

## Job Description Summary

At CLEAResult, we lead the transition to a sustainable, equitable, and carbon-neutral energy-efficient future for our communities and our planet. We do that by creating a people-first culture built on trust, accountability, and transparency; where every employee – regardless of position, role, or identity is treated with respect and given an equal chance to thrive.

Additionally, you will enjoy:

- Medical, Dental, and Vision Insurance; we also offer a company-paid health care concierge service to help navigate our health plan to make the best decisions for you and yours
- 401(k) with company match
- Paid vacation, sick, personal and parental leave time
- Paid Volunteer Time: giving back to our communities is important to us
- Employee Recognition Program – convert your recognition points into gift cards
- Employee Assistance Program – offers benefits to help you manage daily responsibilities
- Access to on-demand training courses to advance further in your career

## Job Description

Through field-based advising, Energy Advisors provide individualized and ongoing assistance to property owners with relevant programs, energy efficiency benefits, assessment report, upgrade project support, and customer service. 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.

## RESPONSIBILITIES:

- Provide individualized and ongoing assistance to property owners through 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
  - Review available rebates and incentives with property owners; Assist with finding and/or providing rebate forms
- Track all activity in data management system accurately and completely to ensure data quality; Follow reporting requirements outlined by supervisor
- Conduct outreach to leads

- Successfully connect with leads generated from a variety of program marketing, education, and outreach efforts and effectively track lead dispositions
- As needed: Participate in community marketing, education, and outreach events as an expert resource
- 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

#### QUALIFICATIONS:

- Minimum education requirement: High School Diploma and work experience in related field. BPI certification a plus.
- Knowledge of building science concepts and applications
- 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
- Proficiency with mobile applications, specifically IOS and SalesForce.
- Strong listening, verbal, and written communication skills
- Consistently friendly, positive, and respectful communications, even under pressure
- Ability to develop and maintain positive interpersonal relationships
- Excellent organization, record-keeping, and time management skills

#### Additional Job Description

Reasonable accommodations may be made for individuals with disabilities to perform the essential functions of this position.

#### Equal Opportunity Employer

As an Equal Opportunity Employer, we are committed to ensuring equal employment opportunities for all job applicants and employees. Employment decisions are based upon job-related reasons regardless of an applicant's race, color, religion, national origin, marital status, age, sex, gender identity, sexual orientation, status as a qualified individual with a disability or protected veteran, or any other protected status.

The above job description and job requirements are not intended to be all inclusive. CLEAResult retains the right to make changes or adjustments to job descriptions and/or requirements at any time without notice.