

Leo Integration & Rebranding FAQ



Post-Town Hall Edition

01. Why are we integrating and rebranding now?

We're bringing our companies together under the Leo brand to unify our talent, expertise, and customer promise into one cohesive organization. This helps us strengthen our position in the market, improve how we serve customers, and create more meaningful growth opportunities for everyone.

When we operate as one company, we can do bigger and better things together than we ever could alone. A great example of this: First Choice and Caliber recently collaborated on a major RFP—working together under the First Choice Facilities name. That collaboration led to a \$5 million award neither company would have had access to on its own. And instead of competing or shifting credit, the team left the “win” in the FCF business, proving that a win for one is truly a win for all.

This is what Leo is all about—scaling what works, sharing success, and becoming stronger together.

02. What does this mean for my job?

Our focus is on growth with people at the center. This is not a downsizing effort. While some reporting lines or systems may evolve to support a more connected structure, our goal is to provide you with better support, smarter tools, and more opportunity—not less.

03. How will this affect my career growth?

As we streamline and unify, we're also building out clearer paths for advancement. You'll see more consistency in job structures, expanded training, and increased visibility into internal career opportunities across the Leo platform. We want Leo to be a place where you can build a career, not just do a job.

04. Will our pay, benefits, or titles change?

No changes today. All current pay, benefits, and titles remain in place. As we align systems, we'll look for opportunities to enhance benefits and L&D offerings across the board, leveraging our scale. Any changes will be communicated transparently and well in advance.

05. Are we being acquired or sold?

No. We're not being sold. We're building Leo—a business designed to last. While we're backed by private equity (Alpine, through Orion), the Leo brand represents the business, the platform, and the people. This is about building a unified, sustainable company, not a short-term exit.

06. What's changing right now?

Today, nothing about your day-to-day work changes. But we are preparing for a few key updates this fall:

- Microsoft 365: One platform for all Leo teams, including unified email addresses (@poweredbyLeo.com) by the end of the year.
- Paylocity: One HR system across the business, starting in October

We'll guide you through each step with training and support.

07. What stays the same?

- Your current role, responsibilities, and direct manager
 - Our commitment to safety, service, and doing the job right
 - The entrepreneurial, can-do spirit that defines our teams
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08. Who do I go to with questions or concerns?

Start with your **local leader or HR representative**, just as you always have. They're closest to the changes and can help you navigate next steps. We're also setting up a digital hub with updates and a space to submit anonymous questions.

09. How will this affect our customers and vendors?

We're aiming for a seamless experience. Customers will benefit from more consistent service, better communication, and deeper bench strength. Vendors are a key part of our strategy—they're not just resources; they're part of our brand. Supporting them is supporting Leo.

10. What if I'm already overwhelmed—how will I manage more change?

We get it. Change fatigue is real. We're taking a measured approach, and your feedback matters. If something's unclear or creating extra work, speak up. This isn't just a top-down rollout—it's something we're building together.

11. What is Leo Sync and how does it relate to me?

Leo Sync is our shared services platform—designed to support all teams by providing consistent tools, systems, and expertise across the organization. It's how we “operate in sync” instead of in silos, allowing you to focus on delivering great service, strong outcomes, and meaningful relationships.

Leo Sync includes the following key functions and leaders:

- **People Excellence:** Led by **Keith Bohns**, Interim CHRO, focused on Total Rewards, L&D, Talent Acquisition and HR Business Partners
- **Financial Excellence:** Led by **Tina Padgett**, focused on fast, accurate, and consistent accounting and reporting.
- **Technology:** Led by **Todd Henry**, focused on scalable, integrated tools and systems
- **M&A Strategy:** Driven by **Matt Martel**, ensuring smart, aligned growth
- **Integrations:** Led by **Kevin Wick**, helping us onboard new businesses seamlessly

- **Business Intelligence:** Overseen by **Christian Lee**, delivering insights that power smarter decisions
- **Vendor Management:** Led by **Matt Elias**, building a high-performing program that supports execution in the field

By bringing these functions together, we're aiming to reduce complexity, eliminate duplication, and deliver high-impact support where it matters most—on the ground with you and your teams.

12. What are Leo Inside and Leo Outside?

Leo Inside and Leo Outside are the two core divisions of our business, replacing the names “Project Liberty” and “Project Elevate.” These divisions reflect how we organize our services and teams moving forward:

- **Leo Inside** focuses on interior facilities management—doors, locksmithing, plumbing, electrical, general maintenance, and more. The companies coming together under Leo Inside include:
 - + CS Hudson
 - + RSM
 - + Academy Locksmith
 - + Firstline Lock & Door
 - + CLM Midwest
- **Leo Outside** focuses on exterior property services—landscaping, snow removal, exterior repairs, and general outdoor maintenance. This division combines the strengths of:
 - + First Choice Facilities
 - + Caliber Service Management

Each of these businesses brings deep expertise, loyal customer relationships, and strong regional knowledge. Together, they make us stronger, more capable, and ready to scale.

A few reporting line changes have also taken place to support the new structure:

- Devin Wenzel (Firstline) will now lead operations across Leo Inside
- Firstline now reports into Kenny Friede (Academy), with Steve Barna supporting day-to-day operations
- John Criezis will now lead CLM Midwest, while Matt Martel shifts his focus to drive our M&A strategy for the brand

These changes are designed to strengthen leadership capacity and help us scale more effectively while keeping deep operational knowledge in place.

13. Will our culture change?

Our culture will continue to evolve—but the values that make each of our offices special remain incredibly important. As we grow into one unified organization, we're introducing Leo's core values and a clear vision for who we are and how we operate. These shared values are meant to guide and connect us, not replace the pride, relationships, and traditions that exist locally.

We encourage everyone to stay connected to your local teams and culture—and to begin

building stronger connections across the broader Leo network. This isn't about erasing the unique culture in any one office—it's about amplifying what's great, while giving all employees a common foundation to grow from, together.

14. Will our technology change?

Yes—but in ways designed to make your work easier, not harder. We're moving to shared systems across the organization, including:

- Microsoft 365 for consistent communication and collaboration
- Paylocity for streamlined HR, payroll, and timekeeping
- A future rollout of a CMMS (Computerized Maintenance Management System)—a platform that helps teams track work orders, schedule preventive maintenance, manage assets, and ensure greater transparency between field teams, dispatch, and customers

These systems are being implemented to reduce friction, eliminate duplication, and ensure everyone has access to the same reliable tools and information. With deeper cybersecurity resources from Leo SYNC, we'll ensure that everyone's information is secure and backed up. You'll receive training and support every step of the way.

15. Should I update my email signature or LinkedIn?

Not yet. We'll give you guidance and templates when the brand officially launches externally. For now, continue using your current company name and email. This update is for employees only at this stage.

16. What is our new brand all about?

It's more than a logo. Our brand is how we show up—how customers, vendors, and employees feel when they work with us. At Leo, we treat every facility like it's our own. That means acting with urgency, ownership, and care. And our new brand identity, launching publicly this Fall, reflects that standard.

17. What is Alder and why is it staying separate?

Alder, led by Roxane Duka, is a premium brand delivering white-glove service to high-end office environments. While it's part of Leo, Alder will retain its distinct brand to protect its specialized value. We'll support Alder with Leo resources and learn from its hospitality-first model.

