1112: Start Sheet

1100: All Sales Policies · https://milo.masseyservices.com/docs/1112-start-sheet/

Section: Sales
Subject: Start Sheet
Approved by: Anthony L. Massey
Effective Date: 1 June 2014
Last Reviewed Date: 6 June 2014
Policy Owner: Vice President of Business Development

Policy

The Start Sheet is a sales tool that is to be filled out by Inspectors and Account Managers for the purpose of increasing communication between sales, administration, management, and service.

By properly completing the Start Sheet and including it in the initial paperwork package of the sale, we are able to prepare for and deliver the exact customized service that was sold to our Customer.

Correctly used, any Service Center team member can quickly glance at the Start Sheet to determine date of initial service, special instructions or equipment needed, directions to the job, and other pertinent information.

Start Sheet

The Start Sheet is prepared as follows:

1. A Start Sheet is to be completed and turned in with every sales package.
2. At the top of the page, the Inspector or Account Manager is to check the box that applies to the type of service sold.
3. Fill in Date, Day, and Time the technician or technicians are to arrive for the initial service.
4. Complete all the customer’s account information (i.e. Name, Address, City, State, Zip Code, Home Phone, Work Phone, Grid Number)

5. Complete the Price section of the Start Sheet as follows:
    - For Residential, Commercial Pest Prevention, Lawn Care and/or Tree Shrub Care include the initial monthly service charge, the per trip visit charge and the total of the annual agreement.
    - For One-time Services, Conventional Termite, Baiting, Total Coverage and Fumigation Sales, include the total charge of service on the price line in the total charge area.
6. Special Instructions / Equipment Needed:
    - Indicate all special instructions discussed between the Inspector or Account Manager and the customer.
    - Indicate any special equipment needs.
7. Directions to Job:
    - Clearly print specific directions from the service center to the job site.
    - Use only left, right, stop and go directions.
    - Do not use directions such as north, south, east and west.
8. Termite Agreements – Complete the termite agreement box as follows:
    - Lineal / square / cubic footage
        - Fumigations: Include cubic footage
        - Conventional and Baiting: Include lineal footage
        - Total Coverage: Include square footage
    - List locations of all active WDI infestations.
9. GreenUp Agreements – Complete the lawn agreement box as follows:
    - Check the box to indicate the Type of Service(s) that apply.
    - Include the Total Square Footage for each service.
    - Indicate the type of lawn variety.
    - Indicate the location of the irrigation timer.
    - Indicate results of pH analysis
10. The Technician Section is to be completed at the job site by the start technician providing the service. By completing this section in its entirety, management has some feedback to assure that

the service

provided matches what we sold our customer.

- Actual lineal / square / cubic footage is to be verified and documented by the technician for the appropriate service rendered. (i.e. Bait, Lawn, Fumigation, etc.)
- Print the first and last name of the technician providing the service.
- Indicate the actual number of termite bait stations installed.

11. The technician will include any pertinent notes concerning this job that must be brought to management’s attention. (i.e. Discrepancies in measurement, referrals, conditions conducive, etc.)
12. Fill in any monies collected upon completion of the service in the space provided.
13. Print the name of the inspector who sold the job and the date of the sale.
14. The General Manager / Sales Manager will review the Start Sheet for accuracy at the time of sales check-in. He will sign and date the Start Sheet indicating approval of all information provided

Downloads

Embedded media: https://milo.masseyservices.com/wp-content/uploads/2025/09/1112-Start-Sheet.pdf

1112 Start SheetDownload