1119: 3/6/9 Month new Homeowner Program

1100: All Sales Policies · https://milo.masseyservices.com/docs/1119-3-6-9-month-new-homeowner-program/

Section: Sales
Subject: 3/6/9 Month new Homeowner Program
Approved by: Tony Massey
Effective Date: 21 October 2020
Last Reviewed Date: 15 November 2023
Policy Owner: Director of Marketing

Policy

Purpose/Overview

To make a deliberate and ongoing effort to connect with all Massey 1st year pretreat customers through 3 communications throughout their first year to:

1. Increase their awareness that Massey Services provided an initial termite treatment during the construction of their home;
2. Convey the importance of termite protection, the need to keep their home protected, and the coverage afforded them already by Massey Services and their builder; and
3. Introduce other beneficial services that Massey Services provides with incentives for the homeowner.

Communications will be managed by the Marketing department. Results of the program will be measured through the lead log and ServicePro from information entered by both the Service Centers and Customer Care (the pieces will have a special number that allows Customer Care to track inbound calls from the initial).

What follows below is the detail to this summary table:

Summary Table for The Handling Of 3-6-9 Month Free Services

Svc(s) Offered	Svc if customer DOES NOT buy annual svc	Pricing w/o annual Svc	Comp	Svc if customer BUYS annual svc	Pricing w/Purchase of Annual Svc	Tech Comp
Pest (all states)	Exterior only	Post as a one time; $0	Tech is paid regular recurring svc PV; complete payroll correction form per policy and submit with payroll pkg	Initial	Discounted Initial:Initial $ minus regular svc $; example $180-$110 = $70 initial	Tech is paid full initial svc PV; complete payroll correction form per policy and submit with payroll pkg
Mosquito(non-FL states)	Foliage Application only			Initial		
Lawn (FL only)	Regular Lawn Svc; NO TREE/Shrub			Initial		

Process

1. On the first Sunday of each month an automated new homeowner contact list will be generated through Business Intelligence for those 1st year pretreat customers where the warranty date is different than the completion date in ServicePro and the warranty date is at the 3-month, 6-month and 9-month mark from the month in which the communications are going to be sent.
    - This list will be used to distinguish which homes will get the initial 3-month welcome piece, which will get the 6-month piece, and finally the 9-month piece. Communication will be completed monthly with an estimated quantity of 3,000 to 5,000 per month.
2. Marketing will manage the communications program in-house or through a third-party vendor.
3. Once the communications are completed each month, the list will be provided to the service centers for creative follow up generally via email in an electronic version.

Offer

Each mailing contains the opportunity for our 1st year pretreat customer to receive:

- FL – a free pest service (OTS) AND a free lawn service (OTS) regardless of whether an annual service is purchased.
- All other states – a free pest service (OTS) AND a free mosquito service (OTS) regardless of whether an annual service is purchased.

Managing/Handling Inquiries, Proposals, Free Service(s), And Sale

1. When an inquiry is received, follow current company policies for looking the customer up in the lead log by name and/or by address. IT IS IMPORTANT TO EXHAUST ALL SEARCH METHODS TO DETERMINE IF THERE IS AN EXISTING LEAD ALREADY IN THE SYSTEM. If there is an existing account in the lead log, validate and update the customer information. If there is NOT an existing account in the lead log, search for the customer by name and/or address in Service Pro. Any customer contacted through the New Homeowner Program will have an existing account number and Site ID. Once the Site ID has been found, create a new lead in the Lead Log (using the existing Site ID) and create an appointment including all customer information. In BOTH instances, the marketing code should be entered as “NEW HOMEOWNER 3 MONTH, NEW HOMEOWNER 6 MONTH, or NEW HOMEOWNER 9 MONTH,” depending on the most recent version of the letter the customer received (indicated in the customer list Marketing emails monthly to each Service Center).
2. Schedule an appointment FOR BOTH THE TECHNICIAN(S) (to do the free service(s) if the customer has already expressed the desire to receive one or both free services) and the SALES INSPECTOR (to deliver the guarantee, restate the importance of Termite Protection, go over the protection already afforded the homeowner, cover the free service(s) being provided, and upsell our annual services) for the same time. Use the appropriate scheduling and production to do tools to record the appointment and have the appropriate paperwork/service tickets ready to use.
3. As part of the Sales Inspector’s review and proposal, an agreement is to be signed EVEN IF IT IS ONLY FOR THE FREE SERVICE WHICH SHOULD BE PUT ON A SPECIAL SERVICES AGREEMENT FOR $0.00. If the customer purchases the annual service, a signed agreement will be needed to provide commissions to the technician doing the free service. In addition, all proposal and sale

