

Position Objective and Responsibilities

Job Title: Heating and Air Conditioning Specialist

Reports To: _____ in the
_____ department.

Position Objective

To sell, distribute, install, and repair heating, cooling, plumbing, and related products in a manner that will optimize the cooperative's market share and savings, improve the cooperative's efficiency, help achieve the cooperative's mission and goals, and result in outstanding customer service.

Position Responsibilities

The heating and air conditioning specialist's responsibilities involve sales, service, inventory, reporting, safety and maintenance, and other duties as assigned by management.

The heating and air conditioning specialist will maintain a positive attitude that promotes team work within the cooperative and a favorable image of the cooperative.

Sales

Sales involves assisting in establishing sales goals and developing and promoting a marketing plan; increasing sales of heating, cooling, and plumbing products and services; making proper recommendations and applications of products sold; knowing prices of products and services; maintaining current market share; and assisting in developing marketing strategies.

Assist in establishing sale goals

1. Work with appropriate employees and/or the manager to establish monthly sales goals
2. Work with management to establish yearly sales and gross margin goals
3. Review sales call reports with department staff monthly

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4. Submit sales call recap to management monthly
5. Analyze sales annually

Assist in developing and promoting a marketing plan

1. Work with management to develop a marketing plan and submit it to management by the _____ of each year

Increase sales of heating, cooling, and plumbing products and services

1. Make sales calls on all potential customers in the trade area
2. Increase sales of service labor
3. Refer leads of other products to the appropriate departments

Make proper recommendations and applications of products sold

1. Know and use all resources necessary to make proper recommendations and applications of products sold
2. Correctly identify resources for assistance
3. Keep resource manuals accessible and current
4. Ensure no product problems result due to your recommendation or installation
5. Attend all product updates and service training sessions
6. Clear all major bids with your supervisor

Know prices of products and services

1. Be aware at all times of the cooperative's prices on commodities and services and review with your supervisor every _____

Maintain current market share

1. Lose no customers due to careless performance

Assist in developing competitive marketing strategies

1. Provide your supervisor with periodic reports of current competitors' strategies
2. Develop plans to counteract competition, with supervisor's approval

Service

Service involves resolving customer complaints; delivering, connecting, and maintaining equipment; responding to after-hour calls from customers; and maintaining product areas and pricing.

Resolve customer complaints

1. Promptly respond to customer complaints
2. Let no complaint remain unresolved for more than _____ days

Deliver, connect, and maintain equipment

1. Install all equipment within _____ weeks of sale or arrival
2. Ensure no customer has improperly installed or inefficiently maintained equipment

Respond to after-hour calls from customers

1. Respond to after-hour calls promptly
2. Ensure no customer is unsatisfied due to your job performance

Maintain product areas and pricing

1. Maintain a clean and orderly inventory and display area
2. Arrange seasonal displays
3. Price all merchandise

Inventory

Inventory involves maintaining product inventory, analyzing and projecting customers' seasonal needs, and assisting in evaluating product lines.

Maintain product inventory

1. Maintain an adequate inventory by reporting needs to your supervisor
2. Check all in-shipments for accuracy against the bill of lading and packing slips for proper quantity
3. Ensure all sales are properly recorded

Analyze and project customers' seasonal needs

1. Submit a projected customer seasonal needs report to the manager _____ times per year

Assist in evaluating product lines

1. Submit feedback received from customers on product lines periodically

Reporting

Reporting involves invoicing all product deliveries promptly and accurately and informing your supervisor of outstanding conditions.

Invoice all product deliveries promptly and accurately

1. Ensure all tickets presented to the office are correct
2. Present a copy of each transaction to the customer after each delivery
3. Turn all sales tickets into the office daily
4. Ensure all cash receipts are turned in daily and are accurate

Inform supervisor of outstanding conditions

1. Inform your supervisor of potential problems or potential new business opportunities directly or indirectly related to your department

Safety and Maintenance

Safety and maintenance involves maintaining the delivery vehicle, following regulations, operating the delivery vehicle safely, and communicating safety and operating procedures to customers.

Maintain the delivery vehicle

1. Wash vehicle as weather and operating conditions require to maintain a clean vehicle
2. Follow the regular vehicle maintenance schedule provided by your supervisor
3. Report any needed repairs or special maintenance to your supervisor immediately
4. Keep updated maintenance schedule on vehicle at all times

Follow regulations

1. Observe OSHA, state, and federal safety regulations
2. Follow all company and regulatory agency safety policies
3. Maintain a valid commercial driver's license

Operate delivery vehicle safely

1. Check lights and safety equipment daily
2. Obey all traffic laws, including:
 - driving within posted speed limits
 - stopping and looking for traffic at all stop signs
3. Drive defensively
4. Report any unsafe equipment or working conditions to your supervisor
5. Allow no riders who have not been approved by your supervisor

Communicate safety and operating procedures to customers

1. Inform all customers of safety and equipment operating procedures

Other Duties

The heating and air conditioning specialist will uphold cooperative policies, perform other duties as assigned by management, and will enforce and uphold the cooperative's credit policy.

Uphold cooperative policies

1. Uphold all cooperative policies

Perform other duties as assigned by management

1. Perform duties as requested by management

Enforce and uphold the cooperative's credit policy

1. Make credit terms known to all employees and customers
2. Do not charge to customers on COD
3. Do not extend credit to customers who have not been approved by the credit manager
4. Do not authorize customer charges that exceed set credit limits
5. Keep all personal accounts current