**Energy Advisor**

**DUTIES & RESPONSIBILITIES:**

The Energy Assessment Advisor will be assigned to operate independently in the field conducting in-home energy assessments and selling home performance solutions. The advisor must be skilled in the fundamentals of building science, HVAC equipment, water heating solutions, windows & doors, local incentives and subsidies available in the market, the home performance sales and pricing process, as well as the complete in-house before and after assessment process.

The responsibilities of the Energy Advisor include, but are not limited to, the following:

* Conduct home energy assessments encompassing all aspects of building science, including test-in and test-out procedures using a blower door, manometer, IR camera, and other applicable tools. Making sure to collect the Free-Reduced Audit Application and Utility Bills if not already done so at the time the appointment was created. Make sure Free-Reduced Application is submitted as soon as possible to [HPwES-Audit@clearesult.com](mailto:HPwES-Audit@csgrp.com).
* Promote home energy improvements to homeowners during assessment. Get the customer involved!
* At the time of the audit and/or the revisit with the report, get a plan from the customer of how they plan on paying for the project. If they plan on financing and getting incentives through the program, collect the designated applications and financials needed for submittal. Submit required documents for financing/incentives (if applicable).
* Prepare and present home energy improvement reports to customers within 2-3 business days of the assessment date, preferably at the time of the audit using Snugg Pro and Invoice to Go.
* Understand and capably present financing options and all local/state/utility/federal incentive programs related to home performance solutions.
* Claim reservation number and submit audited package for the audit incentive.
* If sold or not, put project through the Project Portal-EST and either get the estimated financial breakdown to use to sell customer or for sold customers, get project approval, get summary report signed, and arrange payment/loan docs with Office Manager (if necessary). Once loan docs are overviewed by office manager and submitted back to the Financial Company, we can then schedule work to be done.
* Submit change orders as needed and get approvals.
* Scheduling test-outs the same day as the job completion is preferred. Home owners must be present at the time of the test-out to sign all necessary completion documentation. Submit test out information as soon as possible including customer information form, work scope, Post health & safety, and summary report.
* Work individually and as part of a team to ensure superior customer satisfaction and a positive working environment.
* Be an expert in all components of the home related to energy – air sealing, insulation, heating, cooling, windows, doors, lighting, water heating solutions, solar, appliances, and controls.
* Actively follow-up on all customer requests and co-worker’s requests at any time of day, evening, or weekend (under certain circumstances). Must address issues immediately and inform the manager (document it in the customers file).
* Participate in ongoing training and continue learning about home performance solutions.
* Significant driving required.
* Perform other duties as assigned.

**MINIMUM QUALIFICATIONS:**

* High school diploma required; some college or technical school education preferred
* In-home sales experience strongly preferred
* At least one year of experience in building trades (e.g. HVAC, windows, plumbing, electrical, etc.) is preferred
* BPI Building Analyst certification &/or HERS Rater certification is preferred
* Must pass drug tests and background checks
* Clean driver’s license

**KNOWLEDGE, SKILLS AND ABILITIES:**

* Good computer skills, including a demonstrated ability to use Microsoft Word, Excel, and Outlook
* Ability to lift 50 lbs. and carry equipment into the customer’s home.
* Ability to work Monday through Saturday as customer demand requires
* Ability to drive a company vehicle and meet driving requirements of insurance carrier
* Good math skills and ability to make a variety of geometry calculations
* Familiarity with the program implemented software. Training available for software.

**Analytical/Interpersonal Skills:** (below are examples)

* Excellent communication skills, both verbal and written
* Energetic and excited about launching a new product offering to the marketplace
* Passion for “green” technologies and selling energy improvements
* Desire to become an expert in home performance and energy efficiency solutions
* Well organized, hard worker, team player
* Strong analytical experience
* Strong attention to detail and follow-through skills in a fast-paced environment