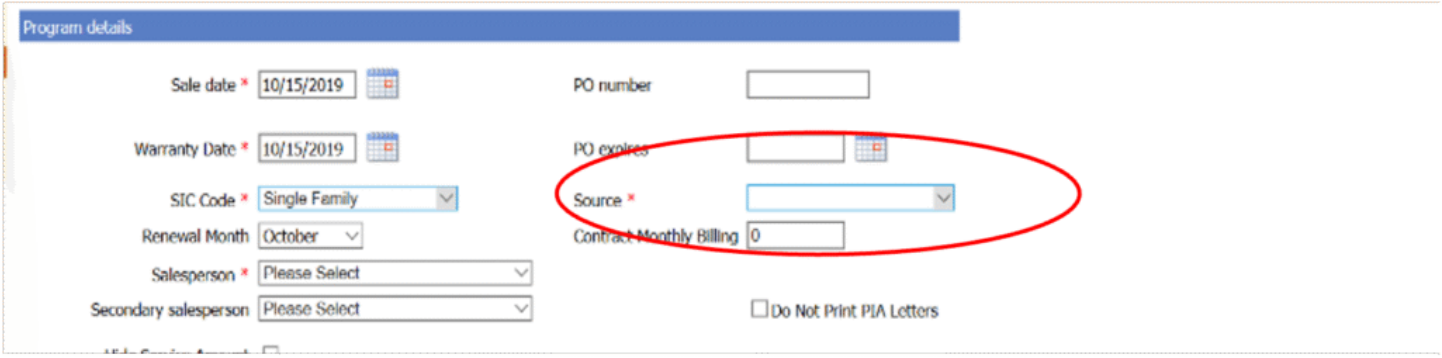
information is to be updated in the lead log per company policies. THE SALES INSPECTOR IS REQUIRED TO COLLECT THE COMMUNICATIONS PIECE AND HAVE IT INCLUDED WITH THE PAPERWORK TURNED INTO THE SERVICE CENTER DURING CHECK-IN.

4. In the event that a customer who qualifies for this free service incentive WHO HAS ALREADY PURCHASED THAT SERVICE AT RATE CARD PRICING PRIOR TO THEIR 1ST RENEWAL (i.e. no other discounts were provided as outlined in our company's policies) calls in to take advantage of this offer, we will provide their next regular service for free and handle as an allowance with the technician getting regular production commissions. Allowance should include all regular information including that it is the result of our New Homeowner/Pretreat program.

Pest Outline of Service

The free pest service will be an "exterior service only" (in essence, a regular quarterly service) completed by the pest technician. If the homeowner purchases a recurring service, we will provide a discount equal to the value of the regular service and apply it to the initial. **The technician will complete a full initial and be paid for completing the full initial service even though the customer will only pay the difference between our rate card initial and free exterior service (a quarterly service)**. All services for this program will be entered into Service Pro as outlined below. For example, a pretreat customer decides to go with our Pest Prevention service and the rate card is $180/$110. The customer would pay only $70 for the initial ($180-$110) and then $110 for the regular services. **The tech would complete a full initial and be paid for $180 production value for the initial**. If the customer only chose to accept the free service, the technician would do an exterior service and be paid $110 production value. OM/GM would follow our payroll policy to make the corrections as part of the month end payroll package.

