



President (Sandy)

1. LMA
2. Business Plan—Budget Approval
3. Culture/RPRS & Big Relationships
4. Remove Obstacles / Barriers
5. Strategic Positioning
6. Approval of Major Purchases
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-Installation Mgr
7. Track, Monitor & Report Results to L10

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

Chief Technical Officer (Jim)

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

VP of Assets (Erick)

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

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

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

Creatives Coordinator (Erick T)

Sales Support Associate (Tammy, Matt C)

Sales Support Assistant (Liz)

Administrative Service Estimator (Elsa, Jessica)

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

HVAC Energy Sales Manager (Mike K)

AC Sales Associate (Bradley)

Project Coordinator (Matt C)

Permit/Install Support Associate (Brooke/Matt)

Service Manager (Bradley)

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

Install/Serv/PM Dispatch (Brooke, Jennifer, Michelle)

Customer Service Representatives (Jennifer, Michelle)

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

Technical Training Coordinator (Terry H)

Lead Serv Techs (Alan, Brian B, Daniel, Jesse, Jimmy D, Les)

Install Techs (Juan J., Kyle, Anthony, Sam)

Service Technicians (Brett, Devon, Jonathan, Logan, Michael F, Spencer, Will)

Install Apprentices (Carlos, Devyn, Nathaniel, Isaac)

Apprentice Techs (Miles)

Planned Maint. Techs (Noah, Caleb, Abimelec)

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)

Warehouse Associate (Brian)

Office Manager (Blake)

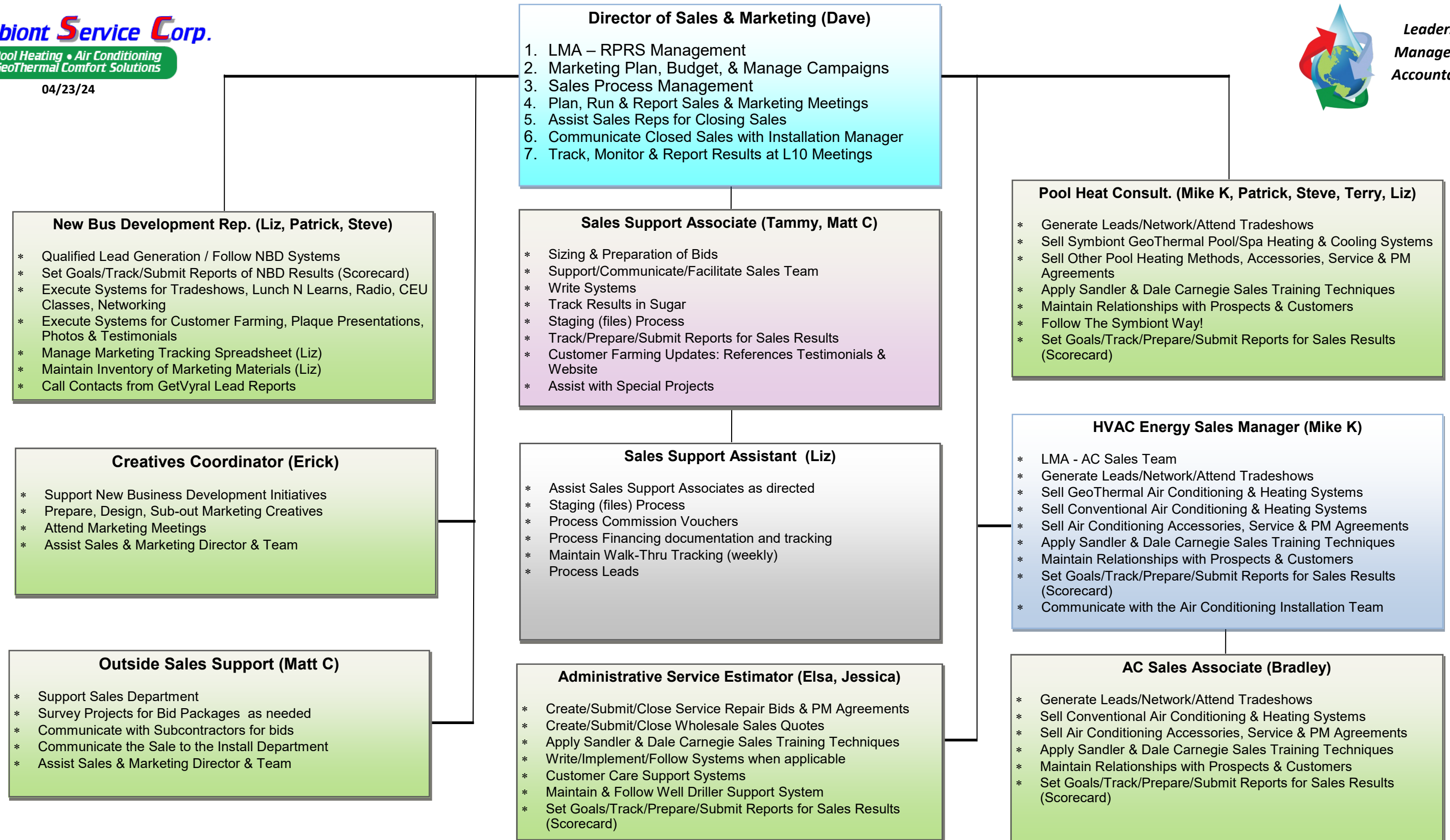
1. LMA - Office Staff
2. Flow of Office Scheduling & Time Off
3. HR Administration
4. AR & PM Administration
5. FieldEdge Administration
6. Special Projects Coordinator

