



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, 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)

Technical Training Coordinator (Terry H)

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

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

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 (Jessica)

Receptionist (Margaret, Michelle)

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)



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

Project Coordinator (Matt C)

- * Assist Installation Manager for project coordination of sold jobs to be installed
- * Communications Coordinator with Customers, Subs, and Interdepartmental
- * Write special instructions for installs
- * Create material lists to be ordered

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

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”

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, Alice, Leigh Ann)

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

Customer Service Representatives (Alice, Leigh Ann)

- * 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

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

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

- * 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

Planned Maintenance Technicians (Miles, Open Positions Avail)

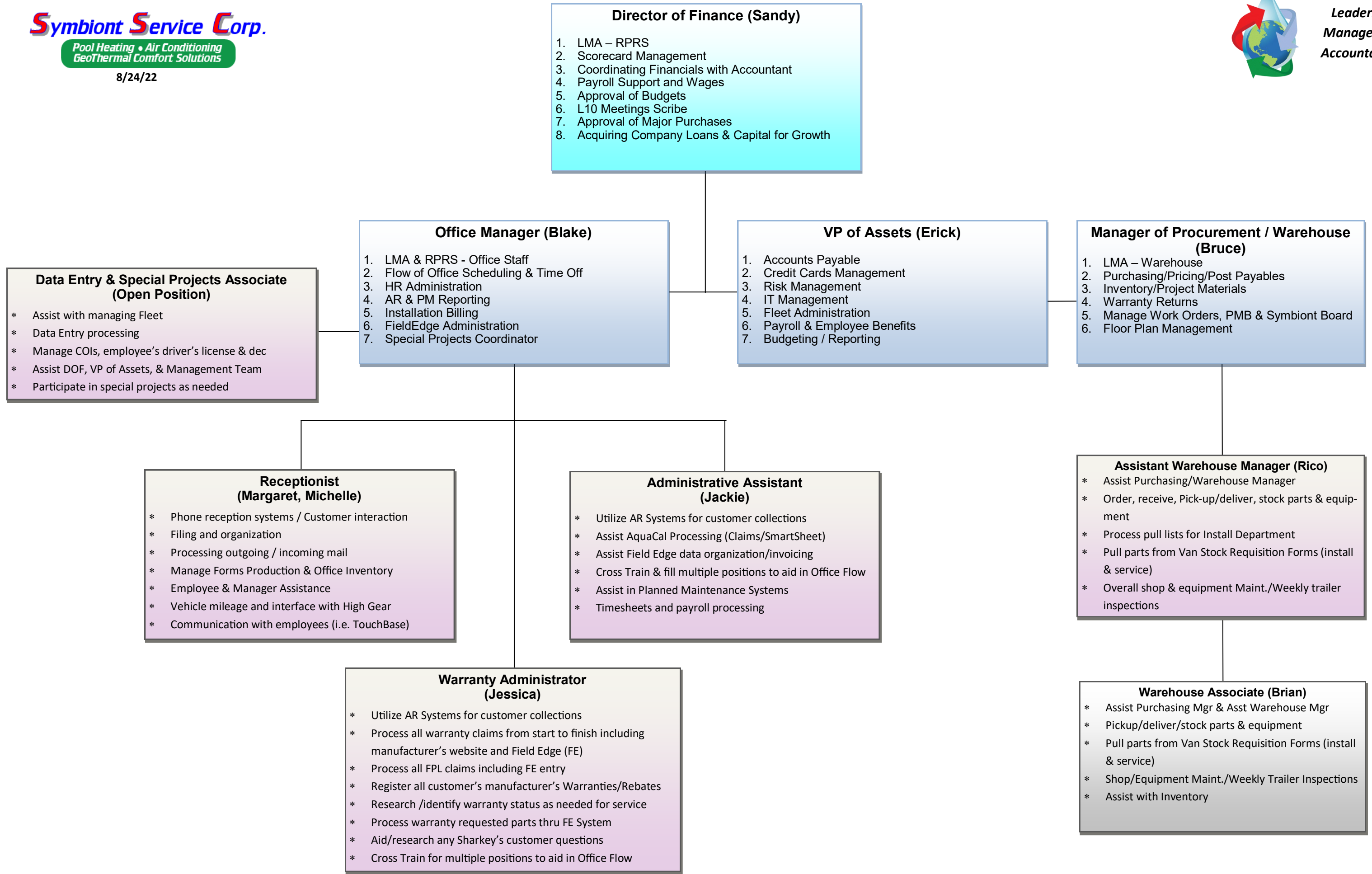
- * TAP
- * Maintain all SSC products
- * Practice safe work habits
- * Acquire & maintain proper tools to perform duties
- * Communicate with customers, dispatcher & service manager
- * Promote & sell additional SSC products / services
- * Possess EPA card

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 (Anthony, Chris H, Kyle, Loren, Sam, Zack E, Dante,)

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



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

Office Manager (Blake)

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

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

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

Data Entry & Special Projects Associate (Open Position)

- * Assist with managing Fleet
- * Data Entry processing
- * Manage COIs, employee's driver's license & dec
- * Assist DOF, VP of Assets, & Management Team
- * Participate in special projects as needed

Receptionist (Margaret, Michelle)

- * Phone reception systems / Customer interaction
- * Filing and organization
- * Processing outgoing / incoming mail
- * Manage Forms Production & Office Inventory
- * Employee & Manager Assistance
- * Vehicle mileage and interface with High Gear
- * Communication with employees (i.e. TouchBase)

Administrative Assistant (Jackie)

- * Utilize AR Systems for customer collections
- * Assist AquaCal Processing (Claims/SmartSheet)
- * Assist Field Edge data organization/invoicing
- * Cross Train & fill multiple positions to aid in Office Flow
- * Assist in Planned Maintenance Systems
- * Timesheets and payroll processing

Warranty Administrator (Jessica)

- * Utilize AR Systems for customer collections
- * Process all warranty claims from start to finish including manufacturer's website and Field Edge (FE)
- * Process all FPL claims including FE entry
- * Register all customer's manufacturer's Warranties/Rebates
- * Research /identify warranty status as needed for service
- * Process warranty requested parts thru FE System
- * Aid/research any Sharkey's customer questions
- * Cross Train for multiple positions to aid in Office Flow

Assistant Warehouse Manager (Rico)

- * Assist Purchasing/Warehouse Manager
- * Order, receive, Pick-up/deliver, stock parts & equipment
- * Process pull lists for Install Department
- * Pull parts from Van Stock Requisition Forms (install & service)
- * Overall shop & equipment Maint./Weekly trailer inspections

Warehouse Associate (Brian)

- * Assist Purchasing Mgr & Asst Warehouse Mgr
- * Pickup/deliver/stock parts & equipment
- * Pull parts from Van Stock Requisition Forms (install & service)
- * Shop/Equipment Maint./Weekly Trailer Inspections
- * Assist with Inventory