



Job Title: Comfort Advisor

Summary

The Comfort Advisor is responsible for producing accurate estimates for projects by gathering information and understanding the client's needs. This role is required to effectively maintain client relationships through exceptional customer service and generate sales from new leads. The Comfort Advisor is responsible for maintaining personal and professional relationships with their clients, educating, and providing transparent information to meet their client's needs. As well, a Comfort Advisor works closely with the Installation Manager, providing detailed information to produce a seamless installation process for our customer.

Core Competencies

- Customer Focus
- Communication
- Time Management
- Adaptability / Flexibility
- Decision Making and Judgment
- Planning and Organizing

Job Duties

- Provide accurate and timely estimates to the customer (within 24 hours of a visit to their home).
- Develop an understanding of the scope and requirements associated with heat pump maintenance and installation to efficiently schedule estimates and determine the customer's needs and wants.
- Efficiently communicate with the customer to determine the type of estimate required.
- Enter data into the Field Service Management (FSM) system (Service Titan), including customer information, sales estimates, and other pertinent details.
- Problem-solve any concerns, obstacles, or customer complaints within a reasonable period.
- Review and advise any required annual maintenance with the customer.
- Actively follow up with new leads to generate sales.



- Liaise with the finance team to ensure the deposit is collected prior to any work being completed.
- Gather first-hand information from the customer, suppliers, and any other vendors to order equipment and parts in a timely manner.
- Perform regular check-ins with the Service Technicians to ensure the job is proceeding on schedule.
- Complete a walkthrough of the customer's home once the job is completed and secure the customer's signature.
- Follow up with the customer on any outstanding payments owed.
- Build and maintain relationships with key vendors.
- Provide consultation on planning where required.
- Perform other duties as assigned.

Requirements

- Minimum 1-3 years of experience in the HVAC or home repair industry.
- Proven experience working as an estimator or similar position.
- Familiarity with financial and project management principles.
- Experience with Service Titan software is considered an asset.
- Outstanding communication and negotiation abilities.
- Thoroughness and reliability.
- Excellent organizational skills.

Work Conditions

- Some travel may be required.
- May be required to remain stationary for extended periods of time.
- Working indoors in an office setting.
- Manual dexterity required to use a desktop computer.
- Will also have to do some lifting of supplies and materials at times.

Wage

- Commission based full-time position with possibilities to earn 125k+