# \*Insert Company Logo Here\*

# Technology Specialist (Sales Design)

**Location:** Local Operations office

**Reports to:** Owner, President or Operations Manager

**Direct Reports:** None

Position Overview

A Technology Specialist (TS) coordinates technical sales activities in association with his or her assigned Technology Advisor(s) (TA) or sales personnel. TS will serve as a liaison between sales and design and between sales and production upon creation of a structured project. This position will provide seamless communication by attending and participating in all local sales, production and scheduling meetings. Upon creation of a project the TS will be responsible for all CRM data and update information to accurately reflect the sales activity of the Technology Team.

Essential Duties and Responsibilities

* Attends sales calls/meetings with TA.
  + Develop accurate Scopes of Work.
  + Detailed intake capturing (thorough notes, pictures, marked up plans, etc.) to adequately document the expectation of the client/project.
* Design team coordination
  + Complete and submit intake form
  + Clearly organize and manage all documentation related to Design Service Agreements (DSAs) and closed projects
  + Submit requests for proposal and proposal revisions
  + Provide a clearly defined Scope of Work so that the design team can produce an accurate proposal.
  + Submit RFPs and RFIs in a timely manner to the design team
  + Update design team on due date changes as they happen
  + Bring in design team representative to client/project meetings as needed
  + Coordinate design review meeting as needed to review plans and proposal requests
  + Clearly define system changes so that design can produce accurate revisions
* CRM
  + Constantly updating CRM data including dollar totals, status, and relevant dates
  + Verification of data for sales projection, weighted and otherwise
  + Tracking of all bids submitted, revisions, closed contracts, etc.
* Production team coordination
  + Creation of Closed Project Documentation and Information
    - Site Address
    - Bill to Entity and Information (Email/Address/Phone)
    - Project Details Report
    - Scope of Work
    - Approved Proposal
    - Line Items detail / by System
    - Line Items detail / by Location
    - Detailed Cost Summary / by System
    - Project Hours / by Phase
  + Attend requested kick off meeting with production team.
  + Serve as the point of contact for production when questions arise regarding scope.
  + Will attend site meeting as needed if projects or clients get off track, will work with the production team to keep things on track.
* Goal setting
  + Provide weekly “Closed Project Goals” for sales meetings.
  + Create and adjust due dates and sales goals (yearly, monthly, and weekly).

Skills and Abilities Required

* A Minimum of 3 years’ experience with audio/video and residential electronic systems projects.
* Knowledge of the construction and design/build industry, including contract structures (time and materials, fixed fee, cost plus, etc.), trade coordination, and project management.
* Well organized, detail oriented, and self-motivated with initiative to meet deadlines and self manage.
* Strong written and verbal communication skills.
* College degree preferred.