

Week of 7/20, I can not remember the exact date:

There was an incident involving me and Ashley regarding a customer call during which she was providing the customer with incorrect information. While she was on the call, I attempted to get her attention so she could place the customer on hold, allowing me to coach her on the best way to handle the situation. Ashley covered her ear and ignored my request.

After the call ended, I attempted to provide coaching. Ashley became defensive and explained that she was handling the situation the best way she could and was unable to listen to both me and the customer at the same time. I explained that the information she provided to the customer was incorrect and that the conversation appeared to be escalating, which was why I had been trying to get her attention and have her place the customer on hold.

I intended to speak with Ashley privately about the incident the following day, however, when I arrived at the office, she asked to speak with me in Humboldt. She apologized for her behavior the previous day. She explained that while she was speaking with the customer, she noticed a message on her watch indicating that a family member had fallen and was being taken to the hospital. She shared that this caused her significant distress and acknowledged that her behavior during and after the customer call was inappropriate.

I thanked Ashley for her apology and advised her that if a family emergency or personal situation affects her ability to perform her job duties, she should notify me immediately and request to be excused so she can address the situation. I also reminded her that at MTech, we are expected to communicate respectfully with one another, even during challenging circumstances, and that her tone toward me during our interaction was inappropriate. I emphasized that while personal situations can be stressful, we are expected to maintain professionalism and composure when interacting with customers and coworkers.

She agreed and we ended the conversation.

On July 28, April approached me and asked if I would speak with Ashley regarding her frequent interruptions during training and coaching sessions. April stated that she has been feeling confused because, whenever a team member is coaching her on MTech's processes and expectations, Ashley often interjects with her own opinions about how tasks

should be handled. April also shared that Ashley is frequently telling her what to do, making her feel as though Ashley is acting more like her supervisor than an equal coworker.

April expressed that she does not appreciate Ashley's constant direction, interruptions, or overall approach and demeanor during these interactions.

I informed April that I would speak with Ashley regarding her concerns. I also explained that, once Mikelle returns, Ashley will be transitioning into a different role focused on assisting with projects, which should significantly limit their interactions going forward.

On July 29, I met with Ashley to discuss upcoming departmental changes. I informed her that Mikelle would be returning to work on Friday, July 31, and that we needed to reassign responsibilities accordingly. I explained that Mikelle would resume her role as a dispatcher alongside April, and that Ashley would transition to working on BuildOps projects that needed to be completed prior to the launch.

I told Ashley that I believed the BuildOps project would be a good fit for her because of her previous experience with ServiceTitan, as BuildOps is a similar platform and I felt she would be able to learn it quickly. Ashley appeared excited about the opportunity and thanked me for considering her for the assignment.

During the same meeting, I also addressed feedback I had received from April. I explained that April was feeling somewhat uncomfortable with Ashley's approach during training and coaching and that it would be best to allow the senior team members to handle April's coaching and training moving forward. Ashley responded that she was only trying to help. I acknowledged and appreciated her willingness to assist but explained that her frequent input was creating confusion rather than helping the training process.

The meeting concluded on a positive note. Ashley appeared receptive to the feedback, and we both left the conversation feeling confident that the changes in responsibilities and expectations would lead to improved interactions going forward.

On July 31, two of our technicians contacted Ashley to report that the job they were working on was taking longer than anticipated and that they did not believe they would be able to make it to their final job of the day. Donna overheard Ashley and me discussing the situation and approached Ashley with suggestions for adjusting the dispatch board so the technicians could remain on their current job for the rest of the day.

Ashley responded to Donna in a manner that I perceived as harsh and somewhat aggressive. Donna reacted negatively to Ashley's response, and a verbal disagreement followed.

Afterward, Ashley asked to speak with me privately in a conference room. During our conversation, Ashley expressed that she felt the team did not like her and that she believed she was treated differently than April.

