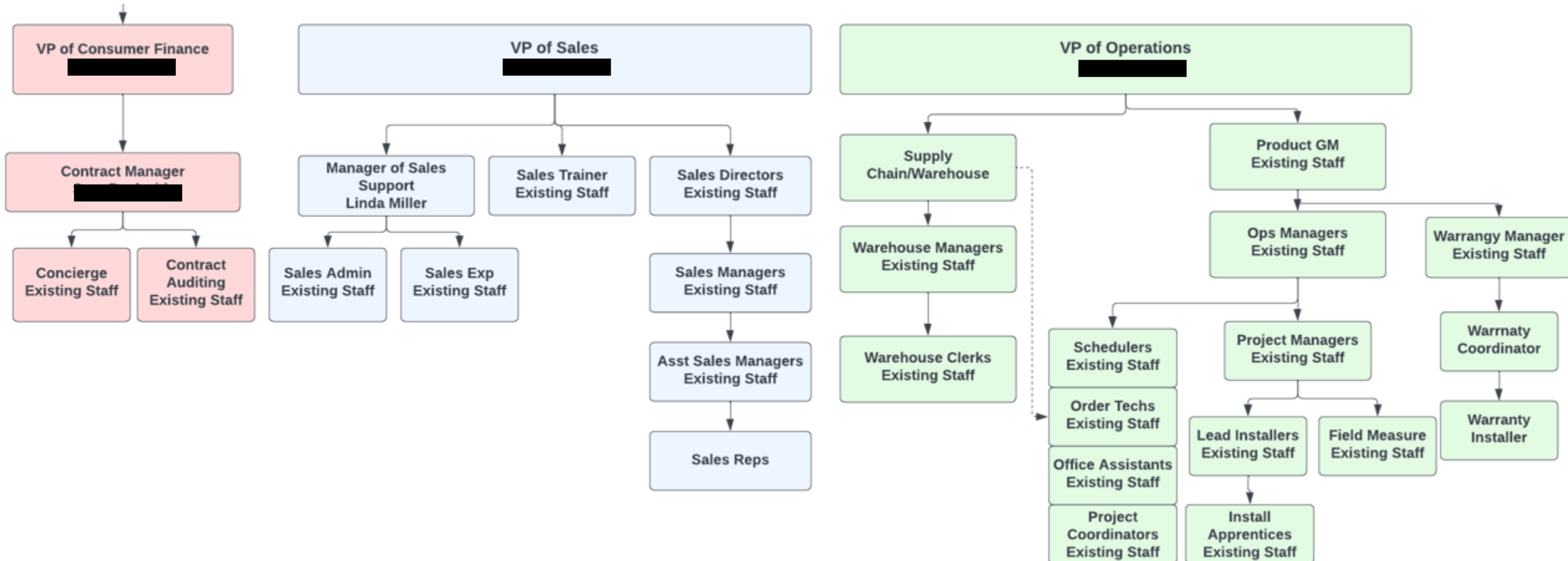


Re-Org Project Plan

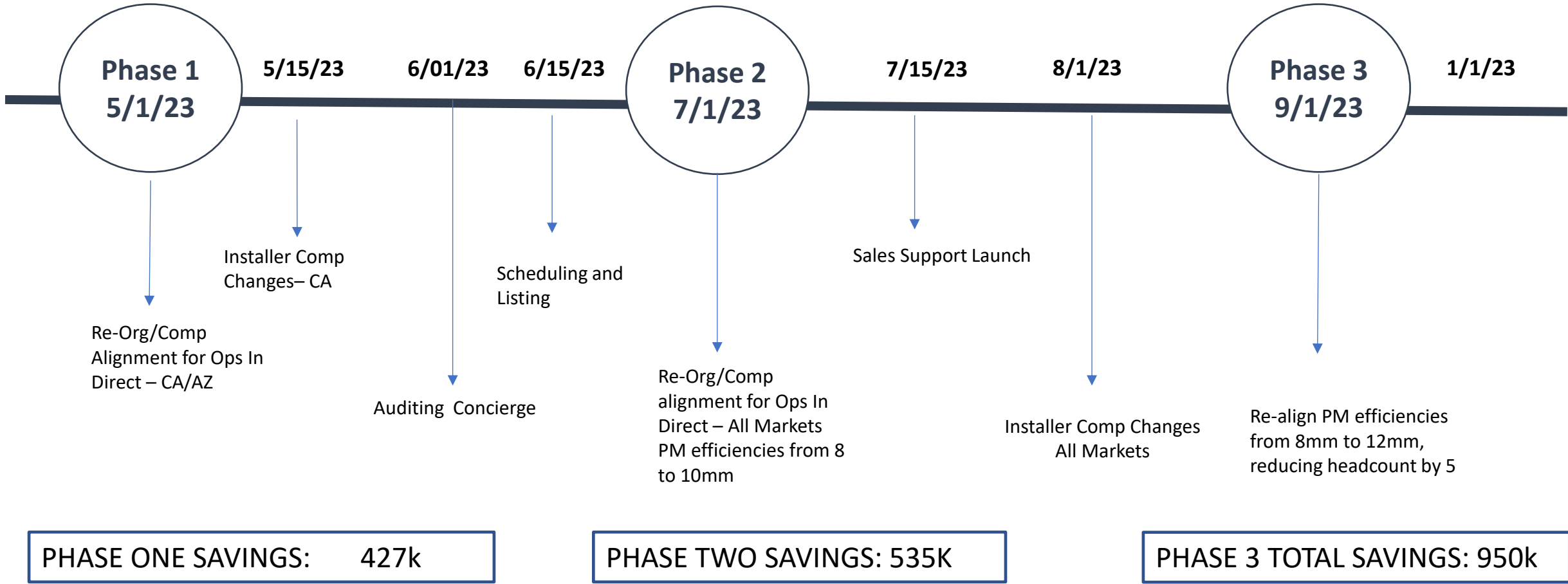
Revised 4/23/23

Phase 1 – Standardized Org Chart



Operational Phases

2 mm through 2023
3mm projected savings per year
moving forward



Market Cost Calculator

CALIFORNIA RE-ALIGNMENT WORKSHEET														
Rev Expected:		Rev Managed	Positions	Required	Headcount	Salary	Bonus	Total	Total Current	\$ 2,922,480				
Bath	\$ 60,000,000	\$ 65,000,000	General Manage	2	2	\$ 285,000	\$ 130,000	\$ 415,000	Total Salary	\$ 2,383,600				
Windows	\$ 24,000,000	\$ 40,000,000	Operations Man	2	2	\$ 210,000	\$ 100,000	\$ 310,000						
Total Revenue	\$ 84,000,000	\$ 8,000,000	Project Manage	11	12	\$ 900,000	\$ 219,429	\$ 1,119,429	Delta	\$ 538,880				
		\$ 16,000,000	Project Coordin	5	5	\$ 281,900	\$ -	\$ 281,900	Savings p/m	\$ 44,907				
Direct Labor Cost Step Down		\$ 20,000,000	Scheduler	4	2	\$ 112,760	\$ -	\$ 112,760						
15%	\$ 12,600,000	\$ 40,000,000	Order Tech	2	2	\$ 112,760	\$ -	\$ 112,760	2022 Bonus Pay					
12%	\$ 10,080,000	\$ 200,000,000	Procurement M	1	0	\$ -	\$ -	\$ -	New Plan Bonus	\$ 460,929				
Projected Savings	\$ 2,520,000	\$ 60,000,000	Service Coordin	1	1	\$ 53,040	\$ -	\$ 53,040						
		\$ 40,000,000	Warehouse Mar	2	2	\$ 135,000	\$ -	\$ 135,000						
		\$ 20,000,000	Warehouse Cler	4	4	\$ 187,200	\$ -	\$ 187,200						
		\$ 40,000,000	Office Manager	2	2	\$ 120,000	\$ -	\$ 120,000						
		\$ 30,000,000	Contract Admin	3	0	\$ -	\$ -	\$ -						
				40	34	\$ -	\$ -	\$ -						
Legal La	Legal Fi	Hire Date	Job Title Descr	Annual Salary	Location Code	Division	Regular Pa	Reports To	Revenue Ma	NEW TITLE	NEW BASE	BONUS	TOTAL COST	BASE DELTA
