1115: New Construction Guarantee Delivery

1100: All Sales Policies · https://milo.masseyservices.com/docs/1115-new-construction-guarantee-delivery/

Section: Office Administration
Subject: New Construction Guarantee Delivery
Approved by: Tony Massey
Effective Date: 1 June 2014
Last Reviewed Date: 6 June 2014
Policy Owner: Vice President of Business Development

Policy

Massey Services, Inc. provides preventative termite treatment for New Construction for the purpose of protecting new buildings from subterranean termite infestation. This practice, known as “Pretreatment,” provides powerful peace of mind and a renewable guarantee of termite protection to our homeowners and the opportunity for us to cross-sell our other services.

In addition to providing a great pre-construction treatment, the most important part of our new construction business is delivering our termite protection guarantee to the new Homeowner to fulfill any and all related laws, statutes, and regulations. An equally important part of delivering guarantees is laying the foundation for the beginning of a long-term, trusting relationship where we can continue to provide renewable Termite Protection and offer additional beneficial services.

General Manager’s Responsibilities

- Ensure that each Inspector is trained to understand the value of continuing termite protection so they can effectively educate our new homeowners about the need and benefit of the service their Home Builder purchased for their home.
- Assign each pretreat neighborhood to a Sales Inspector to systematically work to deliver guarantees and seek out additional opportunities.

- Organize and assign the New Construction guarantees to be delivered in a quick and effective manner.
- Ensure that each delivered guarantee is accompanied by a written estimate for Pest Prevention and Landscape service.
- Ensure that the customer has signed our acknowledgement and understanding of termite protection form.
- Follow-up until every guarantee is delivered.

Sales Inspectors Responsibilities

1. To systematically, on no less than a 2-4 week basis, work assigned new developments to deliver guarantees and seek out additional opportunities.
2. Meet with each new Homeowner to deliver the guarantee and explain the value of continuing termite protection.
3. Confirm the Homeowner's mailing address, phone number, email address, and any other pertinent information to help us with future contacts.
4. Offer the Homeowner a written estimate for Pest Prevention and Landscape services.
5. Explain to the Homeowner that they will receive a statement for next year's renewal fee a month before the anniversary of their closing and that we will make a thorough inspection of their home each year at no charge, providing them with information about conditions conducive, and preventative measures they can take to minimize their home's vulnerability to future infestations and potential damage claims.

Process for delivery and follow-up of all New Construction guarantees once the pretreat is completed

1. Upon completion of the pretreat (as evidenced by the Service Center sending the completion paperwork to NC), NEW CONSTRUCTION will create a NEW CONSTRUCTION LEAD in the lead log with "NEW HOME OWNER" as the customer name, address (not lot #) as well as any other information currently available (subdivision, etc.) and assigns it to the service center. WHEN THE HOME OWNER NAME OR OTHER CONTACT INFORMATION IS CAPTURED BY THE SERVICE CENTER, IT IS TO BE INPUTTED INTO THE LEAD LOG. AS CLOSING LISTS ARE PROVIDED, NC WILL UPDATE

INFO AS WELL IF NOT ALREADY COMPLETED.

