

SERVICE OPERATIONS COORDINATOR

Dispatcher/Customer Accounts Manager

POSITION OVERVIEW

The Service Operations Coordinator is responsible for managing the daily workflow of our company. This position serves as the primary connection between our technicians, customers, office staff, and management to ensure every job moves efficiently from scheduling through invoicing and follow up.

AREAS OF OWNERSHIP

Daily Service Operations

- Manage the daily technician schedule and dispatch service calls.
- Monitor and adjust schedules throughout the day as priorities change.
- Coordinate communication between technicians, customers, office staff, and management.
- Assist with booking incoming service calls and provide backup support for Customer Service.

Customer & Work Order Management

- Manage each work order from dispatch through final invoicing ensuring completeness to company standards.
- Review completed work orders for accuracy and completeness obtaining missing information when needed.
- Process customer invoices and follow up on open estimates and unsold work.
- Track incomplete jobs, return visits, permits, inspections, ordered parts, and outstanding items.

Customer Records & Administrative Support

- Maintain accurate customer records and service history.
- Process and renew Maintenance Plans backflow reporting, company forms and required paperwork.
- Coordinate parts ordering and scheduling for work outstanding.
- Handle customer concerns, questions and complaints escalating to management when necessary.
- Work with accounting department on collections and past dues.

Software & Systems

- Utilize ComputerEase as the primary business software.
- Work within Profit Rhino, Jotform, Microsoft Office, Outlook, and other company software platforms.
- Learn company procedures, pricing structure, memberships, and customer history.
- Generate reports and maintain accurate operational data.

Team Coordination

- Support technicians throughout the day with scheduling, customer information, and job updates.
- Work closely with Customer Service, Permitting, Accounting, Warehouse, and Management.

PERSONAL QUALITIES FOR SUCCESS IN THIS ROLE

This position is the operational hub of our company. Every service call, technician, customer, work order, invoice, estimate, and follow-up passes through this role at some point. Success is measured by keeping information flowing, maintaining accuracy, preventing work from falling through the cracks, and helping the entire team operate efficiently.

- Highly organized with exceptional attention to detail
- Thrives in a fast-paced environment where priorities change throughout the day
- Naturally enjoys creating systems, checklists, and staying organized
- Strong computer skills with the ability to learn new software quickly
- Excellent spelling, grammar, and written communication
- Professional, friendly, and confident when communicating with customers and coworkers
- Comfortable asking questions and solving problems independently
- Takes initiative and follows tasks through to completion
- Holds coworkers accountable while maintaining positive working relationships
- Works well as part of a team and willingly supports others
- Able to balance multiple priorities without losing track of important details