SPP 412: Landscape Service Reports

SPP 400: Pest Prevention & Lawn Service Procedures · https://milo.masseyservices.com/docs/spp-412-landscape-service-reports/

Section: Service Procedures
Subject: Landscape Service Reports
Approved by: Adam Jones
Effective Date: 1 September 2011
Last Reviewed Date: 1 September 2011
Policy Owner:

Policy

A service report is used to document service performed to our customer's property. All service reports should be computer generated to ensure that they are accurate, neat and legible. In certain emergency instances a handwritten report may be used but should be matched up to the original service report prior to posting to the account record in the customer service database.

The completion of the Landscape Service Report is a very important aspect of the service we provide for our customer. This report is the primary way we document and communicate the services performed. In many cases, the Landscape Service Report is our customer's first and primary impression of the value of our service and the quality of your work. The Landscape Service Report must provide our customer with information to show what we saw, what we did, what the customer needs to do and what the customer should expect.

The top left section of the report contains a section titled, "Today's Service Included". Check boxes are provided to indicate what the service performed included. They are:

Landscape Inspection - Each time we visit a customer's home, the "Landscape Inspection" box is checked and the inspection must be performed.

- Lawn care Application/Service – This box is checked when the service being performed provides treatment to turf areas.

- Shrub Application/Service - This box is checked when the service being performed provides treatment to the shrubbery.
- Annual Core Aeration & pH Testing – This box is checked when the service being performed provides core aeration. The pH must be tested on all annual core aerations.
- Annual Irrigation Inspection – (Must be done with the Annual Aeration)
- Lawn Nutrition – Anytime fertilizer (nutrients of any kind) is provided to the turf areas, this box should be checked. Additionally, the nutrients provided must be checked. Identifying the type of nutrients applied is particularly important in areas with local fertilizer ordinances.
- Shrub Nutrition – Anytime fertilizer (nutrients of any kind) is provided to the shrub areas, this box should be checked. Additionally, the nutrients provided must be checked. Identifying the type of nutrients applied is particularly important in areas with local fertilizer ordinances.
- Irrigation Inspection
- Requested Service Visit or Proactive Service Visit should be checked whenever appropriate.

The next section is titled, “Specific Treatments Performed”. Check boxes are provided to indicate if a pest or problem was treated as a “Preventive, Control or Inspection”.

- A “Preventive” treatment indicates that the treatment is being provided to prevent future occurrences of the particular pest or problem listed.
    - When insect control materials are being applied as a regular treatment to turf areas, “Preventive” would be checked for Chinch Bugs, Mole Crickets/Grubs and Fire Ants. Army/Sod Webworms should not be checked as “Preventive” since we are not able to truly prevent them; we do not want to give the customer a false perception of our ability to prevent this problem from occurring.
    - When insect control materials are being applied as a regular treatment to shrub areas, “Preventive” would be checked for Aphids, Scale/Mealy Bugs, Thrips, Lace Bugs and Spidermites. Caterpillars would not be marked as preventive since our products do not typically prevent caterpillars.
    - When a pre-emergent is being applied, “Preventive” would be checked for Controllable Weeds.
- A “Control” treatment indicates that the problem being treated is active and control is being rendered. DO NOT mark this box unless the problem being treated is active. Anytime “Control” is marked, a note and graph must be provided to indicate where the activity is located on the

property. Remember that this documentation may be used later in a claim situation. Your documentation is crucial in determining our level of liability for a customer claim.
    - Leaf Spot or Root Rot can be used for either lawn or shrub. The line adjacent should be used to identify the type of leaf spot or root rot or at least the area as turf or shrub when “Control” is provided.

- “Inspection” must be marked for each of the items listed whenever a service is provided. Make sure you are providing this inspection.

The section titled, “Areas of Concern in Your Landscape” is to identify areas of concern where we need the customer’s help. If an item is checked in this section, it must also be documented with a note and/or graph to help the customer understand the concern and to indicate the location of the problem area. It may also be appropriate to provide our “Fast Fact” information for these areas of concern. Remember: when you point out a problem to a customer, always provide them with a solution. For example, telling a customer they have uncontrollable weeds is not helpful unless you tell the customer that the solution is to eliminate the area and renovate.

The “Contact us for These Recommended Services” section is used when Irrigation Maintenance/Repair or Renovation Services are needed, use this area to help identify the need along with your notes and graph of the situation.

The “GreenUP Specialist Comments” section is used for site specific comments. This area is particularly important. It reflects your level of concern and even your intelligence to a customer. Make a deliberate effort to write neatly and spell properly.

- If you know of a specific concern the customer has, tell them what you did to address their concern.
- Also, use this area to tell the customer what they should expect from the results of your treatment.
- Do not use this area to write a note that is redundant to the area on the left where check marks were used to identify what you did such as, “Today I sprayed and fertilized your lawn”.
- Do not use abbreviations or industry jargon that the customer may not understand. For example, telling a customer you applied IS or TM instead of Iron Sulfate or Manganese Sulfate (Tecmangam). Or, telling a customer you “sprenched” their shrubs instead of saying you sprayed the foliage and drenched the root system. Be conscious of how a customer will understand your

note.

- Avoid using product names unless specifically asked or informed to do so. For example, telling a customer you applied Aloft for chinch bug control does not mean anything to them if they do not know what Aloft is. Instead, inform the customer that you applied materials for the control of chinch bugs.
- Also remember that customers may perceive certain words as being dangerous or scary. We never use the words poison or chemical and even pesticide or anything else ending with “icide” which can sound dangerous. Instead, use statements such as “product(s) for the control of insects, fungus, or weeds.”

