



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

Director of Operations (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. (Patrick, Steve, & Steven B.)

Creatives Coordinator (Erick T)

Sales Support Associate (Tammy)

Outside Sales Support (Matt, Bradley (AS))

Administrative Service Estimator (Elsa, Jessica)

Pool Heating Consultants (Mike K, Bradley, Patrick, Steven B, Steve, Terry)

HVAC Energy Sales Manager (Mike K)

AC Sales Associate (Alfonso)

Project Coordinator (Matt C, Alfonso (AC))

Permit/Install Support Associate (Melissa/Matt)

Lead Install Techs (Anthony, Cameron, Chris, Cliff, Jake, Joel, Robert, Ryan, Terry H)

Install Techs (Juan J, Kyle, Sam Nathaniel, Devyn, Zach V)

Install Apprentices (Carlos, Cordell, Garrett, Grant)

Service Manager (Alan)

1. LMA – Service Team—EDM/PTO/Annual Reviews
2. Training—Hiring, Developing, Mentoring
3. Dispatch Strategizing/Customer Relations/PM
4. Monitoring Mission Control & Symphony
5. Tech Support/Flat Rate Tasks (Canvas / FieldEdge)
6. Labor forecasting—Report to CTO
7. Pump sizing, pricing, & updating price lists

Install/Serv/PM Dispatch (Melissa, Angel, Lisa)

Customer Service Representatives (Angel, Lisa)

Lead Serv Techs (Alan, Brett, Devon, Jesse, Jimmy D, Jonathan, Logan)

Service Technicians (Jacob W, Joseph S., Miles, Pablo, Will)

Apprentice Techs (Abimelec, Joseph J., Sebastian)

Technical Training Coordinator (Terry H)

Planned Maint. Techs (Noah, Clay, Dylan)

Warehouse Manager (Rico)

1. LMA—Warehouse
2. Purchasing, Vendor Relations & Price Updates
3. Inventory/Project Materials/Warranty Returns
4. Manage Work Orders and the Symbiont Board
5. Document Legacy while training direct reports
6. Oversee Warehouses/Floor Plans/Yard
7. Manage Pull Lists for Install Dept
8. Hurricane Prep Team Member

Assistant Warehouse Manager (Brian)

Warehouse Associate (Josh)

Office Manager (Blake)

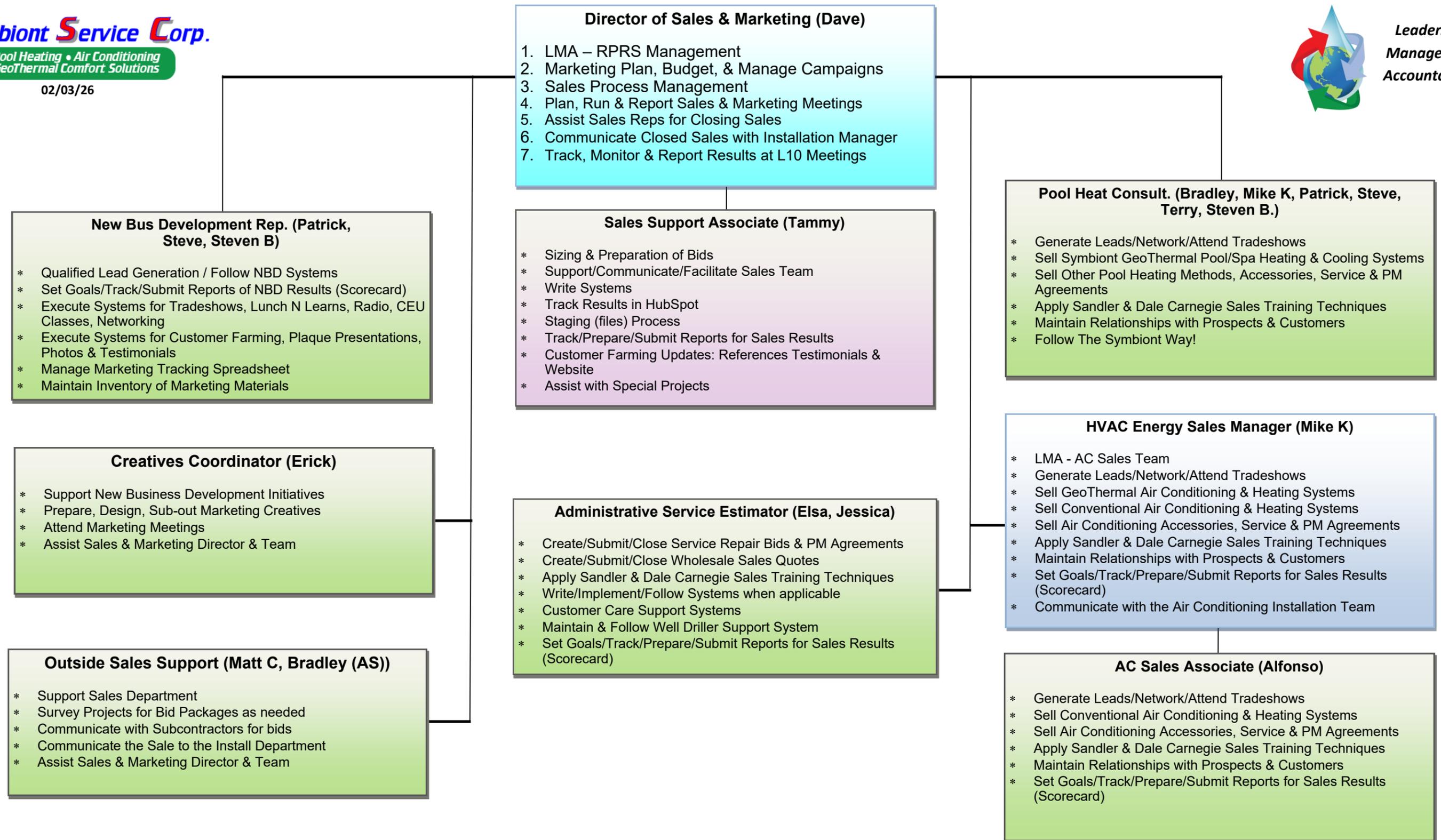
1. LMA—RPRS - Office Staff
2. Flow of Office Scheduling & Time Off
3. HR Administration—New Hires
4. AR & PM Administrator
5. FieldEdge Administrator
6. Special Projects Coordinator

