

COMPANY: ThermFlo, Inc.
POSITION TITLE: Field Services Analyst
LABOR CATEGORY: Non-Exempt
REPORTS TO: Director of Field Services
APPROVED BY: Chief Operating Officer
DATE: 05/05/2021

JOB SUMMARY

The Field Services Analyst (FSA) is responsible for supporting the Director of Field Services (DFS) in maximizing the efficiency of ThermFlo's Field Service Operations. They will audit and analyze field operations processes, reporting, and performance metrics and develop and deploy initiatives that optimize service delivery, maximize efficiency and profitability, and increase the value of services provided with the goal of delivering legendary customer service. The FSA is also responsible for serving as the main point of contact for the Field Service Supervisors (FSSs) with the goal of maximizing their effectiveness by scheduling, coordinating, performing time approval, reviewing cases, and invoicing.

ESSENTIAL RESPONSIBILITIES

Field Service & Coordination Operations

- Acts as an executive assistant to the DFS by performing responsibilities that increase the DFS's productivity and effectiveness, including but not limited to scheduling meetings, note-taking, writing SOPs or process documentation based on dictation, and following up with field staff, as needed.
- Serves as the single point of contact for the Field Service Supervisors (FSSs) and executes on all office processes for work performed by the FSSs, including but not limited to the below:
 - Participates in prompt, professional, and courteous customer service related to field service coordination, dispatch, and delivery for FSSs.
 - Promptly schedules, dispatches, and closes cases for FSSs, prioritizing by importance and urgency. Equitably assigns and directs work to achieve optimized utilization of all available field resources. Assists the Service Coordination team with resource selection and escalated dispatch scenarios.
 - Conducts FSS paperwork reconciliation processes for time approvals and weekly payroll submissions.
- Collaborates with stakeholders to drive the on-time coordination, scheduling, communication, and completion of field service employee training. Manages departmental training records, including certification and training expirations. Assists with research for departmental training development, as needed.
- Collaborates with stakeholders to drive the on-time coordination, scheduling, communication, and completion of field service fleet, safety and compliance audits, requests, and training.
- Proactively administers the afterhours field on-call list and call center communication.
- Proactively works to prevent service completion delays through assisting in site compliance and communication of site access requirements.

Billing & Costing Operations

- Internal project management. Large project analysis. Participates in kickoff and status meetings for large projects to document project requirements, scopes, allowances, and expectations. Regularly collaborates with stakeholders to communicate, manage, and report forecasts, budgets, actuals, burn rates, change orders, billable charges, scope change approvals, project profitability, work progress and completion statuses. Prepares project close-out documentation, as needed.
- Audits and analyzes reporting to ensure all transactions, billing, costs, field time, journals, and other related critical information are accurately associated and reported within projects and cases. Identifies reporting discrepancies and inaccuracies and collaborates with stakeholders to perform invoicing, crediting, rebilling or to make other reporting adjustments, as needed. Supports stakeholders with costing and profitability-related reporting requests, as needed.
- Using analytics to monitor and expedite field work completion for their team, they drive the departmental attainment of quotas, goals, and objectives and take ownership of the prompt, accurate and complete fulfillment, and delivery of service documentation such as invoicing and case reports.
- Analyzes Fleet vehicle reports and manages requests to drive the proactive, prompt, cost- and time-effective completion of vehicle maintenance, repair and compliance requests for the field service teams.
- Analyzes purchase orders and vendor bills to perform rejections, approvals, and advice for cost assignments on behalf of the DFS, Field Service Managers (FSMs) and FSSs.
- Assists stakeholders with billing collection efforts by aggregating and providing information that promotes the likeliness of customer or vendor acceptance and payment of invoices due.

Process & Performance Improvements

- Participates in and defends all critical departmental processes that will ensure the integrity of field service records and reporting such as customer, costing, billing, profitability, history, asset, site, project, agreement, fulfillment or other related records or documentation.
- Regularly reports to the DFS, and collaborates with FSMs, FSSs and other stakeholders to discuss, investigate, and leverage opportunities to develop and effectively deploy changes, solutions or initiatives that improve the customer experience. Drives the teams towards goal or objective completion and assists with resolving process issues, problems and/or complaints.
- Creates and maintains effective departmental training materials on Company systems, safety and work processes, policies, and procedures.

SECONDARY RESPONSIBILITIES

- Comprehends and adheres to all safety, quality, and Company guidelines specified in the Employee Handbook, the safety policy manuals, quality procedures, or any official Company documents.
- Other duties, as assigned.

ESSENTIAL QUALIFICATIONS AND REQUIREMENTS

- **Education and/or Experience:** High school diploma or equivalent (GED) and 5+ years of related work experience in the commercial service industry performing the above responsibilities (dispatching/coordinating, assisting with project management, executive assistance), or an equivalent combination of education and experience.
- **Mathematical Skills:** Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, percentages, decimals, ratios, and ability to interpret graphs and charts.
- **Reasoning Ability:** Demonstrates the use of problem-solving using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems.
- **Communication Skills:** Excellent phone etiquette and verbal communication skills: Ability to listen effectively to understand the needs of internal and external customers. Ability to talk with customers, coworkers, and vendors, and appropriately adjust technical content to meet different audience knowledge. Ability to write effectively for electronic communication with customers, coworkers, and vendors.
- **Computer Skills:** Ability to operate NetSuite and Microsoft Suite (Word, Excel, Outlook). Minimum typing speed of 50 words per minute.
- **Supervisory Responsibilities:** This position has no supervisory responsibilities.
- **Physical Demands:** While performing the duties of this job, the employee is regularly required to sit, stand walk; and talk or hear. The employee must occasionally lift and/or move up to 10 pounds. Specific vision abilities required by this job include close vision and the ability to adjust focus.
- **Driving Responsibilities:** This position requires no travel during regular business hours.
- **Work Environment:** This job operates in a clerical, office setting. This role routinely uses standard office equipment such as computers, phones, photocopiers, and fax machines.
- **Position Type and Expected Hours of Work:** This is a full-time position, and typical work hours and days are Monday through Friday, 8:00 A.M. to 5:00 P.M. with one (1) hour unpaid lunch.
- **Other Qualifications:** Requires the ability to prioritize and multi-task for maximum efficiency without sacrificing accuracy. Must possess a passion for process and harnessing technology to drive success, and a willingness to move the boundaries of the position to grow along with ThermFlo.

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without prior notice.

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed above are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.