C0: Policy Definitions

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Section: Corporate
Subject: Policy Definitions
Approved by: Tony Massey
Effective Date: 10 December 2025
Last Reviewed Date: 10 December 2025
Policy Owner: Senior Director of Learning & Development

Policy

Definitions

For the purposes of our policies and procedures, unless the context clearly indicates otherwise, the term:

1. “Creative lead” means any lead originated by an inspector/account manager via cold calling, cloverleafing/doorhangers, or referrals. The consumer contacting Massey Services as a result of creative activity must reference the inspector/account manager by name in order for it to be considered a creative lead.
    a. Example: A consumer comes home to find a doorhanger on their door and calls Massey Services. If they reference the inspector/account manager’s name on the doorhanger, the lead will be marked as creative. Otherwise, it is an office lead.
2. “New Construction lead” means a lead received by the service center from the New Construction Division for the purpose of explaining our termite protection guarantee and selling Pest Prevention, GreenUP, or other services.
3. “Marketing (office and web) lead” means a phone call, internet request, or walk in from a prospective customer requesting information or a free inspection for any of Massey’s services.

4. “Reinstatement” means a sale that is restarting a cancelled program within a specific timeframe from the program cancellation date. The timeframes are:
    a. Termite & Bait programs- within two years of the cancellation date.
        i. Example:
            1. A bait program cancelled on 1/1/2021 and sold on 2/1/2022 (thirteen months) is a reinstate.
            2. A bait program cancelled on 1/1/2021 and sold on 2/1/2023 (twenty-five months) is not a reinstate; it is a new sale.

    b. All other recurring services (e.g. pest, lawn, or irrigation)- within two full accounting months of the cancellation date.
        i. Example:
            1. A pest program cancelled on 1/1/25 and sold on 3/15/25 is a reinstate. The two full accounting months are February and March.
            2. A pest program cancelled on 1/1/25 and sold on 4/15/25 is not a reinstate. The two full accounting months are February and March.

5. “Sale” means a fully executed service agreement, which must include:
    a. All required signatures: customer, inspector/account manager, and general manager.
    b. Method of payment for at least the initial service.

6. “Service lead” means any lead generated by a service technician/specialist during a service visit or generated by an administrative team member.
    a. Example:
        i. A service technician/specialist performing a lawn service cross sells a customer pest or termite service.
        ii. A service technician/specialist brings the contact information of a potential customer interested in our services back to the service center.
        iii. A customer service specialist calls off the alpha list and sets an appointment.

7. “Upsell” means a sale which changes the scope of an existing agreement by adding services.

a. Example: The addition of tree and shrub services to a lawn service is an upsell to landscape service.
b. Adding a service area or areas to an existing service agreement, such as adding the backyard to a front-only lawn service, does not qualify as an upsell.

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