806: Annual Renewal Collection P&P

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Section: Termite Administration
Subject: Annual Renewal Collection P&P
Approved by: Tony Massey
Effective Date: 24 November 1998
Last Reviewed Date: 5 February 2026
Policy Owner: Director of Administrative Training Manager

Policy

PURPOSE

Massey Services makes every attempt to provide annual reinspections to all properties under guarantee for termite protection. We provide "peace of mind" to our customers by protecting their property from future termite infestation and/or damage. To back up this protection, we issue one of the finest guarantees in the industry. The annual reinspections are a vital part of this guarantee and the protection it provides.

The philosophy and concepts that support Massey's termite annual renewal collection policies and procedures are:

- All charges should be paid in advance or collected at the time of reinspection.
- Annual termite renewal billing will be routinely managed by business intelligence on all accounts listed on the *Customer Contact Report* for the previous month, current month, and the upcoming month.
- The general manager, service manager, office manager, and/or customer service specialist must provide dailyfollow up with all team members to ensure collections are being made on all termite annual renewals at the time of the reinspection.
- All payments will be deposited the same day/next day.

The step-by-step procedures that each team member must follow in order to accomplish our total collection goals are outlined on the following pages.

Responsibilities

General Manager Responsibilities

The general manager has the overall responsibility to make sure all collection policies and procedures are followed. In addition to managing the overall program the general manager has the following specific responsibilities:

- Ensure that all team members are trained in all collection policies and procedures.
- Ensure that all annual reinspections are performed by the due date using the *Production to Do in Detail by Route with Price*.
- Ensure that all complaints and retreatment calls are serviced according to company policy, and in a way that will maintain customer satisfaction.
- Use the *Customer Contact Bait Termite Report* to assist the service manager, office manager, and customer service specialist in making collection calls on all unpaid renewals.
- Per the *Renewal Processing Calendar*, review the *Renewal Fee Increase* report to identify the following:
    - Accounts that should not receive a renewal increase for the current year (reasons below)
        - customer in financial hardship
        - lifetime guarantee including renewal pricing
    - Accounts that should receive an additional increase for the current year (reasons below)
        - account sold too low
        - increased liability
        - excessive claims
        - retreat history
        - conducive conditions
- Using the *Customer Contact Bait Termite* report for the previous month, assist the service manager and administrative team in contacting customers with unpaid renewals to inform them

their termite protection has expired, and immediate payment will prevent cancelation of their account.

Service Manager Responsibilities

The service manager is responsible for ensuring the reinspector and technicians receive comprehensive training to conduct quality inspections in a productive and efficient manner, as well as overseeing the collection of all termite renewals. The service manager is specifically responsible for:

- Ensuring that all annual reinspections are performed using the *Production to Do in Detail by Route with Price.*
- Reviewing the *Assigned Daily Worksheet* of each reinspector and technician to ensure the route is optimized and it maintains the standard for daily reinspections.
- Ensuring that all customer complaints and re-treatment calls are serviced in accordance with company policy, and in a way that will maintain customer satisfaction.
- Reviewing the *Signature Collection Responses for Monitors and REIs* report to ensure that signatures are obtained at the time of inspection.
- Holding reinspector and technicians accountable for collecting unpaid renewals at the time of inspection.
- Assisting the general manager and administrative team to make renewal collection calls to all customers appearing on the *Customer Contact Bait Termite* report.

Sales Inspector, Reinspector, and Technician Responsibilities

The sales inspector, reinspector, and technician have the responsibility to ensure the customer receives a quality annual inspection, understands their guarantee, and the importance of maintaining their termite protection. Sales inspectors, reinspectors, and technicians are specifically responsible for:

- Performing a quality interior and exterior annual inspection on all assigned accounts.
- Using a mobile device to complete the Reinspection work order in its entirety, detailing the following:
  - conducive conditions
  - areas of active live termites

    - evidence of termite activity
    - identified use of spray foam insulation
    - Collecting the renewal payment at the time of inspection.

- Notifying the administrative team of any updates to billing/contact information on customer accounts.
- Contacting the service center to schedule re-treatment services when termite activity is observed during the annual inspection.
- Leaving the appropriate door hanger, filled out in its entirety, when a customer is unavailable for an interior inspection.

Sales inspectors, reinspectors, and technicians will not be paid production commission on any reinspections that do not meet the payroll requirements for:

- Signature collection
- Interior and exterior inspection
- Time spent on site at the property

Administrative Responsibilities

Administrative responsibilities belong to the office manager and customer service specialist. Collection efforts are the most important function of the administrative team. All administrative team members are expected to spend a minimum of one hour per day on collections. Administrative team members are specifically responsible for:

- Following the schedule of the *Renewal Processing Calendar*.
- Reviewing all mail returned as undeliverable and research to identify the correct contact information using the property appraiser website and online phone number searches. If unable to identify current information, the administrative team will assign the general manager or service manager to visit the property to make personal contact with the homeowner. Information will be updated as it is received by the administrative team and a sales inspector will be scheduled to meet with the new homeowner to propose a transfer of termite services and offer additional services.

- Scheduling annual inspection appointments using the scheduler for the sales inspectors, reinspector, and technicians. The appointments will be placed on the appropriate schedule by updating the route on the work order, the date and time of the appointment, and by marking the work order as confirmed.
    - The general manager or service manager will assign annual inspections based on the zip code territory assignments for sales inspectors and by zip code for reinspectors and technicians.
- When the annual inspections are scheduled and assigned to the appropriate sales inspectors, reinspector, or technician, the appointment will be added to the *Lead Log*.
- Scheduling all annual inspections using the *Production To Do in Detail by Route with Price and the Unconfirmed Reinspection* report. These reports will be printed in triplicate and distributed as follows:
    - To the general manager to ensure that all remaining annual inspections are assigned and scheduled.
    - To the service manager to assist the general manager in ensuring that the remaining annual inspections are assigned and scheduled.
    - To the administrative team to update daily until all annual inspections have been performed.
- Follow the cancelation process for all unpaid termite renewals in accordance with the *Renewal Processing Calendar.* Prepare full cancelation packets with the customer's hard file and provide this to the general manager. After the general manager has approved the cancelation, the administrative team will cancel the termite program on the last day of the month after the termite renewal was due.

Business Intelligence Responsibilities

The Business Intelligence department is responsible for mailing or emailing all renewal notices.

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