P & P No.: 1102-A
Section: Sales
Subject: Daily Check-In Report (DCIR)
Approved By: Anthony L. Massey
Effective Date: June 1, 2014
Last Reviewed Date: June 6, 2014
Policy Owner: Vice President of Business Development

- The Daily Check-in Report is to be used by all General Managers and Sales Managers.
- The Daily Check-In Report (DCIR) is to be updated each day during check-in and then provided to the OM/CSR to update the lead log.

DAILY CHECK-IN REPORT

The Daily Check-In Report contains the following useful information:

1. The top right hand section of the report shows the Team Member's achievement to budget by type of service (Pest, Bait, Termite, Lawn, Irr/Ren) and total.
    1. The "Budget $" column shows the budget by service type for the month. If any of the budget dollars do not appear, then either that service type was not budgeted or the budget amount was not entered into the "Manage Budgets" section of the lead log.
    2. The "% Budget" column shows the current achievement against budget. Compare the % achieved to the % of the month gone to determine whether the Team Member is ahead, on, or behind pace to achieve their monthly goal in this category.
    3. The "Projection" column shows the expected month-end results in terms of dollars currently trending.
2. The Month To Date Sales and Activities Report contains information segmented by lead/appointment type (Office, Creative, Service, Web, New Construction) useful in analyzing and impacting the Team Member's activities and results.
    1. "Appointments Scheduled" is a count of all appointments by type scheduled MTD minus yesterday. Appointments scheduled for the future are not included in this count. "Appointments scheduled" is a measurement of activity and can be compared to the number of days gone in the month to determine the average appointments/day.
    2. "Proposals MTD" is a count of all proposals made. "Proposal $" is the sum of all proposal values made. The "Prop. Ratio" shows the number of proposals made for each appointment seen.
    3. "Appointments Sold" is a count of each appointment which resulted in a sale. "Closing %" is the number of appointments which resulted in a sale divided by the number of appointments seen.

SECTION:1102-A	SUBJECT: DAILY CHECK-IN REPORT

4. “Svcs Sold” is a count of all the services sold MTD. “Svcs/Appts Sold%” is the number of services sold divided by the number of appointments sold. This measures our cross-selling success on an appointment basis. “Ttl Sold” and the service specific “Sold MTD” show the dollars and units sold. This information can be used to determine average price per service type sold.
5. “Avg value per appt” shows the historical value for each scheduled appointment. It is impacted by rate card compliance, overall close rates, and effectiveness at cross-selling. “Avg value per sold service” is the total dollars sold divided by the total number of services sold.

3. The 3 schedules which appear next on the DCIR include the prior work day’s schedule, the current day’s schedule, and the next day’s schedule.
    1. During each day’s check-in, the General Manager will review each Team Member’s activities and results and update the report by writing in proposals made by type, sales made by type, lost reasons, and call back dates. In addition, any particular notes wanting to be included in the lead log should be written on each line. Any additional appointments run on the prior day should be notated on the report as well
    2. In reviewing the current day’s activities and appointments, ensure that it matches with the Team Member’s DSAR. In addition, any gaps in the schedule should be addressed to increase the day’s productivity.
    3. The next day’s schedule is to be reviewed to ensure the Sales Inspector has the needed appointments to achieve budget. It is our practice to have fully productive days scheduled three days in advance.
4. The “Pending Leads” section includes all appointments, proposals, and call-backs which have not been sold or lost whether their schedule date has past or is in the future. Consistent follow through on all pending leads/appointments, proposals, and call-backs creates opportunities to significantly increase future sales.