

Account Coordinator

Job Description/Task Requirements



Department: Client Relations

Reports to: Senior Account Manager

Note: At Service West, we provide a team-family environment that promotes safety, personal growth, opportunities for advancement and achievement. Critical to our continued success is hiring team-family members that are an exceptional fit with our company culture. We have high standards for our management and employee teams and we strive to live our Cultural Pillars and Value Proposition on a daily basis.

Cultural Pillars

HEART => Humility / Execution / Accountability / Respect / Trust

Provide the Ultimate Customer Experience / Amaze and Delight our customers

Continuous improvement through employee empowerment and customer collaboration

Great results from well-planned and safe work

Team-based family environment with opportunity for ALL

Value Proposition

At Service West, we deliver great quality work and services by anticipating service requirements, proactive planning and problem-solving, communicating professionally, and delivering seamless project execution all while building winning and long lasting relationships with our customers.

Basic Function

The Account Coordinator manages the entire work order fulfillment process. This includes managing customer orders from order entry through punch list, providing support to Account Management, and delivering accurate and timely service to customers.

Specific Responsibilities and Duties include but are not limited to:

Customer Relations:

- Communicates order status, scheduling of orders for delivery/installation, and punch list resolution to customers.
- Provides accurate and timely response to customer questions on all aspects of Work Orders.

- Account Coordinator may require job sites visit and dealer/client visits.

Account Coordination:

- Initiates and oversees deliveries and small installations; provides order management on all work, including large projects.
- Analyzes order requirements, details scope of work, requests service pricing and schedules work with dispatcher for deliveries and small installations.
- Assists their Account Manager with job tasks as requested/required.
- Communicates with customer on the schedule of work, site requirements and project parameters for deliveries and small installations.
- Communicates with field staff regarding project details.

Work Order Management:

- Sends order information to appropriate internal and external personnel (Account Management staff, operations, customers, etc.).
- Resolves discrepancies with factory; sends acknowledgments to the customer; verifies ship date with the customer.
- Reviews receiving information from warehouse and matches to order; resolves discrepancies.
- Prepares Work Order packet and delivers to operations.
- Provides schedule information to dispatcher.
- Ensures all punch list work is done in a timely manner.
- Initiates T & M quotes.
- Preparation of billing for product delivered and work performed; verifies invoice amounts and balance.
- Manages customer sign-offs for all assigned work orders.
- Manages invoices for all product and service work for assigned Work Orders.

***Background check and drug screening required for employment**

****Service West is committed to the principle of equal employment opportunity for all employees and to providing employees with a work environment free of discrimination and harassment.***