



**President (Sandy)**

1. LMA
2. Business Plan
3. Culture/RPRS
4. Remove Obstacles / Barriers
5. Strategic Positioning
6. Big Relationships
7. Special Project Management

**Director of Sales & Marketing (Sandy)**

1. LMA – Sales & Marketing Team
2. RPRS Management
3. Generate Leads (NBD)
4. Account Management
5. Marketing Plan & Manage Campaigns
6. Sales Process Management
7. Teach CEU Classes
8. Determine Pricing

**Director of Field Operations (Jim)**

1. LMA—RPRS
2. RPRS
3. Training
4. Sales Reporting
5. New Product Development
6. Customer Relations

**Director of Finance (Rick)**

1. LMA – RPRS
2. Administration & Asset Management
3. AR/AP / 8% Profitability
4. IT Management
5. Human Resources
6. Budgeting / Reporting
7. Creatives Coordinator
8. Coordinate Continuing Education

**Sales Manager (Dave)**

1. LMA – Sales Team
2. Track, Monitor & Report Results
3. RPRS
4. Plan, Run & Report Sales Meetings
5. Assist Sales Reps for Close
6. Communicate Closed Sales with Installation Manager

**Installation Manager (Mike J)**

1. LMA – Install Team
2. Customer Relations
3. Permitting Management
4. Oversee Installations / Subs / Schedule
5. Electrical Planning & Bidding
6. The Symbiont Way duties
7. Communicate Install Progress on PMB

**Service Manager (Bradley)**

1. LMA – Service Team
2. Training
3. Dispatch
4. Tech Support (ESC/Canvas'FieldEdge)
5. Customer Relations
6. Planned Maintenance Management

**Manager of Procurement / Warehouse (Bruce)**

1. LMA – Warehouse
2. Purchasing/Pricing/Post Payables
3. Inventory/Project Materials
4. Warranty Returns
5. Manage Work Orders, PMB & Symbiont Board
6. Floor Plan Management

**Office Administrator (Blake)**

1. LMA - Office Staff
2. Flow of Office Scheduling & Time Off
3. HR Administration
4. AR & PM Administration
5. Fleet Administration
6. FieldEdge Administration
7. Special Projects Coordinator

**Sales Support Associate (Tammy)**

**Sales Support Assistant (Liz)**

**Administrative Service Estimator (Elsa)**

**Pool Heating Consultants (Mike K, Patrick, Steve, Terry)**

**HVAC Energy Sales Manager (Mike K)**

**AC Sales Associate (Bradley)  
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**New Bus. Develop. (Liz, Patrick, Steve)**

**Permit/Install Support Associate (Brooke)**

**Lead Install Techs (Brad, Brian, Cameron, Chris, Cliff, Jake, Jeff, Joel, Terry H., Tony, Will)**

**Install Techs (Juan J., Juan L., Kevin, Ryan)**

**Install Apprentices (Aaronn, Anthony, Chris, Kyle, Sam)**

**Technical Training Coordinator (Terry H.)**

**Install/Serv/PM Dispatch (Brooke, Denise, Jackie)**

**Customer Service Representatives (Denise, Jackie)**

**Technical Training Coordinator (Jimmy D.)**

**Service Technicians (Alan, Brandon, Chad, Coy, Dan, Daniel, Jesse, Jimmy D., Sean, Travis)**

**Planned Maint. Tech (Caleb, Devon, Michael F, Tyler)**

**Assistant Warehouse Manager (Rico)**

**Warehouse Associate (Loren)**

**Receptionist (Margaret)**

**Admin Assistant (Courtney)**