

01/25/24

(Mike K, Patrick,

Steve, Terry, Liz)

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

**AC Sales Associate** (Bradley)

**Install Apprentices** 

(Carlos, Devyn,

Nathaniel, Ricky Jr)

#### President (Sandy)

- LMA
- Business Plan—Budget Approval Culture/RPRS & Big Relationships
  - Remove Obstacles / Barriers
- Strategic Positioning
- Approval of Major Purchases
- Special Project Management



Leadership **Management Accountability** 

#### **Director of Finance (Ken) Director of Sales & Marketing (Dave) Installation Manager (Mike J)** VP of Assets (Erick) **Chief Technical Officer (Jim)** 1. LMA – RPRS LMA - RPRS Management LMA - Install Team 1. LMA—RPRS LMA—RPRS Scorecard Management Customer Relations with The Symbiont Way Marketing Plan, Budget, & Manage Campaigns 2. **Technical Training** A/P & Credit Cards Management Coordinating Financials with Accountant Sales Process Management Permitting Management Support Service & Installation Managers Asset & Risk Management Budget Preparation / Approval / Reporting Plan Run & Report Sales/Marketing Meetings Oversee Installations / Subs / Schedule New Product Development IT Management Assist Sales Reps for Closing Sales Payroll Support and Wages Electrical Planning & Bidding Customer & Vendor Relations Fleet Administration Communicate Closed Sales-Installation Mgr 6. L10 Meetings Scribe Communicate Install Progress and document Continued training for product knowledge & 6. Payroll & Employee Benefits Acquiring Company Loans & Capital for Growth 7. Track, Monitor & Report Results to L10 on the Symbiont Board the latest technologies ESOP Management & Compliance **ESOP Support** Warehouse / Inventory Management New Bus. Develop. Service Manager (Bradley) LMA – Service Team (Liz, Patrick, Steve) Training Manager of Procurement / Warehouse (Bruce) Dispatch 1. LMA - Warehouse Tech Support (Canvas/FieldEdge) Purchasing/Pricing/Post Payables Customer Relations Inventory/Project Materials **Creatives Coordinator** Planned Maintenance Management Warranty Returns (Erick T) Manage Work Orders and the Symbiont Board Document Legacy while training direct reports Office Manager (Blake) **Project Coordinator** Permit/Install Support LMA - Office Staff Install/Serv/PM **Associate Customer Service** Flow of Office Scheduling & Time Off Sales Support (Brooke/Matt) Representatives (Matt C) Dispatch **HR** Administration **Associate** (Brooke, Jennifer, (Jennifer, Michelle) AR & PM Administration **Assistant Warehouse** (Tammy, Matt C) Michelle) FieldEdge Administration Manager Special Projects Coordinator (Rico) **Lead Install Techs Lead Serv Techs Sales Support Technical Training** (Alfonso, Brian, Cameron, (Alan, Brian B, Daniel, Assistant Chris N, Cliff, Jake, Jeff, Jesse, Jimmy D, Les ) **Warehouse Associate** Coordinator (Liz) Joel, Ryan, Terry H) (Brian) **Collections Specialist** (Terry H) **Data Entry** (Misha) Administrative **Service Technicians** Service Estimator (Brett, Devon, Jonathan, Logan, (Elsa, Jessica) **Install Techs** Michael F, Spencer, (Juan J., Rick D, Kyle, Will) Anthony, Sam) **Admin Assistant Warranty Admin** Receptionist (Jackie) (Jessica) (Brittany) **Pool Heating** Consultants

**Apprentice Techs** 

(Miles)

Planned Maint, Techs

(Noah, Caleb, Abimelec)



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#### 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 GetVyral Lead Reports

#### **Creatives Coordinator (Erick)**

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

#### 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

#### 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

#### Sales Support Assistant (Liz)

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

#### **Administrative Service Estimator (Elsa, Jessica)**

- 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, Liz)

- 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)



### 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

#### 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

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

- \* 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

### Installation Techs (Juan J, Ricky D, Kyle, Anthony, Sam)

- \* 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

### Installation Manager (Mike J)

- 1. LMA Install Team
- 2. Customer Relations with The Symbiont Way
- 3. Permitting Management
- 4. Oversee Installations / Subs / Schedule
- 5. Electrical Planning & Bidding
- 6. Communicate Install Progress and document on the Symbiont Board

### Install / Service / PM Dispatcher (Brooke, Jennifer, Michelle)

- \* Dispatch installation and service technicians
- Communicate schedules with customers, managers
- \* Communicate with Customers re: service account status
- Accounts Receivable systems
- \* Dispatch approved repair quotes & warranty calls

