

Position: Service Sales Support

Reports to: Service Sales Manager

Summary

The Service Sales Support position is responsible for assisting and supporting the Service Sales and Service Operations Team in all administrative and operational duties.

Responsibilities

- Assist, respond and follow-up with Sales, Operations and Technician in regard to requests, questions, inquiries and research
- Write Proposals including but not limited to recommended repairs for Contract and Non-Contract clients
- Process approved repair proposals by working with internal and external vendors for ordering and checking availability of parts, materials, gear and writing and providing a Purchase Order for those items and setting up the approved repair in the department database for dispatcher scheduling
- Correspond with clients on behalf of the Sales Personnel
- Review, print and bind approved Service Maintenance Agreements for submittal to clients for review, acceptance and signature, and put together electronic copies as needed
- Assist with RFP/RFQ's by researching and providing valuable information from the department that will be helpful in a RFP/RFQ submittal
- Setup new database sites for new department personnel for internal and external office use
- Update department Word and Excel templates as needed for use by both Service Sales and Operations
- Provide quarterly Sales Reports for Service Sales Manager, Ownership review and to be used during company meetings
- Enter newly booked proposal amounts into the sales database to reflect accuracy in booked numbers (to be reviewed by Service Manager, Service Sales Manager and ownership)
- Submit and provide Certificate of Insurance for client sites (assist when needed)
- Provide coverage for Service Administrative Personnel when necessary
- Track Service Sales marketing materials
- Perform special projects/tasks as assigned by the Service Department Manager, Service Sales Manager and Service Operations Supervisor
- Estimate costs for labor and materials required to meet the scope of service. Determine pricing for proposals that support business growth and profitability while considering competitive factors and overall market conditions
- Look for opportunities with existing customers to provide any or all products and services sold by PSF Mechanical, Inc. When necessary partner with other sales staff (specifically PSF SPTI group) to develop the opportunity to the point of proposal and customer acceptance
- Obtain customer acceptance of proposals and transition proposals to booked work for service operations to complete. Maintain job and customer contact to support execution of work that results in customer satisfaction and maximizes gross margin

- Maintain contact with customer base and conduct periodic surveys, both formal and informal, and share results of surveys with both service and company personnel. When required partner with service staff to determine and implement corrective action that satisfies all stakeholders
- Customer base, maintain records and prepare for renewal of annual service agreements
Maximize customer retention rate while ensuring profitability of customer base and exploring opportunities to adjust scope of services performed
- Update PSF Business Intelligence (BI) Suite, to include renewals, large repair and customer information
- Generate and update reports as directed to summarize proposals and quotations as well as other sales activities
- Support or lead miscellaneous projects or tasks as needed or as assigned by Service Sales Manager
- Be a positive and active contributor to PSF's core values of **Reliability, Advocacy, Collaboration, Integrity, and Safety**
- Other tasks as assigned
- Have fun, be passionate, and genuinely enjoy your job and the people you work with

Education & Experience

- High School diploma or equivalent
- Able to work as part of a team and with minimal supervision
- Strong Microsoft Excel skills
- Working knowledge of Microsoft Word, Outlook and SharePoint is required
- Able to adapt to multiple and varied responsibilities
- Consistently set goals and adapt to flexible responsibilities
- Effectively interact with customers, co-workers and vendors
- Strong verbal, written, analytical, and interpersonal skills
- Intermediate understanding of accounting procedures
- Organized and able to prioritize multiple tasks and successfully meet deadlines
- Able to work around a constantly adjusting schedule and priorities
- Basic technical understanding of HVAC systems is preferred
- Able to coordinate work to technician availability and skillset
- Experience with a formal service based dispatch/enterprise application preferred

Physical Demands

- Includes: sitting, standing and bending; repetitive motions of hands and wrists due to frequent computer use
- Able to see, hear well (either naturally or with correction) and speak clearly
- Must be capable of working extended hours days when job/business needs demand

Additional Information

- Type: Full-time
- Experience: Experienced
- Compensation: Hourly