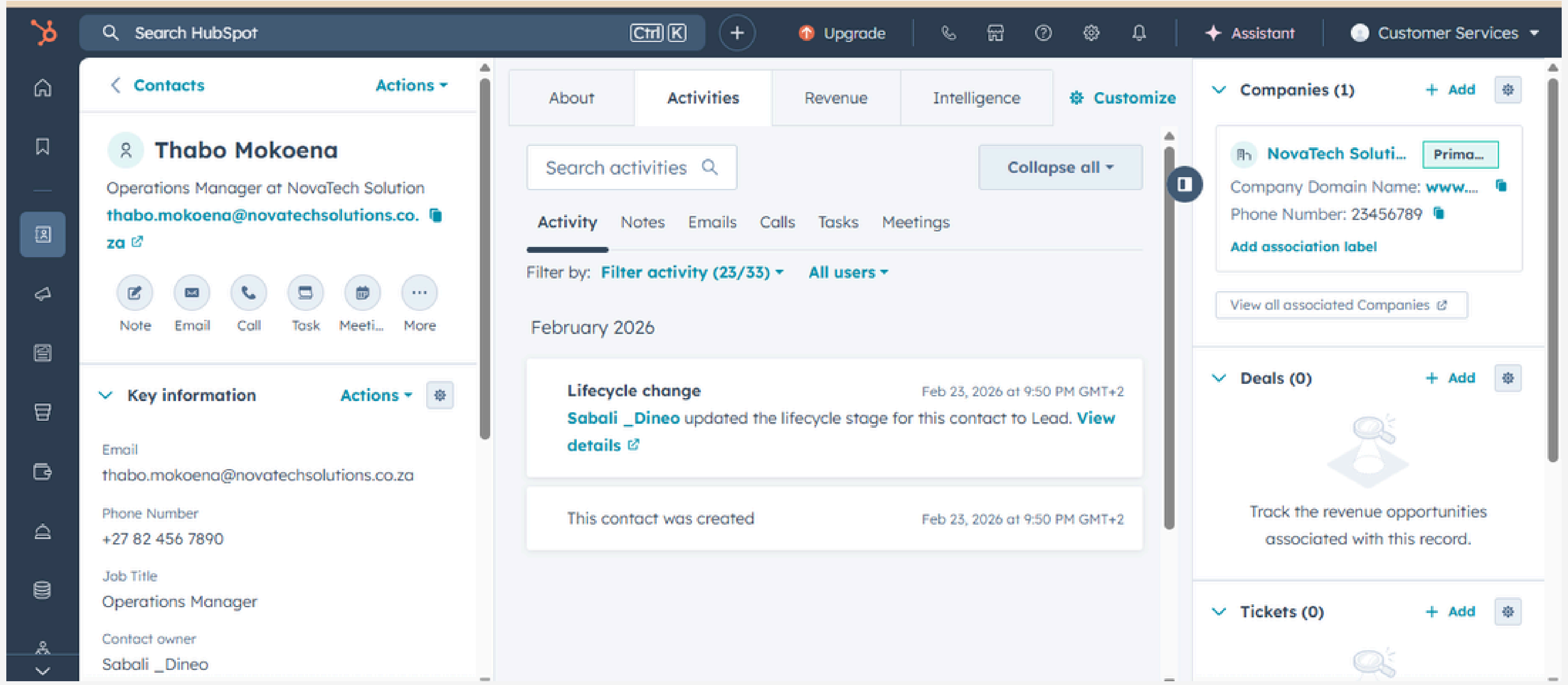


3. Contacts: Create 2 new contacts

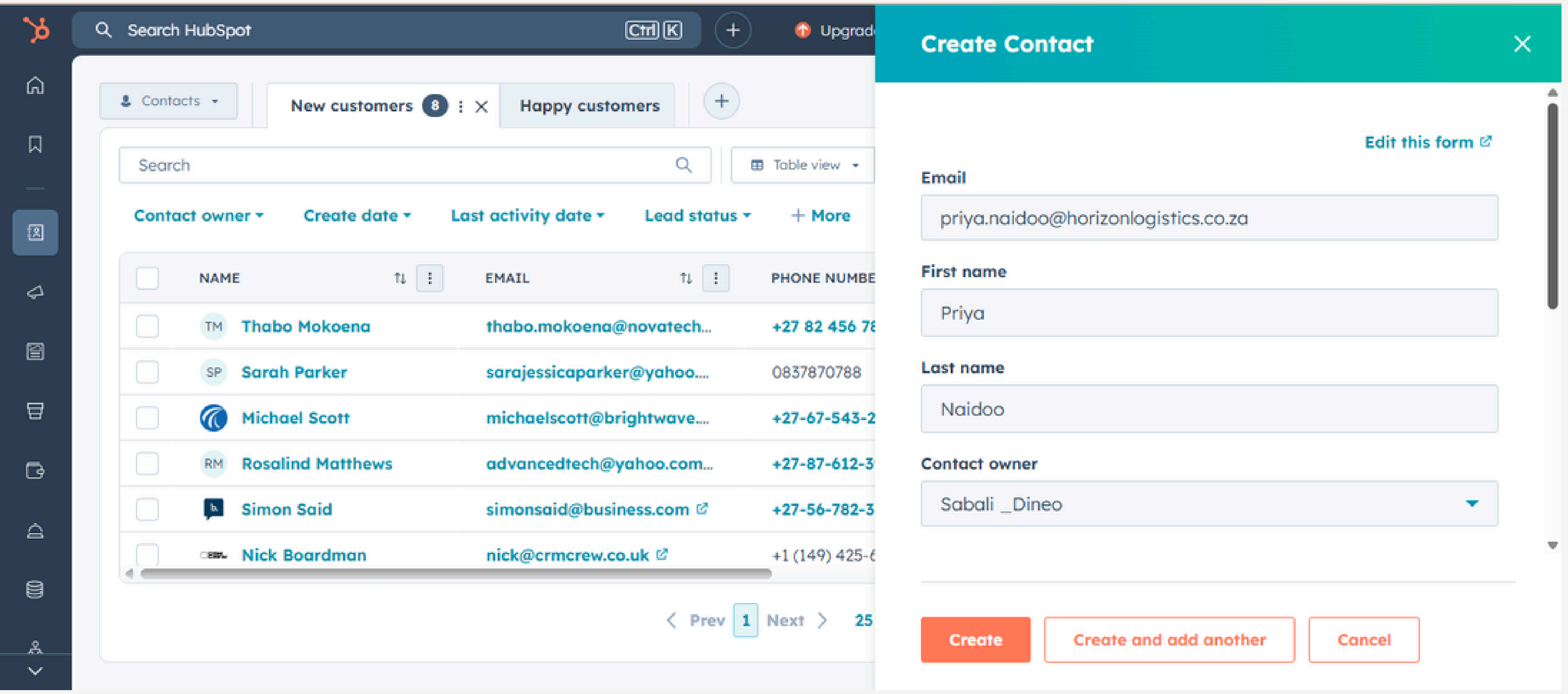