Collections & PM Specialist (Jennifer)

Warranty Admin (Jessica)

Receptionist (Brittany)

Admin Assistant (Jackie)





Leadership
Management
Accountability

Train
Assist
Produce

Director of Operations (Mike J)

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Chief Technical Officer (Jim)

1. LMA—RPRS
2. Document Legacy—Systems & Training
3. Technical Training
4. Support Service Managers
5. New Product Development
6. Customer & Vendor Relations
7. Continued training for product knowledge & latest technologies Department-wide

Project Coordinator (Matt C, Alfonso (AC))

- * 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 (Melissa, Matt)

- * Assist Installation Manager
- * Apply, track, monitor and complete permitting process
- * Communicate with customers, subs & municipalities
- * Process COI's & W-9's
- * Liaison for collections
- * Schedule reservations for out-of-town

Lead Installation Technicians (Anthony, Cameron, Chris, Cliff, Jake, Joel, Robert, 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, Kyle, Nathaniel, Devyn, Sam, Zach V)

- * 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 / Service / PM Dispatcher (Melissa, Angel, Lisa)

- * 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"
- * Reporting his findings to the SM for follow-up

Install Apprentices (Carlos, Cordell, Garrett, Grant)

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

Service Manager (Alan)

1. LMA – Service Team—EDM/PTO/Annual Reviews
2. Training—Hiring, Developing, Mentoring
3. Dispatch Strategizing/Customer Relations/PM
4. Monitoring Mission Control & Symphony
5. Tech Support/Flat Rate Tasks (Canvas / FieldEdge)
6. Labor forecasting—Report to CTO
7. Pump sizing, pricing, & updating price lists

Customer Service Representatives (Angel, Lisa)

- * 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 (Abimelec, Joseph J, Sebastian)

- * 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

Lead Service Technician (Alan, Brett, Devon, Jesse, Jimmy D, Jonathan, Logan)

