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JOB DESCRIPTION:

FOLLOW UP COORDINATOR

Classification

Position Title: _____ Follow Up Coordinator: _____

Department: _____ Sales Department: _____ Pay: Hourly Plus Commission

Location: _____ Job ID: _____

Title of Supervisor: _____ Sales/Service Manager: _____

Incumbent's Signature

____ / ____ / ____
Date

Supervisor's Signature

____ / ____ / ____
Date

Owner/President's Signature

____ / ____ / ____
Date

Summary

The Follow Up Coordinator is responsible for all aspects of follow up sales coordination, including but not limited to scheduling sales calls, communicating with prospects, creating proposals, rehash lead generation, following up with prospects to assist in the close, and achieving the monthly sales goals. In all work activities the Follow Up Coordinator is responsible for projecting a professional image and maintaining the _____ reputation. The Follow Up Coordinator is a conduit of information between the company and customers and must maintain a positive, productive line of communication between all parties.

Responsibilities

- Meet or exceed monthly sales goals by using proper sales techniques, account management, and problem-solving
- Follow up on all open leads in a timely professional manner
- Dispatch and debrief comfort advisors and selling technicians.
- Coordinate with Marketing on all promotions and finance options.
- Maintain a thorough knowledge of _____ products and services
- Prepare proposals
- Use Service Titan and procedures to provide status, follow up, and sales reporting
- Coordinate with installation, sales and service department on sold estimates
- Promptly follow up with Customers to determine satisfaction and to acquire leads, referrals, testimonials, and the satisfaction survey.
- Lead and coach assigned co-workers. Provide sufficient knowledge, skills, training, and information to achieve peak performance, continuous improvement, and a positive, productive work environment consistent with company goals and objectives.
- Perform other duties as assigned.

Authority

- All expenses must be approved via the Expense Report and in accordance with the Expense Report Policy and Procedures
- All discounts & incentive amounts must be approved by Sales Manager

Requirements

- Minimum of one year of interactive customer experience, preferably in a sales environment.
- Good computer skills. Knowledge of Service Titan and the sales process.
- Customer service orientation.
- Excellent interpersonal skills.
- Superb phone skills
- Ability to manage customer records and files

Physical Demands

To adequately perform the duties of this job the employee is regularly and routinely required to sit; stand, walk, stoop, use hands to finger, handle controls; hear, and talk. The employee frequently is required to reach with hands and arms. Specific vision abilities required by this job include close vision and the ability to adjust focus.

Work Environment

The work environment noise level is usually moderate but will vary occasionally. The work environment will subject employees to continual interruptions and changing priorities. Effective, consistent, and constant communication with customers, vendors, co-workers, and others is required.