# 1104: Daily Sales Activity Report

1100: All Sales Policies · https://milo.masseyservices.com/docs/1104-daily-sales-activity-report/

**Section:** Sales
**Subject:** Daily Sales Activity Report
**Approved by:** Harvey L. Massey
**Effective Date:** 18 March 2004
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**Policy Owner:**

# Policy

The Daily Sales Activity Report (DSAR) is to be used by all Inspectors and Account Managers. This report will be prepared every day and must reflect all activities of the day.

The Daily Sales Activity Report (DSAR) is Service specific, with one page for Pest & Termite Services and one page for Landscape Services.

## Daily Sales Activity Reports

The Daily Sales Activity Report is prepared as follows:

I. In the upper right corner, the Inspector/Account Manager is to print the date, the Service Center and their name.

II. Pre-list today’s appointments. The activity report should be updated after each call is made.

III. Below is the information required for each of the columns on the report (place the appropriate information under the appropriate service(i.e. Pest Prevention,GreenUP Lawn, Tree and Shrub Care,TermiteProtection).

- Lead Key – Indicate whether the lead was an office lead (this will include web leads), service lead or creative Call.

**Codes**:

| | |
|---|---|
| O - Office Lead | OCB - Office Lead Callbak |
| W - Web Lead | WCB - Web Lead Callback |
| S - Service Call | SCB - Service Lead Callback |
| C - Creative Call | CCB - Creative Callback |

- Prospect’s Name - Print customer's first and last name. For commercial accounts, indicate business name and contact name.
- Address - Show complete address.
- Phone Number - Show phone number of customer.
- Initial Charge - Show initial charge or special service charge for services either sold or pending in Pest Prevention, Landscape, Lawn Care, Tree/Shrub.
- Reg. Service Charge - Show regular service charge for services either sold or pending in Pest Prevention, Landscape, Lawn Care, Tree/Shrub.
- Total Price Sold - Indicate the total annual contract price for Pest Prevention, Landscape, Lawn Care, and Tree/Shrub.
- Termite Protection - Indicate the total price quoted based on what the customer wanted and needed at the time of the sale. Columns are provided for Total Coverage, Conventional Proposal, Bait Proposal, Pre-Treat Proposal, and WDO Inspection.
- Termite Price Sold - Indicate the total price sold for Total Coverage, Conventional, Bait, Pre-Treat or WDO Inspection.
- Comments - Indicate any comments, which may pertain to the customer/prospect, including reason lost and / or pending, the different prices quoted for liquid versus traditional treatment, and special services work offered.
- Callback Date - Indicate the date you will make a callback on all pending accounts. Immediately transfer the account’s information to the appropriate 1-31 page, or add it to the January- to-December Index pages following the 1-31 pages. A separate 1-31 page will be added as needed for future months callbacks.
- Other Service - Use the following key code to indicate the Type of Proposal:
  - PP – Pest Prevention
  - IR – Irrigation

- TP – Termite Protection
- SD – Sod
- PL – Plants

- Total Price Sold - Indicate the total price sold for the type of Other Service indicated.

IV. On a daily basis, the following columns must be totaled and both the daily and month-to- date figures entered in the appropriate boxes at the bottom of the respective columns:

Pest Prevention Total Price Sold
Termite / Bait / Fumigation Total Price Sold
Landscape, Lawn, and Tree/Shrub Price Sold

V. The Call and Sales Recap boxes to be filled out daily for each sales category at the bottom left half of the page as follows:

- Calls Today - List the number of calls made today and the number of proposals presented today by category (i.e. Pest Prevention, GreenUP Landscape, Lawn, Tree/Shrub Care and Termite Protection).
- Month-to-Date - Enter a running total of Calls made by Lead Type received or Creative Calls made adjacent to the type of call box for each Sales category. Office, Web and Service are referred to as leads, Creative is referred to as “Calls” made i.e. physical contacts/proposals for current/future business appointments.
  - Office Leads - enter a running total of Office Leads received for the entire month-to-date in the box provided.
  - Web Leads - enter a running total of Web Leads received for the entire month-to-date in the box provided.
  - Service Leads - enter a running total of Service Leads received for the entire month-to-date in the box provided.
  - Creative Call - Enter a running total of creative “**Calls**”, month-to-date in the box provided. i.e. physical contacts/proposals for current/future business appointments made.
  - Call backs - Enter the total number of callbacks made by type in the month-to-date box.

    - MTD Calls - Enter in the box provided the total number of all "Calls" made. Add vertically all office, service, and creative “Calls” for the Month-to-date.
    - MTD Proposals - Enter the total number of office, service, and creative “Proposals” made month-to-date in the box provided.

- Type of call - Indicates the three major types of Calls/Leads: Office indicates any leads that result from inquiry into the office; WEB indicates any leads that result from the web site; Service indicates any leads that result from a Service Technician; Creative indicates all “Calls” generated by the Inspector or Account Manager.
- Sold - Indicate the number of sales month-to-date by category and type of lead. Include all sales regardless of the amount, including special service agreement sales.
- % (Percentage) - Reflects the percentage of sold divided by the total number of leads received or calls made.
- Unit/Dollars MTD Budgets - by Sales Category- Each Inspector/Accounts Manager will maintain a daily progressive budget predetermined by he/she and the General Manager at the beginning of each month.
- The Odometer Reading box in the bottom right corner is to be completed by all Inspectors and Account Managers driving company vehicles. Indicate the odometer reading at the start of the workday under the line labeled “A.M.”. Indicate the odometer reading at the end of the workday on the top line labeled “P.M.”. Subtract the A.M. reading from the P.M. reading to obtain “Mileage Driven Today”.
- The Inspector/Account Manager must sign the Daily Sales Activity Report after the report has been completed. After reviewing, the General Manager must sign the report indicating his acceptance of the information therein.
- Prior to the Daily Accountability Session held each morning, the Inspector/Account Manager must complete the prior day’s activity report and prepare a new report (pre-list) for today’s appointments. All signed Service Agreements or completed proposals/graphs must be attached to the prior day’s Activity Report for every inspection indicated. The General Manager’s copy of the pre-list and the Daily Sales Activity Report is kept on file in the Service Center Office. The Inspector/Account Manager maintains the sales copy for follow-up.
- At the end of each month, file the completed Daily Sales Activity Reports by date, by Inspector, with all other reports compiled at month-end, including the month’s deposits, the technicians’

completed work, accounts payable, etc.

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