

Office HVAC Coordinator

Part-Time | On-Site | Fresno, CA

Hours increase during peak seasons



POSITION OVERVIEW

The Office HVAC Coordinator supports Nalk's daily operations by managing administrative coordination, permitting and compliance activities, customer membership programs, CRM data integrity, inventory and parts tracking, lead follow-up processes, and marketing support functions.

This role works closely with technicians, sales staff, vendors, inspectors, and leadership to ensure accurate documentation, timely communication, and consistent execution of operational processes. The Office HVAC Coordinator contributes directly to operational efficiency, regulatory compliance, and customer service standards, with increased responsibility during peak seasonal demand.

This is a part-time, on-site position with variable hours that increase during high-volume periods.

JOB RESPONSIBILITIES

Key Area: Core Office Operations and Compliance

- Maintain organized company files, shared drives, and documentation systems, and support professional communication between customers, technicians, sales staff, inspectors, vendors, and leadership.
- Manage permitting processes by preparing and submitting HVAC permits with local jurisdictions, scheduling inspections, coordinating with installers and customers, tracking permit status, and ensuring permits are properly completed and closed.
- Manage rebate and compliance requirements by preparing, submitting, and tracking utility, manufacturer, and state rebate applications, collecting required documentation, completing Title 24 CF1R, CF2R, and CF3R forms, coordinating with HERS raters as required, and maintaining accurate compliance records.
- Provide administrative support as needed and assist with the development and improvement of internal processes and standard operating procedures.

Key Area: Customer Programs and CRM Management

ESA Membership Program

- Schedule ESA member heating and cooling maintenance visits; contact customers regarding scheduled services; document communication attempts in CRM notes; and upload service invoices to customer records following completed visits.
- Maintain accurate ESA tracking records, including customer system details, replaced components and parts, replacement dates, updated model and serial numbers, and required CRM tag transfers.

CRM and Lead Follow-Up

- Maintain CRM accuracy by managing pipeline stages, tags, notes, statuses, and next-step activities for all leads and estimates.
- Execute quote follow-up activities at defined intervals of 1 day, 3 days, and 7 days using approved email, text, and call procedures.
- Identify and flag inactive or unquoted leads for review by management.

Customer Experience and Reviews

- Send review requests following service and installation appointments, monitor customer feedback, and escalate service concerns to management when appropriate.

Key Area: Inventory, Estimates, and Financial Processing

- Coordinate inventory and parts management by tracking equipment and materials, managing special-order items, placing and documenting vendor orders, recording PO numbers and tracking details, notifying technicians of parts availability, reconciling inventory usage after jobs, and processing parts warranties when applicable.
- Process estimates by downloading files from OneDrive, proofreading for accuracy, converting documents to PDF format, uploading estimates into Housecall Pro, notifying customers of estimate delivery, converting approved estimates into jobs, and verifying invoice accuracy prior to scheduling.
- Enter and process check payments in Housecall Pro, record payments accurately in the ledger, verify totals, and apply payments to multiple invoices when required to maintain accurate financial records.

Supporting Area: Marketing and Reporting

- Help maintain digital and printed marketing materials, ensure technicians and sales staff are supplied with current brochures, flyers, and rebate information, and coordinate with marketing partners regarding promotions and seasonal messaging updates.
- Prepare monthly operational summaries for leadership, including quote close rates, follow-up completion metrics, rebate submissions and totals, customer review activity, lead source performance, and ESA membership trends.

Qualifications

Required

- Strong organizational and time management skills
- High level of attention to detail and accuracy
- Professional written and verbal communication skills
- Ability to work effectively with CRMs, spreadsheets, shared drives, and digital documentation systems
- Ability to manage multiple priorities and deadlines
- Demonstrated reliability and problem-solving ability

Preferred

- Office experience in HVAC, construction, or a related skilled trade environment
- Experience with permitting, rebate processing, or Title 24 compliance, or willingness to learn
- Familiarity with CRM pipeline management and follow-up systems, Housecall Pro experience preferred
- Experience with inventory tracking, parts ordering, or dispatch support
- Experience supporting operational or administrative functions in a fast-paced environment