Collections Specialist Data Entry (Misha)

Warranty Admin (Jessica)

Receptionist (Brittany)

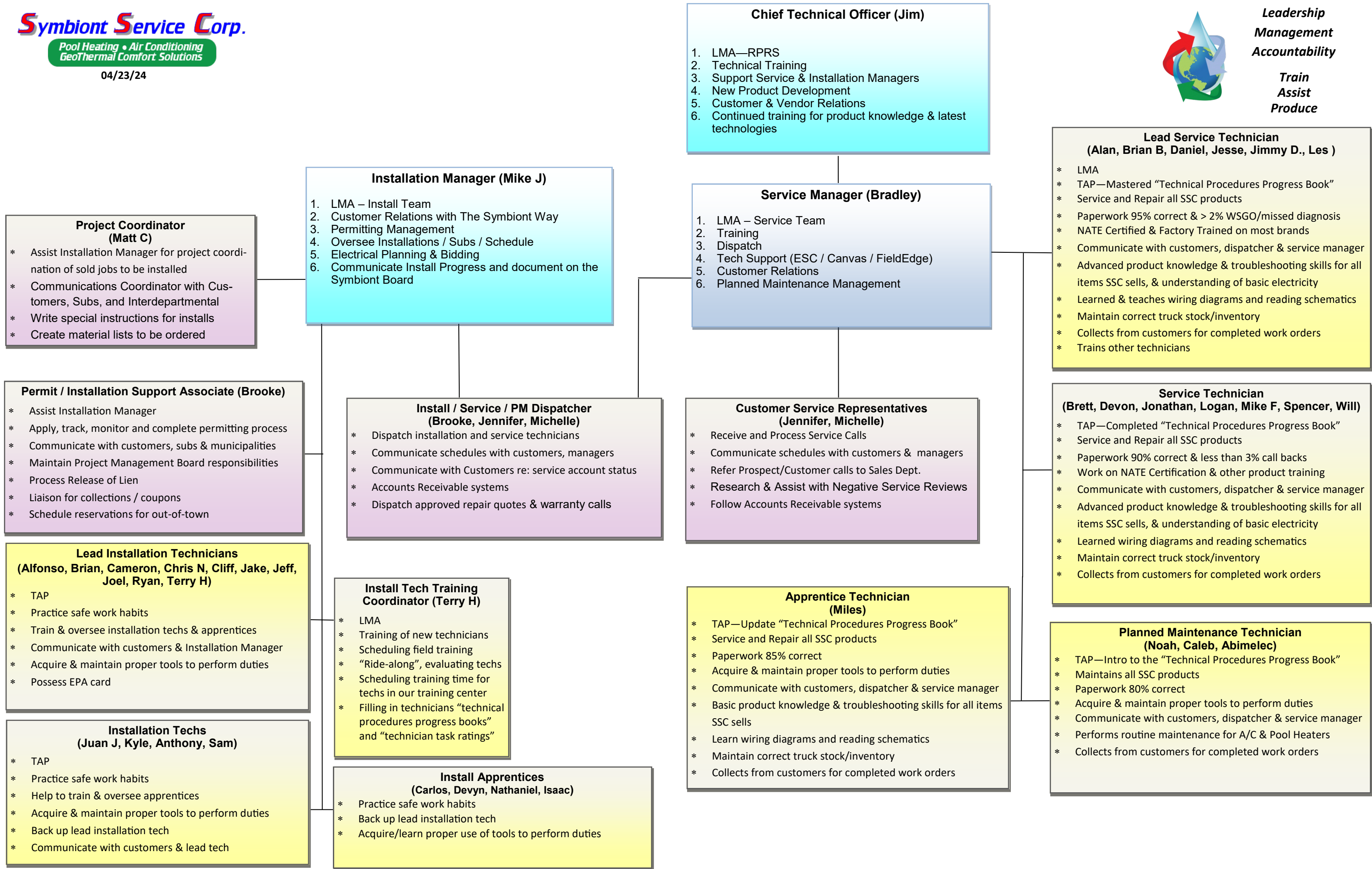
Admin Assistant (Jackie)





**Leadership
Management
Accountability**

**Train
Assist
Produce**



Chief Technical Officer (Jim)

1. LMA—RPRS
2. Technical Training
3. Support Service & Installation Managers
4. 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
4. Tech Support (ESC / Canvas / FieldEdge)
5. Customer Relations
6. Planned Maintenance Management

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

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

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

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

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
- * Communicate with customers, dispatcher & service manager
- * Advanced product knowledge & troubleshooting skills for all items SSC sells, & understanding of basic electricity
- * Learned wiring diagrams and reading schematics
- * Maintain correct truck stock/inventory
- * Collects from customers for completed work orders

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

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”

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

Installation Techs (Juan J, 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

Install Apprentices (Carlos, Devyn, Nathaniel, Isaac)

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

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