C		07/27/2020	General Manager	\$140,000.00	CASAN	BATH	\$5,384.62		\$ 65,000,000	General Manager	\$ 150,000	\$ 65,000	\$ 215,000	\$ 10,000
		06/06/2022	Director of Operatio	\$175,000.00	CODEN	WINDOOR	\$6,730.77		\$ 84,000,000	General Manager	\$ 175,000	\$ 84,000	\$ 259,000	\$ -
		11/30/2021	Office Manager	\$64,480.00	CAIEP	ADMIN	\$2,480.00		\$ 40,000,000	Office Manager	\$ 70,000		\$ 70,000	\$ 5,520
		02/20/2023	Office Manager	\$70,000.06	CASAN	ADMIN	\$2,692.31		\$ 40,000,000	Office Manager	\$ 70,000		\$ 70,000	\$ (0)
		09/08/2020	Operations Manager	\$119,999.88	CASAN	ADMIN	\$4,615.38		\$ 40,000,000	Operations Manager	\$ 120,000	\$ 40,000	\$ 160,000	\$ 0
		10/17/2022	Operations Manager	\$110,000.02	CALOS	BATH	\$4,230.77		\$ 40,000,000	Operations Manager	\$ 95,000	\$ 40,000	\$ 135,000	\$ (15,000)
		12/12/2022	Order Management	\$55,120.00	CALOS	BATH	\$26.50		\$ 60,000,000	Order Tech	\$ 55,120		\$ 55,120	\$ -
		02/12/2015	Order Management	\$45,760.00	CASAN	WINDOOR	\$22.00		\$ 60,000,000	Order Tech	\$ 46,000		\$ 46,000	\$ 240
		05/02/2022	Administrative Assis	\$49,920.00	CAIEP	ADMIN	\$24.00		\$ 16,000,000	Project Coordinator	\$ 54,080		\$ 54,080	\$ 4,160
		08/08/2022	Administrative Assis	\$43,680.00	CASAN	ADMIN	\$21.00		\$ 16,000,000	Project Coordinator	\$ 50,000		\$ 50,000	\$ 6,320
		06/27/2022	Project Coordinator	\$64,480.00	CASAN	ADMIN	\$2,480.00		\$ 16,000,000	Project Coordinator	\$ 54,080		\$ 54,080	\$ (10,400)
		10/12/2021	Project Coordinator	\$64,480.00	CASAN	ADMIN	\$2,480.00		\$ 16,000,000	Project Coordinator	\$ 54,080		\$ 54,080	\$ (10,400)
		12/27/2022	Administrative Assis	\$49,920.00	CALOS	ADMIN	\$24.00		\$ 16,000,000	Project Coordinator	\$ 50,000		\$ 50,000	\$ 80

