



# THE MASSEY INITIAL TRAINING SALES MANUAL

Second Edition

MASSEY SERVICES, INC.

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# Introduction

The **Massey Sales Manual** is your **essential guide** to understanding and excelling in your role as a Sales Inspector. This manual provides the **foundational knowledge, processes, and best practices** needed to **build strong customer relationships, navigate the sales cycle, and drive success** in the field.

## Purpose of This Manual

This manual is designed to serve as a **practical reference** for all aspects of the sales process at Massey Services. It will help you:

- Develop a **clear understanding of Massey’s sales philosophy** and approach to customer engagement.
- Strengthen your ability to apply the **8-Step Sales Process**, ensuring seamless and effective customer interactions.
- Gain insight into **customer needs and expectations**, allowing you to tailor your approach.
- Utilize proven techniques to **overcome objections, close sales, and generate referrals**.

## What Else Is in This Manual?

While the front half of this manual is structured to provide a complete guide to the sales process, customer engagement, and essential skills needed to succeed, the back half focus on service-specific strategies and structured planning for sustained success:

- **Creative Ways to Sell Pest Prevention Services** – Explore strategies to generate new sales opportunities and maximize customer outreach.
- **Creative Ways to Sell Lawn/Landscape Services** – Learn how to identify and capitalize on landscaping needs as a gateway to service offerings.
- **Creative Ways to Sell Total Coverage/Total Protection** – Understand how to position Massey’s comprehensive service plans to customers.
- **Proper Irrigation Inspection & Water Management Audit** – Develop expertise in evaluating irrigation systems to support sales discussions.
- **Roadmap to Success** – A structured approach to setting sales goals, tracking performance, and optimizing daily activities for growth.

## How to Use This Manual

- **Read and Reference It Often:** This manual is designed to be a **living resource** that supports you throughout your journey at Massey.
- **Apply the Strategies in the Field:** The knowledge within these pages is meant to be **practical and actionable**.
- **Refine and Adapt Your Approach:** Sales is **dynamic**—use this manual to build your skills and adjust to different customer scenarios over time.

Your **success at Massey Services** depends on your ability to build trust, provide solutions, and confidently guide customers through the decision-making process. This manual is here to support you every step of the way.

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At Massey Services our team members make a difference!

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# Chapter 1: Mission Statement

Massey Services operates with a clear mission and guiding philosophy that drives our commitment to customer satisfaction, integrity, teamwork, and professional excellence. Our mission statement outlines the principles that define how we serve our customers, engage with our team members, and contribute to our industry and communities.

Take a moment to read and reflect on the **Massey Services Mission Statement** which follows this introduction. Understanding these core values will help you align with the company's expectations and uphold the standards that define Massey's success.

## Mission Statement

### *GUIDING PHILOSOPHY*

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#### **This We Believe:**

- *Above all, we are committed to TOTAL CUSTOMER SATISFACTION.*
- *We believe in building LONG-TERM, TRUSTING RELATIONSHIPS with Customers and Team Members.*
- *We value TRUTH and INTEGRITY.  
Never compromise! Be consistent and fair.*
- *We are committed to ONGOING TRAINING and TEAM MEMBER EDUCATION which develop pride, job enrichment, and personal and professional growth.*
- *We believe "OUR PEOPLE MAKE THE DIFFERENCE."  
Knowing that our future rests squarely on the work ethic, image, knowledge, imagination, skills, dependability, and integrity of our team members, we respect and value these qualities most highly.*
- *We value OUR COMPANY'S IMAGE.  
The public perception of our team members, vehicles, equipment, and materials is essential to our success.*
- *We are committed to INNOVATION and CREATIVITY to produce safer, more efficient and effective technologies and methods.*
- *We believe in being a CONTRIBUTING member to our Community and Industry.*
- *We value TEAMWORK; think WE and US !*
- *We are committed to GROWTH WITH PROFIT and believe this provides the greatest assurance of security and promotional opportunities for each team member.*

### *OUR PURPOSE*

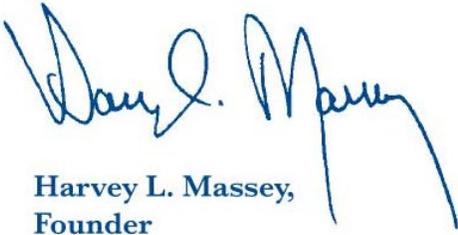
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To provide beneficial services that protect health, food, property and the quality of our environment.

**MISSION**

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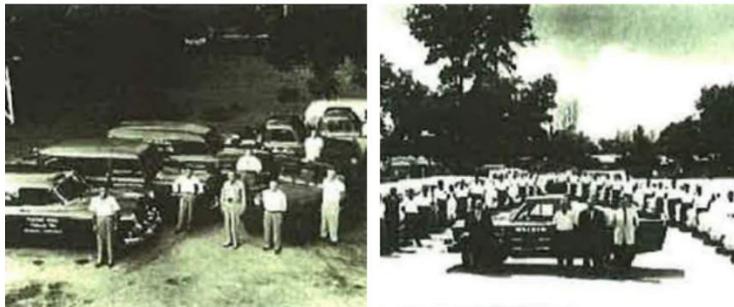
Massey Services will be the leader in providing an environmentally responsible and superior service. Our Company will grow by adhering to the highest standards of performance and professionalism. Our ultimate goal is to be recognized as the best service company in our industry.



**Harvey L. Massey,  
Founder**

## Chapter 2: The History of Massey Services

In 2009, Massey Services celebrated 25 years of uninterrupted growth, 18 of which saw double-digit increases. But how did we get here?



*Top: Walker Chemical & Exterminating Company  
Middle: Walker Chemical & Exterminating Employees  
Bottom: Walker Chemical Building on Clay Avenue*

The story of Massey Services began in 1984, when our founder and CEO, Harvey L. Massey, found himself at a crossroads in his career. After holding executive operations positions at both Orkin and Terminix, Mr. Massey sought a new opportunity in Orlando, Florida—one that would allow him to build a company centered around service excellence, customer satisfaction, and sustainable growth.

Through an industry associate, he learned about a well-established pest control company in a growing marketplace. That company was Walker Chemical and Exterminating, a pest and termite business generating \$3.9 million in annual revenue, with offices in Daytona, Cocoa, and Fort Pierce, along with its corporate headquarters at 3210 Clay Avenue in Orlando.

On February 20, 1985, Mr. Massey took over as President and CEO of Walker Chemical and

Exterminating. At that time, the company lacked commercial services, landscape services, and new construction divisions. Its headquarters operated out of a small, two-story gray house, where team members shared cramped offices—and the basement still housed a bomb shelter filled with canned food.

From day one, Mr. Massey drew on his experience to transform the company. He focused on enhancing technician productivity, increasing new sales pricing, and elevating the company's image. But he had a bigger vision—one that extended beyond traditional extermination services. Recognizing the need for a name change, he submitted several options to the state of Florida. The last name on the list was the one selected: Massey Services.

## Growth & Expansion

By 1989, Massey Services had grown from four service centers to eleven. The company expanded through strategic acquisitions, bringing in additional locations and services that would set the foundation for continued growth. With the introduction of landscape and commercial services, Massey quickly demonstrated that a single company could meet all pest and lawn needs.

Massey Services' corporate offices continue to sit next to the original Walker Chemical office, a reminder of where it all began. Over the years, our corporate footprint has evolved to accommodate our continued growth. The original Walker Chemical office, where the company first began its journey, has remained part of the organization and is set to become the New Construction Headquarters in April. The Service Centers that once operated at that site have since relocated to larger, more modern facilities, reflecting the continued growth and expansion of the company.

By 2009, Massey Services had 65 service centers across Florida, Georgia, and Louisiana and had risen to become the 12th largest pest control company in the nation.

Then, on December 16, 2009, Massey Services made a bold move that reshaped the industry. After more than a year of negotiations, we finalized the acquisition of Middleton Lawn & Pest Control. This acquisition brought in an additional 100,000 customers, added 500 service vehicles to the fleet, and further strengthened Massey's presence in the market. Most notably, this acquisition propelled Massey Services to the 5th largest pest company in the industry and solidified its status as the largest family-owned pest company in North America.



*Top: Clay Avenue Building after Massey Acquisition*

*Middle: Massey's Previous Corporate Offices*

*Bottom: Massey's Current Corporate Offices*

## A Legacy of Growth & Excellence

Since then, Massey Services has continued to grow, expanding into Texas, South Carolina, North Carolina, Virginia, Tennessee, and Oklahoma, with nearly 1,000,000 satisfied customers and nearly 200 service centers across nine states. The company now employs nearly 3,000 team members and operates over 2,600 service vehicles.



*Top Left: Pesticide Environmental Stewardship Program  
Top Right: Close-Up of Massey's Fleet Vehicles  
Bottom: New Service Center on Fairbanks Avenue*

Massey Services is committed to service excellence, total customer satisfaction, and environmentally responsible services, which is why customers trust us for Pest Control, Termite Protection, Lawn Services, Irrigation Maintenance, Mosquito Control Services, and Disinfecting Services. Our reputation has positioned us as the nation's 5th largest pest prevention company and the one of the largest privately held, family-owned business in the industry.

Beyond business growth, Massey Services has also been a leader in innovation and environmental responsibility. In 1990, we pioneered Pest Prevention, shifting away from traditional pest control by focusing on

eliminating conditions, avenues, and sources that attract pests. In 2006, we introduced an Irrigation Maintenance Program, helping customers conserve water and maintain healthier landscapes. Our commitment to environmental stewardship has earned us multiple recognitions, including being named a Pesticide Environmental Stewardship Champion by the U.S. Environmental Protection Agency.

## Looking Ahead

Massey Services continues to push the boundaries of innovation. In 2018, we announced a strategic partnership with BRIDG, a cutting-edge microelectronics facility. This partnership allows Massey Services to co-develop and leverage sensor technology to improve service delivery and customer experience.

Beyond business success, Massey Services is deeply committed to giving back. The Harvey and Carol Massey Foundation, established in 2014, solidifies our dedication to philanthropy, supporting causes such as:

- United Way
- Nemours Children's Hospital
- Autism Speaks
- Making Strides Against Breast Cancer
- Dr. Phillips Performing Arts Center
- Veterans Memorial Park of Central Florida

Massey Services continues to actively support local communities through outreach initiatives, volunteer programs, and charitable partnerships. Our team members are encouraged to participate in community service efforts, ensuring that our commitment to excellence extends beyond our business and into the neighborhoods we serve. Through corporate giving, sponsorships, and hands-on involvement, Massey Services remains dedicated to making a positive and lasting impact.

Through hard work, strategic growth, and a commitment to excellence, Massey Services has achieved nearly 40 years of profitable growth—and by all accounts, we are just getting started.

So how did we do it? **Growth, hard work, and a few solid risks.**



## Chapter 3: Your Role as a Sales Inspector

A successful career in sales begins with a clear understanding of your role and responsibilities. As a Massey Sales Inspector, you play a crucial role in building customer relationships, identifying needs, and providing tailored solutions that align with Massey's commitment to excellence.

The next section outlines your official job description, detailing the key expectations, responsibilities, and performance standards that define success in this role. Reviewing this information will help you understand the impact of your work and how you contribute to the company's mission.

### Policy 204: Residential Services Sales Inspector

**Sales Inspector** - Reports to the General Manager

#### SUMMARY OF RESPONSIBILITY

##### PROJECT A QUALITY IMAGE

- Look and act professional at all times. This includes, but is not limited to, personal grooming, vehicle appearance and point of sale materials.

##### SELL QUALIFIED BUSINESS

- Respond to all sales leads immediately.
- Make additional sales calls adjacent to and around existing customers.
- Perform quality inspections (inside, outside, over and under the customer's property).
- Identify and address all of the customer's needs.
- Prepare and present proposals for all necessary services.

##### HONOR YOUR COMMITMENTS

- When you make an appointment or promise, keep it! Be dependable.

##### NEVER STOP LEARNING

- Take advantage of all opportunities to increase your technical and professional education with regard to your position, your industry, and your personal self-development.

##### ESTABLISH TRUSTING RELATIONSHIPS

- Always say and do what's right. Remember, at all times, **YOU** are the Company!
- Maintain ongoing communication with customers.