Created new contact



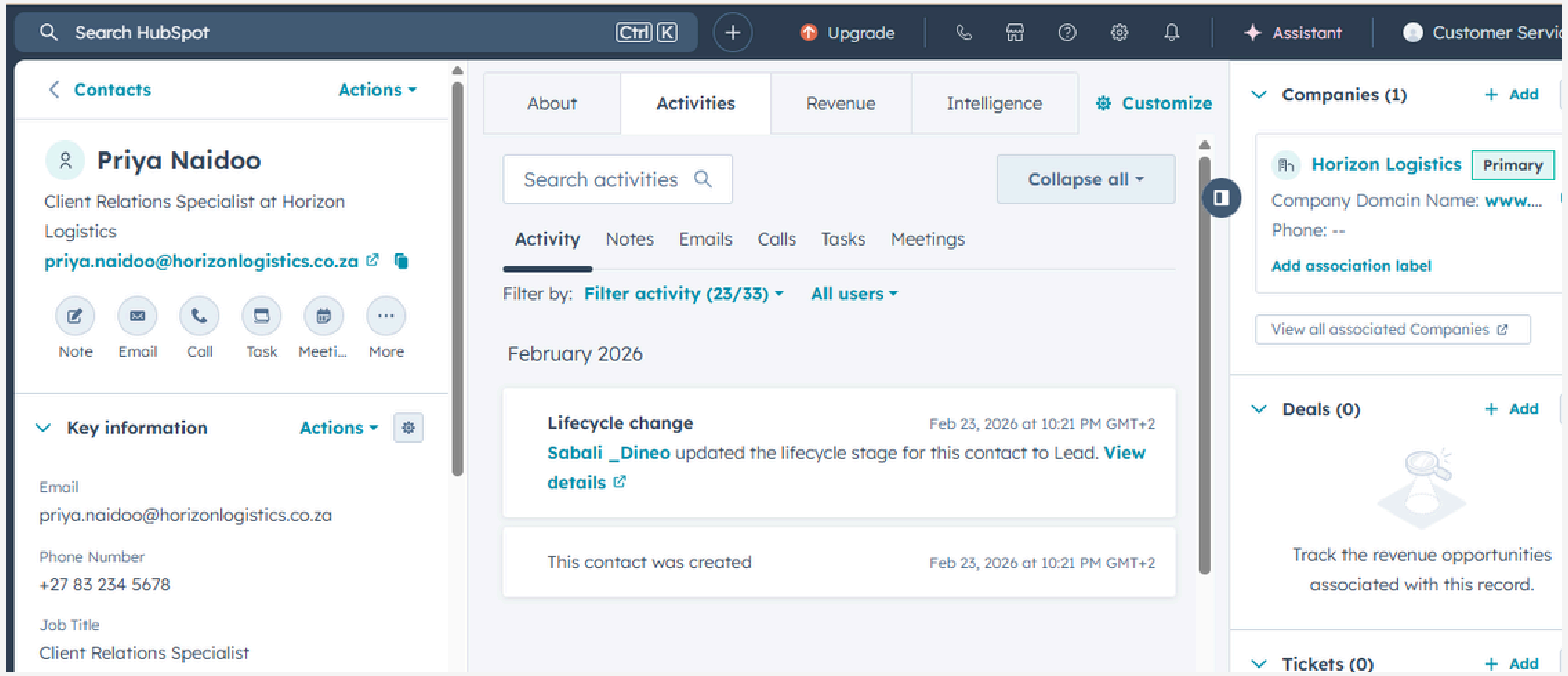
Contact created: Linked to NovaTech Solution



