1114: Multi-Family Prospecting and Sales

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Section: Office Administration & Sales
Subject: Multi-Family Prospecting and Sales
Approved by: Tony Massey
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Policy Owner: Vice President of Business Development

Policy

The multiple property and portfolio packaging of multi-family communities requires coordination between our Service Center sales teams and our Multi-family Service Center.

Effective coordination and communication:

- Ensures consistent pricing and appropriate protocol selection across multiple properties managed by a single property management company;
- Takes advantage of existing relationships at either the property, regional, or corporate level of property management companies; and
- Ensures that we present ourselves as the best choice to provide services to the multi-family communities.

To accomplish effective coordination and communication, the following is required:

Prior to Calling on a Multi-Family

Prior to calling on a multi-family community, the Team Member is to contact our Multi-family Service Center to determine what, if any, current activity exists with that property or portfolio and/or what relevant information is available to increase the success of the Team Member’s efforts.

Upon calling our MULTI-FAMILY Service Center, the Team Member will be provided with the following:

1. **This community is already being solicited directly**. In this case, the Team Member should not call on the property.

2. **This community is already being solicited through its property management company**. In this case, the Team Member may be asked to call on the property manager to establish a secondary, positive relationship. If the Team Member is asked to call on the property manager in order to establish a secondary, positive relationship, the components of the call would include:

1. Introducing yourself and our Company;
2. Sharing that we are working through their property management company to provide solutions to their needs;
3. Determining what specific problems this particular community is having and describing how our MULTI-FAMILY protocols can eliminate them and prevent them from happening in the future; and
4. Qualifying our company, expressing excitement at the prospect of servicing them in the future, and restating that we are working through their management company to provide them excellent customer service.

NOTE: Under NO Circumstances is a proposal or speculative pricing to be given to the property manager.

3. **This community is not being solicited directly or through its property management company**.

In this case, any relevant information available will be provided to the Team Member in order to increase the likelihood for success. The Team Member is then able to call on the community using best practices to establish a relationship and secure the opportunity to make a proposal and presentation.

Prior to Making a Proposal or Presentation to a Multi-Family Community

Prior to any proposal or presentation to a multi-family community, the Team Member is to contact our Multi-Family Service Center and cover the proposal with either the Multi-Family General Manager or Director of Key Accounts. The Multi-Family GM or Director of Key Accounts must sign off on the proposal before it is allowed to be presented.

This communication and pre-approval process ensures:

1. Proper selection of the authorized protocols available;
2. Appropriate frequency of on-site servicing based upon the number of units;
3. Rate Card pricing consistency based upon portfolio size including charges for one-time services, additional site work not included in the regular service price; and
4. Conveying and reinforcing all advantages of Massey Services (i.e. planning meeting, Service Log book, etc.).

After the Sale

At the time the sale is made to a multi-family community, a planning meeting is to be scheduled by the Team Member to include the property manager, the maintenance supervisor, the Team Member, and the Service Manager or General Manager. At the planning meeting, all aspects of the service to be provided are to be covered. Planning meetings are required and would include, but not be limited to:

1. Scope of Service and Covered Insects
2. Frequency of Service
3. Day/Time of Service
4. Pre-notification requirements and responsibilities
5. Confirmation of key preparation by Community as well as oversight conditions
6. Service Log use and contact information
7. Bed bug and infestation pricing and processes including non-emergency additional visits, etc.

Invoicing, billing, and payment procedure.

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