## JOB FUNCTIONS AND DUTIES

1. **Maintain the highest standards of personal conduct**, both on the off the job. Look and act professional: this includes, but is not limited to, personal grooming, vehicle appearance, and point of sales materials.
2. **Make at least 5 appointments per day**. This includes office/web leads, service leads as well as making creative calls. An appointment will be defined as: “a scheduled time to perform an inspection”.
3. **Perform quality inspections**. This will include the preparation of a complete and accurate graph, graphical analysis, appropriate treatment specifications, and correct rate card pricing.
4. **Present sales proposals in a professional manner**. Carefully and completely advise customers of inspection findings. Offer effective, environmentally responsible solutions to existing conditions, avenues and sources of infestation.
5. **Sell additional services**. Offer formal proposals on all of Massey's residential Pest Prevention, GreenUp Lawn/Landscape, Termite and Wood Destroying Insects Protection and Irrigation repair and maintenance services.
6. **Contact all customers after service is performed** to ensure customer satisfaction and to generate referrals.
7. **Maintain productivity at or above published minimum standard**. Review, understand and comply with all general Sales Policies.
8. **Complete and submit a Daily Sales Activity Report (DSAR) Daily**.
9. **Respond to all leads immediately** and, where possible, handle the same day received.
10. **Be on time**. When you make an appointment or promise, keep it. Be dependable.
11. **Respond to customer issues with urgency and to the complete satisfaction of the customer**. Inform Management of any unusual problems or requests made by customers.
12. **Always respect the customer's premises and furnishings**. Leave them in the same condition or better than you found them when you arrived.
13. **Attend all sales technical training meetings, as required**.
14. **Stay abreast of all regulations involving our industry and use of safety equipment and procedures**. Perform job functions consistent with regulations and Company policies and procedures.
15. **Stay abreast of all technical data pertaining to industry products, material and equipment**.
16. **Build trusting and lasting relationships with customers**. Always, and do what is right!
17. **Assist with collection efforts on delinquent accounts**, as required.

18. **Maintain your vehicle in a safe, clean and in proper operating condition.**
19. **Safeguard all Company property, equipment and materials.** Use and maintain all personal safety equipment, as required.
20. **Participate in promotional and public/community relations efforts as required.**
21. **Perform all other duties as assigned.**

## Chapter 4: Counselor Selling

To be a successful and contributing Sales Professional with Massey Services, it is important to understand, believe in, and share our core values:

- **Building LONG-TERM and TRUSTING RELATIONSHIPS** with our Customers.
- **Demonstrating TRUTH AND INTEGRITY** in dealings with our Customers, our Company, and Team Associates.
- **Maintaining a strong COMPANY IMAGE and PERSONAL IMAGE**, which provides a competitive advantage and reinforces our reputation.
- **Committing to ONGOING TRAINING and SALES EDUCATION** to develop professional growth and enrichment.

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At Massey Services, our people truly make the difference!

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Our Sales Professionals play a **critical role** in our success. They are the first physical contact that prospective buyers have with our Company, shaping our image and reputation from the initial sales process, must be committed to making Sales Calls (explored in the next chapter). This commitment becomes the foundation of personal success and ultimately the success of our Company and all Team Members.

As such, Massey Services is committed to **ongoing training** and **sales education** which is designed to develop job enrichment, as well as personal and professional growth opportunities in the future. Our Managers and Staff are **committed** to teaching, showing, and working with our Sales Professionals in every segment of the initial sales training program and beyond.

### The Counselor Selling Approach

Counselor Selling focuses on **building long-term, trust-based relationships** by understanding customer needs, demonstrating genuine care, and providing tailored solutions. This approach teaches you how to:

- Gain customer trust more quickly.
- Link your recommendations more effectively to critical customer needs.
- Differentiate yourself more completely from the competition.
- Sell more on the first appointment.
- Retain and grow more customer business.
- Generate more referral business.

Unlike outdated sales techniques focused on **“trick closes”** and high-pressure tactics, Counselor Selling emphasizes understanding the **customer’s perspective** and guiding

them toward a solution that truly meets their needs and handling objections deftly, with understanding, and genuine concern.

### Are you a Vendor, Consultant, Peddler, Or Trusted Advisor?

Today's customers have become more sophisticated and demanding of higher levels of customer service than ever before. They want someone they can **TRUST**, someone who understands their needs and wants. This is particularly important during slow economic times, when most people make buying decisions, even small ones, very carefully.

Compare the various levels of skill, trust, and length of relationship of the four different types of relationships between buyers and sellers in the following chart. Most importantly look at how price enters the buying decision.

Relationship	Trust Level	Skill Level	Length of Relationship	Buying Decision Based On:
<b>Trusted Advisor</b>	Absolute Trust	High Skill	Could be a life-long Relationship	Almost Never About Price
<b>Consultant</b>	High Trust	High Skill	Could be long-term or short-term	Seldom About Price
<b>Vendor</b>	Some Trust	Some Skill	Could be long-term or short-term	Mostly About Price
<b>Peddler</b>	Low Trust	Low Skill	Always short-term	Always About Price

As a Sales Professional, your goal is to **become a Trusted Advisor** by consistently demonstrating **expertise, reliability, and a genuine commitment to customer success.**

**Because we all share the basic needs and wants** - Safety, security, peace of mind, convenience, value, success, happiness, etc., - we all tend to act the same way in similar situations. Therefore, it is logical that we learn how people behave going through a buying experience and learn how to better help them through the buying experience.

Counselor Selling sees selling and buying as a process:

- It starts somewhere.
- It ends somewhere.
- It has identifiable steps in between.
- It flows in a certain order.

## Chapter 5: The Genesis of Selling: “The Call”

Before proposals are written, inspections completed, or contracts signed, the sales process begins with one crucial action: **The Call**. This chapter reinforces the foundational truth that consistent, proactive outreach—whether face-to-face, by phone, or through personal follow-up—is the engine behind every successful sale. It introduces Massey's "Genesis" Call Plan and outlines the expectations, techniques, and daily habits that help Sales Inspectors generate appointments, build relationships, and drive their own success.

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### Nothing happens until someone sells something.

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Everyone has heard this truism, and, once again, it is for this reason that our Sales Professionals play such a critical role in our success. Every Sales Professional must be willing and absolutely **committed** to making **Sales Calls**.

Executing on this commitment becomes the **foundation of personal success** and ultimately the success of our Company and all the Team Players who are associated with your contribution. As you consider developing the foundation for your future success with our Company, please understand that the sales process:

- does not start with an inspection,
- does not start with the completion of the sales proposal,
- does not start with a sales presentation, handling objectives or closing the sale,
- not even with the successful signing of a contract.

The sales process has always started, currently starts, and always will start with **“The Call.”**

In today's competitive environment, every company **must have a successful sales** organization to provide the necessary growth that businesses and people must have to prosper.

Organizations that do not command the ability to sell its service and products, **do not survive**.

In the same fashion, salespeople who choose **not** to make an **abundance** of **Sales Calls**, do not make it in the sales profession. They fail despite their ability to make a quality sales presentation, handle objections, or their skillful ability to close a sale.

Thus, understanding that **“The Call”** is the beginning of the sales process, the following will outline specific methods and techniques not only for making **sales calls**, but how to become a *committed, valued and successful* Sales Professional with Massey Services.

A “Call” is defined as any activity for the purpose of selling one or more Massey Services.

# The “Genesis” Call Plan

## Minimum Sales Expectations

To understand the importance of this sales call initiative, it is important to understand the minimum sales expectations for every Inspector in our Company.

We expect that you follow the current Sales Standards. The standards outline the following requirements:

1. **Making a certain number “Calls” a day.**
2. Generate 2 + sales for every office lead received.
3. Generate a minimum amount of revenue in residential sales per month.
4. Sell 75% of all leads received through the office or web.

The “**Genesis**” Call Plan is designed for all Inspectors to **exceed** minimum expectations.

## The Drill

**The Drill** is the one sales tool that will help you of achieve your daily sales objectives and maximize your daily sales activity for success. Follow “The Drill” and WIN!

- **Daily Objective:** 4-6 First-Time, Scheduled Appointments
- **Time Allocation:** 5-6 hours per day
- **Networking:** Don’t forget your friends, neighbors, and business acquaintances are also recourses or networking.

## Daily Activities for New Business Development

Activity	Description
<b>4+1 / Door Knocking</b>	Five properties adjacent to each appointment
<b>10 New Construction Opportunities</b>	Guarantee delivery, superintendent stop-bys, re-inspections
<b>10 Direct Mail Follow-Ups</b>	Most recent direct mail campaign(s)
<b>20-30 Door Hangers</b>	New construction areas, current customer neighborhoods
<b>10 Customer Contacts</b>	Alpha listing, customer files, referral callback sheets
<b>All Scheduled Call-Backs +2</b>	DSAR & Pending/Dead Proposals

**These numbers on this page and others are subject to change each year. Talk to your manager about the current standards or read the current Sale Standards Document in Policy & Procedure.**

<b>Pending Opportunities Not Seen</b>	Pending leads on DCIR
<b>Time Allocation for Follow-Ups</b>	1-2 hours per day

## Leads

Successful sales begin with strong leads. Massey Services generates leads from multiple sources, each providing a unique opportunity to connect with prospective customers. Understanding where leads come from and how they are categorized ensures that Sales Professionals can approach each one with the right strategy.

### The following are the primary types of leads you will encounter:

- **Office Lead:** a phone call or walk-in prospective Customer requesting information on any of Massey's Services.
- **Web/Internet Lead:** a lead received on the Internet from a prospective Customer requesting information on any of Massey's Services.
- **Service Lead:** any lead received from a Service Technician.
- **New Construction Lead:** a lead received by the Service Center from the New Construction Division for the purpose of explaining our Guarantee and selling Pest Prevention, GreenUP Services or Mosquito Services.

## The 4+1 Program

The 4+ 1 Program generates 4 additional calls for every lead received. This will be accomplished by calling on neighbors around the lead received. The contact method may be:

- Cold Calling at the time of inspection, sale or start,**
- By phone in the Service Center using the alpha-list, or**
- Sending a personal letter to the correct addresses.**

## Cold Calling & Lead Follow-Ups

Regardless of the method of contact, the Inspector is to use the appropriate sales materials, business cards and personal handwritten notes.

### Cold Calling at the Time of Inspection, Sale, or Start

For guidance on how to structure these conversations, refer to the Example Introduction Scripts at the end of this lesson.

Cold calling immediately after an inspection, sale, or service start is a key strategy for generating additional leads and building customer interest. By reaching out to nearby homes, Inspectors can leverage the credibility of a completed appointment to create new opportunities. Whether the prospect is home or not, leaving behind the right materials ensures continued engagement.

#### **When prospective customers are home:**

At the completion of the lead appointment, the Inspector will:

- Make **4 calls** around the lead.
- Record the house numbers and addresses around each lead on the **Daily Sales Activity Report**.
- Offer inspections or set future appointments as appropriate, **time permitting**.
- Record all appointments in the **1-31 Binder**.
- Call **Administration**, who will record all appointments in the **Appointment Log**.

#### **When prospective customers are not home:**

At the completion of the lead appointment, the Inspector will:

- Make **4 calls** around the lead.
- Record the house numbers and addresses around each lead on the **Daily Sales Activity Report**.
- Leave a **plastic bag** with the following contents:
  - The appropriate **Pest or Termite Survey** or **GreenUP Landscape Alert**. The Inspector will leave a handwritten note in the **Comments Section** of the Survey/Report Alert, along with a **Service Charge Estimate**.
  - **Fast Facts brochures** for the appropriate pest problem encountered in the neighborhood.
  - A **Homeowner's Guide** for the appropriate pest problem.
  - A **business card**.

#### **Using Handwritten Notes for Cold Calls**

Handwritten notes are a highly effective and personal way to communicate with potential customers who are not at home.

#### **Example Note:**

Dear Homeowner, we just inspected a neighbor's property where they were concerned about a (type of pest problem). Other Massey customers in the neighborhood have shared the same concerns. We'd like to offer you a complimentary inspection of your property. If interested, please contact me at (telephone number) to schedule an inspection at your convenience. We look forward to hearing from you.