General Manager Accountabilities

High Level Job Functions

- Manage and establish product pricing.
- Manage set meetings between key vendors, ordering technicians, and operations managers.
- Own material and labor budget.
- Manage LP for accuracy and purity.
- Manage and set target installed revenue.
- Manage and set target cycle times.
- Manage customer experience.

KPI Expectations

- Cycle time compliance (varies by product), established quarterly
- Budget vs Achieved have a delta of less than 5%, established quarterly according to the backlog
- Gross profit of X%

General Manager (4)
Base Pay: \$125-160k
Bonus: \$0-78k (see below)
Total Earning Potential: \$177-238k
Headcount Trigger: 50-65mm

Bonus Based on : GROSS PROFIT ATTAINMENT

Goal Attainment	% of Rev Scale	Bonus potential
90-94%	0.08%	\$ 52,000
95-99%	0.10%	\$ 65,000
100% plus	0.12%	\$ 78,000

Operation Manager Accountabilities

High Level Job Functions

- Manage Backlog.
- Manage Accounts Receivable in relation to cycle time and finance obligations.
- Drive revenue per day, per week, per month metrics.
- LP Purity
- Staffing/Capacity in relation to the need to accomplish target goals.
- Installed Revenue metrics in relation to target goal.
- Cycle Time less than 90 days (TBD) as a blended average post installation for any given time frame.
- Conduct installer meetings.
- Manage customer experience.

KPI Expectations

- Budget Compliance – 10% direct labor
- Cycle time compliance (varies by product), established quarterly
- Budget vs Achieved have a delta of less than 5%, established quarterly according to the backlog

Operations Manager (6)
Base Pay: \$90-120k
Bonus: \$0-39k (see below)
Total Earning Potential: \$114-159k
Headcount Trigger: 30-35mm

Bonus Based on : Budget vs Achieved

Goal Attainment	% of Rev Scale		Bonus potential
90-94%	0.08%	\$	24,000
95-99%	0.10%	\$	30,000
100% plus	0.12%	\$	39,000

Project Manager Accountabilities

High Level Job Functions

- Customer satisfaction and overall experience.
- Contract and installation scope review.
- Installation paperwork completion.
- Manage installation crews (10 crews/2 individuals)
- Accept and manage installer calls.
- Complete the post install completion call.
- Manage Verification Call for finance.
- Manage and distribute service orders.
- Materials (back up stock)
- Cycle time
- Complete Job Walks
- Training Installs of expectations.
- Attend and participate in installer meetings.