Created New Contact

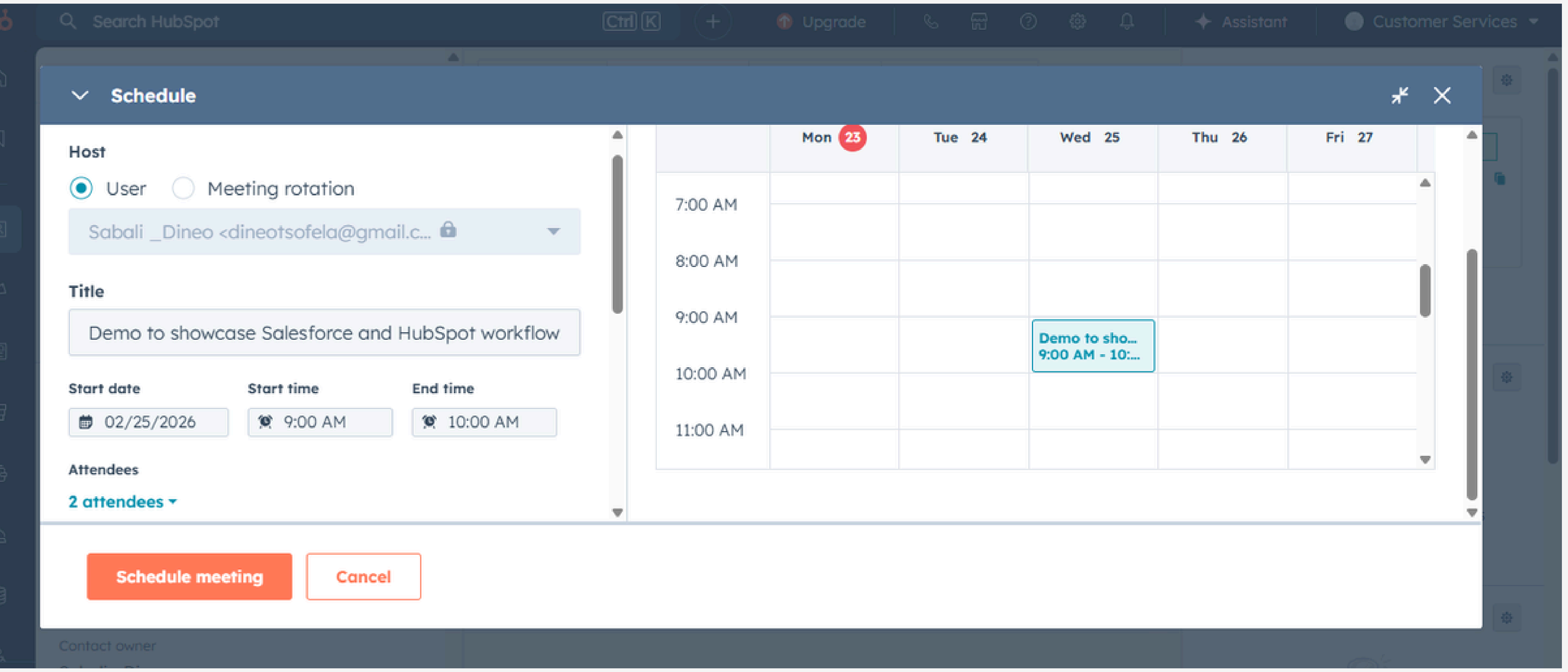


Contact created: Linked to Horizon Logistics

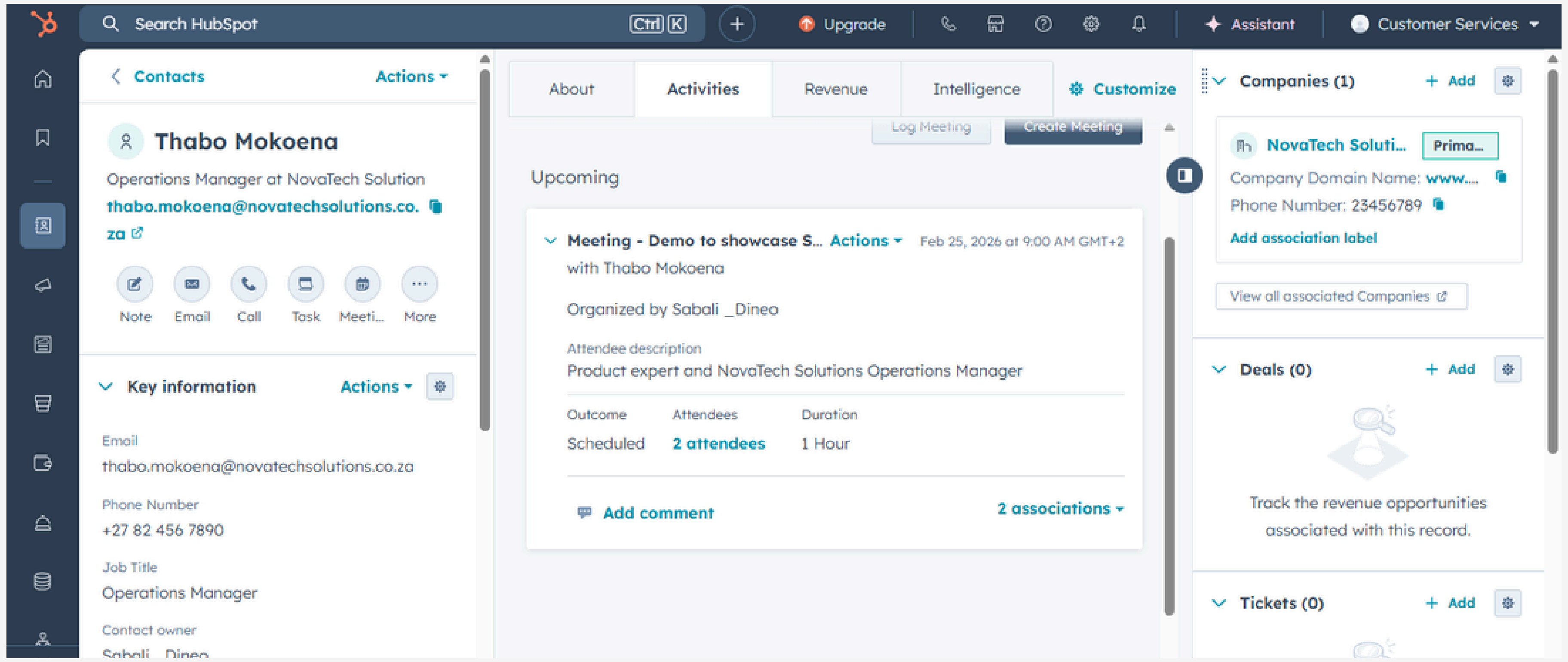


4. Contacts: Schedule Demo and meeting for contact