**⚠ Only when prior approval is given can the customer's name and address be used in any type of message.**

## Phone Outreach from the Service Center

The Inspector will phone the prospective Customers by using the alpha-list, and offer a complimentary inspection using the example telephone script below:

### Example Call Script: 📞

*Ms. Smith, this is (Bob Jones) with Massey Services. Today, I was at one of your neighbor's homes because of a (carpenter ant) problem. Since (carpenter ants) tend to be neighborhood problems, we would like to offer a complimentary inspection and written analysis on your home. We will be in your neighborhood on Thursday and Friday this week. Which day would be most convenient for you?*

## Sending a Personal Letter to Prospects

1. The Inspector will **attach a business card** to a **handwritten note**, along with:
  - a. The appropriate **sales material**.
  - b. **Fast Facts brochures**.
  - c. A **handwritten envelope** for mailing.
2. The Inspector will provide the **handwritten note, materials, and envelope** to the **General Manager** at check-in the following morning.

## Example Introduction Scripts

**⚠️ Only when prior approval is given can the customer's name and address be used in any type of message.**

### Pest Prevention Script

*Good morning, Ms. White. My name is Bob Jones with Massey Services. I was just at one of your neighbor's homes at 1543 Quail Hollow discussing a (fire ant problem). Since (fire ants) are neighborhood problems, I wanted to offer you a complimentary inspection of your home. If now is not convenient, would Monday or Tuesday be better for you?*

### Lawn Care Script

*Good morning, Ms. White. My name is Bob Jones with Green UP Lawn Care. I was just at your neighbor's home at 1543 Quail Hollow where I witnessed (Sod Web Worm Moths) in their lawn. Since (Sod Web Worm Moths) are serious neighborhood lawn problems, I wanted to offer you a complimentary analysis for your lawn. If now is not convenient, would Tuesday or Wednesday be better for you?*

### Termite Script

*Good morning, Ms. White. My name is Bob Jones with Massey Services. I was just at 1543 Quail Hollow discussing a problem with termites. Since termite problems tend to be serious problems to neighborhoods, we are offering complimentary inspections to you and other neighbors. If now is not convenient, would Tuesday or Wednesday be better for you?*

# Chapter 6: Expanding Sales & Lead Development

Successful sales professionals go beyond making calls and setting appointments. Expanding sales requires leveraging multiple strategies, including **cross-selling, referral programs, and proactive customer follow-ups**. This chapter outlines the programs and techniques designed to maximize opportunities and generate long-term customer engagement.

## Cross Selling Program

The Cross Selling Program is designed to generate new sales by cross selling our services to existing Customers (pest prevention, termite, GreenUP and Irrigation sales). This will be accomplished as follows:

### Working with Technicians

Each Inspector will **work with Technicians at least once per week** (Wednesday or Thursday) to offer services to existing customers and prospective customers nearby (next door and across the street). There are potential cross-sell opportunities **based on technician type**:

1. **Reinspector** - Lawn, Pest, Mosquito
2. **Pest Prevention Technician** - Lawn, Irrigation, Termite, Mosquito
3. **Bait Technician** - Lawn, Irrigation, Pest, Mosquito
4. **Lawn Specialist** - Irrigation, Pest, Mosquito, Termite
5. **Irrigation Specialist** - Pest, Mosquito, Termite

The Inspector will leave an estimate for additional services with the existing customer utilizing the **Pass-It-On Program and make calls to nearby homes** while the Technician performs services, leaving appropriate sales materials such as:

1. Pest or Termite Surveys
2. Landscape Alerts
3. Other relevant sales brochures
4. Regular Service Charge estimates

### Cross Selling from the Alpha Listing

The General Manager will use the **current alpha listing** to assign specific customers to Inspectors for cross-selling opportunities. Once an appointment is scheduled:

1. The Inspector will record the time on the **Daily Sales Activity Report** for the appropriate day.
2. The appointment will be transferred to the **1-31 Binder**.
3. The Inspector will notify **Administration** to log the appointment.

## Cross Selling Office Leads

Every lead will generate multiple inspections with emphasis placed on the primary problem associated with the lead.

## Pass-It-On Program



**Welcome to Massey Services Pass It On Program! You have been referred to us by one of our valued customers.**

The **Pass-It-On Program** encourages satisfied customers to refer Massey Services to friends, relatives, and neighbors. This structured referral program helps generate new leads through customer advocacy.

Inspector must explain the **Pass-It-On Program** immediately following the closing of any sale.

### Process:

1. After closing a sale, the Inspector will introduce the customer to the **Preferred Customer Discount Coupon** and explain the Pass-It-On Program.
2. Prior to the next morning check-in, the Inspector will:
  - a. Complete a **handwritten Thank You Card** for the customer.
  - b. Fill out a **Referral Callback Sheet** for any referrals received.
3. After Manager verification:
  - a. The Thank You Card will be mailed.
  - b. The referral callback will be scheduled approximately **four weeks after service completion**.
4. The Inspector will place the completed **Referral Callback Sheet** in the appropriate **January-December Index**.



*Thank You cards are available from Thumbprint.*

**Turn satisfied customers into your best lead source.** After every sale, introduce the Pass-It-On Program, send a thank-you card, and follow up to secure referrals and grow your book of business.

## Referral Follow-Up

Four weeks following the Service Completion Date, the Inspector will phone or revisit the property of the current customer to perform a **quality assurance** check and ensure that service was performed to their satisfaction.

The Inspector will contact the customer to ensure satisfaction and reintroduce the Pass-It-On Program.

1. If referrals are provided:
  - a. The Inspector will thank the Customer and ask for permission to use their name when contacting the referral.
  - b. The Inspector will immediately enter the referral into **Daily Sales Activity Report** to start the process of calling the prospective customer for an appointment.
  - c. The Inspector will continue following up until the referral is either **converted into a sale or lost**.
2. If referrals are not provided:
  - a. The Inspector will **thank the Customer** for their business.
  - b. A future **follow-up will be scheduled** to check satisfaction and revisit referral opportunities.



**Referral Call Back Sheet**

Customer's Name: \_\_\_\_\_  
 Email Address: \_\_\_\_\_  
 Telephone: \_\_\_\_\_  
 Address: \_\_\_\_\_

How did you hear about Massey Services? \_\_\_\_\_  
 Do you have current lawn service? \_\_\_\_\_ Pest Service? \_\_\_\_\_  
 Termite Protection? \_\_\_\_\_ Irrigation Service? \_\_\_\_\_

**Relationship Building Facts**  
 (Children, Pets, School, Other Interests, Etc.)

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Referral: \_\_\_\_\_  
 Referral: \_\_\_\_\_

**Services Sold**  
 (Place price after service sold)

Landscape \_\_\_\_\_ Lawn \_\_\_\_\_ Irrigation \_\_\_\_\_ Pest \_\_\_\_\_ Termite \_\_\_\_\_

Inspector's Name: \_\_\_\_\_ Date Proposed \_\_\_\_\_

30 Day Call Back Date \_\_\_\_\_ Results \_\_\_\_\_  
 60 Day Call Back Date \_\_\_\_\_ Results \_\_\_\_\_  
 90 Day Call Back Date \_\_\_\_\_ Results \_\_\_\_\_

Payment \_\_\_\_\_ Thank you Card \_\_\_\_\_ Start Sheet \_\_\_\_\_ Agreement \_\_\_\_\_  
 Rate Card \_\_\_\_\_ Graph \_\_\_\_\_ Protocol Sheet \_\_\_\_\_ Referral Sheet \_\_\_\_\_ Graphical Analysis \_\_\_\_\_

*The Referral Call Back Sheet*

## Reinstatement Program

The Reinstatement Program requires Inspectors to follow up and reinstate discontinued Customers **90 days after the cancellation date**. This program applies to **Pest Prevention, Mosquito, Lawn/Landscape, and Irrigation Maintenance customers**.

### Process:

1. The **General Manager** will pull all cancellation request forms from the last **90 days** from the accordion file.
2. The General Manager will **review account standings** before assigning them to an Inspector.
3. The General Manager will assign the canceled accounts to the Inspector for follow-up calls.

### Inspector Follow-Up Calls:

The Inspector is required to contact the discontinued Customers using the following script while **using active listening skills** to carefully to customer concerns and take notes.

- *Ms. Smith, this is Bob Jones with Massey Services. The reason for my call is to ask you a few questions about the service you had with our Company. Our records indicate you had our service from January 2020 and discontinued in June 2021. Is this correct? Why did you cancel? What can we do to regain your business?*

### **Reinstating the Customer:**

**What happens after the outreach begins?** Once you've contacted (or attempted to contact) a former customer, follow the appropriate next steps—whether you're restarting service, making in-person contact, or speaking with a new homeowner. This section outlines how to handle each scenario professionally and effectively.

#### **1. If the customer agrees to reinstate service:**

- a. The Inspector will prepare a **new Service Agreement** for the Customer's signature.
- b. The standard sales procedures will be followed to restart service.

#### **2. If the customer does not answer:**

- a. The Inspector will **research the address and phone number** using the Cross Reference Directory to check for name changes.
- b. If no contact is made by phone, the Inspector will **visit the home** to verify the current homeowner.
- c. If the previous customer still resides at the address, the Inspector should ask:
  - i. *Why did you cancel? What will it take to regain your business?*
- d. If the home has a new owner, the Inspector should explain:
  - i. *Massey Services previously provided service at this address. I'd like to offer you an opportunity to reinstate that service at the same rate as the previous owner, or at a discounted rate under our current pricing.*

## **Door Hanger Daily Program**

The General Manager, with the assistance of each Inspector, will determine which subdivisions to target daily with door hangers.

1. The **General Manager** will order the appropriate number of door hangers before each month begins.
2. Inspectors will **pre-list daily and hang 50 door hangers per day**. If pest activity (spiders, ants, mud daubers, etc.) is observed, the Inspector will:

- a. Make a note of the issue.
  - b. Send a **handwritten letter (thank-you card)** introducing Massey Services and offering a free inspection.
3. The type of door hanger used will change based on **seasonal pest problems and conditions**. The General Manager will ensure each Inspector is accountable for using the required **50 door hangers per day**.

## Guarantee Delivery Program

Inspectors in pre-construction treatment areas will deliver **five (5) guarantees per day**.

1. The General Manager will organize and assign **five (5) New Construction Guarantees** per day to each Inspector for delivery.
2. The Guarantees will be assigned by **territory**.
3. The Inspector will attempt to make contact using **available telephone numbers or an in-person visit**.
4. After **five (5) failed delivery attempts**, the Guarantee will be copied and the original mailed.
5. A copy of the Guarantee will be placed in an **accordion file** for follow-up next month.
6. At the beginning of each month, all **New Construction Guarantees will be pre-listed**, and another delivery attempt will be made.
7. This process will continue until contact is made and the Guarantee is successfully delivered.
8. Proposals for **Pest and Lawn Services** will be provided to every customer.



Example door hangers.

# Chapter 7: The 8-Step Sales Process

A structured sales process is essential for creating consistent, successful interactions with customers. The **8-Step Sales Process** guides Sales Inspectors through every phase of the customer engagement, from the initial introduction to closing the sale.

Each step builds on the previous one, ensuring a logical flow that **identifies customer needs, presents solutions, and reinforces trust** throughout the process.

## Step #1: Introduction (Interview)

The first step in the sales process is about establishing trust and setting expectations. A professional introduction helps the customer feel comfortable and reassured that they are in good hands. This stage is also about gathering information, allowing the Sales Inspector to understand the customer's concerns before beginning the inspection.

### Starting Strong: The Introduction Process:

Your approach in the first few minutes sets the tone for the entire appointment. This step walks you through how to professionally introduce yourself, build rapport, and gather valuable insights to guide the rest of the conversation.

#### 1. Establish rapport and introduce yourself professionally:

Make a strong first impression by showing appreciation, professionalism, and concern for the customer's needs.

- a. Introduce yourself and Massey Services.
- b. Thank the customer for calling Massey and for the opportunity to inspect their home.
- c. Demonstrate concern for the customer's perceived problems.

#### 2. Engage the customer upon arrival:

Start building connection and trust by observing and acknowledging their immediate concerns.

