



**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 (Dave)**

1. LMA – RPRS Management
2. Marketing Plan, Budget, & Manage Campaigns
3. Sales Process Management
4. Plan, Run & Report Sales & Marketing Meetings
5. Assist Sales Reps for Closing Sales
6. Communicate Closed Sales with Installation Manager
7. Track, Monitor & Report Results at L10 Meetings

**Director of Field Operations (Jim)**

1. LMA—RPRS
2. Training
3. Sales Reporting
4. Support Service & Installation Managers
5. New Product Development
6. Customer Relations

**Director of Finance (Sandy)**

1. LMA – RPRS
2. Scorecard Management
3. Coordinating Financials with Accountant
4. Payroll Support and Wages
5. Approval of Budgets
6. L10 Meetings Scribe
7. Approval of Major Purchases
8. Acquiring Company Loans & Capital for Growth

**New Bus. Develop.  
(Liz, Patrick, Steve)**

**Creatives Coordinator  
(Erick Toth)**

**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)**

**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 (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 Manager (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

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

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

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

**Assistant Warehouse Manager  
(Rico)**

**VP of Assets (Erick)**

1. Accounts Payable
2. Credit Cards Management
3. Risk Management
4. IT Management
5. Fleet Administration
6. Payroll & Employee Benefits
7. Budgeting / Reporting

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

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

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

**Warehouse Associate  
(Brian)**

**Receptionist  
(Margaret)**

**Admin Assistant  
(Courtney)**

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

**Service Technicians  
(Alan, Brett, Brian B., Coy,, Devon, Jesse, Jimmy D., Jonathan, Spencer, Travis, Will)**

**Finance & Special Projects Assoc  
(Leigh Ann)**

**Install Apprentices  
(Aaronn, Anthony, Chris H, Kyle, Loren, Sam, Zack)**

**Planned Maint. Tech  
(Caleb, Michael F, Trevor)**



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

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6. Communicate Closed Sales with Installation Manager
7. Track, Monitor & Report Results at L10 Meetings

**New Bus Development Rep. (Liz, Patrick, Steve)**

- \* Qualified Lead Generation / Follow NBD Systems
- \* Set Goals/Track/Submit Reports of NBD Results (Scorecard)
- \* Execute Systems for Tradeshows, Lunch N Learns, Radio, CEU Classes, Networking
- \* Execute Systems for Customer Farming, Plaque Presentations, Photos & Testimonials
- \* Manage Marketing Tracking Spreadsheet (Liz)
- \* Maintain Inventory of Marketing Materials (Liz)
- \* Call Contacts from GetViral Lead Reports

**Creatives Coordinator (Erick)**

- \* Support New Business Development Initiatives
- \* Prepare, Design, Sub-out Marketing Creatives
- \* Attend Marketing Meetings
- \* Assist Sales & Marketing Director & Team

**Sales Support Associate (Tammy)**

- \* Sizing & Preparation of Bids
- \* Support/Communicate/Facilitate Sales Team
- \* Write Systems
- \* Track Results in Sugar
- \* Staging (files) Process
- \* Track/Prepare/Submit Reports for Sales Results
- \* Customer Farming Updates: References Testimonials & Website
- \* Assist with Special Projects

**Sales Support Assistant (Liz)**

- \* Assist Sales Support Associates as directed
- \* Staging (files) Process
- \* Process Commission Vouchers
- \* Process GeoSmart documentation and tracking
- \* Maintain Walk-Thru Tracking (weekly)
- \* Process Leads

**Administrative Service Estimator (Elsa)**

- \* Create/Submit/Close Service Repair Bids & PM Agreements
- \* Create/Submit/Close Wholesale Sales Quotes
- \* Apply Sandler & Dale Carnegie Sales Training Techniques
- \* Write/Implement/Follow Systems when applicable
- \* Customer Care Support Systems
- \* Maintain & Follow Well Driller Support System
- \* Set Goals/Track/Prepare/Submit Reports for Sales Results (Scorecard)

**Pool Heat Consult. (Mike K, Patrick, Steve, Terry)**

- \* Generate Leads/Network/Attend Tradeshows
- \* Sell Symbiont GeoThermal Pool/Spa Heating & Cooling Systems
- \* Sell Other Pool Heating Methods, Accessories, Service & PM Agreements
- \* Apply Sandler & Dale Carnegie Sales Training Techniques
- \* Maintain Relationships with Prospects & Customers
- \* Follow The Symbiont Way!
- \* Set Goals/Track/Prepare/Submit Reports for Sales Results (Scorecard)

