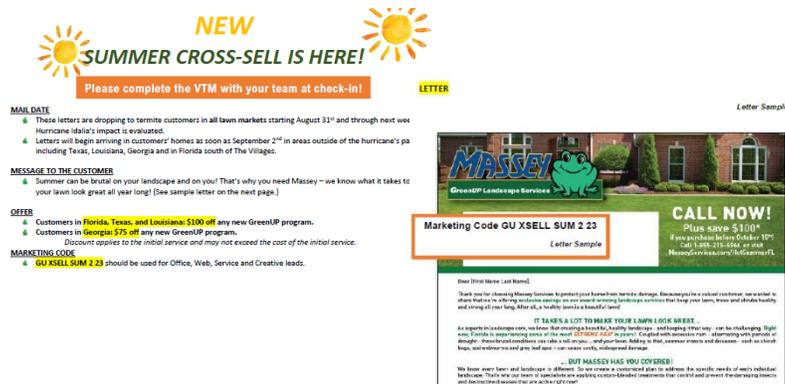


Lead Reporting & Coding: 2025

There are three types of leads: Marketing (Office and Web) leads & Creative leads, and Service leads. The difference is based on what prompted the consumer or customer to contact Massey Services. While each type of lead is important, understanding what prompted the person to contact us is critical for marketing spending allocation.

1. Responding to consumer telephone calls: Take all lead information and enter it in the “Service Center Call Book.” **Remember to ask the potential customer how they heard about our Company.** If the consumer responds, “I’m a current customer”, you might ask if they saw us on TV or received a letter.
2. Marketing Codes: Every lead must be accurately recorded via a Marketing Code to record the way our prospective customer heard about Massey Services. Use the drop-down menu to choose the source: Direct Mail, Radio, Yellow Pages, etc. **Please note:** Marketing Codes are developed for every new program; these codes are provided to Service Centers via an emailed Marketing Memo as well as a VTM prior to new programs. The codes for on-going programs (i.e.: Pass It On) remain constant throughout the year.

- a. For example, the following Spring GreenUP direct mail memo was sent to all Service Centers in markets receiving the mail. The code “GU XSELL SUM 2 23” was listed in the memo.



- b. Leads from this program should have been recorded as follows:

Lead Details	
*Classification:	Residential
*Marketing Code:	GU XSELL SUM 2 23
*Lead Type:	Office

WHY IS CORRECT LEAD TRACKING IMPORTANT?

If we don’t correctly capture leads from our various marketing programs, we’ll never understand what worked well for us (and generated a lot of leads) and what didn’t. This is critical when developing marketing spending by Service Center.

For example, if your Service Center received calls from the above Direct Mail program which was mailed to current customers and they were recorded as “Current Customer” versus “GU XSELL SUM 2 23”, the Marketing Department will conclude the program was ineffective and stop mailing to that Service Center.

UNDERSTANDING THE DIFFERENCE BETWEEN AN OFFICE/WEB LEAD VERSUS A CREATIVE/SERVICE LEAD

This can be a little tricky with some categories. For example, referrals, doorhangers and current customers.

Marketing Leads (Office and Web)

Marketing leads, previously separated as Office or Web, are leads that were driven by a Marketing initiative. Our Lead Log still breaks them out separately. Below is a short definition of each lead type.

- **Office Lead:**
 - An office lead is generated by a marketing related activity such as billboards, television, radio, Massey Vehicles, referrals, Current Customers, etc. Office Leads occur when a current or potential customer contacts Massey.
- **Web Lead:**
 - A web lead is generated by a digital marketing related activity such as social media posting, Internet Advertising, Email, Webchat, Angie's List, etc. Web Leads can be generated when a potential customer calls regarding internet activity, or they complete a form fill on the Massey website

Creative and Service Leads

- **Creative Lead:**
 - A creative lead is any lead that was originated by a Sales Inspector via cold calling, cloverleafing/doorhangers, and referrals. The consumer contacting Massey Services must reference the Sales Inspector by name in order for it to be considered a creative lead.
 - For example: A consumer comes home to find a doorhanger on their door and calls Massey Services. If they reference the Inspector's name on the doorhanger, it is a creative lead. Otherwise, it's an office lead.
- **Service Lead:**
 - A service lead is a lead that was generated by the Technician or Specialist during a service visit.
 - For example, Specialist is performing the lawn service and cross sells the current customer on Pest or Termite; or Technician brings the contact information of a potential customer interested in our services back to the Service Center.
- **New Construction:**
 - A New Construction lead is generated when a new construction pretreat is completed. The lead will be used to deliver the termite guarantee to the New Homeowner when the home is sold, and other services are proposed.

[For additional questions, please review the Lead Code Glossary for a detailed explanation of each Lead Code.](#)