- a. **Pest Prevention & Termite Services:** Once invited inside, observe and identify the customer's concerns.
- b. **Lawn Services:** Begin by reviewing the lawn's condition and discussing any issues the customer has noticed.

#### 3. Ask fact-finding questions to understand the customer's needs:

Use open-ended questions to uncover the customer's history, concerns, and expectations.

- a. *How did you hear about Massey Services?*
- b. *How long have you had this problem?*
- c. *Have you had this issue before? If so, where?*
- d. *What did you do about it at that time?*
- e. *What other pest, termite, or lawn concerns do you have?*

- f. *How soon were you expecting to have this problem resolved?*
4. **Actively listen and tailor your approach:**  
Show genuine interest in their responses and use that information to personalize your inspection and recommendations. Pay attention to the customer's responses and adjust your presentation to **address their specific concerns**.
5. **Explain the inspection process:**  
Set clear expectations by walking the customer through what the inspection will include and how it benefits them. Inform the customer that you will perform a **thorough inspection** that includes:
  - a. **Interior and exterior assessment**
  - b. **Over and under inspection** (crawl spaces, attics, etc.)
  - c. **Graphing and documentation of findings**

## Why This Matters

The introduction sets the **foundation for trust and credibility**, creating a professional first impression. It's more than just a greeting—it's an opportunity to **demonstrate expertise, show genuine concern, and gather key insights** about the customer's needs. A well-executed introduction **engages the customer, builds confidence, and smoothly transitions into the inspection**, setting the stage for a successful sales process.

## Step #2: Inspection (interview)

A thorough inspection is the foundation for presenting a compelling solution to the customer. This step allows the Sales Inspector to identify the full scope of the problem and document key findings that will support their recommendations. **More detailed information on inspections and graphing will be covered in Chapter 8.**

### Explaining and Performing the Inspection:

The inspection involves a detailed evaluation of the **entire property**—not just the home or landscape. After completing the inspection, the Sales Inspector prepares a written report that documents all findings and areas of concern.

A complete inspection covers both the outside and inside of the property, from boundary line to attic space. This process ensures nothing is missed, builds customer confidence in your thoroughness, and consists of the following elements:

1. Perform a **full outside inspection**, including crawl spaces (if applicable), boundary line to boundary line.
2. Draw the appropriate **residential or landscape graph**.
3. Perform a **full interior inspection**.
4. Identify **the attic location** and ask whether it is in the garage, hallway, or another area.

- Offer concern by asking if there are any areas the customer prefers **not** to have inspected.

### Encourage Customer Participation:

Involving the customer during the inspection builds trust and helps them better understand your findings. Whether they walk with you or review materials on their own, this is a key opportunity to create engagement and reinforce professionalism.

Offer the customer the option to **join you during the inspection** or provide them with an appropriate **Fast Facts Brochure** to read while you complete the inspection.

If the customer accompanies you:

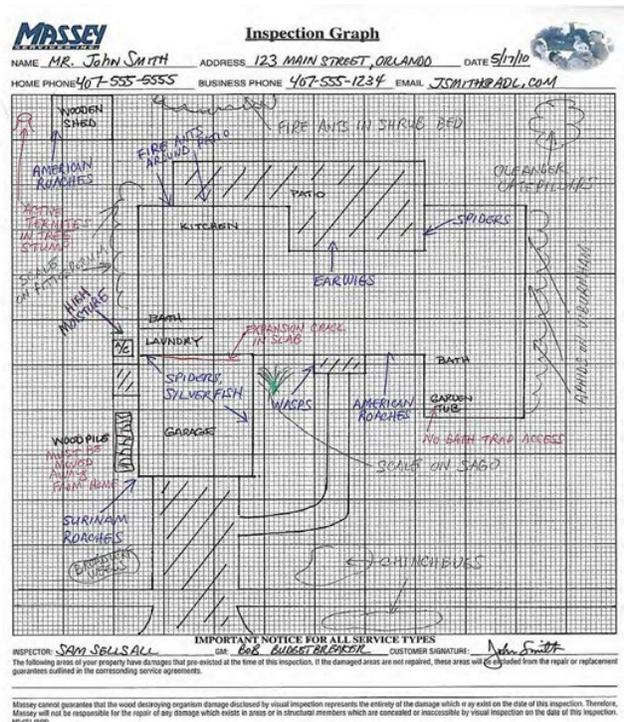
- Demonstrate professional knowledge by pointing out **Avenues, Conditions, and Sources** of infestation.
- Ask **probing questions** to better understand their concerns and past experiences.

### Graphing the Inspection Findings:

The inspection graph is both a legal document and a powerful visual tool. Creating a clear, detailed graph reinforces your professionalism and helps the customer understand exactly what was found during the inspection.

When graphing a **structure or landscape**, begin at the **left front side** and work **counterclockwise**.

- Pay close attention to detail to maintain a professional appearance.
- Prepare a **complete graphic analysis**, using:
  - Red ink** to mark Avenues, Conditions, and Sources of infestation or problem areas.
  - Black ink** to outline the structure.
- Prepare **pricing and agreements** before reentering the customer's home to present findings.



Example inspection graph.

### Why This Matters

A thorough inspection is the **backbone of the sales process**, providing the factual basis for all recommendations. By carefully assessing the property, documenting findings, and involving the customer, Sales Inspectors **build trust, demonstrate expertise, and create a clear path to the solution**.

A well-conducted inspection not only uncovers existing issues but also **identifies potential risks**, reinforcing the need for proactive services. This step ensures that recommendations are **credible, tailored, and supported by clear evidence**, making it easier for the customer to see the value in Massey Services.

## Step #3: Define the Problem

Once the inspection is complete, the next step is to clearly define the problem for the customer. This step ensures the customer fully understands the issues present on their property and sets the stage for presenting solutions.

1. **Explain the problem using visual and informational tools:**

Use the inspection materials you've prepared to visually walk the customer through the issues identified. These tools help make the problem tangible and easy to understand.

- a. Open and review the appropriate **Massey Folder, graph, graphical analysis, specification sheets, and worksheets.**
- b. Identify **Avenues, Conditions, and Sources** of potential and real infestations using the graph.

2. **Demonstrate expertise and reinforce customer confidence:**

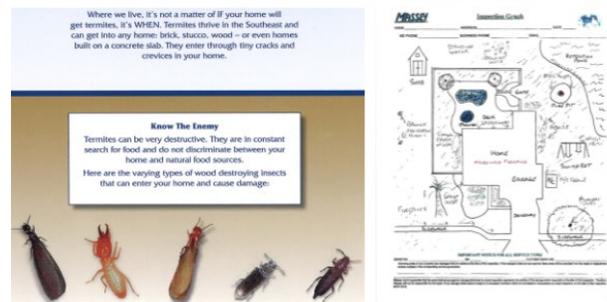
Your ability to clearly explain what's going on—and why it matters—builds trust and reassures the customer that you know exactly how to help.

- a. Use the appropriate **Fast Facts Sheets** and **Massey Proposal Folder** to explain the customer's problem.
- b. Provide clear explanations to ensure the customer understands the findings and their implications.

At this stage, the customer should have a **clear understanding of the issues affecting their home or landscape**, allowing for a smooth transition into presenting solutions.

## Why This Matters

Defining the problem **bridges the gap between the inspection and the solution**, ensuring the customer fully understands the issues at hand. By using visual tools and clear explanations, Sales Inspectors **reinforce credibility, educate the customer, and create a sense of urgency** for addressing concerns. A well-explained problem statement



Top: Example service brochure

Bottom Left: Example fact facts

Bottom Right: Example inspection graph

**builds trust and positions Massey Services as the expert**, making it easier to transition into the next step—presenting solutions tailored to the customer’s needs.

## Step #4: Describe the Solution

After defining the problem, the next step is to **present a clear and compelling solution** that aligns with the customer's needs. This step helps the customer understand why Massey's approach is the best choice for addressing their concerns.

1. **Explain the differences between key service options:**
  - a. **Pest Prevention vs. Pest Control**
  - b. **Agronomic Landscape Program vs. Lawn Spray Program**
  - c. **Termite Coverage vs. Total Coverage/Total Protection for five wood-destroying insects**
2. **Present the best service alternatives for the home or property such as:**
  - a. **Caulking and Sealing** to prevent pest entry
  - b. **Liquids vs. Baits** for termite treatment
  - c. **Granular vs. Liquid Fertilizers** for landscape care
3. **Provide protocol explanations** for solving service-related problems.
4. **Use Features and Benefits** to reinforce why the recommended solution is effective.

This step ensures that the customer **fully understands the available solutions and how they directly address their concerns**, making it easier to transition into the next phase of the sales process.

I have customized your initial landscape treatment based on the problems and conditions I observed during my inspection of your property. My treatment specifications are listed below and will be used by your GreenUP Lawn Specialist in completing your service.

SOIL HEALTH MANAGEMENT SPECIFICATIONS		
1. <input type="checkbox"/> Core Aeration 	2. <input type="checkbox"/> Granular Lawn Fertilization 	3. <input type="checkbox"/> Liquid Fertilization with Micronutrients; Lawn 
4. <input type="checkbox"/> Granular Potassium Fertilization; Lawn 	5. <input type="checkbox"/> Granular Tree & Shrub Fertilization 	6. <input type="checkbox"/> Liquid Fertilization with Micronutrients; Tree & Shrubs 
7. <input type="checkbox"/> Soil Testing for pH 	8. <input type="checkbox"/> Soil Adjustment for pH 	9. <input type="checkbox"/> Irrigation System Inspection 
LAWN/WEED MANAGEMENT SPECIFICATIONS		

## Wood Destroying Organism Inspection

STRUCTURAL ADDITIONS / MODIFICATIONS:  Garage  Shed/Storage  Patio  Carport  Other: \_\_\_\_\_ YEAR BUILT \_\_\_\_\_

CONSTRUCTION KEY	WDO DAMAGE / INFESTATION KEY	DIMENSION KEY (STRUCTURES ONLY)	STRUCTURAL USE
FOUNDATION TYPE: <input type="checkbox"/> CRAWL <input type="checkbox"/> BASEMENT <input type="checkbox"/> COMBINATION <input type="checkbox"/> SLAB: <input type="checkbox"/> Monolithic <input type="checkbox"/> Stem Wall ■ EXTERIOR WALLS: <input type="checkbox"/> Block <input type="checkbox"/> Frame <input type="checkbox"/> Brick <input type="checkbox"/> Concrete <input type="checkbox"/> Stone <input type="checkbox"/> Other _____ ■ SIDING: <input type="checkbox"/> Stucco <input type="checkbox"/> Wood <input type="checkbox"/> Metal <input type="checkbox"/> Brick/Stone <input type="checkbox"/> Vinyl <input type="checkbox"/> Log <input type="checkbox"/> Other _____ ■ GRADE STATUS: <input type="checkbox"/> Siding: <input type="checkbox"/> Below Grade <input type="checkbox"/> Above Grade <input type="checkbox"/> Slab: <input type="checkbox"/> Below Grade <input type="checkbox"/> Above Grade	<input type="checkbox"/> Existing Damage = XXX <input type="checkbox"/> Suspected Damage = SD <input type="checkbox"/> Presumptive Evidence = P <input type="checkbox"/> Active Insects = A	Scale: 1 sq. = _____ ft. Total lineal ft. = _____ Bait lineal ft. = _____ Total sq. ft. = _____ Total cubic ft. = _____	<input type="checkbox"/> Residence <input type="checkbox"/> Detached Garage/Shed <input type="checkbox"/> Multiplex _____ <input type="checkbox"/> Multi-Family _____ <input type="checkbox"/> Comm/Type _____
WOOD DESTROYING ORGANISM IDENTIFICATION KEY			AREAS INSPECTED:
<input type="checkbox"/> Subterranean Termite = ST <input type="checkbox"/> Formosan Termite = FT <input type="checkbox"/> Woodborers = WB <input type="checkbox"/> Wood Destroying Fungus = WDF <input type="checkbox"/> Drywood Termite = DT <input type="checkbox"/> Dampwood Termite = DW <input type="checkbox"/> Powder Post Beetles = PPB <input type="checkbox"/> Other _____			<input type="checkbox"/> Interior <input type="checkbox"/> Exterior <input type="checkbox"/> Attic <input type="checkbox"/> Basement/Crawl

*Example treatment specification and inspection sheets*

### Why This Matters

Describing the solution **transforms the inspection findings into a clear, actionable plan** tailored to the customer’s needs. By explaining **why Massey’s approach is superior**, Sales Inspectors reinforce trust and position the company as the best choice. Presenting solutions in a way that highlights **features, benefits, and service options** ensures the customer sees the **value and effectiveness** of Massey’s services. A well-explained solution makes the transition to the next step—**qualifying Massey Services**—seamless and natural.

