1118: Pass-It-On Program

1100: All Sales Policies · https://milo.masseyservices.com/docs/1118-pass-it-on-program/

Section: Sales
Subject: Pass-It-On Program
Approved by: Tony Massey
Effective Date: 6 March 2020
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Policy Owner: Director of Marketing

Policy

A) Summary of Program

1. The Massey Services referral program is branded as, “Pass-it-On.” The program offers a gift card incentive to our current customers to refer their family and friends to Massey Services. If the referral purchases a service, both the current customer and the referred customer will receive a gift card positioned as a thank you. The purpose of the program is to capitalize on the goodwill of current customers who are satisfied with our services to generate new leads at a low cost.

B) Intention & Use

1. Referral programs are an effective way of generating new customers and sales. People are four-times more likely to buy when they are referred by a family member or friend. In addition, offering a gift reward provides incentive to our customers to provide us with referrals.

2. Pass-it-On is intended to be a stand-alone lead generating program. It is not intended to be an incentive to purchase for potential customers who have scheduled a free inspection through a channel or marketing program other than Pass-it-On.

C) Gift Card

1. The Pass-it-On program offers the following Target® gift card incentives regardless of region.
    1. $25.00 to our current customer.

2. $10.00 to the referred customer.

D) Qualifications

1. To qualify for the program, the referred customer must purchase a minimum of $200 in services (annual amount or one-time). Please note: the minimum in The Villages is $180.
2. The following referrals also qualify to participate in the program:
    1. Previous customers who have not had service in the last year.
        1. Termite pretreat customers who do not have another active service with our company.
        2. Customers recently acquired through an acquisition.

E) Exclusions

1. Each referral qualifies for one gift card, regardless of the number of services the referred customer purchased. Exception: When a current customer refers to multiple franchisees, for example, Wendy’s, both the current customer and referrals qualify for gift cards per franchise.

2. The following are not eligible for the program:

a. Current Customers cannot refer themselves.

b. Current Customers cannot refer to their spouses.

c. Previous customers who cancelled in the last year.

F) Commission

1. Any Service Center Team Member is eligible to participate in the Pass-It-On program when interacting with current customers. A Team Member who generates a Pass-It-On referral but does not perform the sales inspection is eligible to receive 5% of the sales commission.

2. In order to ensure that Technicians and Specialists are compensated properly for any sold Pass It On referrals that they generated, it is critical that:

3. The referring Team Member’s name is included in the Lead Log as the lead source.

4. The referring Team Member’s name is on the Pass It On submission form and entered into Service Pro as a secondary salesperson.

5. Technicians and Specialists use the “DAILY SERVICE LEADS & REFERRAL CAPTURE FORM” to submit service leads to their Office Managers.

6. Both the Pass It On submission form and the Daily Service Leads & Referral Capture form can be found on the X:Drive in the Marketing folder.

G) Disclaimer

1. Discounts may not be substituted for a gift card. (For example, a new customer wants a discount and the current customer a $25.00 card). This program has been designed for gift card offer only. New referrals must not have an existing account (excluding pretreat customers and customers from a recent acquisition). Please allow 2-4 weeks for receipt of gift cards.

H) Procedure for Acquiring Referrals

1. When the Pass-it-On program is communicated to our current customers, Massey Services will request that our current customer “Pass” the program information on to the person that they are referring to. Our current customer will provide their referral with a way to contact Massey Services through a program specific contact method (e.g., a phone number, landing page link) or mention the program name when speaking to a Customer Care representative.

2. We will never reach out directly to a referral who is not aware that they have been referred to Massey Services and has not already contacted Massey Services. This would fall under telemarketing regulations and could potentially jeopardize our relationship with our current customer, the referred customer and possibly result in fines from the FTC.

I) Submission Procedure

1. The Pass-it-On request form (which is available in the X:Drive; Marketing) should be completed in its entirety. Any omission of fields may result in a delay in gift card fulfillment. The form should be scanned and emailed to the Customer Care Pass-it-On Group on the same day the service is sold (passiton@masseyservices.com).

a. Any requests for a service that was purchased longer than 1 month (30 days) requires approval by the Regional Manager.

2. The new customer must be entered into Service Pro in order to receive their gift card.

3. Initial services must be completed before gift cards are issued.

4. The referring customer’s account balance must be current before gift cards will be issued.

5. Any referrals that deviate from these guidelines are subject to approval and must be explained in detail.

J) Tracking

1. Leads generated through the Pass-it-On program are tracked separately from general referral leads.

2. The program has a dedicated lead line and web page to distinguish it from a regular referral.

3. Please code any leads that are generated through the program to “Pass It On” in the Lead Log.

K) Reporting

1. Two reports will be generated for the program on a monthly basis. The first report (Marketing Report) will track leads generated from marketing programs and are tied to the lead code “Pass It On.” The second report (Operations Report) will be based on the number of gift cards fulfilled.

2. Marketing Report

a. The Marketing Report will be pulled from the Marketing Code in Detail (Lead Log report on the Intranet) and will monitor and analyze the effectiveness of marketing driven programs promoting the program. This report will only be distributed to marketing and to other stakeholders as required or requested.

3. Operations Report

a. The Operations Report will be based on the number of gift cards fulfilled (as indicated by the Pass-it-On tracker) and will be distributed to operations. The report will communicate the current status of sold leads and services through the program and provide insight and analysis beneficial to our Regional Managers to increase the number of referrals generated through the program. The report timing metric will be based on the date that the submission was entered into the Pass-it-On tracker.

4. Both reports are due on the 6th of every month.

Downloads

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