

Project Coordinator II

Position Summary:

This position reports to the Sales Manager and works with the Commercial Sales group providing assistance in the scheduling, reporting, and quality control functions of all Commercial project activities of varying size and complexity.

Key Duties and Responsibilities:

- Analyze project requirements while evaluating and recommending sound approaches or applications to meet the needs of projects and clients
- Coordinate project activities and request for changes from original specifications
- Acts as liaison between Commercial Manager, Commercial Sales group and clients
- Consistently maintains job files with appropriate supporting documents
- Maintains intimate knowledge of clients project schedule requirements and product preferences
- Consistently maintains job files with appropriate supporting documents
- Manages risk and establishes project recovery plans
- Estimate job accounts
- Reconcile job accounts
- Provide job account documentation to the credit department
- Update jobs on order sheets and send to customers
- Coordinate project close out with credit department
- Provide O&M's to customer
- Manages our customers bid lists
- Interacts with outside sales employees and engineers, technical engineers and technical assistants as well as credit department, and other departments, vendors and Carrier factory.
- Responsible for reviewing all aspects of the Order Entry Form (OEF) from creation until all orders are closed.
- Research parts, weights and dimensions for products.
- Reviews pricing and shipping information
- Coordinate deliveries and crane meets/lifts
- Set up new vendors in Sage
- Track, monitor and handle order revisions (returns and additions)
- Enter orders into the warranty Nest system
- Handle credit and rebill issues
- Handle proof of deliveries
- Assist customers and credit department with credit holds, CODs, and credit card payment information.
- Support outside sales employees and technical engineers as assigned by department supervisor

Critical Knowledge and Skills:

- Proficient in plan, drawing, and specification reading
- Strong interpersonal, organizational and communication skills with the ability to work with cross functional teams
- Good time management and follow-up skills
- Proficient in MS Project and the MS Office Suite
- Exceptional interpersonal and communications skills
- Excellent and accurate data entry skills
- Exceptional multitasking and organizational skills
- Resolve problems/issues
- Strong attention to details
- Work independently with minimal supervision in fast paced work environment
- Review part numbers and pricing
- Research using systems and software to obtain product guides and information, catalogs and manufacturing literature
- Respond effectively to daily issues, establish facts and draw valid conclusions, create and execute plans.
- Reliable, able to work hours dictated by the demands of position
- Required to learn HVAC Carrier Products and software (Sage, HVAC Partners, NEST system, vendor websites)

Education and Experience:

- AA/AS degree w/5+ years related experience in the HVAC industry or
- BA/BS degree w/2+ years related experience in the HVAC industry