2. The OM completes the appropriate pre-construction termite protection guarantee with all information. If the customer name is not known, leave that blank. The guarantee(s) are given to the GM with his check-in report for the next morning.
3. The GM,during the next check-in, will assign the NEW CONSTRUCTION lead to the appropriate Sales Inspector and schedule it to be seen as detailed below.
    1. If the pretreat type was bait, then the guarantee is placed in the 1-31 file for 2 weeks from the day of the check-in; or
    2. If the pretreat type was Bora-care or liquid, the guarantee is placed in the 1-31 for 4 weeks from the day of the check-in.
4. The assigned schedule for the guarantee to be delivered is recorded on the check-in report. The assigned schedule is also to be prelisted on the Team Member’s DSAR.
5. As part of the daily check-in, the Manager will check his 1-31 file and give the sales inspector the guarantees to be attempted to be delivered that day.
6. The Inspector will attempt to deliver the guarantee, explain the protection, and provide the Homeowner with Pest Prevention and Landscape estimates. The Inspector will document the attempt on the Daily Sales Activity Report (DSAR).
7. If the attempt to deliver was unsuccessful, the guarantee is to be placed in the 1-31 file to be run again in no less than 5, but no more than 10 days. All scheduled attempts are to be prelisted on the DSAR and reported on the check-in report. Group guarantees in the same neighborhood to be seen on the same day. Attempts should be scheduled to vary between morning, afternoon, evening, and weekend times.
8. After four (4) months and no less than 20 unsuccessful attempts to deliver the guarantee, the GM will assign the guarantees to the Office Manager. The OM will photocopy each guarantee and along with a letter of explanation and related marketing information, mail the original to the Homeowner. Note the mailing date on the guarantee and place a note on the customer account.
9. The copy of the guarantee will go into an accordion file with pockets separated by month. Place the photocopies in the next month’s pocket. (Copies of guarantees mailed in May will go into June’s pocket).

10. On the last workday of each month, the General Manager will assign the next month's photocopies to the Inspectors. The Inspectors must pre-list the addresses on their DSARs and continue to make additional delivery attempts. If the home remains vacant, or no one is home when we visit, document this on the DSAR and return the photocopy to the GM for placement in next month's accordion file pocket. The photocopy will be reissued at the beginning of each month until we are able to make personal contact with the Homeowner. This process will continue for one full year from the property's closing date. See the procedure for Guarantees that remain undelivered.
11. When the Inspector finds the Homeowner at home, he will explain the details of the guarantee that protects their new home. He will explain the benefits of the annual inspection that we make at no charge and when the Homeowner can expect to receive their renewal statement. He will confirm the spelling of the Homeowner's name and ask for phone numbers and email addresses so we can schedule the following year's inspection at their convenience. The Inspector will give the Homeowner a written estimate for Pest Prevention and Landscape services, being sure they understand we're offering a Preferred Customer Discount Because they're already a Massey customer. The Inspector will note the record changes, if any, on the photocopy of the Guarantee and he will secure the Homeowner's signature on Massey's ***Acknowledgement and Explanation of Termite Protection***. In Florida, the Inspector will supply the Homeowner with "**A Message on Protecting your home from Termites**," from Charles H. Bronson, Commissioner of Florida's Department of Agriculture and Consumer Services,
12. The Inspector will return the updated photocopy of the Guarantee to the office where the OM or CSR will verify or modify the name and phone numbers in the computer data and the hard file. He will turn in the signed ***Acknowledgement and Explanation of Termite Protection***.
13. The OM will keep a photocopy of the ***Acknowledgement*** in a pending file for the month's payroll processing.
14. The Homeowner's hard file will be moved to the appropriate month's file drawer.

Undelivered Guarantees

If we have been unsuccessful in delivering the Guarantee for **one full year** after the property's closing date, the GM will provide a signed Cancellation Request to the OM, and the account will be cancelled with the reason "**Active 1stYr Pretreat No Contact**."

At this point, the Inspector will continue to make monthly attempts to meet the Homeowner with the GM using the accordion file system from month to month. We will visit the property until we are able to meet with the Homeowner and satisfy the requirements of Massey's "***Acknowledgement and Explanation of Termite Protection***."

If we are able to meet the Homeowner, and they choose to decline our service and the Guarantee, the Inspector should determine the specific reason they want to cancel the service. The Inspector will give this information to the OM or CSR, and they will modify the account with a valid cancellation reason, such as "Doesn't Want – Treatment Still Good."

There is a report available called "**Active 1stYr Pretreat No Contact**" that the GM can use to see which Homeowners are left to be contacted. Every account that is on the report must be visited monthly until contact is made.

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