



WISCONSIN ENERGY CONSERVATION CORPORATION

Job Description

Title: Trade Ally Services Representative
Department: Midwest Energy Programs
Status: Exempt

I. POSITION MISSION:

Under **general supervision**, the Trade Ally Services Representative recruits, trains, and provides ongoing assistance to trade allies (also referred to as market providers) to gain their support in increasing awareness and adoption of energy efficient technologies in conjunction with utility sponsored energy efficiency programs at the Wisconsin Energy Conservation Corporation (WECC). In addition, the Trade Ally Services Representative is responsible for coordinating program activities, assisting in the managing of relations with utility sponsors and assisting in ensuring contract goals are achieved on time and within budget. The work is done out of the Trade Ally Services Representative's home office but on occasion may require working out of the Charlotte, NC office. Trade allies may include retailers, HVAC contractors, plumbing contractors, electrical contractors, food service equipment dealers, and related trade associations within a designated territory.

II. PRIMARY & ESSENTIAL RESPONSIBILITIES

Percent Time:

1. **Recruit, train, and provide ongoing support to trade allies.** 70%
 - a. Recruitment and enlistment of new trade allies for their participation in the programs.
 - b. Provide onsite training for market provider executives, managers, sales representatives, estimators, project managers, engineers, etc. on program goals, terms, conditions, materials, forms, documentation and the energy saving benefits of targeted products and strategies for integrating energy efficiency into their sales process. Trainings may include one-on-one, group training sessions or formal presentations.
 - c. Make telephone calls and site visits to market providers to present and deliver promotional materials (e.g. rebated forms, signage, brochures), label targeted products on showroom floors, present information on the benefits of promoting energy efficient products in cooperation with utility rebate programs
 - d. Maintain and grow existing trade allies' participation in the programs.
 - e. Maintain business relationships with existing trade allies and communicate program information (e.g. changes, special promotions, cooperative promotion opportunities) to them on an ongoing basis.
 - f. Collect sales data and other data as requested from participating market providers as needed.
 - g. Log all trade ally contacts in a database provided by WECC.
 - h. Meet or exceed defined goals and objectives established for the individual Trade Ally Services Representative, the Midwest Utility Programs and the Midwest Program Trade Ally Services Group.

- | | |
|---|------------|
| <p>2. Conduct field verification inspections.</p> <p>a. Contact end use residential and business customers to schedule and then conduct inspections of equipment purchased in conjunction with incentive program to verify that it was in fact installed and meets program energy efficiency standards.</p> | <p>20%</p> |
| <p>3. Assist by Providing Input into Program Design and Continuous Program Improvement</p> <p>a. When appropriate, provide input in developing initial program design and providing input on program improvements through the consultation with WECC staff, utility sponsors, and market providers on an ongoing basis.</p> <p>b. Assist in the organization of advisory groups of market providers to advise program design as needed.</p> | <p>5%</p> |
| <p>4. Assist in Program Implementation</p> <p>a. Assist in the development of detailed project implementation and marketing plans in consultation with WECC staff, utility sponsors, and program staff.</p> <p>b. Assist in the communication of implementation plans to program staff.</p> <p>c. Assist in the tracking of progress toward program goals and assist in the adjustment of implementation plans as necessary to achieve them.</p> <p>d. Assist in ensuring the promotional materials are developed, prepared, distributed and delivered.</p> | <p>3%</p> |
| <p>5. Assist in Serving as additional Contact for Utility Sponsors</p> <p>a. Assist in maintaining the working relationships with utility sponsors.</p> <p>b. Assist in the coordination of the day to day communications with sponsors.</p> <p>c. Assist in managing client expectations with regard to program delivery timelines, progress and outcome.</p> <p>d. Assist in the solicitation of client input with respect to their needs, concerns, questions and ideas and coordinate program planning with them.</p> <p>e. Assist in the collaboration with WECC staff to identify proactive strategies for addressing client needs through existing or modified program service.</p> <p>f. Assist in the completion monthly written progress reports for sponsors and supervisor.</p> <p>g. Assist by participation in meetings and conference calls with sponsors when necessary to assist in coordination activities and deliver progress reports.</p> | <p>2%</p> |

