

Title: **Project Coordinator**
Reports to: **Director of Project Coordinator**
Department:

Revision Date: **11/23/16**
FLSA Status: **Exempt** **Non-Exempt**
Work Status: **Full-time** **Part-time**

JOB SUMMARY

The Project Coordinator is responsible for meeting with homeowners after the insurance company has agreed to replace their roof and to put them under contract so that StormForce of Jacksonville can replace the roof. This also involves determine the terms of payment.

ESSENTIAL DUTIES & RESPONSIBILITIES

- Being proficient in using the CRM system – must check notes, print out roof drawings and count sheets, communicate with anyone involved with the account, flow through the “Next Steps” when uploading client information and documentation, enter notes, and anything else required.
- Before a Project Coordinator appointment – must know all the information about the account, special roof instructions. Then put together the proper StormForce forms and documents in a client folder.
- Prepare the Insurance Spreadsheet – input in Microsoft Excel.
- Have reliable transportation to get to and from appointments.
- Execute Project Coordinator appointments and lead the homeowner(s) through the process of roof replacement:
 - Dissect the settlement statement for the insurance company
 - Explain the roof replacement process- what to expect
 - Demonstrate roofing materials
 - Prepare and execute contracts
 - Answer questions from the homeowner
- After the appointment, upload documents into the CRM system and note crucial information on the message board-communicate all information to the key team members.
- Use a calendar to keep track of appointments.
- Know how to use a computer and create documents.
- Participate in staff meetings as necessary.
- Performs other related duties as required and assigned.

JOB REQUIREMENTS

Skills, Abilities & Competencies:

- Must be personable and outgoing while maintaining a positive and professional image to all customers.
- Strong oral and written communications
- Strong computer knowledge to include typing, Microsoft office.
- Must be able to read and understand basic insurance document.
- Must be able to fill out and complete basic contracts.
- Must be detail oriented including the ability to manage multiple projects at one time.
- Familiarity with residential required roof structures and roofing procedures is required.
- Must be computer literate and able to use scanners, mobile devices, cameras and internet, as well as design programs.
- Must have excellent attention to detail with high level of accuracy.
- Strong mathematical skills are required including estimations and calculations.
- Strong time management, ethical conduct, and problem solving skills are required.
- Ability to read maps and apply basic map reading skills.

Education & Experience:

- Minimum of a high school diploma, or equivalent is required
- Prior administrative experience
- Prefer prior outside sales experience including going door to door
- Two or more years of insurance document knowledge experience is preferred
- Specialized training in roofing is preferred

PHYSICAL DEMANDS

While performing the essential functions of this job, the employee is regularly required to stand, walk, sit, reach with hands and arms over their head, stoop, kneel, crouch, climb, talk and hear for extended periods of time. Employee must have excellent balance and be able to climb a ladder and walk around a roof. The employee must regularly lift and/or move up to 50 pounds and be able to work at heights. Specific vision abilities required by the job include close, distance, and peripheral vision, depth perception and the ability to adjust focus. Employee will be working in a variety of environmental conditions including extremes of temperature, humidity and precipitation. Employee must be able to walk continuously for up to 3 hours.