SPP 403: Scheduling of Accounts

SPP 400: Pest Prevention & Lawn Service Procedures · https://milo.masseyservices.com/docs/spp-403-scheduling-of-accounts/

Section: Service Procedures
Subject: Scheduling of Accounts
Approved by: Tony Massey
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Policy Owner: V.P. Director of Quality Assurance

Policy

SCHEDULING A NEW ACCOUNT

Initial Service

- At the time of sale, the inspector will call the office from the customer’s home to schedule the start. The inspector will provide the start’s time requirements.
- The customer service specialist or the office manager will review the scheduler and give the inspector a list of options for the start.
- The scheduled time will take into account the customer’s convenience.
- The agreed upon day and time will be entered into the CRM’s scheduler for the team member responsible for completing the initial service.
- The inspector must provide the completed paperwork for the initial service by 4 pm of the day preceding the scheduled date.
- Each day the service manager will review the approved new start paperwork/documentation and ensure the start is assigned to the appropriate team member before it is to be serviced.

Regular Service

- Each day the Service Manager will review the new start paperwork to determine what regular service date is most appropriate considering the service interval and proximity to other accounts to minimize drive time.
    - This information will be noted on the service agreement so we can communicate the regular service schedule to the customer during the Welcome to Massey call.
- The CSS will call the customer seven days after their first service as a courtesy follow-up to ensure that the service was performed to their satisfaction. This will be a “welcome to Massey” call that will confirm the regular service schedule, the name of their service person, and the process for requesting additional service if the need should ever arise (PP 105: Welcome to Massey Quality Assurance Program).
- These steps are designed to ensure that all new Massey customers start off with a clear understanding of our service and billing process and build on the new relationship.

PROCEDURAL STEPS

The specific procedures for completing these processes are outlined in the following:

Program Type	Procedure
Pest Prevention	SPP 402: Scheduling Pest Prevention Services
Landscape Services	SPP 410: Scheduling GreenUP Services
Termite & Bait	SPP 505: Scheduling Termite Services
Irrigation	SPP 417: Scheduling Irrigation Services

Downloads

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