

POWRMATIC

Sales & Customer Support *(Sales and Customer Support Advisor; Technical Sales Specialist Job Descriptions)*

Reports to: **Sales & Customer Support Manager**

Definition:

The Sales and Customer Support Advisor works closely with customers and delivers the best service possible, to maximise sales, stimulate customer retention and generate additional opportunities.

Overall Purpose of the Role:

To provide exceptional support to all customers, both internal and external.

Key Responsibilities:

The list of responsibilities below is not a definitive list and is subject to change as the business needs deem necessary. You may be required to undertake differing tasks within your capability.

General and Task Management

Achieve departmental KPIs and deliver excellent customer service.

Using the CRM system to manage daily, weekly, and other tasks and activities.

Pre-Sales Support

- Qualify leads with Marketing and Business Development Managers.
- Arrange meetings and CPD presentations for leads.
- Respond to requests for information in a way that promotes Powrmatic and its range of HVAC products.
- Provide product information & simple technical advice, written quotations, prices and lead times for our current portfolio of products and spare parts.
- Responsible for quote values up to set approval rate
- Manage outstanding quotes and opportunities in the CRM.
- Support Area Sales Managers as needed.

Sales Support

- Serve as the primary contact for assigned customers, fostering loyalty.
- Process sales orders and proforma invoices.
- Ensure successful deliveries by coordinating with relevant departments.
- Monitor high-risk orders and ensure timely dispatch and delivery.
- Provide necessary documentation and resolve delivery issues.
- Chase outstanding commissioning orders.
- Responsible for post-order correspondence with customers ensuring all aspects of a project are effectively communicated and documented.

CRM Case Ownership

- Respond to information requests within company targets.
- Resolve order and delivery issues empathetically.
- Assist with product returns and follow up on outstanding items.
- Raise NCRs to improve product and process quality.

For Technical Specialist Sales Role Only

Other responsibilities include:

- Serve as the primary point of contact for assigned projects, liaising with customers, consultants, and M&E contractors to build strong relationships and identify new and existing business opportunities.
- Qualify project leads and support the creation of detailed specification documents in collaboration with Business Development Managers to meet the project requirements.
- Prepare and deliver comprehensive project submittals, tailored quotations, and technical proposals that align with customer needs.
- Provide technical expertise to support Business Development Managers (BDMs) and Area Sales Managers (ASMs) during meetings, presentations, and CPD sessions.
- Respond promptly and professionally to customer and consultant inquiries, effectively promoting Powrmatic's full range of HVAC products.
- Submit detailed tenders, technical advice, submittals, quotations, pricing, and lead time information for Powrmatic's HVAC systems and spare parts portfolio.
- Maintain responsibility for assigned projects up to a pre-defined approval limit, ensuring commercial and technical accuracy.
- Track and manage project quotes and opportunities through the CRM system, ensuring data is up to date and actionable.
- Provide ongoing support to ASMs and the wider sales team as needed to drive project success.
- Process assigned project sales orders and proforma invoices in line with internal procedures.
- Coordinate with internal departments to ensure timely and complete deliveries, proactively managing high-risk orders and resolving any delivery issues.
- Monitor and manage outstanding commissioning requirements; arrange and schedule site visits with engineers as appropriate.
- Manage all post-order communications with customers, ensuring consistent documentation and clear project updates throughout the project delivery cycle.
- Collaborate with marketing, engineering, and product development teams to feedback market intelligence and contribute to product improvement.
- Support the strategic management of key accounts, ensuring continuity and growth across long-term relationships.
- Ensure all technical documentation and proposals comply with relevant industry regulations and company quality standards.
- Stay current with product developments, market trends, and competitor offerings through training and industry engagement.
- Understand and achieve agreed department performance metrics, revenue target, opportunity to project conversion rates, and customer retention.

Glossary of Terms:

Lead: *A lead refers to a potential sales prospect, person, or company that expressed interest in a product or service but hasn't yet become a customer. Leads are typically individuals or organizations that the sales team identifies as potential opportunities for business.*

Opportunity: *Once a lead is qualified as a potential customer, it can progress into an opportunity, which is the next stage of the sales process.*

Accounts and Contacts: *Accounts are companies that we are doing business with, and contacts are the people who work for them.*

Case Ownership: *This is the process of handling customer inquiries, requests and complaints.*

Person Spec

Competencies

Functional Role

- Demonstrates knowledge, skill, attitude, and commitment.
- Well-informed and authoritative.
- Keeps up to date with new developments.
- Advice and guidance sought by others.
- Exceeds quality standards.
- Technical bias and logical problem-solving.
- High commercial awareness, driven to maximize revenue.

Leading Oneself/Personal Accountability

- Takes ownership of deliverables and interactions.
- Learns from difficult situations, takes responsibility.

Continuous Improvement

- Continuously improves business, products, services, and processes.
- Offers innovative ideas and takes action.
- Promotes positive change and helps others see benefits.
- Uses resources efficiently and suggests cost improvements.

Customer Focus

- Understands and meets customer needs and expectations.
- Gains in-depth understanding of customers' goals.
- Balances customer needs with business goals.
- Seeks feedback and implements improvements.
- Professional and trusted by customers.

Safety

- Proactive approach to working safely.
- Prevents risk of injury, communicates safety issues.
- Reports near misses and ensures corrective actions.

Delivers Results

- Improves performance quality in line with company goals.
- Manages time effectively to exceed targets.
- Overcomes obstacles and anticipates problems.
- Reviews progress and takes corrective action.
- Reliable and delivers under pressure.
- Exceeds objectives despite difficulties.

Team Working and Interpersonal Skills

- Trusted and cooperative with colleagues.
- Shares knowledge and seeks relevant information.
- Establishes trust and credibility.
- Supports others in meeting business goals.
- Effective and persuasive, resolves situations.

Decision Making

- Analyses situations and makes timely decisions.
- Takes difficult decisions and accepts accountability.
- Gathers information and considers options.

Strategic Thinking

- Understands company values and goals.

Develops Self and Others

- Implements actions to improve performance.
- Offers constructive feedback to colleagues.

Communication

- Clear, trusted, logical, concise, and persuasive.
- Quick to understand and respond.
- Excellent written communication

Qualifications & Experience

Essential

- A good level of education is required
- Experience in a busy business environment.
- Customer service or sales experience.
- Proficient in Microsoft Excel and Outlook.

Desirable

- Experience in Construction or HVAC Industry.
- Familiarity with MRP and CRM systems.
- Experience with Microsoft SharePoint and Teams.

I accept the job description detailed above

Print Name: _____

Signature: _____

Date: _____