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

- \* LMA - AC Sales Team
- \* Generate Leads/Network/Attend Tradeshows
- \* Sell GeoThermal Air Conditioning & Heating Systems
- \* Sell Conventional Air Conditioning & Heating Systems
- \* Sell Air Conditioning Accessories, Service & PM Agreements
- \* Apply Sandler & Dale Carnegie Sales Training Techniques
- \* Maintain Relationships with Prospects & Customers
- \* Set Goals/Track/Prepare/Submit Reports for Sales Results (Scorecard)
- \* Communicate with the Air Conditioning Installation Team

**AC Sales Associate (Bradley)**

- \* Generate Leads/Network/Attend Tradeshows
- \* Sell Conventional Air Conditioning & Heating Systems
- \* Sell Air Conditioning Accessories, Service & PM Agreements
- \* Apply Sandler & Dale Carnegie Sales Training Techniques
- \* Maintain Relationships with Prospects & Customers
- \* Set Goals/Track/Prepare/Submit Reports for Sales Results (Scorecard)



**Director of Field Operations (Jim)**

1. LMA—RPRS
2. Training
3. Sales Reporting
4. Support Service & Installation Managers
5. New Product Development
6. Customer Relations

**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

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

- \* Assist Installation Manager
- \* Apply, track, monitor and complete permitting process
- \* Communicate with customers, subs & municipalities
- \* Maintain Project Management Board responsibilities
- \* Process Release of Lien
- \* Liaison for collections / coupons
- \* Schedule reservations for out-of-town

**Install / Service / PM Dispatcher (Brooke, Denise, Jackie)**

- \* Dispatch installation and service technicians
- \* Communicate schedules with customers, managers
- \* Communicate with Customers re: service account status
- \* Job costing time sheet reports
- \* Time sheets & payroll processing
- \* Accounts Receivable systems

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

- \* Receive and Process Service Calls
- \* Communicate schedules with customers and managers
- \* Warranty processing
- \* Process repair quotes
- \* Refer Prospect/Customer calls to Sales Dept.
- \* Accounts Receivable systems

**Assistant Warehouse Manager (Rico)**

- \* Assist Inventory Purchasing Manager
- \* Order, receive, Pick-up/deliver, stock parts & equipment
- \* Possess EPA card
- \* Process pull lists for Install Department
- \* Pull parts from Van Stock Requisition Forms (install & service)
- \* Overall shop & equipment maint / weekly trailer inspection
- \* Inventory

**Lead Installation Technicians (Brad, Brian, Cameron, Chris N, Cliff, Jake, Jeff, Joel, Terry H, Tony)**

- \* TAP
- \* Practice safe work habits
- \* Train & oversee installation techs & apprentices
- \* Communicate with customers & Installation Manager
- \* Acquire & maintain proper tools to perform duties
- \* Possess EPA card
- \* Competent in all aspects of installation start-to-finish

**Install Tech Training Coordinator (Terry H.)**

- \* LMA
- \* Training of new technicians
- \* Scheduling field training
- \* "Ride-alongs", evaluating techs
- \* Scheduling training time for techs in our training center
- \* Filling in technicians "technical procedures progress books"

**Service Tech Training Coordinator (Alan, Jimmy D.)**

- \* LMA
- \* Training of new technicians
- \* Scheduling field training
- \* "Ride-alongs", evaluating techs
- \* Scheduling training time for techs in our training center
- \* Filling in technicians "technical procedures progress books"

**Service Technicians (Alan, Brett, Brian B, Coy, Devon, Jesse, Jimmy D., Jonathan, Spencer, Travis, Will)**

- \* TAP
- \* Service and Repair all SSC products
- \* Practice safe work habits
- \* Acquire & maintain proper tools to perform duties
- \* Communicate with customers, dispatcher & service manager
- \* Promote & sell additional SSC products / services
- \* Possess EPA card and be NATE certified

**Planned Maintenance Technicians (Caleb, Michael F., Trevor)**

- \* TAP
- \* Maintain all SSC products
- \* Practice safe work habits
- \* Acquire & maintain proper tools to perform duties
- \* Communicate with customers, dispatcher & service manager
- \* Promote & sell additional SSC products / services
- \* Possess EPA card

**Installation Techs (Juan J., Juan L., Kevin, Ryan, Rick D)**

- \* TAP
- \* Practice safe work habits
- \* Help to train & oversee apprentices
- \* Acquire & maintain proper tools to perform duties
- \* Back up lead installation tech
- \* Communicate with customers & lead tech

**Install Apprentices (Aaronn, Anthony, Chris H, Kyle, Loren, Sam, Zack)**

- \* Practice safe work habits
- \* Back up lead installation tech
- \* Acquire/learn proper use of tools to perform duties

**Warehouse Associate (Brian)**

- \* Assist Inventory Purchasing Manager and Asst Warehouse Manager

