

Customer Coordinators/Energy Advisors serve as an independent resource for property owners, renters, contractors, and other key stakeholders interested in energy issues. Energy Advisors combine technical expertise, sales skills, and customer service skills to provide a streamlined customer experience and increase participation in relevant energy programs.

Through phone-based and/or field-based advising, Energy Advisors provide individualized and ongoing assistance to property owners with relevant programs, energy efficiency benefits, contractor selection, assessment report and bid review, financing options, upgrade project support, and customer service. The long-term follow-up helps ensure that interested property owners complete their energy upgrade.

Energy Advisors provide individualized and ongoing assistance to contractors with program recruitment, onboarding, program participation requirements, lead generation, sales, upgrade project support, identifying areas for contractor improvement, and providing resources to increase contractor success.

Energy Advisors help maximize the value of energy program marketing activities by referring customers to all relevant programs, participating in community marketing, education, and outreach events as an expert resource, encouraging every customer to pursue every energy upgrade that makes sense for them, tracking the status of every customer, and identifying opportunities for customers to make deeper energy savings over time. Detailed data tracking conducted by Energy Advisors also helps to identify the most effective marketing tactics and offers real-time insight into a wide variety of parameters that can be used to maximize program performance.

Provide individualized and ongoing assistance to property owners through phone-based and field-based advising:

- Customer Intake: Establish account, determine qualification and eligibility, conduct entry interview, and advise customer as appropriate.
- Conduct initial energy advising consultation with customers; Provide an overview of the program and collect any required documentation.
- Educate and counsel property owners with regard to residential energy efficiency (energy upgrades, behavioral changes), including the review of energy assessment reports with homeowners if available.
- Assist property owners in obtaining and reviewing estimates and contacting their selected contractor to schedule work.
- Review available rebates and incentives with property owners; Assist with finding and/or providing rebate forms; Assist with the completion of rebate forms, using electronic forms when possible.
- Provide property owners with information on relevant financing options and assist with applications for financing options when relevant and available.
- Provide property owners with information regarding historic preservation compliance, if applicable.

Provide individualized and ongoing assistance to contractors:

- Assist with program recruitment, onboarding, and requirements, lead generation, scheduling, sales, upgrade project support, identifying areas for contractor improvement, and providing resources to increase contractor success.

Conduct outreach to leads:

- Successfully connect with leads generated from a variety of program marketing, education, and outreach efforts and effectively track lead dispositions.
- Provide long-term follow-up with inactive leads to drive increased program participation.

As needed:

- Rebate processing and QA/QC support including desktop review of energy upgrade project submissions and scheduling of field QC visits.
- Participate in community marketing, education, and outreach events as an expert resource
- Other duties as assigned.

Track all activity in data management system accurately and completely to ensure data quality; Follow reporting requirements outlined by supervisor.

Deliver excellent customer service and provide consistent and timely follow up to all stakeholders.

Properly execute all Energy Advisor workflows.

Plan, coordinate, and follow through on tasks and assignments in a timely manner.

Exhibit CLEAResult Guiding Principles in all communication efforts, both written and verbal, with all internal and external customers, while following CLEAResult policies and procedures.

- Knowledge of building science concepts and applications.
- Building Performance Institute (BPI) Building Analyst or similar certification is preferred.
- Ability to explain technical information in an easy-to-understand way.
- Knowledge of rebates and incentives for different types of energy upgrades and ability to apply that knowledge appropriately.
- Ability to read, write, and speak the English language fluently.
- Proficiency in computing and expertise with or ability to quickly learn a variety of web-based software tools including email, file management, and data management applications.
- Ability to effectively utilize available resources to achieve goals.
- Ability to efficiently handle multiple tasks at one time.
- Ability to learn new information quickly.
- Schedule flexibility: Ability to work evenings and weekends if needed.
- Ability to provide exemplary customer service.

Bachelor's Degree or combination of training, education, and work experience in a related field.