I told Ashley that I believed her communication style sometimes came across as harsh or condescending and that this could be contributing to the team's reactions. I explained that this communication style was inconsistent with the respectful and collaborative culture we strive to maintain at MTech. Ashley responded that she is naturally a very direct person and that this is simply how she communicates.

I clarified that I was not asking her to change her direct communication style, but rather to deliver feedback and direction in a more considerate and respectful manner. I explained that it is possible to be both direct and kind, and that this approach aligns with MTech's expectations for professional interactions.

I also shared feedback that, when team members attempt to coach her on MTech's processes and procedures, she often becomes defensive and provides lengthy explanations for why she is handling situations differently. I explained that this can create the impression that she is unwilling to accept coaching or consider alternative approaches, making team members less inclined to continue providing guidance.

Ashley then stated that I had "given Mikelle the dispatcher position instead of her" and that I had assigned her to the BuildOps project because "no one wants to deal with her in Dispatch."

I explained that Mikelle was originally hired as a Dispatcher in 2019 and, because she had been on approved FMLA leave, she was entitled to return to the same position upon her return. I clarified that this decision was unrelated to Ashley's performance or relationships with the team. I also explained that if I believed Ashley was not a good fit for the dispatcher role due to interpersonal concerns, I would have addressed that directly rather than assigning her to an important BuildOps project. I reiterated that I selected her for the BuildOps assignment because I believed her previous ServiceTitan experience would allow her to contribute successfully to that project.

Ashley became emotional during the discussion and stated that she was doing her best to get along with everyone. She also shared that she sometimes felt I had demeaned her. I told Ashley that this had never been my intention and asked whether she could provide specific examples so I could better understand and address the concern. Ashley was

unable to identify any specific incidents and stated that it was simply how she had felt at times.

I encouraged Ashley to let me know immediately if she ever felt that I had spoken to her in a way that made her feel demeaned so that I could recognize the behavior and correct it if necessary. I also provided several examples of how certain situations could be approached in a way that remained direct while being more collaborative and respectful, with the goal of improving communication and strengthening working relationships with her teammates.

The meeting concluded on a positive note. Ashley appeared receptive to the discussion, and we both left with the understanding that we would work toward improving communication and interactions moving forward.

On 8/4/26

Per our conversation on Friday 7/31, Ashley was assigned to projects today. I explained to Ashley that her role would be to provide backup dispatch support if April or Mikelle were on the phone or needed to step away, ensuring phone coverage as needed.

Throughout the day, I observed that when I asked April questions related to dispatch or attempted to coach her, Ashley frequently interjected and would answer on April's behalf.

One specific example occurred when one of our plumbers called to report that he was unable to reach the contact for his next service call. April had created the work order and attempted to contact the customer. The phone number on file was not accepting calls, and the email address on file resulted in an undeliverable message. As I was coaching April through the next steps, Ashley interjected and instructed April to review Service Sites to identify the last known contact and attempt to reach that individual. This was the same coaching I was in the process of providing to April before I was interrupted.

Ashley then independently emailed the last contact on file, asking that individual to call her directly to determine whether service was still needed. The contact responded, and it was confirmed that service was still required.

While Ashley's actions resulted in establishing contact with the customer, she stepped into a coaching and decision-making role that had not been assigned to her. This interrupted the coaching conversation with April and was inconsistent with the expectations that had been communicated regarding her backup dispatch responsibilities.

Week of 7/13 and 8/6 was when the below incidents were mentioned to me:

A couple of gentlemen on our team have expressed to me that they are uncomfortable because Ashley has a habit of touching their shoulders or arms while conversing. I have experienced the same behavior myself. While it does not personally bother me, I believe it is generally inappropriate to touch coworkers unless you know them well enough to know that such contact is welcome. Because not everyone is comfortable with physical touch, maintaining appropriate professional boundaries helps ensure everyone feels respected and comfortable in the workplace.

I have not discussed this with Ashley.