### Install Tech Training Coordinator (Terry H)

- ⊧ LMA
- Training of new technicians
- Scheduling field training
- "Ride-along", evaluating techs
- Scheduling training time for techs in our training center
- Filling in technicians "technical procedures progress books" and "technician task ratings"

### Install Apprentices (Carlos, Devyn, Nathaniel, Ricky Jr)

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

#### **Chief Technical Officer (Jim)**

- LMA—RPRS
- 2. Technical Training
- 3. Support Service & Installation Managers
- . New Product Development
- 5. Customer & Vendor Relations
- 6. Continued training for product knowledge & latest technologies

#### Service Manager (Bradley)

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

### Customer Service Representatives (Jennifer, Michelle)

- Receive and Process Service Calls
- Communicate schedules with customers & managers
- Refer Prospect/Customer calls to Sales Dept.
- Research & Assist with Negative Service Reviews
- \* Follow Accounts Receivable systems

### Apprentice Technician (Miles)

- \* TAP—Update "Technical Procedures Progress Book"
- Service and Repair all SSC products
- Paperwork 85% correct
- \* Acquire & maintain proper tools to perform duties
- Communicate with customers, dispatcher & service manager
- Basic product knowledge & troubleshooting skills for all items
   SSC sells
- Learn wiring diagrams and reading schematics
- Maintain correct truck stock/inventory
- \* Collects from customers for completed work orders



### Leadership Management Accountability

Train Assist Produce

### Lead Service Technician (Alan, Brian B, Daniel, Jesse, Jimmy D., Les )

- LMA
- \* TAP—Mastered "Technical Procedures Progress Book"
- \* Service and Repair all SSC products
- Paperwork 95% correct & > 2% WSGO/missed diagnosis
- \* NATE Certified & Factory Trained on most brands
- Communicate with customers, dispatcher & service manager
- Advanced product knowledge & troubleshooting skills for all items SSC sells, & understanding of basic electricity
- Learned & teaches wiring diagrams and reading schematics
- Maintain correct truck stock/inventory
- Collects from customers for completed work orders
- Trains other technicians

### Service Technician (Brett, Devon, Jonathan, Logan, Mike F, Spencer, Will)

- TAP—Completed "Technical Procedures Progress Book"
- Service and Repair all SSC products
- \* Paperwork 90% correct & less than 3% call backs
- Work on NATE Certification & other product training
- Advanced product knowledge & troubleshooting skills for all items SSC sells, & understanding of basic electricity

Communicate with customers, dispatcher & service manager

- \* Learned wiring diagrams and reading schematics
- Maintain correct truck stock/inventory
- Collects from customers for completed work orders

### Planned Maintenance Technician (Noah, Caleb, Abimelec)

- TAP—Intro to the "Technical Procedures Progress Book"
- Maintains all SSC products
- Paperwork 80% correct
- Acquire & maintain proper tools to perform duties
- Communicate with customers, dispatcher & service manager
- Performs routine maintenance for A/C & Pool Heaters
- Collects from customers for completed work orders



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#### Office Manager (Blake)

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

### Collections Specialist / Data Entry (Misha)

- \* Accounts Receivable Collections
- \* Participate in special projects as needed

### Receptionist (Brittany)

- \* Phone reception systems / Customer interaction
- Filing and organization
- \* Processing outgoing / incoming mail
- \* Manage Forms Production & Office Inventory
- \* Employee & Manager Assistance
- Communication with employees

#### Director of Finance (Ken)

- 1. LMA—RPRS
- 2. Scorecard Management
- 3. Coordinating Financials with Accountant
- 4. Budget Preparation / Approval / Reporting
- 5. Payroll Support and Wages
- 6. L10 Meetings Scribe
- 7. Acquiring Company Loans & Capital for Growth
- 8. ESOP Management & Compliance

#### **VP of Assets (Erick)**

- 1. LMA—RPRS
- 2. Accounts Payable & Credit Cards Management
- 3. Asset & Risk Management
- 4. IT Management
- 5. Fleet Administration
- 6. Payroll & Employee Benefits
- 7. ESOP Support
- 8. Warehouse / Inventory Management

## Administrative Assistant (Jackie)

- \* Utilize AR Systems for customer collections
- \* 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
- \* Assist the Office Manager

### 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)
- \* Register all customer's manufacturer's Warranties/Rebates
- Research /identify warranty status as needed for service
- Process warranty requested parts thru FE System
- \* Cross Train for multiple positions to aid in Office Flow



Leadership Management Accountability

## Manager of Procurement / Warehouse (Bruce)

- 1. LMA—Warehouse
- 2. Purchasing/Pricing/Post Payables
- 3. Inventory/Project Materials
- 4. Warranty Returns
- 5. Manage Work Orders and the Symbiont Board
- 6. Document Legacy while training direct reports

#### **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)
- \* Inventory

#### Warehouse Associate (Brian)

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