### Step #5: Qualify Massey Services

A **qualifier** provides the prospect with insight into **why they should choose Massey Services** over other providers. This step helps bridge the gap between the **problems identified in Step 3** and the **solutions presented in Step 4**, reinforcing Massey’s credibility and unique value.

By using **qualifying facts** about the company, Sales Inspectors can build trust and answer the question, **“Why do business with Massey Services?”**

The following examples illustrate how to incorporate qualifiers into customer conversations to establish **confidence, credibility, and competitive differentiation**.

#### Example Qualifiers and Applications

**Qualifier: 5th largest pest/lawn/termite provider in our industry**

- **Best used when** the prospect is unfamiliar with Massey Services.
- **Why it matters:** Demonstrates **stability** and highlights that Massey’s **great service** has been well received by consumers shopping for a provider.

**Qualifier: The largest privately held pest/lawn/termite provider in our industry**

- **Best used when** the prospect is unaware that Massey is a family-owned company.
- **Why it matters:** Consumers often prefer **family-owned businesses** because the owner's **reputation is personally on the line every day.**

**Qualifier: Two-time recipient of the EPA Pesticide Environmental Stewardship Program Champion**

- **Best used when** comparing Massey's **Pest Prevention** service to traditional **Pest Control.**
- **Why it matters:** Massey is the **only pest provider to receive this honor twice,** showing our commitment to **environmentally responsible service.**

**Qualifier: Awarded grants from the EPA to study zero pesticide usage in schools**

- **Best used when** presenting Pest Prevention Services to prospects with **children in the home.**
- **Why it matters:** Establishes **trust** by showing that Massey is held in high regard by the EPA for **making schools safer** through environmentally responsible pest management.

**Qualifier: The only company in the industry to be named “Best Dressed” by the American Uniform Association**

- **Best used when** showing the brochure during the presentation.
- **Why it matters:** Customers see **real Massey Team Members** in professional, **neat, clean uniforms,** reinforcing **trust** in the team that will service their home.

**Qualifier: Recognized as one of the top lawn care providers in America by Lawn & Landscape Magazine**

- **Best used when** presenting Massey's lawn and landscape services.
- **Why it matters:** Establishes Massey as a **highly recognized, industry-leading** lawn care provider, reinforcing our **Agronomic Landscape Program** as a top-tier service.

**Qualifier: Nearly 1,000,000 happy, satisfied customers**

- **Best used when** presenting any of Massey's services.
- **Why it matters:** Customers make buying decisions based on **trust**—this qualifier validates Massey's **outstanding service and long-term customer relationships.**

**Qualifier: Massey Services has a written Money-Back Guarantee on all services**

- **Best used when** presenting services to a **new customer** who has never used Massey before.
- **Why it matters:** A **money-back guarantee, signed by Mr. Massey himself,** reassures customers that **there is no risk** in choosing Massey Services.

**Qualifier: Massey Services is a full-service company**

- **Best used when** a prospect is **comparing multiple bids** or looking for a comprehensive solution.

- **Why it matters:** Customers benefit from **one provider, one statement, and multiple professionals from the same Service Center**, simplifying service and providing seamless customer support.

## Why This Matters

Qualifying Massey Services **reinforces credibility and trust**, helping customers understand why Massey is the **best choice** for their pest, lawn, and termite needs. By incorporating **company achievements, industry recognition, and service guarantees** into the conversation, Sales Inspectors differentiate Massey from competitors and **build confidence in the proposed solution**.

This step bridges the gap between **identifying the problem and presenting the solution**, ensuring the customer sees Massey as the **most reliable and knowledgeable provider**. Strong qualifiers make the decision **clear and easy**, setting the stage for closing the sale.

## Step #6: Features & Benefits

Effectively communicating **features and benefits** is essential for helping customers understand the **value of Massey Services' programs**. This step ensures that Sales Inspectors can **differentiate Massey's services from competitors** by emphasizing **key advantages, value-added services, and guarantees**.

The following **definitions and examples** illustrate how to present features and benefits in a way that resonates with customers and **reinforces the value of their investment** in Massey Services.

## Definitions & Examples

Before presenting a solution, it's important to speak in terms that resonate with the customer. The definitions below will help you clearly communicate how Massey's services stand out and why they matter to the customer.

- **Feature:** A proven fact about Massey Services, its services, or its guarantees.
- **Value-Added Feature:** A unique **service enhancement** that **Massey Services provides** that most competitors do not.
- **Benefit:** The **value the customer receives** from the feature.

**Translating Service into Value:** Customers don't just want to hear what's included—they want to understand why it matters. Explore the examples below to see how to connect each feature to a clear, meaningful benefit.

## Pest Prevention: Proactive, Responsible, and Personalized

These examples highlight how Massey's Pest Prevention Service offers more than traditional pest control—focusing on proactive solutions, environmentally responsible tools, and personalized service that gives customers peace of mind.

- **Feature: Massey Services' Pest Prevention Program** eliminates **conditions, avenues, and sources** that attract pests.
  - **Benefit:** Provides an **environmentally responsible approach** to pest control.
  - *Ms. Smith, unlike traditional pest control, Massey Services' Pest Prevention Program eliminates conditions, avenues, and sources that attract pests—both inside and outside your home.*
- **Feature: Customized Graph** identifying pest activity and risks.
  - **Benefit:** Customers receive a **clear, visual representation** of their property's pest risk.
  - *Mr. Jones, as part of your inspection, I'll create a customized graph identifying conditions, avenues, and sources that could lead to a pest infestation.*
- **Feature: The primary tools** we use for pest prevention are **caulk, pruners, and a Webster broom**.
  - **Benefit:** Uses **less chemical**, making Massey Services a **safer choice** for families and the environment.
  - *Mr. Franklin, unlike traditional pest control, Massey's Pest Prevention Program focuses on sealing entry points, trimming overgrown vegetation, and removing spider webs—minimizing the need for chemical applications.*
- **Feature: Guaranteed Pest Prevention Pricing** for **two years** with no **unexpected price increases**.
  - **Benefit: No surprises**—ensures a **long-term, trustworthy relationship**.
  - *Ms. Edwards, one frustration for many customers is rising costs. With Massey Services, your Pest Prevention pricing is locked in for at least two years—so you can budget with confidence.*

## **Lawn & Landscape: Proactive Care with Visible Results**

These examples show how Massey's Lawn & Landscape Services go beyond basic treatment. With built-in inspections, proactive applications, and guaranteed protection, customers gain a greener, healthier lawn—and confidence in long-term care.

- **Feature: Aeration** is included in Massey Services' **Annual Lawn & Landscape Program**.
  - **Benefit:** Ensures **stronger root growth** and a **healthier lawn**.
  - *Ms. Jenkins, aeration is one of the most environmentally responsible ways to improve your lawn's health, and it's included in our program every year.*
- **Feature: Annual Irrigation Inspection & pH Soil Analysis** included in service.
  - **Benefit: Ensures proper watering and soil conditions**, promoting a **greener, healthier lawn**.

- *Mr. Anderson, our pH soil analysis ensures your lawn is absorbing nutrients properly—because a healthy lawn starts from the roots up.*
- **Feature: Proactive treatments**—3 pre/post-emergent applications and 3 insect applications per year.
  - **Benefit: Prevents problems before they start**, keeping lawns **weed- and insect-free**.
  - *Mr. Barns, instead of waiting for weeds or lawn pests to appear, Massey's Monthly Landscape Program proactively prevents these issues—guaranteeing a beautiful, healthy lawn all year.*
- **Feature: Lawn & Shrub Insect Damage Replacement Guarantee.**
  - **Benefit:** If pests damage a customer's lawn or shrubs, Massey Services will **replace them at no charge**.
  - *Mr. Green, your lawn is your second-largest investment after your home. That's why our GreenUP Program includes a guarantee to replace any lawn or shrubs damaged by insects.*

## Termite Protection: Confidence Backed by Guarantees

These examples show how Massey's termite services go beyond treatment—they offer protection, flexibility, and peace of mind through industry-leading guarantees and personalized care.

- **Feature: 5-Year Annual Renewal Pricing Guarantee.**
  - **Benefit:** Customers can **budget confidently** without fear of rising costs.
  - *Mr. Jones, your termite renewal pricing is guaranteed not to increase for five years—giving you peace of mind and cost predictability.*
- **Feature: Money-Back Guarantee.**
  - **Benefit: No risk**—ensures **complete customer satisfaction**.
  - *Mr. Franklin, investing in termite protection is a big decision. That's why Massey Services offers one of the few termite guarantees that includes a full money-back promise.*
- **Feature: Flexible Termite Treatment Options** tailored to individual homes.
  - **Benefit:** Treatments and guarantees are **customized** for each property.
  - *Mr. Phillips, every home is unique. That's why we tailor our termite protection plans to match your property's needs and structure.*
- **Feature: Massey's Termite Guarantee Does Not Exclude 'Masonry Failure'.**
  - **Benefit:** If termites enter through a **crack in the slab** and cause damage, the home is **still covered** under Massey's guarantee.

- *Ms. Jones, unlike many termite companies that have fine-print exclusions, Massey's Total Coverage/Total Protection Guarantee ensures you're protected—even if termites enter through structural cracks.*

## Why This Matters

Effectively presenting **features and benefits** allows Sales Inspectors to **demonstrate value**, build trust, and differentiate Massey Services from competitors. By clearly linking **features to customer benefits**, Inspectors help prospects understand **why Massey's services are a superior choice**.

Whether it's the **environmentally responsible approach to pest prevention, proactive lawn care, or the industry-leading termite protection plans**, customers feel more confident in their investment when they recognize the **long-term value and security** Massey Services provides. A well-explained **feature and benefit conversation** does more than just sell a service—it builds **lasting relationships** and ensures **customer satisfaction for years to come**.

## Step #7: Close

Closing the sale is the natural progression of a well-structured sales process. At this stage,



*Building Trust and Securing the Sale – A Massey Services Inspector confidently closes the deal with a satisfied customer.*

the Sales Inspector **confidently presents purchasing options** and **reinforces the value of Massey Services** to help the customer make a decision.

By offering **flexible payment options, promotional opportunities, and structured closing techniques**, the Inspector can guide the prospect toward committing to a service that meets their needs.

The following closing techniques provide **proven strategies** for securing a sale while ensuring the

customer feels **comfortable and confident** in their decision.

## Payment and Promotional Options

The Inspector will close the sale by offering the customer:

- **Payment options** including Visa, MasterCard, Discover, and cash
- **Promotional opportunities** such as the Preferred Customer Discount and Pass-It-On Program

## Examples of Closing Techniques: Confident Closes

### Alternative Close

This method assumes the prospect has already made the decision to buy and presents the next steps as a simple choice.

#### Example Statements:

- We have openings Thursday or Friday to start your service. Which day will fit your schedule best?
- Of the two solutions I have presented, which one would you like me to schedule to start?

### Assumptive Close

Used for both closing and trial closing, this technique acts confidently as if moving forward is the only logical step.

#### Example Statements:

- Knowing you need the pest and lawn programs, let's get both scheduled. We can discuss the irrigation program during my 30-day follow-up.
- I am glad that after today you will have peace of mind using our environmentally responsible programs.

### Trial Close

This technique helps gauge the prospect's readiness to move forward by **subtly introducing the idea of closure** without directly asking for the sale.

#### Example Statements:

- Based on what we've discussed, do you agree that this service will provide the solutions you need?
- Considering everything I've shared about our menu of services, which one stands out as the most important for your home?

## Examples of Closing Techniques: Value-Based Closes

### Cost of Ownership Close

Instead of focusing on price, this technique emphasizes the **long-term value** of Massey Services over competing providers.