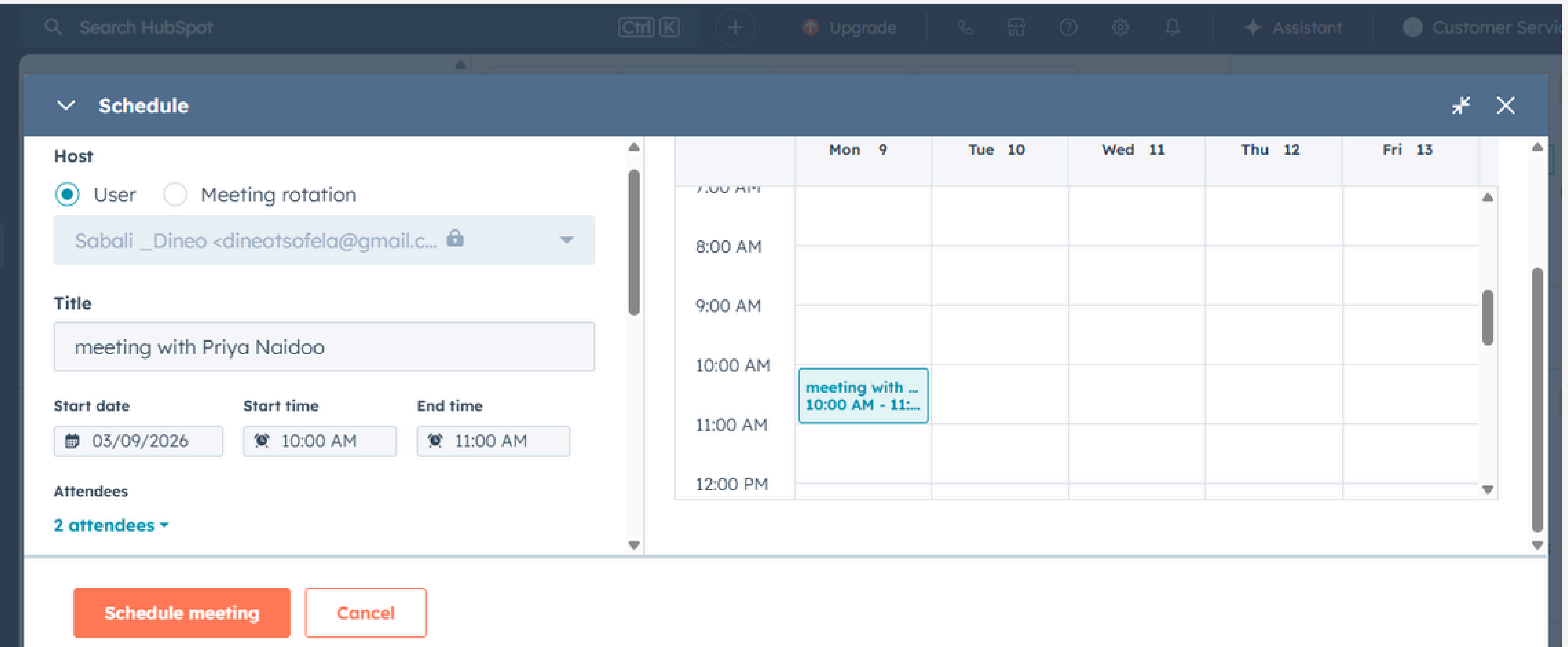
Scheduling a Demo for Contact



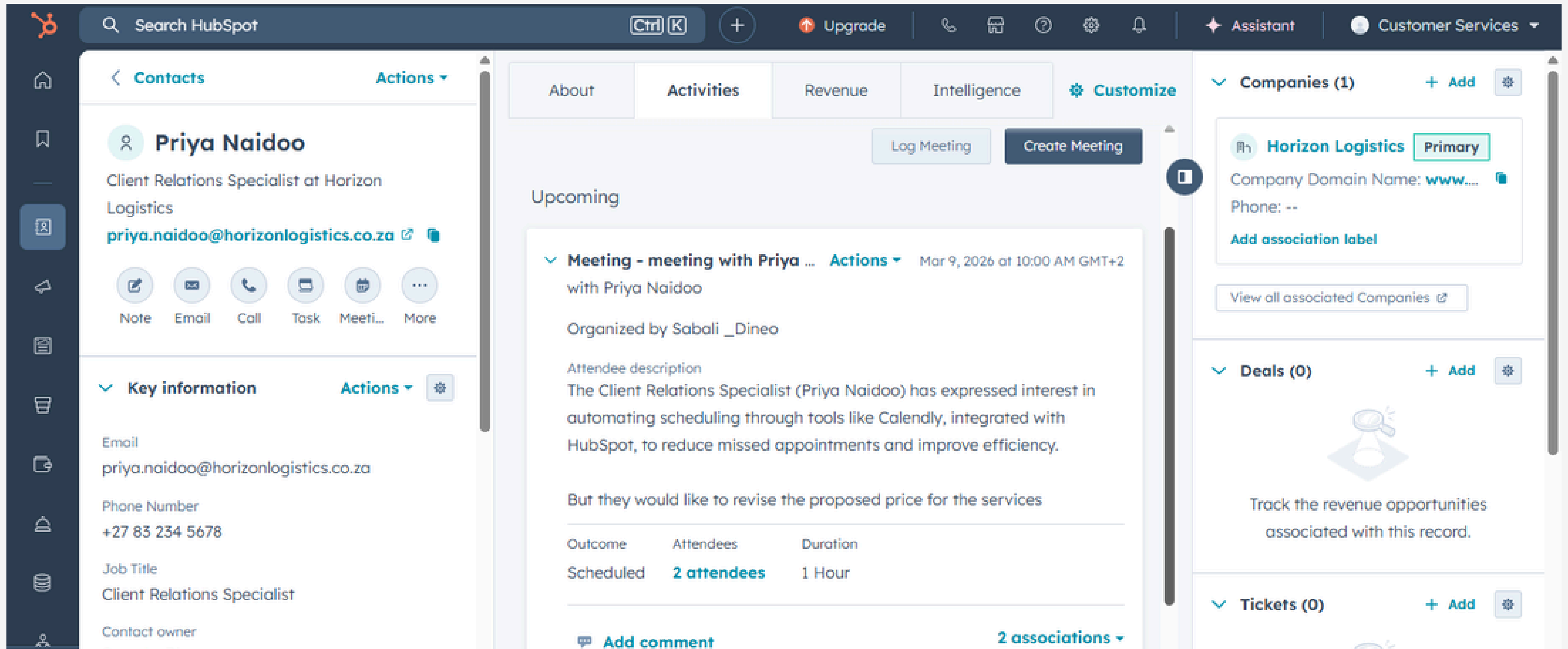
Demo scheduled for contact



Scheduling meeting for contact

