1107: Service Center Recap

1100: All Sales Policies · https://milo.masseyservices.com/docs/1107-service-center-recap/

Subject: Service Center Recap

Approved by: Tony Massey

Effective Date: 1 June 2014

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Policy Owner: Vice President of Business Development

Policy

- The Service Center Sales Recap is to be prepared by management every Friday. The information for this report should be taken from the Daily Sales Activity Report (DSAR). This report must be updated on the “G” (Global)
  Drive every Friday by 10:00 AM.
- Once the Lead Count reconciliation has been performed at month end using the telephone call books, lead logs, Daily Sales Activity Reports and computer reports to assure an accurate count, a Final Sales Recap is to be prepared. This report must be updated on the “G” (Global) Drive on the first day of the month before 12:00 PM.
- The Service Center Sales Recap is Service specific, with one page for Pest & Termite Services and one page for Landscape Services

The Service Center Sales Recap is prepared as follows:

1. **Service Center:** in the upper right-hand corner record the service center name and number.
2. **MTD thru Day:** record the date the report is being prepared for.
3. **Date:** the date the report is being prepared.
4. The **Pest & Termite Sales Recap** is divided into two sections: PEST PREVENTION and TERMITE PROTECTION and the Landscape Services Sales Recap is divided into two sections: LAWN CARE and LANDSCAPE IRRIGATION / RENOVATION. Under the appropriate sections, record the following

information:

i. **Name:** record employees' names. Every Service Center employee with sales should be listed.

ii. **Position:** record current position (i.e. Inspector, Account Manager, Service Technician, Service Manager, etc.).

5. **# MTD** – Marketing Leads received.
   Rec'd – number of Marketing Leads received month-to-date
   Sold – number of Marketing Leads sold month-to-date
   % - Marketing Lead closure (calculate by dividing number sold by number received)
6. **MTD** – Creative Sales – number of creative sales sold month to date.
7. **# MTD** – Total Sales – Number of office leads sold month to date plus the number of creative sales sold.
8. **# Calls MTD** – record number of personal contacts month to date (do not include phone contacts or house calls where no one is home).
9. **# Proposals MTD** – record the total number of proposals given month to date. (Note: to classify as a proposal, a complete proposal should be written up by the Inspector / Account Manager and filed alphabetically in the Service Center.)
10. **Total $ Pest/Termite/Landscape/Lawn/Tree & Shrub/Irrigation/Renovation MTD** – record the total dollar of Pest/Termite/Landscape/Lawn/Tree & Shrub/Irrigation/Renovation sales in the appropriate sections.
11. **Pest/Termite/Landscape/Lawn/Tree & Shrub/Irrigation/Renovation Specials Sold MTD** – record the number
    of units and dollar amount in the appropriate sections.
12. **To Other Service Centers** – record the number and dollar value of services that were sold out of your Service
    Center territory. (Note: these sales should be subtracted from Pest/Lawn, Tree & Shrub/Termite sales columns.)
13. **From Other Service Centers** – record the number and dollar value of services sold within your territory by other
    Service Centers (Note: these sales should be added to Pest/Termite/Landscape/Lawn/Tree & Shrub/Irrigation/Renovation sales columns.)

14. **Termite Protection** – Termite Sales MTD – record the number and dollar value of conventional or termite odd
    jobs sold month to date.
15. **Baiting Sales MTD** – record number and dollar value of baiting contracts sold month to date

Downloads

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