#### Example Statements:

- Competing services may seem less expensive short-term. However, Massey guarantees pricing for multiple years, making us the more cost-effective choice over time.
- Constantly switching service providers can be costly. Massey focuses on long-term customer relationships, ensuring you will never have to switch again.

### 1-2-3 Close

This technique presents three reinforcing points that work together to build confidence in the decision.

#### **Example Statements:**

- Considering the conditions, avenues, and sources I identified during my inspection, this service is the best solution for your needs.
- Our Money-Back Guarantee, commitment to Total Customer Satisfaction, and Environmentally Responsible service make this an easy choice.

#### **Valuable Customer Close**

This technique makes the customer feel **valued and appreciated**, offering special promotions or rewards for their commitment.

#### **Example Statements:**

- You seem well-connected in this neighborhood. After we begin your new service, I'll set you up with rewards through our Pass-It-On Program.
- Your home qualifies for Massey's pest and lawn programs. Because of that, I can offer you a special discount today.

### **Examples of Closing Techniques: Consideration Closes**

#### **Think About It Close**

This technique allows prospects time to process the information while keeping them engaged in the decision-making process.

#### **Example Statements:**

- I can see you're thinking about it. I'm going to step outside to put my equipment back in my car. When I return, I can answer any additional questions you may have.
- I understand you want to think about it. Let me summarize the program again so you have a clear picture of why this solution is a great fit for you.

### **Why This Matters**

Mastering closing techniques is essential for turning interest into commitment. By confidently presenting **payment options, promotional opportunities, and tailored closing strategies**, the Sales Inspector helps customers **feel secure in their decision** to choose Massey Services.

The key to a successful close is **reading the customer, identifying the best approach, and reinforcing value** at every step. A well-executed close not only secures the sale but also **establishes trust for a long-term customer relationship**.

### **Step #8: Ask for Referrals (follow-up)**

The final step in the sales process is about **maintaining strong customer relationships** and **leveraging satisfied customers** to grow Massey Services' reach. A well-executed referral process not only helps generate new business but also reinforces trust and long-term engagement with existing customers.

Once a sale is completed, the Sales Inspector should follow up with the customer to **ensure satisfaction** and introduce the **Pass-It-On** program. This step helps turn satisfied customers into valuable advocates.



**Welcome to Massey Services Pass It On Program! You have been referred to us by one of our valued customers.**

### **Follow-Up Process:**

Before asking for a referral, it's essential to confirm the customer is satisfied. This quick check-in ensures trust is maintained and creates a natural opening to reintroduce the Pass-It-On Program.

- **Verify customer satisfaction** and confirm that the service met expectations.
- **Explain the Pass-It-On referral program** until the customer either agrees to provide a referral or declines.

### **If a Referral is Provided:**

When a customer shares a referral, treat it as a meaningful gesture. Reinforce appreciation and keep the relationship warm to encourage future recommendations.

- Thank the customer and ask **if their name can be used** when contacting the referral.
- Continue developing the relationship to **encourage additional referrals in the future.**

### **If a Referral is Not Provided:**

Not every customer will have a referral right away—that's okay. Express gratitude and schedule a polite follow-up to revisit the conversation later.

- Thank the customer for their time.
- Prepare a **Referral Call-Back Sheet** for a **follow-up in 30 days.**

**⚠ The Sales Inspector must also finalize all paperwork before check-in with the General Manager the following day.**

## **Why This Matters**

Following up with customers ensures they remain satisfied with their service while also creating **new opportunities for business growth**. By maintaining strong relationships and introducing the **Pass-It-On** program, Sales Inspectors help build long-term customer loyalty and generate **consistent referral-based business**.

## Summary

The **8-Step Sales Process** provides a **structured, customer-focused approach** that ensures every interaction is professional, informative, and results-driven. Each step builds upon the last, guiding the customer from **introduction to trust, from problem identification to tailored solutions, and from value demonstration to confident decision-making**.

By following this process, Sales Inspectors **differentiate Massey Services, establish credibility, and create long-term customer relationships**. Mastering these steps not only leads to more successful sales but also fosters **trust, satisfaction, and continued business growth**—ensuring that every customer interaction contributes to Massey’s reputation for excellence.

## Chapter 8: Inspection & Graphing

Professional inspection skills are among the most important abilities you will develop in this industry. Your success as a **Massey Services Inspector** depends on your ability to conduct thorough inspections for **general household pests, termites and other wood-destroying organisms, landscape pests, and irrigation systems**.

Although each inspection—**pest, termite, lawn, and irrigation**—has its unique aspects, they share common elements, including:

- **Inspection Techniques**
- **Inspection Equipment**
- **Measuring and Identification**
- **Graphing & Documentation**

An effective inspection does more than identify the **current pest or condition** present; it also uncovers **conditions conducive to future infestations** and potential problems. Measurements of the **structure and/or landscape** are critical for accurately pricing services. All findings are documented on a **graph and graphical analysis**—not only to illustrate the issues to the customer but also as a **legal record of the conditions observed during the initial inspection**.

A thorough inspection is also a valuable **sales tool**. Taking the time to conduct a complete evaluation—**inspecting every area of the structure and landscape, identifying problems, documenting conditions, avenues, and sources**—sets Massey Services apart from competitors.

Many of our best Inspectors have heard new customers say:

- *I knew your service was going to be thorough because of how detailed your inspection was."*

### Inspection Overview

For every inspection, you will:

- **Draw an outline** of the structure on a graph
- **Measure the property**
- **Document pests and/or conditions** on the **Inspection Graph and Graphical Analysis**



*Thorough Inspections for Lasting Protection – A Massey Services Inspector carefully assesses landscape conditions to identify potential issues.*

As a **full-service pest, termite, lawn/landscape, and irrigation solutions company**, we conduct **comprehensive inspections** that go beyond the **initial service requested**. This ensures we identify potential **needs** the customer may not yet recognize.

For example, someone requesting a **pest inspection** may not be aware of the **risks posed by termites** or the damage caused by a **faulty irrigation system**. They may also **not fully understand the value** of professional services in these areas.

That's where your role as an **Inspector** comes in. Your job is to **educate customers** on the **importance of professional inspections and services**.

## Offering Comprehensive Solutions

Our sales process is built on **offering all our services**—pest, lawn, termite, and irrigation—to every prospect we meet. While a customer may have a **specific concern**, such as pests, our goal is to inspect for **three or more additional core services**. By doing so, we:

1. **Protect their home and property** from current and future issues.
2. **Help them avoid costly problems** by identifying risks early.
3. **Offer a complete solution** tailored to their needs.

Every customer interaction is an opportunity to educate, inform, and **offer solutions**. After all, **100% of the people you don't ask to buy won't**.

## Inspection Fundamentals

In most situations, you will begin an inspection by **greeting and interviewing the customer**. This conversation often reveals the **customer's voiced concerns**, which provide insight into what they have already noticed. However, a thorough inspection should go beyond these concerns to identify **hidden issues and future risks**.

## The Inspection Process

### Step 1: Begin Outside

- Inspections typically start on the **exterior of the home**, as many pest issues originate outside.

### Step 2: Identify External Signs

- Look for visible indicators such as **irrigation stains**, which could suggest **moisture problems** on the exterior walls.

### Step 3: Inspect the Corresponding Interior

- Check the **same wall inside** to assess for signs of **termite activity**, which is attracted to moisture, or the presence of other pests like **ants and roaches**.

### Step 4: Benefits of Inviting the Homeowner to Join the Inspection

- **Increased Trust** – Having the homeowner observe your professionalism helps build confidence in your expertise.
- **Not Mandatory** – While not all homeowners will choose to accompany you, many appreciate the opportunity to be involved.

### **Key Takeaway**

Starting the inspection **outside first** and inviting the homeowner to observe are best practices that **help identify potential problems and build trust** with the customer.

## **Inspecting the Outside**

Massey Services offers a **full range of pest, lawn, termite, and irrigation services**, allowing us to conduct **comprehensive inspections** that go beyond what most competitors offer. Many other providers focus on just **one or two services**, limiting their ability to detect **larger property concerns**.

### **Why Start with the Outside?**

- **Identifies Sources & Conditions** – Many pest and landscape issues originate outside the home.
- **Comprehensive Approach** – Inspecting walls, eaves, foundations, plants, and the surrounding property ensures that no potential issue is overlooked.
- **Sets Us Apart** – Massey’s **detailed, multi-service inspections** differentiate us from competitors with limited offerings.

### **Starting the Outside Inspection: Process**

#### **Step 1: Follow a Clockwise Pattern**

- Establishing a consistent inspection pattern helps ensure no areas are missed. Starting at the **base** of the home and moving **clockwise** supports a thorough and professional evaluation.

#### **Step 2: Key Exterior Areas to Inspect**

Certain exterior zones are more likely to reveal pest entry points or landscape issues. Knowing where to look—and what to look for—helps you detect concerns early and provide a more valuable service.

- **Exterior walls** – Look for cracks, moisture damage, and pest entry points.
- **Eaves** – Inspect where the roof meets the walls for potential nesting sites.
- **Foundation** – Check for termite mud tubes, cracks, and moisture buildup.
- **Trees and shrubs within 15 feet of the home** – Overgrown vegetation can act as a bridge for pests.
- **Plant bedding** – Assess soil condition and identify signs of pest activity.

#### **Step 3: Identify Key Signs of Problems**

Your role is more than spotting current infestations—**it's about identifying the hidden risks**. Keep an eye out for conditions, avenues, and sources that could lead to future issues and clearly document them.

- At each inspection point, look for **conditions, avenues, and sources** that may attract pests or cause other issues.
- Document both **live infestations** and **potential risks** that could become future problems.

#### **Step 4: Expanding the Inspection Beyond the Perimeter**

- Once the perimeter is complete, **expand** your review to the **entire property**. This additional layer of inspection **supports Massey's full-service model** and helps you uncover broader needs.

#### **Summary: Inspecting the Entire Property**

A detailed exterior inspection isn't limited to one service—it's an opportunity to assess the full range of potential needs. By evaluating the property through the lens of all Massey services, you strengthen your recommendations and build greater customer trust.

- **Pest Control** – Look for entry points and signs of rodent or insect infestations.
- **Lawn & Landscape** – Assess the health of trees, shrubs, and plant beds.
- **Soil Conditioning** – Identify soil conditions that may affect landscaping.
- **Irrigation** – Check sprinkler systems for **functionality and efficiency**.
- **Termite Protection** – Inspect the foundation and exterior for signs of termite activity.

### **You Are the Massey Store!**

As an Inspector, you represent **all of Massey's services**. A **comprehensive inspection** allows you to **educate homeowners** about potential concerns, offer **preventative solutions**, and ensure that they **receive the best protection for their home and property**.

### **Inspecting the Inside**

Once the **exterior inspection** is complete, the next step is to **inspect the interior** of the home. A thorough interior inspection requires **methodical movement from room to room**, ensuring that no potential issue is overlooked.

- Start in **one room or area** and move systematically throughout the home.
- Inspect **low and high**, beyond the obvious.
- Be **curious and inquisitive**—pests often hide in unexpected places.

Take the time to check **behind curtains, under furniture, in cobwebs, and along sliding door tracks**. Look beneath appliances, inside cabinets, and in tight corners. Using an **inspection mirror** allows you to see areas that would otherwise be difficult to access.

#### **What Are You Looking For?**

During an interior inspection, you should be identifying:

- **Live pests** and **dead pests**

- **Shed skins, wings, eggs, larval and pupal cases**
- **Droppings and spittle marks**
- **Damage caused by pests**, such as gnaw marks or structural weakening

### **Attic & Crawlspace**

Attics and crawlspaces must always be inspected, as they provide **ideal harborage for many pests**. These areas often go unnoticed by homeowners but can serve as **prime nesting and breeding sites**.

- **Use extra caution** when entering these spaces.
- **Always wear company-supplied safety equipment** to ensure proper protection.

A detailed **interior inspection**—including attics and crawlspaces—helps uncover **hidden pest activity and structural vulnerabilities**, allowing you to provide a **complete and effective solution** for the customer.