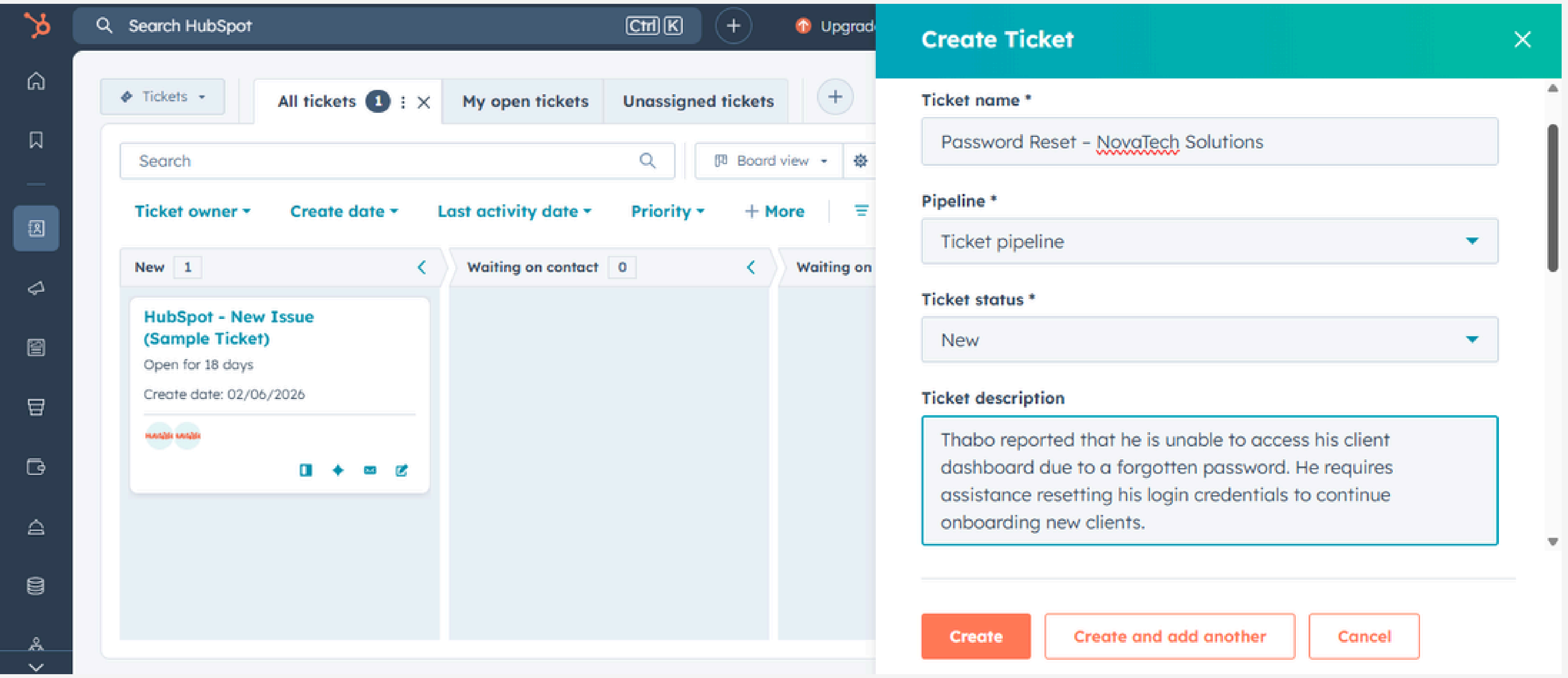


Meeting scheduled for contact

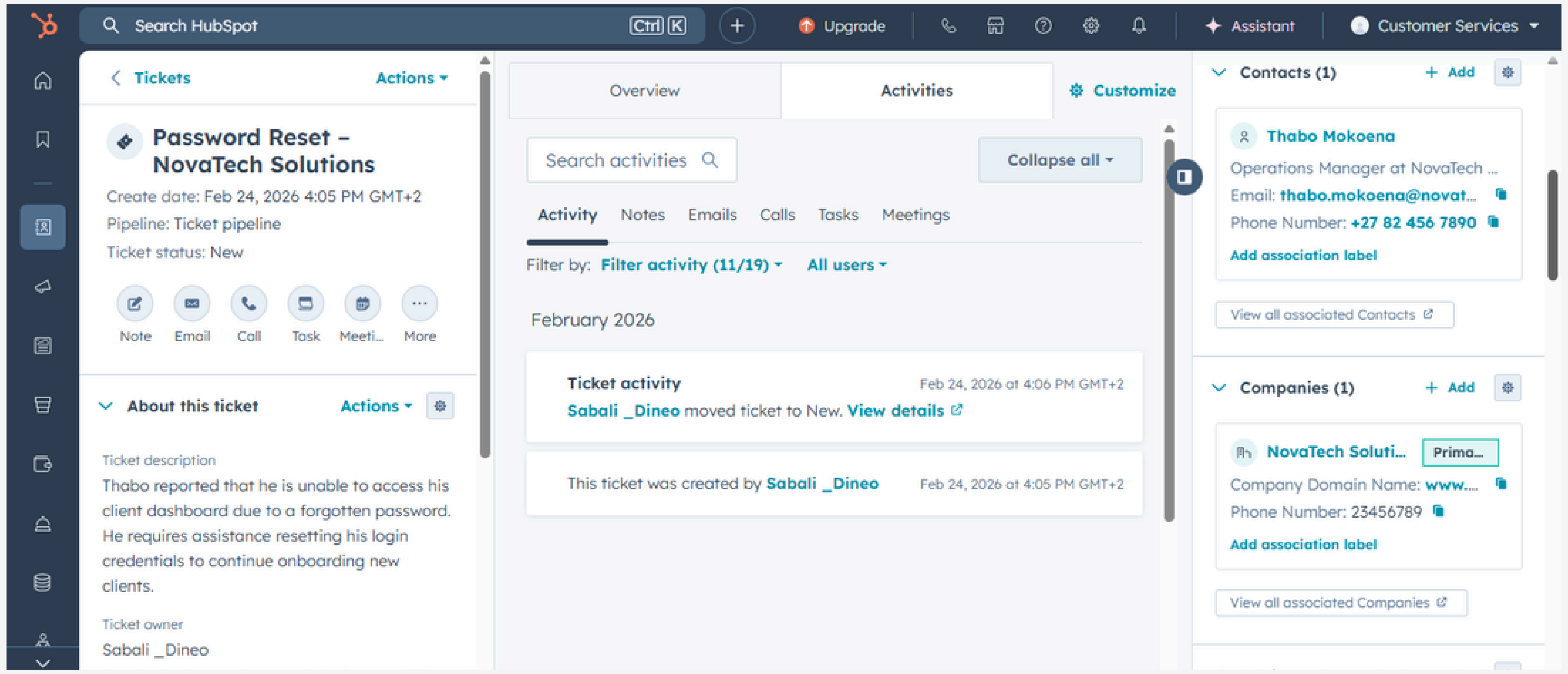


5. Create 2 new tickets

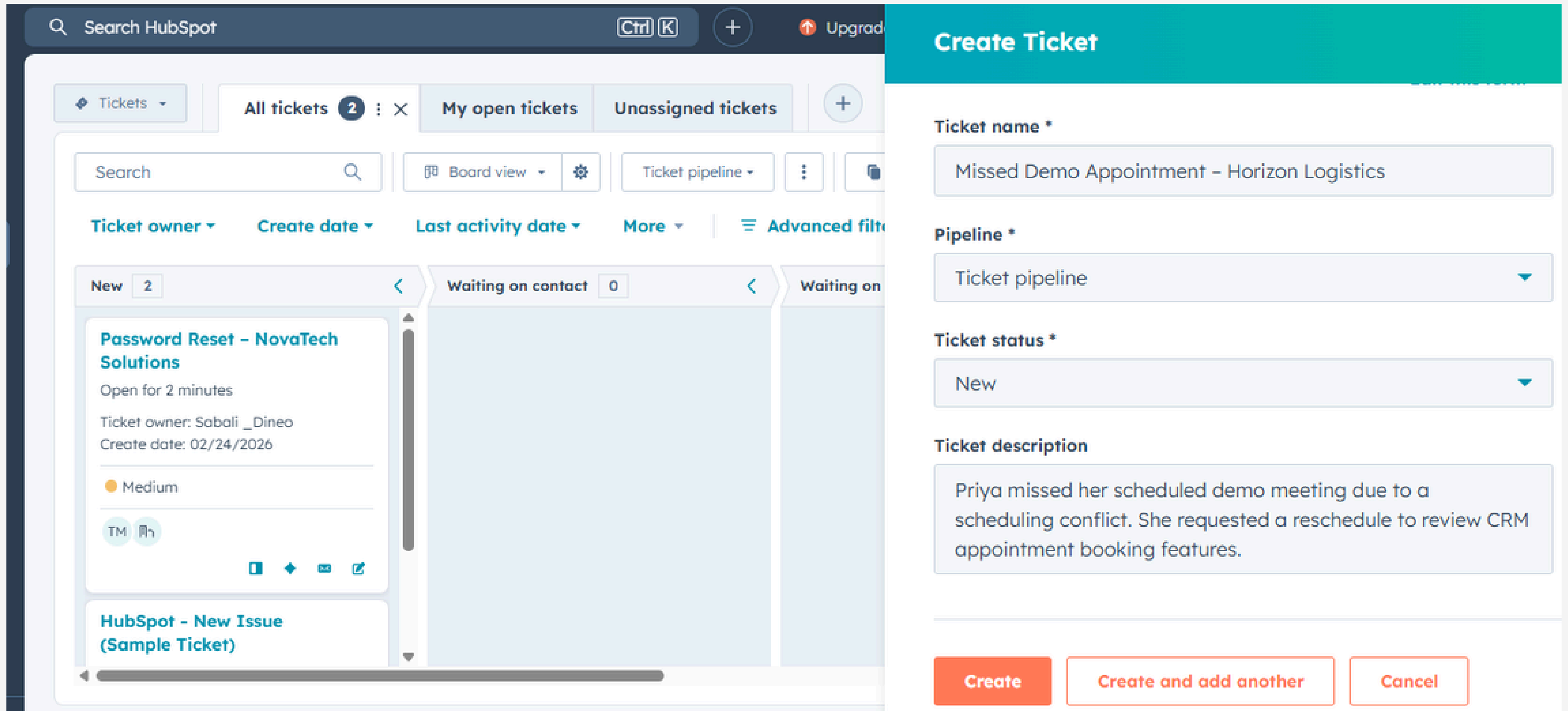
Creating ticket for a client