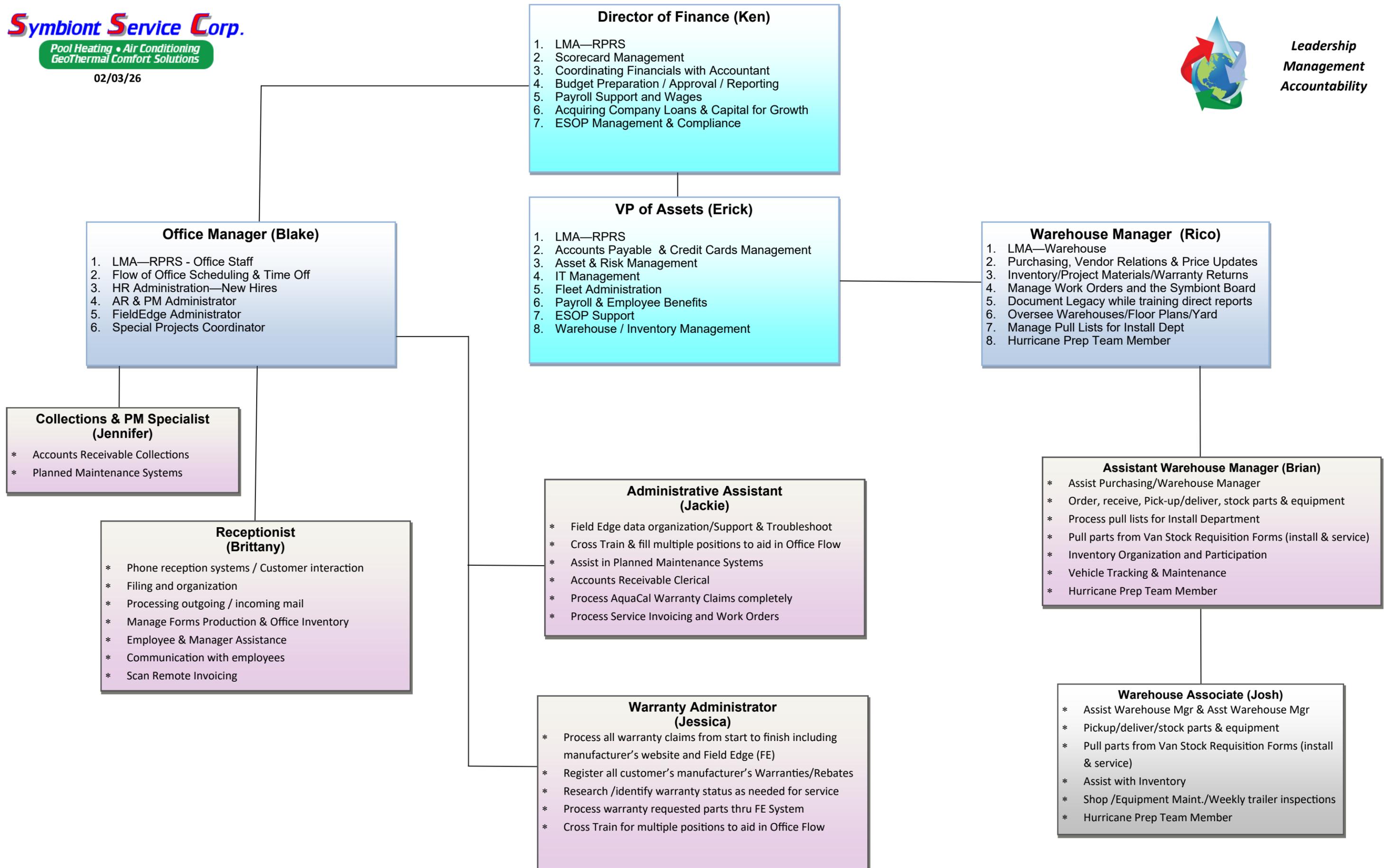
- * LMA
- * TAP—Mastered "Technical Procedures Progress Book"
- * Service and Repair all SSC products
- * Paperwork 95% correct & > 2% WSGO/missed diagnosis
- * NATE Certified & Factory Trained on most brands
- * Communicate with customers, dispatcher & service manager
- * Advanced product knowledge & 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 (Jacob W, Joseph S, Miles, Pablo, 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

Planned Maintenance Technician (Noah, Clay, Dylan)

- * 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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Warehouse Manager (Rico)

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Office Manager (Blake)

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3. HR Administration—New Hires
4. AR & PM Administrator
5. FieldEdge Administrator
6. Special Projects Coordinator

Collections & PM Specialist (Jennifer)

- * Accounts Receivable Collections
- * Planned Maintenance Systems

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
- * Scan Remote Invoicing

Administrative Assistant (Jackie)

- * Field Edge data organization/Support & Troubleshoot
- * Cross Train & fill multiple positions to aid in Office Flow
- * Assist in Planned Maintenance Systems
- * Accounts Receivable Clerical
- * Process AquaCal Warranty Claims completely
- * Process Service Invoicing and Work Orders

Warranty Administrator (Jessica)

- * 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

Assistant Warehouse Manager (Brian)

- * 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 Organization and Participation
- * Vehicle Tracking & Maintenance
- * Hurricane Prep Team Member

Warehouse Associate (Josh)

- * Assist Warehouse 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
- * Hurricane Prep Team Member