III. SECONDARY AND INESSENTIAL RESPONSIBILITIES

- | | |
|---|------------------------------------|
| <p>1. Track time spent representing different utility programs.</p> | <p>Frequency: Daily</p> |
| <p>2. Track travel expenses.</p> | <p>Daily</p> |
| <p>3. Assist the Trade Ally Services Manager in organizing an advisory group of market providers to provide feedback on program design.</p> | <p>Semi-Annually</p> |
| <p>4. Document visits with Market Providers by completing site visit reports using</p> | <p>Weekly</p> |

- provided software.
- | | | |
|----|--|--------------------|
| 5. | Assist in the collection of sales/market data from Market Providers to support program evaluation. | Quarterly |
| 6. | Participate in industry conferences, organization and associations. | Monthly, As Needed |

IV. SUPERVISORY RESPONSIBILITIES

None at this time.

V. REQUIRED QUALIFICATIONS

The individual must possess these skills and abilities, or explain and demonstrate that s/he can perform the essential functions, with or without reasonable accommodation, using some combination of skills and abilities.

| | |
|-------------------------------|--|
| Education | High school diploma or equivalent. College degree preferred. |
| Required Skills & Experience | <ol style="list-style-type: none"> 1. 2 years sales/account management/training experience. 2. 2 years experience in project management. 3. Ability to work and make decisions independently. 4. Strong, fluent verbal and written communication skills. 5. Efficient time management and organizational skills. 6. Effective public speaking and presentation skills. |
| Desirable Skills & Experience | <ol style="list-style-type: none"> 1. Previous experience within the HVAC, lighting, compressed air, electric motor and drive, or refrigeration industries. 2. Previous utility or energy efficiency experience. 3. Proficiency using Microsoft Outlook, Word, and Excel software. 4. Analytical skills, specifically regarding research data. |
| Personal Suitability | <ol style="list-style-type: none"> 1. Ambitious and Persuasive personality 2. Diplomatic people skills 3. Persistent 4. Independent 5. Organized |
| Occupational Certification | Valid Driver's License |

VI. FISCAL RESPONSIBILITY

No budget responsibility or signature authority. Trade Ally Services Representative will track personal expenses.

VII. EXTENT OF PUBLIC CONTACT

Trade Ally Services Representative will interact on a daily basis with trade allies and their associates, both in person and via telephone, with market providers, utilities, and WECC staff. May involve delivering presentations, training, reporting, coordinating events and responding to general inquiries.

VIII. PHYSICAL DEMANDS

Lifting is considered (up to 25 lbs) essential. Bending, squatting, kneeling, handling objects, reaching above shoulder level, and using fine finger movements to set up promotional displays and other materials; standing for periods of 2 to 7 hours during events; and sitting for up to 2-4 hours while traveling by car throughout one's territory are all essential. Occasional crawl space or confined space work required while doing verifications.

IX. WORKING CONDITIONS AND ENVIRONMENT

Equipment Used: Computer, fax machine, telephone, copier (provided)
Travel Status: Frequent (daily within territory, with occasional overnights)
Car Required: Yes – expenses reimbursed or assigned Company Car with Corporate Gas Card
Normal Work Hours: Generally Monday through Friday, 8:00 AM- 5:00 PM; some weekends and evenings may be required infrequently to attend conferences, promotional events, and market provider trainings.
Other: Proof of valid driver's license

Excessive noise? No
Working around moving machinery? No
Marked changes in temperature/ humidity? No
Exposed to dust, fumes, gases, radiation, microwave? No
Drives motorized equipment? No
Works in confined quarters? No

Reports To: Trade Ally Services Manager

Date Written: May 1, 2009.

Certification: I certify that this is a fair and accurate statement of the requirements of this position.

Date Signature, Trade Ally Services Representative Print Name