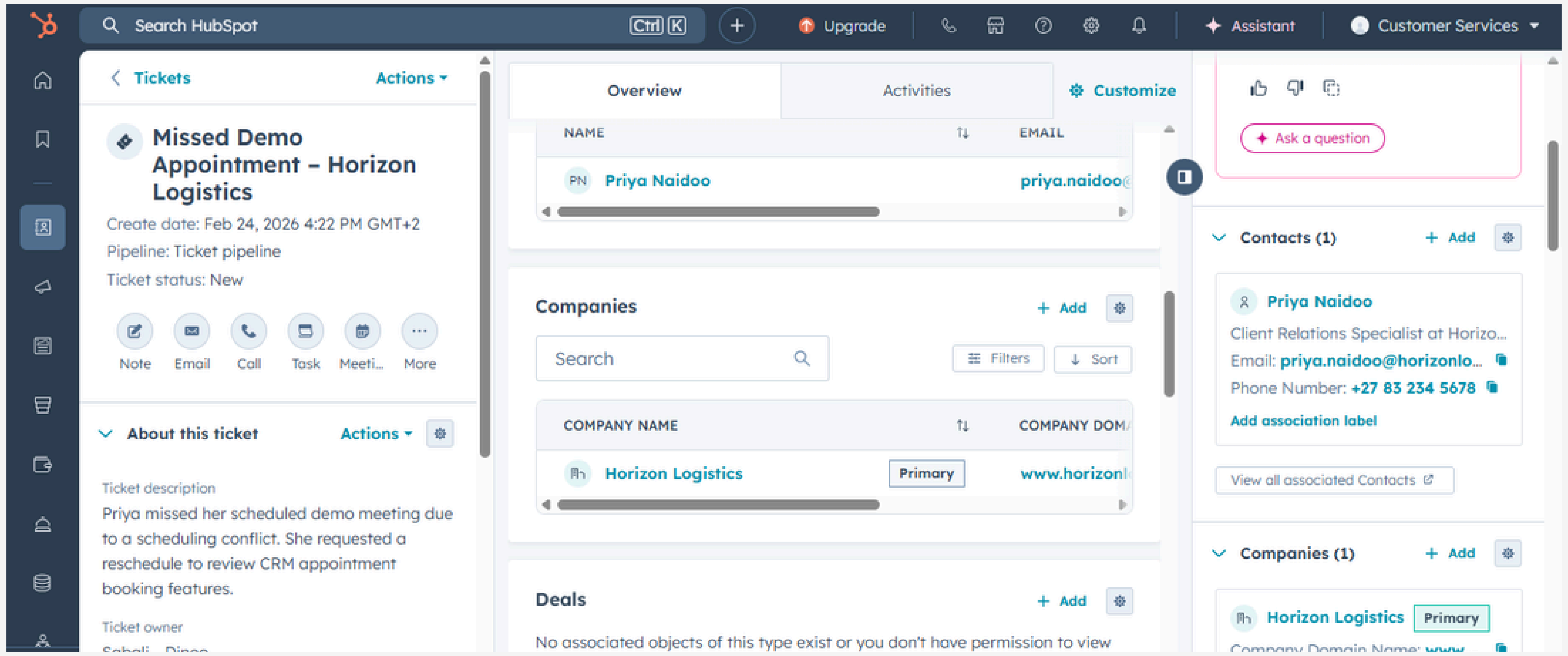
ticket in the CRM



Creating ticket for a client



ticket in the CRM



Calendly

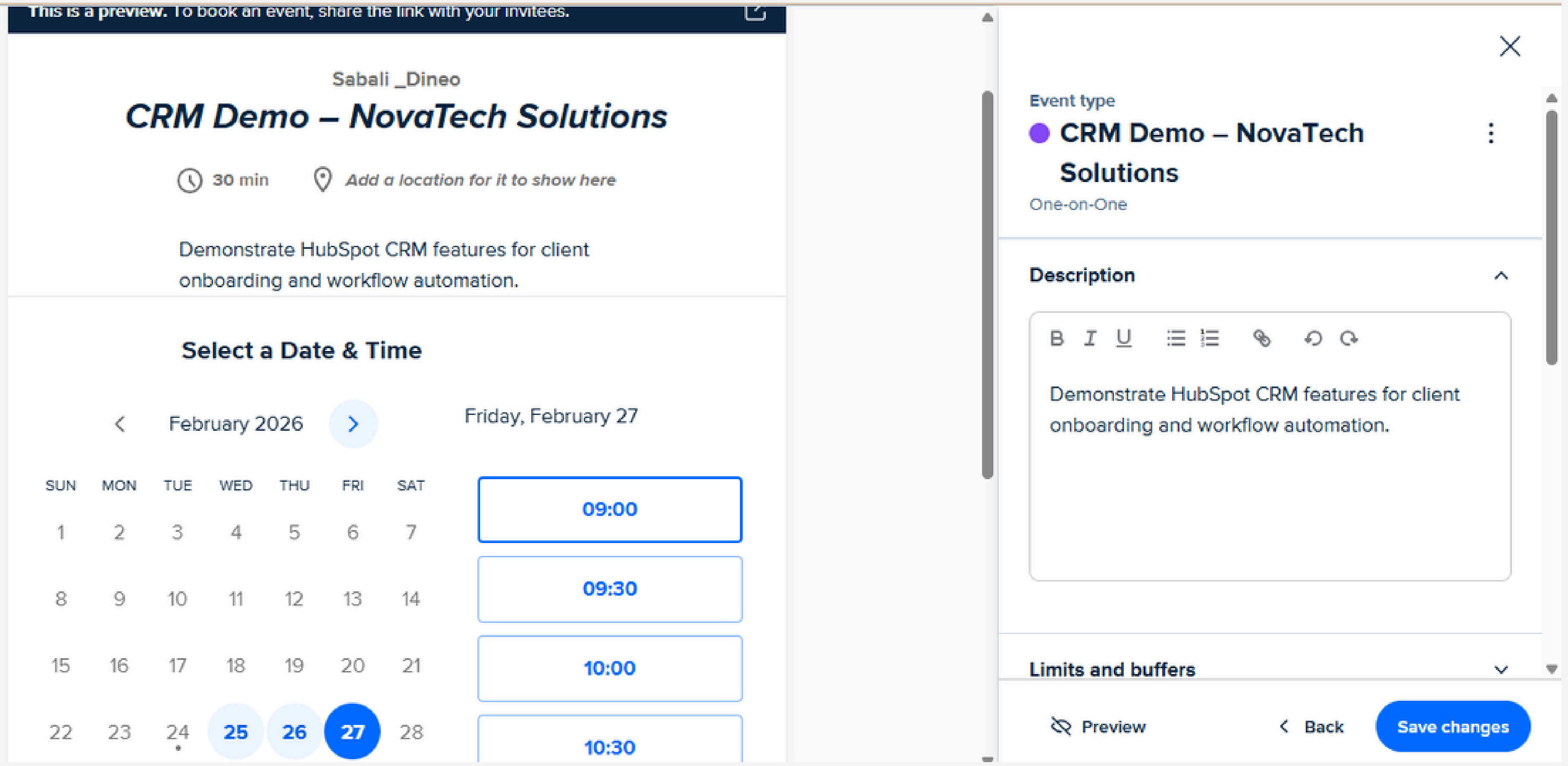
Third project

Mock Calendly Tasks