KPI Expectations

- Budget Compliance – 10% direct labor
- Service Order Rate – 10% or less (project workmanship)
- Cycle time compliance (varies by product), established quarterly
- Customer Reviews – greater or equal to 75% response rate

These will be level
loaded by product



Project Manager

Base Pay: \$65-85k

Bonus: \$0-18k (see below)

Total Earning Potential: \$78-103k

Headcount Trigger:

- Phase 1 – 8mm (40)
- Phase 2 – 10mm (30)
- Phase 3 – 12 mm (17)

Bonus Based on : LABOR BUDGET COMPLIANCE

Goal Attainment	Per COC	Bonus potential
90-94%	\$ 28	\$ 12,800
95-99%	\$ 35	\$ 16,000
100% plus	\$ 40	\$ 18,286

Project Coordinator Accountabilities

High Level Job Functions

- Act as customer's point of contact post scheduling through completion of installation.
- Assign installation crew to projects.
- Complete administrative components of work orders at the direction of PM.
- Process close of job
- Receive warranty requests.
- Refer warranty requests to PM for confirmation and scope of work order.
- Track project budget / labor cost
- Installer timecard compliance and installer paysheets creation.
- Maintain LP purity

KPI Expectations

- Customer satisfaction rating greater than or equal to 75%.
- Administrative Error rate less than 10%
- Installer payroll accuracy 95%

Project Coordinator

Base Pay: \$22-32 per hour

Bonus: Not Eligible

Total Earning Potential: \$45-67k per year

Headcount Trigger:

- **Phase 1 – 12mm (17)**
- **Phase 2 – 14mm (14)**
- **Phase 3 – 16 mm (12)**

Schedule Accountabilities

High Level Job Functions

- Scheduling Upcoming Projects, filling slots to ensure the budgeted jobs to be completed is reached
- Schedule installation in the company's CRM using the Scheduling module.
- Advise the customer of preparations that need to take place prior to installation as well as what to expect on the day of installation.
- Update CRM's notes with details from the customer interaction.
- Assign an installation team based on capability rating.
- Build and Update project schedules.
- Develop schedule logic and constraints and realistic installation durations.

KPI Expectations

- Schedule to budget – 95% or more
- Schedule a minimum of 10 jobs per day, based on backlog established quarterly

Scheduler (6)

Base Pay: \$22-27 per hour

Bonus: Not Eligible

Total Earning Potential: \$45-56k per year

Headcount Trigger:

- 45mm p/y
- 3.7mm per month

Order Tech Accountabilities

High Level Job Functions

- Order Material per contract
- Monitor Accurate Shipping Dates
- Meet with suppliers weekly to confirm shipping date accuracy.
- Monitor Suppliers Performance
- Monitor suppliers pricing and shipping dates accuracy.
- Monitoring accurate pricing.
- Research billing differences and approve for payment.
- Process Reorders

KPI Expectations

- Purchase materials- a minimum of 10 jobs per day
- Maintain project materials budget of X% - within 95%

Order Tech (6)

Base Pay: \$22-28 per hour

Bonus: Not Eligible

Total Earning Potential: \$45-58k per year

Headcount Trigger:

- 45mm p/y
- 3.7mm per month

Installer Accountabilities

High Level Job Functions

- Effectively prepare for and complete all assigned jobs.
- Ensure work is completed to the satisfaction the customer and project manager.
- Participate in training, coaching + mentoring personnel in the department.
- Demonstrate commitment to driving proficiency, efficiency, and customer satisfaction no less than 5 stars.
- Completed installation documents and obtain customer satisfaction before closing job
- When it becomes necessary to modify a project process change order

KPI Expectations

- Customer satisfaction rating greater than or equal to 98%.
- Completion time (varies by product)
- Service Order Rate – Less than 5%

This is where most of the “headcount” reduction will come from, I am not sure if they are all actual installers since there is only 45 install “assistants”

