

# Troy's Plan Implementation Summary

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**Date:** November 13, 2024

**Action:** Employee Map Updated with Troy's Branch Assignments

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## Changes Implemented

### 1. Preliminary Evaluation Completed

**File:** `Troy_Plan_Evaluation.md`

Comprehensive analysis of Troy's reorganization plan including:

- 5-branch structure overview (West, Central, East, Tucson, Commercial)
- Pool count and employee distribution analysis
- Financial assessment with EBITDA projections
- Risk identification and mitigation strategies
- Comparison with previous geographic optimization plan
- Recommendations for next steps

**Key Findings:**

- **43 employees** assigned across 5 branches
  - **1,752 total pools** (1,688 residential + 64 commercial)
  - **Commercial division** is new addition with highest profitability (14.2% margin)
  - **Tucson branch** requires attention (-4.4% projected margin, aggressive growth target)
  - **West/Central margins** are thin (2.3-2.4%) but acceptable
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### 2. Employee Location Map Updated

**Live Map:** <https://phoenixnewlocations.abacusai.app>

**Changes Made:**

#### A. Data Updates

- Added `troyAssignment` field to all 43 employees
- Mapped employees to Troy's 5 branches:
- **West:** 10 employees
- **Central:** 11 employees
- **East:** 14 employees
- **Commercial:** 5 employees
- **Tucson:** 3 employees

#### B. Visual Updates

- **New branch colors:**
- Blue: West Branch
- Green: Central Branch
- Purple: East Branch

- 🟧 Amber: Commercial Branch
- 💗 Pink: Tucson Branch
- **Star markers** for office locations maintained (red = 2026, orange = future)

## C. UI Enhancements

- Updated sidebar filters to show all 5 branches
- Modified title from “Office Assignments” to “Branch Assignments”
- Info windows now display:
  - Troy’s current assignment (highlighted in green)
  - Previous geographic recommendation (if different)
  - Distances to 2026 offices (for comparison)
  - Manager information

## D. Comparison Feature

- Map shows when Troy’s assignment differs from geographic optimization
- Allows evaluation of operational vs. distance-based decisions
- Displays distance trade-offs for each employee

## Branch Assignment Summary

### West Branch (10 employees)

**GM:** Steve Lucas | **Asst. Director:** Oney Urquiza | **Repair:** John McCowan

Name	City	Zip	Title
Reyandres Vega	Phoenix	85033	Service Professional
Kenje Dalmacio	Laveen	85339	Service Professional
Michael Vendetti	Buckeye	85326	Service Professional
Ray Vega	Phoenix	85031	Service Professional
Mason Constable	Goodyear	85338	Service Professional
Miranda Loveland	Glendale	85301	Service Professional I
Shae Blackburn	Glendale	85305	Repair Technician - Driver
Steve Lucas	Peoria	85345	Repair Director
Oney Urquiza	Surprise	85374	Assistant Director of Service
John McCowan	Mesa	85203	Pool Technician

**Pools:** 494 → 559 (+13.2% growth)

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## Central Branch (11 employees)

**GM:** Steve Gutierrez | **Asst. Director:** Megan Bradley | **Repair:** Bryan Walters

Name	City	Zip	Title
Angel Ortiz	Phoenix	85051	Service Professional
Tony Pangburn	Phoenix	85027	Service Professional
Joan Magana-Chavez	Surprise	85379	Service Professional
William Odell	Scottsdale	85254	Service Professional
Christian Carlson	Scottsdale	85251	Service Professional
Ray Saltsman	Glendale	85308	Service Professional
Alexander Widom	Tempe	85283	Service Professional I
Bryan Walters	Glendale	85308	Repair Service Professional
Megan Bradley	Peoria	85382	Service Professional
Steve Gutierrez	Mesa	85213	Assistant Director of Service
Chris Bentley	Glendale	85302	Operations Coordinator

**Pools:** 434 → 499 (+15.0% growth)

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## East Branch (14 employees)

**GM:** Todd Johnston | **Asst. Director:** Charles Gay | **Repair:** Jordan Garcia

Name	City	Zip	Title
Michael Montgomery	Mesa	85203	Service Professional
Gerrytt Nikolaus	Phoenix	85040	Service Professional
David Bontrager	Phoenix	85042	Service Professional
Qualen Ross-Cunningham	Chandler	85286	Service Professional
Anthony Garcia	Mesa	85206	Service Professional
Joseph Strong	Mesa	85215	Service Professional
Kent Armer	Phoenix	85032	Service Professional
Ivan Martinez	Casa Grande	85122	Service Professional
Kenneth Felix	Casa Grande	85122	Service Professional
Corey Cox	Casa Grande	85122	Service Professional
Christian Nolan	Gilbert	85233	Service Professional I
Jordan Garcia	Glendale	85301	Service Professional
Charles Gay	Mesa	85208	Assistant Director of Service
Todd Johnston	Chandler	85225	Director of Service

