



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

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

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 T)

Sales Support Associate (Tammy, Matt C)

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

Project Coordinator (Matt C)

Permit/Install Support Associate (Brooke/Matt)

Install/Serv/PM Dispatch (Brooke, Denise, Leigh Ann, Alice)

Customer Service Representatives (Leigh Ann, Alice)

Technical Training Coordinator (Alan, Jimmy D)

Assistant Warehouse Manager (Rico)

Warehouse Associate (Brian)

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

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

Install Apprentices (Anthony, Chris H, Kyle, Loren, Sam, Zack E, Zack Mc, Dante, Zack M)

Technical Training Coordinator (Terry H)

Service Technicians (Alan, Brett, Brian B, Caleb, Coy, Devon, Jesse, Jimmy D, Les, Jonathan, Spencer, Travis, Will, Travis Jr, Michael F, Daniel)

Planned Maint. Tech (Miles, Open Position)

Warranty Admin (Denise)

Receptionist (Margaret)

Admin Assistant (Jackie)

Data Entry & Special Projects Associate (Open Position)



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

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 GetVyrat Lead Reports

Sales Support Associate (Tammy, Matt C)

- * 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

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)

Creatives Coordinator (Erick)

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

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

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

Outside Sales Support (Matt C)

- * Support Sales Department
- * Survey Projects for Bid Packages as needed
- * Communicate with Subcontractors for bids
- * Communicate the Sale to the Install Department
- * Assist Sales & Marketing Director & Team

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)

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)