## **Graphing**

The **inspection graph** is one of the most important documents in the industry and serves as one of the **best sales tools available**. Often referred to as the **cornerstone of our program**, it provides both a **legal record of observed conditions** and a **visual representation of problems** for the customer.

### **Steps in Preparing a Graph**

A well-prepared graph not only documents **conditions, avenues, and sources** of pest activity—it also makes the issues **visible and tangible** to the prospect. When done well, it reinforces the **value** of Massey Services’ professional expertise and helps the customer **understand** exactly what was found during the inspection.

Use the following steps to create a clear, complete, and customer-friendly graph.

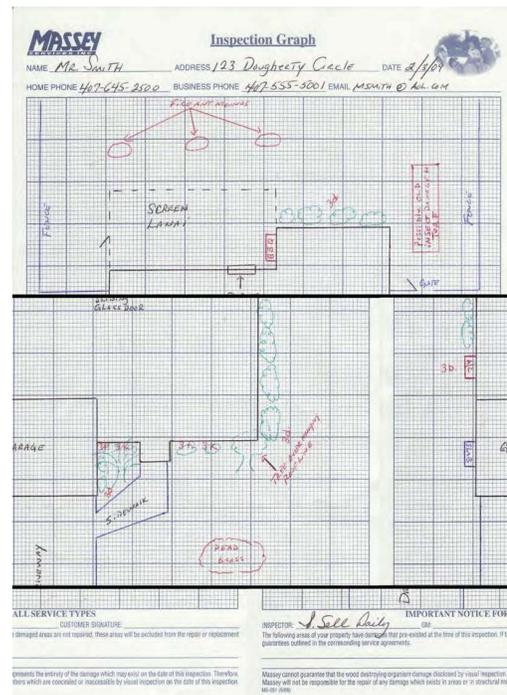
#### **Step 1: Complete the Written Information**

**Start by filling out the basics.** This ensures all documentation is properly attributed and easy to reference.

- Fill out the **customer's name, address, date, home and cell phone numbers, email, and the inspector's name** at the top of the form.

#### **Step 2: Draw and Document Findings**

**Use your inspection observations to build the visual story.** Record everything clearly and consistently using Massey’s color-coding standards to make the graph easy to interpret.



*Graph showing pest entry points and other highlighted using the color-coded system.*

- As you **inspect the home and property**, be observant and record **all conditions, avenues, and sources** that could contribute to current or future pest issues.
- Use the following **color-coding system** to maintain clarity:
  - **Black Ink** – Structure outline
  - **Green Ink** – Landscaping and bedding
  - **Red Ink** – Pest activity, conditions, avenues, sources, landscape issues (e.g., weeds, disease), and irrigation problems (e.g., broken heads)
  - **Blue Ink** – Sales documents

### Step 3: Ensure the Graph is Easy to Read

Make your graph customer-friendly. **Don't use codes and shorthand**. Writing out findings in full helps customers understand the problem and builds trust in your inspection.

- The **graph should tell a clear and understandable story. Avoid using acronyms or codes** when labeling findings.
- Instead of abbreviations like **RA** for Rover Ants or **DW** for Dollar Weed, **write out the full name** so the customer understands what was documented.
- Customers may forget abbreviations, but they will remember **clear, written descriptions** of their problems.

A strong graph speaks for itself. When done right, it communicates your findings clearly, supports your credibility, and reinforces the value of Massey's services. Take the time to make it accurate, complete, and easy for the customer to follow.

 **The original, top-copy colored graph must always be left with the prospect.**

## Inspection Report & Graphical Analysis

In addition to the **inspection graph**, an **inspection report and graphical analysis** are completed for all inspections.

- These documents **work together** to tell the story of the property's conditions.
- During the **presentation**, the graph and graphical analysis reinforce the **findings, severity of the issues, and recommended solutions**.
- Leaving a **detailed, professional graph and report** behind allows Massey Services to **sell additional services throughout the year** with follow-up.

## Measurements

Accurate measurements are critical to providing **precise pricing and service recommendations**.

- **Structures** – Measure **linear footage and square footage** for general treatments, and **cubic footage** for drywood termite or powder post beetle fumigations.
- **Landscape** – Measure the **square footage of the lawn, trees, and shrubs** to determine treatment plans.

## Equipment

Having the right equipment is essential for conducting a **thorough and professional inspection**. A properly equipped inspector can **identify, document, and communicate issues more effectively**.

For **comprehensive list of common inspection equipment** used for **pest, termite, lawn, and irrigation inspections**, consult your manager.

# Chapter 9: Proper Irrigation Inspection & Water Management Audit

Water management is one of the most crucial factors in maintaining a **healthy, vibrant lawn and landscape**. A properly functioning irrigation system ensures **optimal distribution of water**, known as **distribution uniformity**, which prevents overwatering, underwatering, and uneven coverage.

Before **quarterly Irrigation Maintenance Service** can begin, the system must be **operating at peak efficiency**. This requires making necessary **repairs and adjustments** to optimize **distribution uniformity** and avoid wasting water or damaging the landscape.

## Objectives of the Irrigation Initial Inspection & Estimate

1. Inspect the **entire irrigation system**, documenting and discussing any needed repairs to achieve **peak distribution uniformity**.
2. Provide an **estimate for initial repairs**, along with an outline of the **quarterly Irrigation Maintenance Service** plan.

## Initial Inspection Protocol

A thorough inspection begins with a **walkaround of the property**, identifying **drought-stressed areas** in turf and plants. Look for:

- **Brown patches, wilting, or folded leaf blades**
- **Washouts, holes, or broken sprinkler heads**
- **Signs of poor water distribution**

While inspecting, use a **soil probe** to check moisture levels and identify areas receiving **too much or too little water**.

### Key Observations to Document:

- **Irrigation pipe depth** – Pipes should be deep enough to avoid interference with **aeration and landscaping maintenance**.
- **System pressure levels** – Ensure the irrigation system has adequate water pressure.
- **Water source type** – Identify whether the system uses **well, reclaimed, lake, or city water**

## Irrigation System Inspection Steps

Turn on the **irrigation system** and inspect **each zone**, flagging **all heads that need adjustment** and documenting needed repairs in the **Inspection Graph and Service Agreement**.

Common **repairs and adjustments** include:

- **Relocating sprinkler heads** to correct coverage deficiencies.
- **Adding new heads** to improve uniform water distribution.
- **Installing risers** to ensure unobstructed water flow.
- **Addressing poor system pressure**, which may indicate broken pipes or excessive heads in one zone.
- **Replacing broken, worn, or clogged heads** to maintain proper spray patterns.
- **Installing pressure regulators** on heads emitting excessive mist, preventing water waste.
- **Cleaning nozzles and screens** to remove blockages that disrupt water flow.
- **Pruning overgrown vegetation** obstructing proper irrigation coverage.
- **Adjusting arc and distance settings** to maintain head-to-head coverage without waste.
- **Replacing mismatched nozzles** to ensure consistent distribution uniformity.



*You might get wet. Have a dry uniform on hand and do your best to stay out of the line of fire.*

## Irrigation Value-Added Features & Benefits

An irrigation system does more than water the lawn—it protects the customer’s **landscape investment**. When **properly maintained**, it ensures **healthy root systems**, prevents **costly issues**, and supports long-term **curb appeal**.

In this section, you’ll explore the **features and benefits** that set Massey’s **Irrigation Services** apart—from routine **maintenance** to essential **repairs**—and learn how to present these solutions in a way that builds **trust** and communicates **value**.

### Key Benefits of Proper Irrigation Maintenance

Proper irrigation isn’t just about watering—it’s about creating the right conditions for a healthy, resilient landscape. The benefits listed below highlight why regular maintenance is essential.

1. **Encourages strong root growth** by maintaining an optimal balance of **water and oxygen** in the soil.
2. **Prevents patchy, unhealthy-looking lawns** by improving **distribution uniformity**.
3. **Reduces insect damage** caused by **underwatering** that weakens plants.
4. **Prevents fungus, disease, and weed overgrowth** by eliminating **overwatering**.

## Features & Benefits of Irrigation Maintenance

**Routine irrigation maintenance** keeps systems running **efficiently** and protects the landscape from **avoidable damage**. The tasks below highlight how Massey ensures **long-term performance** and **water conservation**.

- **Observing zone operation** to identify filtration and backflow issues.
- **Inspecting controllers, programming, and relay enclosures** to prevent future malfunctions.
- **Measuring water pressure** to ensure proper function and detect unseen leaks.
- **Adjusting watering schedules** to comply with local regulations and optimize plant health.
- **Testing valves, batteries, and rain sensors** to prevent overwatering and system failures.
- **Checking for leaks, clogs, and misaligned sprinkler heads** that lead to **water waste and inefficiency**.

## Features & Benefits of Irrigation Repair

**Timely irrigation repairs** are essential to maintain **system efficiency** and prevent **long-term damage**. The services below help ensure consistent coverage and adapt to the property's **evolving needs**.

- **Replacing damaged sprinkler heads and pipes** to restore proper function.
- **Clearing blockages** that reduce water flow and coverage.
- **Adding or removing sprinkler heads** to optimize distribution.
- **Installing additional irrigation zones** to accommodate changing landscape needs.

A **properly maintained irrigation system** prevents **water waste, reduces plant stress, and ensures an even, healthy landscape**. By conducting a **thorough initial inspection**, identifying **necessary repairs**, and offering **ongoing maintenance services**, Massey Services helps customers protect their **lawns, landscaping, and water resources**—all while ensuring a **cost-effective, environmentally responsible solution**.

# Chapter 10: Creative Ways to Sell Pest Prevention Services

Pest prevention is an essential service that helps protect homes and businesses from a wide variety of household pests, including ants, roaches, spiders, fleas, ticks, bed bugs, silverfish, earwigs, centipedes, millipedes, scorpions, bees, wasps, mosquitoes, flies, carpet beetles, clothes moths, pantry pests, rats, mice, and more.

This chapter explores **proven strategies** for generating **pest prevention service appointments and sales**. As discussed in **Chapter 5**, a **Call** is a **face-to-face interaction** where prospects know your business and have the ability to buy, while an **Appointment** is a scheduled meeting for **proposals or presentations**.

## Generating Pest Prevention Sales

Generating Pest Prevention sales isn't just about cold calls. From networking with technicians to engaging online communities, there are many creative and proactive ways to fill your calendar with new opportunities.

### Customer Follow-Up & Retention

*Your current and past customers are powerful sources of new business.* These strategies focus on building long-term relationships, checking in after service, and leveraging satisfied customers to spark referrals and win-backs.

- **Following Up** – Schedule satisfaction appointments for new services sold.
- **Win-Back Campaigns** – Reconnect with canceled customers after 90 days to reinstate service.
- **Pass-It-On Program** – Gain referrals from satisfied customers.

### Neighborhood & Community Outreach

*Get out into the neighborhoods you serve.* From knocking on doors to engaging online, these techniques help you stay visible, relevant, and connected to local prospects in the areas where Massey is already making an impact.

- **4+1 Program** – Contact neighbors of satisfied customers.
- **Door Knocking** – Knock on 25 doors in the morning and afternoon to generate interest.
- **Social Media Engagement** – Promote services on HOA and neighborhood pages.

### Lead Generation & Internal Partnerships

*Sometimes your best leads are already inside the system.* These approaches use internal tools like the alpha list and frontline partnerships with technicians to generate qualified appointments efficiently.

- **Alpha List Calling** – Use the alpha-list to schedule inspection appointments.
- **Technician Collaboration** – Work with service techs in your area to generate leads.

## Strategic Market Expansion

*Reach beyond the everyday routes.* These methods target growth opportunities in new construction communities and through professional networks—opening doors to untapped markets and long-term customers.

- **New Construction Sales** – Target new developments for service opportunities.
- **Professional Networking** – Build relationships with realtors, pool techs, landscapers, and more.