Installer

Base Pay: \$25-40 per hour

Bonus: Not Eligible

Total Earning Potential: \$65-150k per year

Headcount Trigger: Rev per month

Bath: 150k

Windows: 300k

Reface: 125k

Design Build 75K

Spa/Hearth 140k

Stucco 100k

Sunrooms/Patio 90k

Roofing 140k

Current Headcount 248

Required Headcount: 113

Sales Support Accountabilities

SALES ADMINS/SALES EXPEDITOR

- Weekly Reporting for sales performance and data analysis on performance.
- Help Desk for Sales Reps (ingage issues, one click issues, etc.)
- Publishing Promotions to Sales Teams and liaison with Marketing for creation
- Ensuring all 'sales paraphernalia' is created in a uniform look / feel
- Managing Ingage (in home presentations) and liaison with Marketing.
- Assist with managing 'sales rep head count' to plan and specific market demands.
- New Product Launches and ensuring all 'sales related' items are completed on time for the launch.
- Ensuring Lead Perfection (and Salesforce) are correct with onboarding and offboarding of sales reps.
- Managing 'automated LP reports' are assigned and working for sales reps.
- Managing CA compliance for HIS Licensing for sales reps.
- Ensuring all process are documented and stored for future reference and liaison with Sales Training for pushing new processes into training department for new sales reps.
- Managing and reporting on 'low performing' reps for VP of Sales to have weekly visibility for additional actions.
- Coordinating with training department on new sales reps and distribution to sales teams as well as coordinating 'sales manager interviews' for new hires.
- Receiving and distributing 'commission reports' to sales reps, received from Auditing.
- Receiving and distributing 'monthly bonus reports' to sales reps and managers received from Auditing.
- Liaison with Concierge Team on feedback loop to VP of Sales and Sales Managers on Post Sale project review issues (IE: Reps not calling in from POS).
- Primary conduit for contact to sales managers and sales teams from rest of the company.
- Manage 'Sales Team' promotional programs.
- Create and publish monthly 'Sales Newsletter' with participation from Marketing.
- Conduit to Auditing for additional reimbursements from Sales Reps and Managers.

SALES ADMIN (2)
Pay: \$22-27 per hour
Trigger: 100mm

SALES EXP (4)
Pay: \$60-70k
Trigger: 50mm

Concierge/Auditing Accountabilities

Concierge

- Reviewing sold projects with client/rep while in the home.
- Ensuring AP is received for project to continue. (both cash and finance)
- Processing new project setup in LP (and future SF)
- Scheduling 'next phase' of project (IE: Field Measures for Window, etc. and eventually Installation Date (once on SF) for projects that DO NOT required a field measure.
- Managing Expeditors for projects that 'come back' from operations for additional clarification.
- Managing 'jobs on hold' reports and ensuring all projects are moving forward post sale into operations, including weekly 'on hold' reports by Lead Perfection Job Status.
- Managing feedback loop to Sales Operations with 'defect rate' on sales reps that are providing 'sloppy' contracts

Auditors

- Post sale audits and commission calculations for first draw.
- Post completion sale audits and final commissions calculations.
- Monthly Bonus Calculations for sales teams.
- Providing Payroll with weekly payroll reports for sales teams and managers.

Concierge (5)
Pay: \$20-26 per hour
Trigger: 40mm

Auditors: (3)
Pay: \$20-26
Trigger: 75mm

Headcount Reduction – In Direct Ops

	Current	Phase 1	Phase 2	Phase 3	Delta
Admin	13	13	6	6	-7
GM	4	4	4	4	0
Office Manager	9	9	9	9	0
Operations Manager	12	6	6	6	-6
Order Tech	8	8	6	6	-2
Project Coordinator	19	17	14	12	-7
Project Manager	49	40	30	17	-32
Warehouse Clerk	14	18	18	18	4
Warehouse Manager	6	9	9	9	3
Warranty	9	9	8	6	-3
	143	133	110	93	-50

Reduction in Headcount 7% 24% 35%

	Ops In Direct	Ops Direct	TOAL
Phase 1 Savings	\$ 89,084	\$ 338,333	\$ 427,417
Phase 2 Savings	\$ 197,411	\$ 338,333	\$ 535,744
Phase 3 Savings	\$ 271,496	\$ 676,667	\$ 948,463
Total	\$ 557,990	\$ 1,353,333	\$ 1,911,624

Installer Labor % Reduction Plan:

Current: 15% Labor

Phase 1: 14% Labor

Phase 2: 13% Labor

Phase 3: 12% Labor