**Pools:** 690 → 720 (+4.3% growth)

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## Commercial Branch (5 employees)

**GM:** Talynn Stewart | **Asst. Director:** Thomas Rau

Name	City	Zip	Title
Wilfred Lambert	Glendale	85305	Commercial Service Professional
Michael Grant	Phoenix	85021	Service Professional
Hassan El Bouqa	Tempe	85282	Service Professional I
Thomas Rau	Tempe	85281	Service Professional
Talynn Stewart	Phoenix	85023	Assistant Director of Service

**Pools:** 64 → 86 (+34.4% growth)

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## Tucson Branch (3 employees)

**GM:** Matthew Halteman

Name	City	Zip	Title
Matthew Halteman	Tucson	85743	Assistant Director of Service
Mike Wall	Tucson	85741	Service Professional I
Jeremy Hodge	Arizona City	85123	Service Professional I

**Pools:** 70 → 135 (+92.9% growth) 

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## Notable Assignment Differences

### Geographic Optimization vs. Troy's Operational Assignment

Employee	Home City	Troy's Assignment	Geographic Rec.	Distance Impact
Michael Grant	Phoenix (85021)	Commercial	West	Commercial spans metro
Matthew Halteman	Tucson	Tucson	East	Tucson leadership role
Thomas Rau	Tempe	Commercial	Phoenix	Commercial spans metro
Joan Magana-Chavez	Surprise	Central	West	~5-10 mi difference
Alexander Widom	Tempe	Central	East	~5-10 mi difference

**Analysis:** Most assignments align well with geography. Differences are primarily due to:

1. **Commercial division** requires metro-wide coverage (not tied to specific office)
2. **Leadership roles** (e.g., Matthew Halteman leading Tucson operations)
3. **Operational needs** (e.g., balancing team sizes and expertise)

## Map Usage Guide

### Viewing the Map

1. **Visit:** <https://phoenixnewlocations.abacusai.app>
2. **Select:** “Employee Locations” view (orange icon)
3. **Filter by branch:** Click branch buttons in left sidebar
4. **Click markers** to see employee details

### Understanding the Display

#### Employee Markers (circles):

- Click any employee marker to see:
- Name, title, city
- Troy's branch assignment
- Manager
- Distances to all three 2026 offices
- Note if assignment differs from geographic recommendation

#### Office Markers (stars):

- ★ Red stars: 2026 office locations (West, Central, East)
- ★ Orange stars: Future planning office locations

**Filters:**

- Use sidebar buttons to view specific branches
  - Employee count displayed for each branch
  - "All Employees" shows complete 43-person team
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## **Next Steps & Open Items**

### **Priority 1: Commercial Data (CRITICAL)**

- [ ] Obtain commercial pool addresses
- [ ] Get detailed commercial account list
- [ ] Map commercial territories on the application
- [ ] Validate commercial employee assignments with actual service areas

### **Priority 2: Tucson Planning**

- [ ] Review Tucson growth projections (92.9% is very aggressive)
- [ ] Identify Assistant Director and CSM candidates
- [ ] Develop staffing plan for growth phase
- [ ] Consider partnership with East branch for support

### **Priority 3: Financial Validation**

- [ ] Validate pool counts against actual customer database
- [ ] Confirm revenue figures with historical data
- [ ] Stress-test financial model with conservative assumptions
- [ ] Review pricing strategy for West/Central margins

### **Priority 4: Employee Validation**

- [ ] Confirm all employees accept their branch assignments
- [ ] Review any assignments with significant commute changes
- [ ] Validate Casa Grande employees' willingness for East assignment
- [ ] Address any concerns from Buckeye/Goodyear employees

### **Priority 5: Open Positions**

- [ ] East - Customer Service Manager (Taryn Takeda)
  - [ ] Tucson - Assistant Director
  - [ ] Tucson - Customer Service Manager
  - [ ] Commercial - Customer Service Manager
  - [ ] Tucson - Repair Professional
  - [ ] Commercial - Future Repair Pro
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## **Files Delivered**

1. **Troy\_Plan\_Evaluation.md** - Comprehensive analysis document
2. **Employee\_Addresses\_with\_Branches.xlsx** - Employee data with Troy's assignments
3. **Troy\_Plan\_Branch\_Summary.xlsx** - Financial summary by branch

4. **Updated Live Map** - <https://phoenixnewlocations.abacusai.app> (Employee Locations view)

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## Summary

 **Evaluation completed** - Troy's plan is promising but needs refinement, particularly for Tucson branch

 **Map updated** - All 43 employees now displayed with Troy's 5-branch assignments (West, Central, East, Commercial, Tucson)

 **Comparison enabled** - Map shows both Troy's operational assignments and previous geographic recommendations

 **Commercial data needed** - Cannot fully validate commercial territory without pool addresses

 **Tucson requires attention** - Negative EBITDA projection and aggressive growth target need review

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**Prepared by:** Strategic Planning Analysis

**Last Updated:** November 13, 2024