SPP 406: Daily Check-In Session

SPP 400: Pest Prevention & Lawn Service Procedures · https://milo.masseyservices.com/docs/spp-406-daily-check-in-session/

Section: Service Procedures
Subject: Daily Check-In Session
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Policy Owner:

Policy

The greatest opportunity for managers to influence their Team Members is during the daily Check-In session. This session provides consistent interaction and creates an environment of accountability. The Service Manager will conduct this mandatory check-in session at the end of every workday with each Team Member. Check-in must focus on each of the following areas:

1. Verification of Daily Production
2. Review Daily Paperwork
3. M&S Usage
4. Follow-up service or communication
5. Complaint Log
6. Cancellation Log
7. Equipment requirements
8. Assign next day’s work and issue materials

Verification of Daily Production

- Verify that all assigned work was completed.
  - Ensure all unserviced accounts are re-scheduled as soon as possible.

    - Determine the reason the route was not completed that day.

- Did the Team Member generate leads and take advantage of sales opportunities?

Review Daily Paperwork

- Review for overall accuracy and neatness.
- Verify Daily Summary Report/Daily Worksheet for:
    - Hours worked
        - Document all hours worked and all breaks.
        - Encourage Team Members to take a 15 minute break in the morning and afternoon.
        - Encourage Team Members to take a 30 minute lunch break.
    - Evaluate the logistics of the route.
        - Did they navigate the route as efficiently?
        - Miles driven
    - M&S usage
    - Collections
    - Team Member signature
- Verify the Daily M&S Usage Summary (GreenUP only)
- Ensure all required Account Record Changes are attached
- Review Service Reports
    - Read a few of the reports
        - The notes and documentation should illustrate the condition of the property.
        - The quality of the communication should add value to the service.
        - Pay attention to neatness, accuracy and clarity of thought.
    - Evaluate the amount of time spent servicing the account.
    - Has the customer signed the service report?
    - Has the Team Member printed their name and PCID number?

    - Check for collections activity. Team Members should attempt to collect the service charge when the customer is home.

After the work is reviewed, the Service Manager must sign the work packet.

M&S Usage

- Use the M&S Usage Report, Daily Summary Report and Service Reports to determine if the current material program is being followed.
- Ensure that the proper concentration and rates are being applied.

Follow Up Service or Communication

- If there are any accounts that require follow-up, determine what actions need to be taken.
    - Requests for extra service must be entered into the customer service database to ensure a service report will be printed for the appropriate service day.

Complaint Log

- Ensure every complaint has been contacted, scheduled and completed as assigned.
- Review all unresolved complaints with the Team Member. Discuss each complaint in detail and strategize on the best resolution.

Cancellation Log

- Discuss the causes of all cancellations. This is an opportunity to teach Team Members and help prevent future cancellations.
- If a Service Report has been printed, it must be pulled from the current production and attached to the cancellation request form.

Equipment Requirements

- Ask if the vehicle has been cleaned. Perform random spot checks to evaluate the image of the vehicle.

- Ensure that the Team Member has all of the equipment required to do their job.
- Determine if the service equipment is working properly and immediately fix any issue.

Assign Next Day’s Work and Issue Materials

- Have all the paperwork for the next day of production prepared and issue it to the Team Member.
- Identify any special material or equipment needs for the next day.
- Issue materials according to policy.

During the check-in process, observe the attitude and demeanor of the Team Member. Evaluate how they are reacting to the workload. Determine if they can accept more accounts or if you need to provide assistance. Try to ascertain training needs. Give reinforcement of positive activities while clearing up deficiencies. When you are done with the check-in, the Team Member should feel that you were sincerely trying to help them improve.

Out-of-Area Technician Check-In

Having an out-of-area Team Member operating from a Service Center does not eliminate the need for a daily Check-In session with their Service Manager. Each day all out-of-area Team Members will call in to the Service Center at the end of the day to Check-In over the phone. In addition, two face-to-face Check-In sessions must take place every week.

- The out-of-area Technician will fax their Technician Daily Summary Report plus the Daily Worksheets to the Service Center at the end of the workday. The Service Manager will review this information while on the phone with the Technician. Items for review will be completion of scheduled services, rescheduling missed services, completion of complaint calls, hours worked, mileage, and collections. Any money collected will be held by Technician until transfer can be made to the Service Center along with the complete paperwork package for that day.
- Service Manager and Technician will schedule two face-to-face Check-In meetings during the week. One of these meetings should be on Wednesday when the Technician will be in the Service Center for weekly training while the second should be held on Friday to review the week completed and determine if additional Saturday work is necessary. Scheduled work assignments will be given to the technician at this time for the days remaining until the next scheduled Check-In. Any collected money will be turned over to the Service Manager or Office Manager.

- If it is mutually agreeable between the Service Manager and Technician, the Friday session can be scheduled for a location in the field.

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