

## **Job Description – Service Account Manager**

This is a service-focused HVAC building automation maintenance agreement planner / scheduler / customer liaison. Ideally, this is an experienced building automation / HVAC controls field person with good technical ability and excellent customer focus. Position crosses over the line to customer relations and sales to some degree.

### **JOB SUMMARY:**

- Interface between customers and all levels of management to fulfill needs and expectations of Service Agreement Customers.
- Agreement planning and execution management for our service customers is primary responsibility, while also providing sales assistance, quotes, project management, control system design, and system upgrades for Service Agreement customers.
- Assist with developing and implementing Energy Conservation strategies or programs for Support Agreement Customers.
- Financial responsibility will increase with tenure in this position, including use of project management financial reports.
- This is an exempt position.

### **DUTIES AND RESPONSIBILITIES:**

#### **Service Agreement Planning and Execution**

- Regularly interface with customers to ensure their needs are being met and automation service work is providing recognizable value.
- Track and monitor accounts for Energy Management opportunities.
- Manage documentation and records for service agreement customers.
- Plan Preventative Maintenance execution.
- Review Preventative Maintenance visit documentation and discuss with Service Engineer as necessary.
- Service execution review meetings with customer.

#### **Financial Responsibility of Service Agreement Execution**

- Maintain financial stability of service agreements while meeting customer expectations.
- Review departmental financial reports for Service Agreements on a monthly basis.
- Meet with management to review financial status of Service Agreements.

#### **Desired Skills & Experience**

- Ability to plan and execute service strategies for high-profile building automation clients.
- Strong communications and customer relationship management skills are a must.
- Knowledge of HVAC DDC control theory & applications and mechanical systems.
- Strong time management and organizational skills.
- Ability to work independently and unsupervised.
- HVAC and/or mechanical systems experience is a plus.
- Account management and/or project management experience is a plus.
- Financial analysis and Excel skills are a plus.
- Familiar with Microsoft Office suite of products as well as SharePoint and Dynamics.
- Knowledge of Energy Star and additional energy management strategies is a plus.