

## **Project Co-ordinator**

### **Office Based**

#### **Purpose of post**

- To provide support to the Survey Manager and Directors and survey staff
- To control smooth running of the companies' projects
- To build rapport with clients and develop new clients
- To identify new processes and utilise software systems

#### **Main duties and Responsibilities:**

- Ensure all documents/correspondence is uploaded to WFM and JDrive
- Ensure hours/type/staff are correctly allocated in WFM and PlanRight
- Ensure that we have a record of all correspondence with clients
- Liaise with clients from start to end of project
- Answer questions and queries in a timely manner / delegate to staff members
- Build and maintain a professional relationship with clients, understanding their requirements
- Work with senior surveyor to programme in jobs correctly and efficiently
- To arrange access for surveyors and arrange site meetings if needed
- Manage the jobs accepted spreadsheet
- Add quotes to the systems
- Send out quotes to clients
- Send drawings to clients and being the port of call when they have queries
- Collect the relevant information for the accounts team for invoicing following completion of the job
- Updating the CRM system to ensure the reports are accurate for month end reports
- To be able to create and manage reports to distribute to the team
- Source subcontractors and liaise with them with upcoming projects
- Collate and circulate client feedback
- Check monthly that the surveyors LSS Dongles are all in the appropriate places
- Organise subcontractors' access
- Assist the Director in obtaining tender information and meeting the deadlines
- To create dropbox links and Wetransfer links for clients' drawings
- Liaise with Thorne Widgery our support for the CRM System Workflow Max and Planright
- Update the notes for the jobs prior to the surveyor attending site with clients updated requirements
- Assist the Utility Surveyor Manager with collating of Stat Map records
- Manage deadlines and update the CRM system notes when a deadline has been set
- Update the company drive when jobs have been accepted, finished and declined
- Obtain permissions for sending client drawings on request
- To be able to assist the Director in writing reports for clients projects

#### **Cover and Basic Knowledge**

- Have a basic knowledge of XERO e.g. Able to send invoice and search for basic data – training will be given
- To run WFM reports when needed (Mileage/Profit & Loss) - training will be given
- Book hotels when needed
- To support director for booking MEIs when needed
- Favourable if they have worked in a surveying industry

Training will be given in all aspects of this role

**Package and Benefits:**

- £00,000
- 20 days holiday + 8 days bank holiday
- On site parking
- one rest day per year