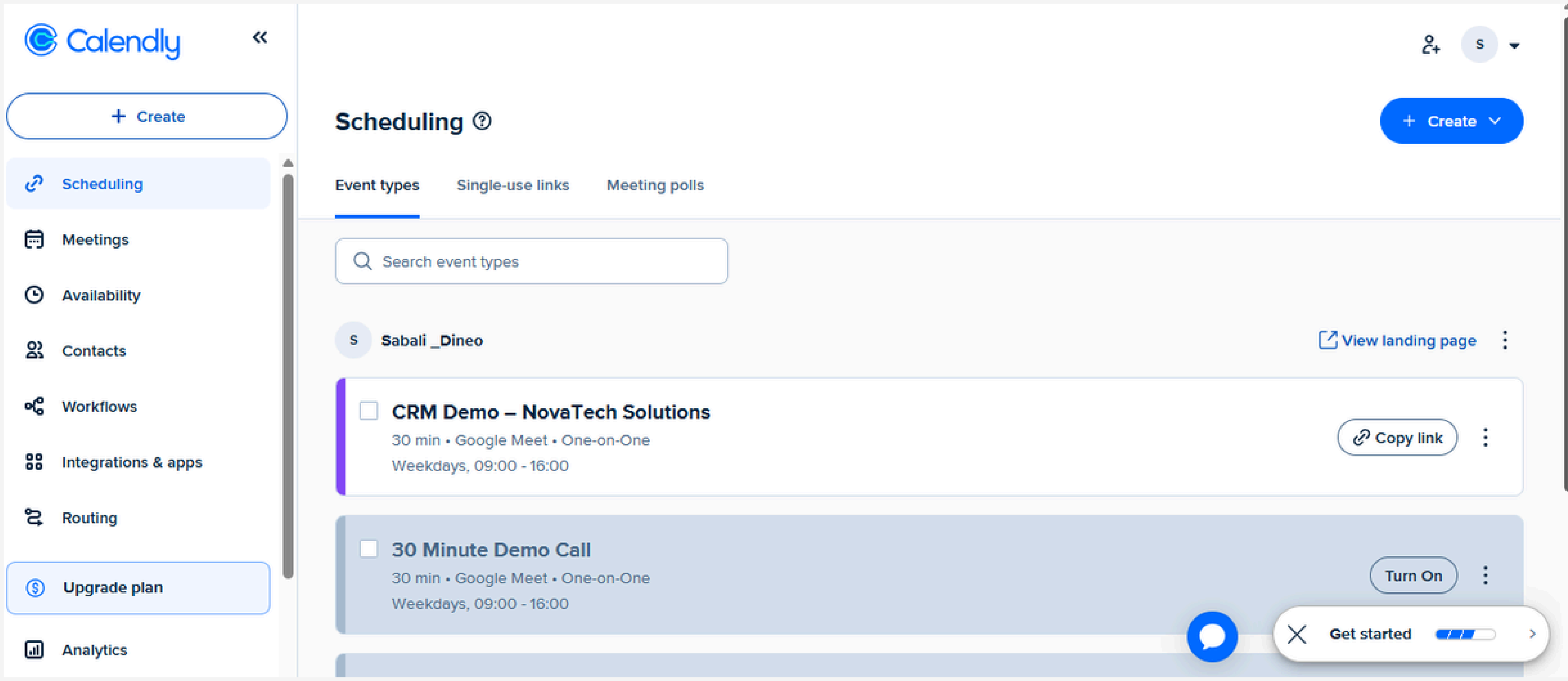
Calendly

1. Scheduling a demo for a client on Calendly

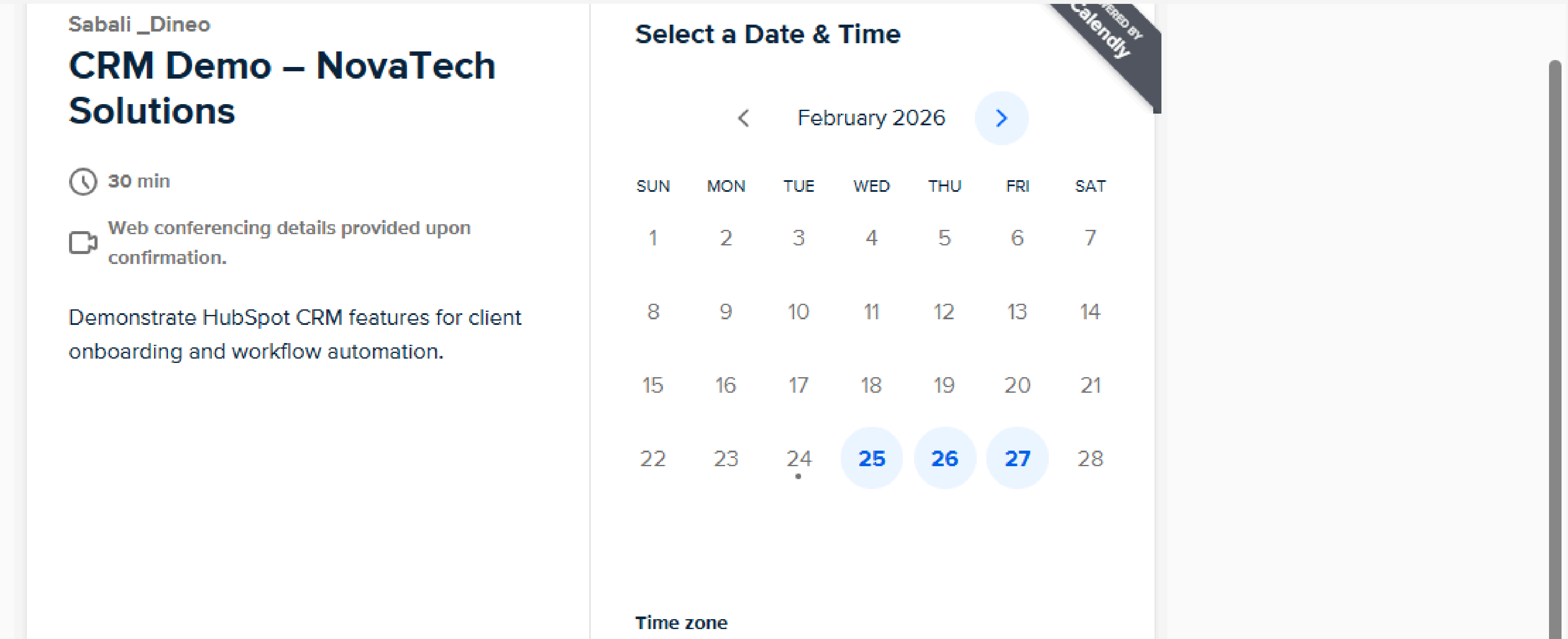
Scheduling the appointment

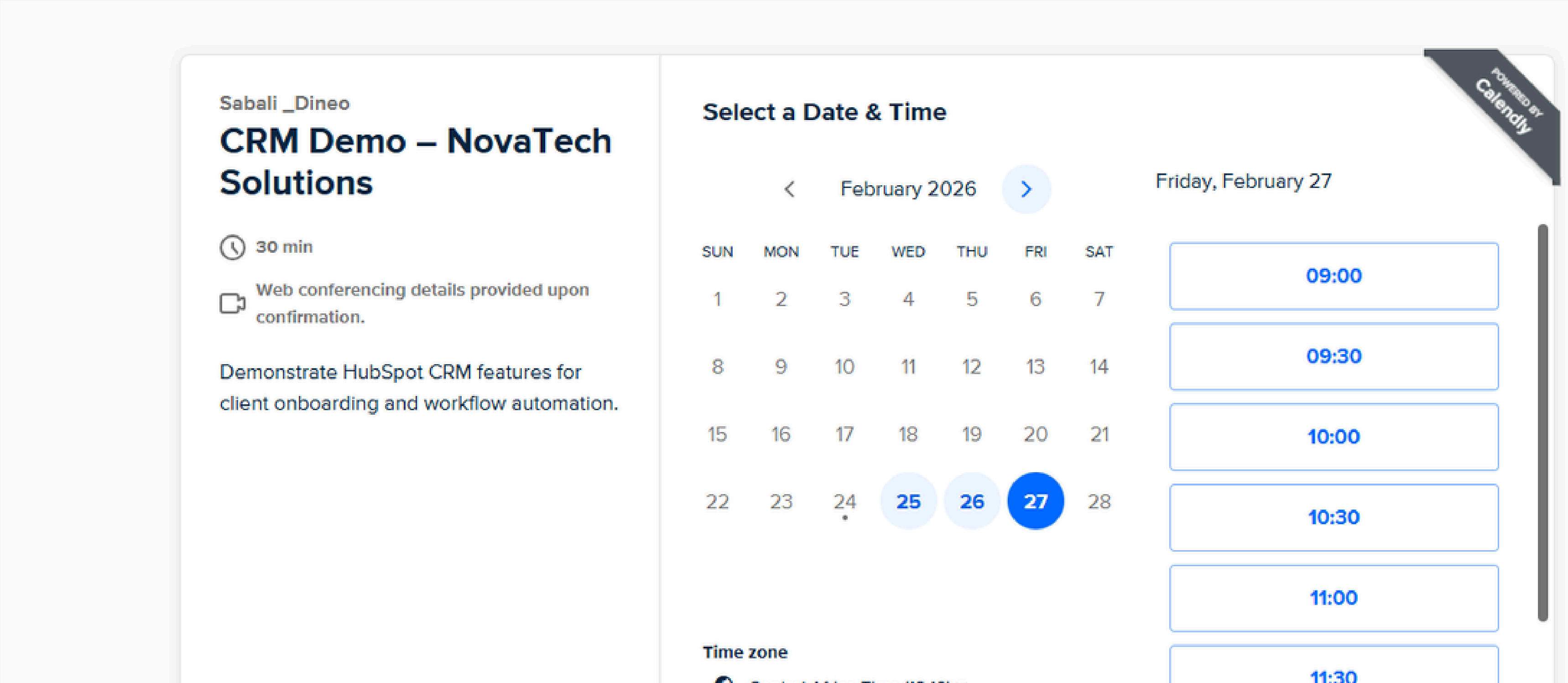


Appointment scheduled into the system



How it looks on the client's end to pick their available time and time





THANK YOU!

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