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Optimum Energy is the energy optimization expert. We use integrated software and cloud computing to optimize HVAC systems to deliver sustained energy reductions year after year.

Based in Seattle, Optimum Energy partners with commercial building equipment and service providers to offer the best overall value and return on efficiency investments to the market. More information can be found at [www.optimumenergyco.com](http://www.optimumenergyco.com).

<b>Title:</b>	Contract and Proposal Specialist
<b>Department:</b>	Sales
<b>Reports to:</b>	Director, Sales Operations
<b>Location:</b>	Seattle, WA
<b>Job Type:</b>	Salary
<b>Job Time</b>	Full Time
<b>Experience Level:</b>	Mid-Career/Senior
<b>Required Education:</b>	Bachelor's or Equivalent Experience

#### **Job Description:**

The Optimum Energy Contracts and Proposal Specialist is a critical member of the Sales Operations team. Reporting to the Director of Sales Operations, this role develops, authors, reviews, and approves customer and partner proposals, contracts, and information responses for all sales activity at Optimum Energy. This position also manages subscription renewal business activity in Sales Operations and the information and documentation libraries for sales and delivery teams and supports.

The Contracts and Proposal Specialist balances mission-critical initiatives for the company: 1) owns all customer and partner sales responses including high-quality proposal generation, customer and partner contracts, RFP/RFI responses, all customer and partner onboarding requirements and 2) owns the content of all customer facing template and documentation libraries including proposal and contract templates, RFP/RFI and onboarding information, user guides, technical references, product information and 3) owns ongoing subscription renewal sales support to ensure timely renewals. A qualified candidate will be strong in the required skills, self-managed, and able to embrace executing the hands-on day to day tasks needed for these critical functions.

#### **Responsibilities:**

##### **Contract Administration Responsibilities**

- Collaborate with global Optimum Energy/partner/customer legal teams, lawyers, paralegals, sales teams, and office staff, to prepare, research, review, and approve all customer and partner contractual agreements.
- Prepare, research, and review customer and partner/reseller contractual agreements with full knowledge of Optimum Energy and customer/partner ability to fulfill the contract requirements.
- Maintain Optimum Energy's partner/reseller agreement template library to ensure document language remains aligned to current business requirements.
- Review/approve customer purchase orders and other related order documentation, ensuring compliance with all agreed upon terms and conditions.
- Proofread, edit, and fact-check all legal documents for accuracy and consistency.
- Ensure that the terms of contractual agreements are written in language that is legally binding and in accordance with the interests and requirements of Optimum Energy and the requirements of the customer/partner.

- Own and maintain a library of contract terms and conditions templates. Work with the Engineering and Finance teams to ensure templates always reflect the current abilities and interests of Optimum Energy.
- Review contract terms and conditions to verify that they're in compliance with company policies and all applicable international, federal, and state regulations.
- Clearly explain contract terminology to customers, partners, and Optimum Energy teams in simple, everyday language.
- Own and manage Optimum Energy Data Privacy policy and contract language and ensure customer and vendor contracts adhere to requirements.
- Manage Non-Disclosure Agreement process and maintain library of executed NDAs and NDA templates.
- Manage the Certificate of Insurance (COI) library. Ensure annual COI are received, distributed, and canceled as needed.
- Onboard Optimum Energy to new Customer and Partner Sites by entering all company information to complete onboarding for new customers and partners. Build/manage a library of onboarding information resources.
- Own and manage the RFP process. Work with Account Executives to collect all required information and prepare final document or upload requirements to customer web sites. Build and maintain an RFP information library to constantly improve RFP response times.

#### **Proposal and Sales Operations Support Responsibilities**

- As the owner of the Optimum Energy Proposal Desk function, use the latest proposal templates and content modules to consistently deliver top-quality, error-free documents that follow proposal writing standards for readability, consistency, and tone, while remaining vigilant to business rules.
- Determine proposal type/classification by identifying and clarifying unique points of the opportunities presented and the related needs of those opportunities.
- Work with field-based Account Executives to ensure document requests are fulfilled accurately, efficiently, timely, and within pre-defined SLAs.
- Own proposal templates along with associated content and proposal support databases. Work effectively with internal Optimum Energy teams to maintain up-to-date and accurate content across the organization.
- Own and drive renewal business activity. Manage renewal pipeline tracking. Ensure corporate CRM accurately reflects the renewal business and balances with the Finance forecast. Coordinate with Sales and Support teams to ensure renewals are purchased on time
- Manage the customer facing product and technical documentation, including product user guides, technical reference documents, and marketing data sheet. Coordinate with marketing, engineering, and delivery teams to ensure documentation remains current and accurate.
- Assist with select marketing projects and provide text/language updates for website content, case studies, and other writing projects.

#### **Required Qualifications:**

- 3+ years' experience in proposal writing and editing, preferably within a technical viewpoint.
- 3+ years of legal or paralegal experience, preferably working directly with contract law.
- Knowledge of current and legally-binding contractual language and terminology.
- Excellent writing, copy editing, and oral communications skills required.
- Excellent MS Office user expertise, including Excel, and the ability to manage technical document layouts.
- Experience using Salesforce.com and other sales support tools.
- Superior ability to maintain document versioning, documentation control and the review process.
- Must be a self-starter, possess a desire to drive initiatives and work independently.



- Demonstrates a creative skill for providing recommendations on streamlining and automating business processes and tasks.
- Excellent organizational skills, extremely detail-oriented, and the ability to multitask on several projects simultaneously.
- Internal customer service focus with an emphasis on sales.
- Passionate about technology, able to quickly learn industry fundamentals and comprehend technical solutions.
- Excellent interpersonal and communication skills, including a mastery of the English language.
- Able to maintain calm goal focused attitude, even when others are not.

**Desired Qualifications**

- Previous experience with an engineering organization preferred.
- Experience working in small, startup environments.
- Software licensing experience preferred.

Salary and benefits will be competitive and dependent upon experience and qualifications. Optimum Energy is an Equal Opportunity Employer encouraging diversity in the workplace.