1. If a free pest/mosquito service is provided **without the customer buying our annual service**, the program that will be set in Service Pro will be a ONE TIME PEST at $0.00 charge and the SOURCE CODE in Service Pro should be updated to, "NEW HOMEOWNER 3 MONTH, NEW HOMEOWNER 6 MONTH, or NEW HOMEOWNER 9 MONTH."



To compensate the technician for servicing the free service (in cases where the customer does not extend coverage for the year by purchasing our annual service), complete the proper payroll correction form and submit—along with the Special Service Agreement, the coupon, and the completed service ticket—with the monthly payroll package. Commission is limited to the rate card value associated with the service being provided for free. For pest, this is the regular quarterly service and for mosquito, the monthly recurring service for our standard/base program (not deluxe or premium).

NOTE: When completing the proper payroll correction form, please indicate the correct production type. For occasions when the customer only takes the free service and doesn't purchase the annual service, put "quarterly pest" for pest or mosquito in the comments section.

2. If a free pest/mosquito service is provided **and the homeowner purchases a recurring pest or mosquito service**, the program set in Service Pro will be a QUARTERLY PEST SERVICE (and/or appropriate MOSQUITO program).
   i. The price for the initial will be the difference between the initial price and the regular service price according to the current rate card. For example, on a pest that is $180/$110, the customer would be charged $70 for the initial and then $110 on the recurring services.
   ii. The SOURCE CODE in Service Pro should be updated to, "NEW HOMEOWNER 3 MONTH, NEW HOMEOWNER 6 MONTH, or NEW HOMEOWNER 9 MONTH."
   iii. To compensate the technician for servicing the discounted initial, complete the proper payroll correction form and submit—along with the agreement, coupon, and completed service ticket—with the monthly payroll package. Commission is limited to the recurring service value associated with the service being provided for free or to the initial being provided if the customer purchased the annual service.

NOTE: When completing the proper payroll correction form, please indicate the correct production type. For occasions when the customer purchases the annual service, select “PEST QUARTERLY” for pest. For mosquito, selection “PEST” (not “pest quarterly).

Lawn Outline of Service

All free lawn services will be a regular lawn service based upon the agronomic program at that time. TREE/SHRUB IS EXCLUDED, ONLY REGULAR LAWN. The discount amount will be equal the regular service.

1. If a free lawn service is provided **without the customer buying our annual service**, the program in Service Pro will be a ONE TIME LAWN at $0.00 charge and the SOURCE CODE in Service Pro should be updated to, “NEW HOMEOWNER 3 MONTH, NEW HOMEOWNER 6 MONTH, or NEW HOMEOWNER 9 MONTH”. To compensate the specialist for servicing the free service, complete the proper payroll correction form and submit—along with the Special Service Agreement, coupon, and completed service ticket -- with the monthly payroll package. Commission is limited to the rate card value associated with the service being provided for free.
2. If a free lawn service is initiated **and the homeowner purchases a recurring lawn service, the lawn specialist will complete a full initial** and the program set in Service Pro will be MONTHLY LANDSCAPE SERVICE or BI-MONTHLY LAWN and the price for the initial will be the difference between the initial price and the recurring service price (no less than a $0.01 charge) and the SOURCE CODE in Service Pro should be updated to, “NEW HOMEOWNER 3 MONTH, NEW HOMEOWNER 6 MONTH, or NEW HOMEOWNER 9 MONTH”. If the difference between the initial and the regular service resulted in a $0.01 charge, then A CREDIT OF $0.01 SHOULD IMMEDIATELY BE APPLIED TO THE ACCOUNT IN SERVICE PRO SO THAT A STATEMENT IS NOT AUTOGENERATED. To compensate the specialist for servicing the free service/discounted initial, complete the proper payroll correction form and submit—along with the agreement, coupon, and completed service ticket-- with the monthly payroll package. Commission is limited to the recurring service value associated with the service being provided for free or to the initial being provided if the customer purchased the annual service.

NOTE: When completing the proper payroll correction form, please indicate the correct production type by selecting “LAWN” for lawn for either free service only or purchase.

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