The graph area is used to identify areas of concern in a pictorial manner. Draw a neat but simple graph of the property. Identify areas of concern. Certain issues have been given a code in the “Areas of Concern in Your Landscape” area. For example, “D” for Dry Areas/Drought or “UW” for Uncontrollable Weeds. Use these codes to identify these areas of concern pictured on the graph.

The “Service Notes” section is used for notes from the customer database system. These notes may be instructions for the service or permanent instructions for the account.

Spaces are provided just above the “Payment Coupon” to write the date, your name (Technician) and Department of Agriculture Pest Control ID Number (PCID#). Write clearly and print your first and last name.

A space is provided for the Customer’s Signature. Always have the customer sign this form when they are available to do so (also ask for payment if the service has not been pre-paid). If the customer is not available to sign the report, document this as well by writing, “Not available”. The signature area should never be left blank.

In the past, product usage was documented on the Service Report. Since this is no longer the case, it is particularly important that the product usage be documented in the handheld computer. Product usage should be documented on the “white sheet” if there is a situation where the handheld computer is not functioning.

An example can be found below:

Landscape Service Report

TODAY'S SERVICE INCLUDED:

- ☐ Landscape Inspection
- ☐ Lawncare Application/Service
- ☐ Shrub Application/Service
- ☐ Annual Core Aeration & pH Testing
- ☐ Annual Irrigation Inspection
- ☐ Requested Service Visit
- ☐ Proactive Service Visit
- ☐ Irrigation Inspection
- ☐ Other: _____
- ☐ Lawn Nutrition: ☐ Nitrogen ☐ Phosphorus ☐ Potassium ☐ Micro-nutrients
- ☐ Shrub Nutrition: ☐ Nitrogen ☐ Phosphorus ☐ Potassium ☐ Micro-nutrients

SPECIFIC TREATMENTS PERFORMED:

	Preventive	Control	Inspection
Chinch Bugs	☐	☐	☐
Mole Crickets/Grubs	☐	☐	☐
Fire Ants	☐	☐	☐
Army/Sod Webworms	☐	☐	☐
Brown Patch Fungus	☐	☐	☐
Controllable Weeds	☐	☐	☐
Leaf Spot _____	☐	☐	☐
Root Rot _____	☐	☐	☐
Aphids	☐	☐	☐
Scale/Mealy Bugs	☐	☐	☐
Thrips	☐	☐	☐
Lacebugs	☐	☐	☐
Caterpillars	☐	☐	☐
Spider Mites	☐	☐	☐
Other _____	☐	☐	☐

AREAS OF CONCERN IN YOUR LANDSCAPE:

Our goal is to make your landscape the envy of the neighborhood! However, we need your assistance with the following: (See graph for specifics)

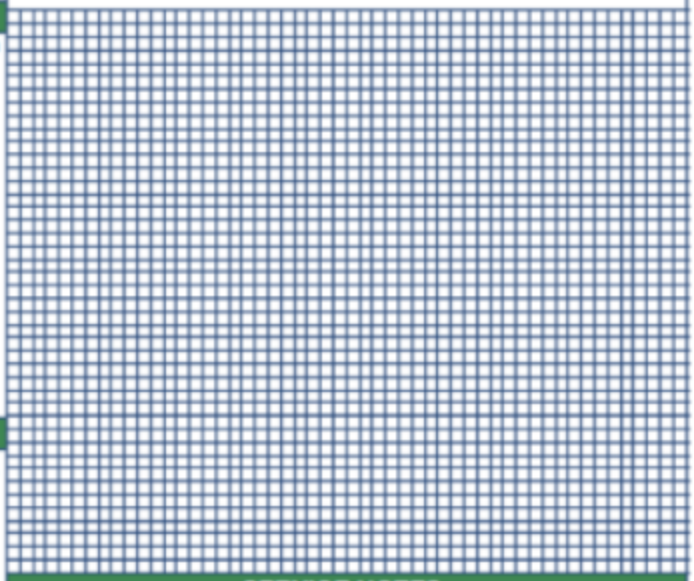
- ☐ Dry areas/Drought (D)
- ☐ Uncontrollable weeds (UW)
- ☐ Broken sprinkler heads (BH)
- ☐ Excessive moisture (EM)
- ☐ Excessive sunlight (ES)
- ☐ Inadequate sunlight (IS)
- ☐ Increase mowing height
- ☐ Increase mowing frequency
- ☐ Sharpen mower blade
- ☐ Change mowing patterns
- ☐ Change pruning practices

CONTACT US FOR THESE RECOMMENDED SERVICES:

Irrigation Maintenance/Repair
- ☐ Cleaning and adjustment of heads
- ☐ Repair to damaged heads
- ☐ Repair to connecting pipes
- ☐ Install rain sensor

Renovation Services
- ☐ Sod replacement needed
- ☐ New plants needed
- ☐ Uncontrollable weed removal
- ☐ Add/Update shrub beds

GREENUP SPECIALIST COMMENTS:



SERVICE NOTES:

DATE: _____ TECHNICIAN: _____ PCID #_____ CUSTOMER SIGNATURE: _____

Payment Coupon

☐ VISA ☐ MASTERCARD ☐ DISCOVER ☐ AMEX

CARD ACCOUNT #: _____

AMOUNT PAID: _____

EXPIRATION DATE: _____

SIGNATURE: _____

WHEN PAYING BY MAIL
Please return this portion to:
Massey Services, Inc.
P.O. Box 547668
Orlando, FL 32854-7668

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