



## JOB DESCRIPTION

POSITION: Equipment Sales Engineer  
DEPARTMENT: Sales  
CLASSIFICATION: Exempt

### I. SUMMARY:

#### General Responsibilities:

The Equipment Sales Engineer is responsible for promoting, estimating, and bidding various projects related to HVAC equipment. This position focuses all sales related efforts on building relationships with mechanical engineers and contractors.

Reports to: Director of Sales  
Direct reports: None

#### Direction:

- Minimal supervision.

### II. MAJOR RESPONSIBILITIES:

- 1. 30% Promotes HVAC equipment sales to mechanical engineers and contractors.**
  - Assists mechanical engineers and contractors with problems involving the use of HVAC equipment and services and recommends suitable resolutions according to their needs.
  - Effectively communicates solutions utilizing product lines and development of presentations, webinars, and lunch and learns.
  - Prepares and delivers technical presentations explaining products and services to customers and prospective customers.
  - Arranges for demonstrations or trial installations of equipment.
  - Works closely with the Sales Account Executive to promote additional HVAC products, including grills, registers, diffusers, VAV boxes, etc.
  - Handles various calls and inquiries from engineers and contractors.
  - Attends trades shows or conventions to promote products.
- 2. 30% Prepares proposals and bids for HVAC equipment sales of company products and services.**
  - Reviews and downloads upcoming projects and keeps up-to-date plans, addendums and bid dates for projects.
  - Develops sales proposals, specifications, estimates, and presentations.
  - Performs layouts with engineers and contractors as directed.
  - Prepares quotes for new products or services.
  - Negotiates prices or terms of sales or service agreements.



- Follows up with engineers and contractors on bids.
  - Prepares formal submittals containing schematics, descriptions and technical information for use and approval by owner's representative.
  - Places and tracks orders and coordinates orders with engineers and contractors.
  - Prices change orders as necessary.
  - Files and follows up on freight/warranty claims.
3. 20% **Builds and maintains customer, prospect and other relationships**
- Meets regularly with mechanical engineers and contractors to build relationships and prospect for new business leads.
  - Identifies and maintains prospect list.
  - Participates in various civic and professional organizations to network and build relationships.
  - Directs customer relationship management programs.
  - Solicits feedback from key customers regarding service delivery.
  - Routinely visits project sites.
  - Responds to customer inquiries and resolves difficult and sensitive issues.
  - Maintains customer records, using designated computer and electronic systems and media.
4. 20% **Works in conjunction with sales team to coordinate sales and business development activities.**
- Participates in sales team meetings.
  - Shares opportunities and information with relevant team members.
  - Collaborates with sales team to understand and promote other company products and services.
  - Recommends process improvements as identified.

### III. QUALIFICATION:

#### Education

- Bachelor's degree in Engineering, Engineering Technology or related field.

#### Skills and Experience

- Minimum five years of experience in engineering systems or related field.
- Minimum two years in technical product sales.
- Strong knowledge of engineering fundamentals and HVAC concepts and operations.
- Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals.
- Excellent oral and written communication skills.
- Mathematical abilities to add, subtract, multiply and divide all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and create and interpret graphs.
- Ability to build rapport and strengthen relationships with new and existing customers.
- Strong problem solving ability.



- Ability to evaluate urgency of situation and prioritize tasks.
- Organized with an attention to detail.

#### Certificates, Licenses, Registrations

- Valid driver license

#### Other Requirements

- Requires occasional evening or weekend work
- Requires travel to and from job sites, some may be out of town
- Requires occasional overnight stays

#### Training and development:

- Studies literature and attends seminars to keep current in products, processes and materials. Must be familiar with competitors product lines and how our products met or exceed specification

#### Physical Requirements

Requires standing, walking, bending, squatting or twisting on a regular basis. May require the ability to climb, balance, stoop, kneel, crouch, crawl or reach with hands and arms occasionally. Requires the ability to carry, lift, move or push up to 20 pounds on a regular basis and may be required to carry, lift, move or push 100 or more pounds on an occasional basis. Must be able to talk and listen to others. Frequently uses hands or fingers to handle or feel. Frequent use of manual dexterity and visualization of a computer screen through the day. Requires ability to see up close and distant, distinguish colors, peripheral vision, depth perception and the ability to adjust focus.

#### Work Environment

This position regularly works in an office setting and also frequently visits company sites in all types of indoor and outdoor conditions including near moving mechanical parts, in high, precarious places, extreme heat, cold and humidity. Occasional exposure to toxic or caustic fumes or chemicals. Regular noise levels range from minimal to moderate, but may be very loud when visiting job sites.

Most of the job duties require the employee to be working with computers and electronic media on a regular basis.

To perform this job successfully, an individual must be able to complete all areas outlined for this position in a satisfactory manner. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The above statements are intended to describe the general nature and level of work being performed by most people assigned to this job. They are not intended to be an exhaustive list of all responsibilities, duties, and requirements.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_