## Proposal & Selling Pest Prevention on Every Termite Proposal

Whenever conducting an inspection for **termites and other wood-destroying insects**, **always check for general household pests as well.**

- Use **Red Ink** on the **Inspection Graph** to document **pest evidence and activity** alongside termite findings.
- After presenting **termite protection**, transition smoothly into discussing **pest prevention.**

Even in homes that appear **pest-free**, prospects may still be interested in a **preventative program** to keep their home **clean and protected long-term.**

## Proposal & Selling Pest Prevention on Every Landscape Proposal

Every **landscape inspection and analysis** is another opportunity to introduce **pest prevention services.**

- Lawns and landscapes often have **both lawn pests and household pests.**
- Some shrubs, for example, may be infested with **aphids**, which **attract ants**—requiring treatment from **both a Lawn Specialist and a Pest Prevention Technician.**

By identifying these **cross-service opportunities**, Massey Services ensures **comprehensive protection** for the property.

## The Universal Need for Pest Services

**Pest prevention isn't just a nice-to-have—it's a necessity.** Whether someone owns a home or rents, lives in a city or suburb, the need for proactive pest services continues to grow. Here's why:

- Consumers are more aware than ever of **the dangers of pests.**
- There is **increasing demand** for **professional pest services.**
- **Proactive pest prevention** provides long-term benefits over **reactive pest control.**
- Household pests **thrive both indoors and outdoors**—meaning a complete prevention program is essential.
- Some pests can cause **allergic reactions**, contaminate food, or infest children's play equipment.

- Many homeowners prefer **environmentally responsible solutions** for pest prevention.

Since pests are **persistent and aggressive**, people either **already have a pest service or will need one in the future**.

The most **effective way** to generate pest prevention sales is to **ask everyone**:

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Who currently takes care of your pest service?  
Would you like a professional pest inspection?

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## Overcoming Common Objections

**Even strong prospects may hesitate before committing.** Understanding how to respond to common objections helps you keep the conversation going and position Massey's Pest Prevention Program as a smarter, safer, and more effective solution. Explore these two common responses and how to guide the discussion forward.

1. **I do it myself.**
  - a. **Response:** Have you ever considered the **time, effort, and safety risks** involved in handling pest problems yourself? Professional service provides **expert care and long-term prevention**, often for a **lower overall cost**.
2. **I already have another company.**
  - a. **Response:** Are you **completely satisfied** with their service? If not, what could be improved?
  - b. If they are happy with their service, ask:
    - i. *Have you ever compared your current Pest Control Service to a Pest Prevention Program?*

Many homeowners may not realize the **differences** between traditional **Pest Control** and **Pest Prevention**.

## Explaining Massey's Pest Prevention Program

Unlike **traditional pest control**, which relies on **pesticide application** whether needed or not, Massey Services' **Pest Prevention Program** is a **customized environmental management solution** that focuses on **eliminating conditions** that attract pests. Pest Prevention Includes:

- **Sealing cracks and crevices** to block entry points.
- **Sweeping eaves** to remove spider webs and nests.
- **Repairing window screens** to prevent pest intrusion.
- **Applying weatherstripping** to doors and windows.

- **Pruning vegetation** to eliminate pest pathways.

 **Best of all, it's backed by Massey's Money-Back Guarantee! Let them know:**

---

Our Pest Prevention Program is truly unique. Let me show you how it works and provide a complimentary professional inspection.

---

**Ask them to allow you** to perform a professional inspection. Our Pest Prevention Program is **truly unique**, and you may be surprised how interested people will be in hearing about it.

### **Final Takeaway: Take Initiative!**

Generating pest prevention sales **starts with asking the right questions and educating prospects**. The key to success? **Taking the initiative to make calls, set appointments, and demonstrate value**—because a **well-informed prospect is a future customer**.

# Chapter 11: Creative Ways to Sell Lawn/Landscape Services

A healthy lawn and landscape not only enhances a home's **curb appeal and value** but also **improves quality of life and benefits the environment**.

However, **maintaining a vibrant landscape** is challenging due to weather fluctuations, pest infestations, weeds, diseases, soil conditions, irrigation issues, and improper mowing and trimming practices.

For most homeowners, keeping their lawn and landscape in optimal condition **without professional help** is difficult. That's why offering a professional landscape inspection and analysis is one of the **easiest ways to generate new appointments and sales opportunities**.



## Why Offer a Landscape Inspection?

Many lawn and landscape problems are highly **visible from the street**, making it easy to spot **potential sales opportunities**. When driving through a neighborhood, be on the lookout for:

- **Lack of color** in the grass or landscape
- **Brown spots** in the lawn
- **Weeds taking over** plant beds or turf
- **Dry spots** indicating irrigation issues
- **Dead leaves or plants** signaling disease or nutrient deficiencies
- **Excessive shade** affecting plant growth
- **Wrong plant placement** causing stress or overcrowding

## Approaching Homeowners

When you identify a lawn issue, take the opportunity to knock on the door and ask:

- *Are you happy with your current provider?*
- *Have you ever experienced the difference between a professional Landscape Service and a Lawn Spray Service?*

More often than not, simply **starting the conversation** can lead to a **scheduled inspection**.

## Generating Lawn & Landscape Sales

Successful Inspectors don't rely on just one method—they **combine several proven strategies to generate** appointments and build lasting customer relationships. Explore the list below for practical, field-tested approaches that drive lawn and landscape sales.

1. **Partnering with Lawn Specialists** to execute the **4+1 Prospecting Plan**.
2. **Knocking on neighbors' doors** during an **annual aeration service**.
3. **Offering a free pH soil analysis** to homeowners.
4. **Cross-selling lawn services** while working with Pest Prevention Technicians.
5. **Targeting homes with a competitor's lawn sign** to offer a comparison.
6. **Using the Pass-It-On Program** to obtain referral inspections.
7. **Networking with local mowing and trimming professionals** to gain referrals.

## The Difference Between Lawn & Pest Inspections

Unlike pest or termite inspections, landscape issues are often **visible and easier to detect**. However, many homeowners do not notice a **problem until it becomes severe or costly**. A professional **landscape and irrigation inspection** can help detect issues **before** they lead to expensive damage.

While **obvious problems** may stand out to trained professionals, homeowners may not recognize the **early warning signs**. By offering a **free pH soil analysis and irrigation inspection**, most homeowners are happy to say: *Sure, go ahead and inspect my lawn, landscape, and irrigation system!*

## How to Approach Landscape Sales Opportunities

In **service areas where Massey provides GreenUP Services**, Inspectors have the best success by **getting out of the vehicle and walking house to house** to identify **lawn, tree, shrub, and irrigation issues**.

When you see an obvious problem, knock on the door, and initiate the conversation:

- *Hi, I'm David with Massey Services, and I was working in the neighborhood when I noticed an issue with your lawn. It could be a pH imbalance, an irrigation issue, or an insect problem. Would you like me to take a look?*

 **When inspecting residential properties, do not enter the backyard without the homeowner's prior permission.**

 **If they agree**, provide a **thorough, detailed inspection** to assess their lawn and irrigation needs.

 **If they decline**, leave them with a **business card** and let them know they can reach out whenever they need a **professional lawn or irrigation inspection**. Even if they don't need service now, **you've planted the seed for future sales opportunities**.

# Setting Up Landscape Inspections with LANDSCAPE ALERTS

When no one is home, use the **Landscape Alert**—one of Massey Services’ most effective marketing tools.

- The **Landscape Alert** includes boxes to **check off observed conditions**, such as **lawn issues, tree/shrub health, and irrigation problems**.
- It also provides space for **lawn and tree/shrub measurements**, which will be necessary for **accurate pricing**.
- **If the homeowner is not home, leave a personalized note on the alert instructing them to call Massey Services for a full lawn and landscape inspection.**

## Examples of Effective Notes :

- *When was the last time you had a pH soil analysis and an irrigation inspection? I am professionally trained to provide both. Proper pH and proper irrigation are essential for maintaining a healthy lawn. Please call me.*
- *When was the last time your lawn was aerated? To ensure a strong root system, lawns must be aerated at least once a year. At Massey Services, this is included in our Lawn and Landscape Programs. Please call me.*



1-888-2MASSEY (262-7739)  
**LANDSCAPE ALERT**

“Enhancing the Beauty of Nature”

Address: \_\_\_\_\_  
City: \_\_\_\_\_ Date: \_\_\_\_\_  
Ask your neighbor about our services.  
Neighbor: \_\_\_\_\_  
Address: \_\_\_\_\_

## After filling out the Landscape Alert:

- Leave one copy for the homeowner in a pocket brochure at the door.
- Keep a copy for follow-up. There is a high likelihood the homeowner will call back, turning a cold lead into a potential sale.

While servicing customers in your neighborhood today, I noticed the following conditions on your property. A complete inspection and analysis was not done today. If interested, I would be pleased to meet with you to perform a complimentary inspection of your complete landscape. Please call and we can meet at your convenience.

LAWN	TREE/SHRUB	ESTIMATE
<b>1. Turf Type</b> <input type="checkbox"/> St. Augustine <input type="checkbox"/> Centipede <input type="checkbox"/> Bahia <input type="checkbox"/> Bermuda	<b>6. Ornamental Insects</b> <input type="checkbox"/> Aphids <input type="checkbox"/> Scales <input type="checkbox"/> Lace bugs <input type="checkbox"/> Caterpillars	Lawn Sq. Ft. _____ Tree/Shrub Sq. _____
<b>2. Turf Color/Density</b> <input type="checkbox"/> Good <input type="checkbox"/> Poor	<b>7. Ornamental Diseases</b> <input type="checkbox"/> Leaf Spot <input type="checkbox"/> Sooty Mold <input type="checkbox"/> Powdery Mildew	<b>NOTE.</b> The square footage is based on a visual inspection only. Please contact me for a complete inspection, soil testing and solutions to existing conditions. License # SCC131151531
<b>3. Weeds</b> <input type="checkbox"/> Broadleaves <input type="checkbox"/> Dollarweed <input type="checkbox"/> Grassy Weeds <input type="checkbox"/> Uncontrollable	<b>CULTURAL CONDITIONS</b> <b>8. Mowing Height</b> <input type="checkbox"/> Too Short <input type="checkbox"/> Too High	
<b>4. Insects</b> <input type="checkbox"/> Chinch Bugs <input type="checkbox"/> Mole Crickets <input type="checkbox"/> Sod Webworms <input type="checkbox"/> Fire Ants	<b>9. Watering</b> <input type="checkbox"/> Too Wet <input type="checkbox"/> Dry Spots <input type="checkbox"/> Too Dry <input type="checkbox"/> Faulty Irrigation	
<b>5. Diseases</b> <input type="checkbox"/> Brown Patch <input type="checkbox"/> Leaf Spot	<b>10. Shade</b> <input type="checkbox"/> Heavy <input type="checkbox"/> Partial	
<b>INSPECTOR COMMENTS</b> _____ _____ _____		

Expect More . . . and Get It!

The Landscape Alert

## Key Takeaways

The keys to success in lawn and landscape sales are **consistency, visibility, and confidence**. The reminders below reinforce the importance of proactive outreach and how small actions can lead to big results.

- A healthy lawn and landscape **require professional care**.
- Landscape **inspections generate** some of the easiest sales leads.

- Most homeowners welcome an inspection, analysis, and expert recommendations. **For 100% of the people you don't ask, the answer is always no.**
- Even if a prospect isn't interested now, **you've introduced them to Massey Services.**
- For every **10-15 Landscape Alerts left**, Inspectors generate multiple sales opportunities.

 **At the end of the day, your success in lawn and landscape sales is in your hands! The more homes you inspect, the more opportunities you create—and the more sales you close.**

## Chapter 12: Creative Ways to Sell Total Coverage/Total Protection

Termites are among the **most destructive pests** homeowners face. In the areas we service, termites cause **over a billion dollars in damage annually**, and in **almost all cases, this damage is not covered by homeowner's insurance**. Due to the economic impact of termite infestations, homeowners are often **highly aware of the risks** and actively seek protection.

Most states in our service areas conduct **ongoing consumer awareness campaigns**, educating homeowners about the importance of **annual termite inspections**. Additionally, **state and federal agencies** and most **mortgage companies** require a **wood-destroying organism (WDO) inspection** as part of the **home buying process**.

Because **termites often remain hidden for years**, homeowners depend on **industry professionals** to detect, prevent, and eliminate termite threats before severe damage occurs. **Regular professional inspections** are the best way to identify and address termite activity before it escalates into costly repairs.

### Generating Termite Inspections & Sales

Offering **professional termite inspections** is one of the **easiest ways to generate appointments and sales**.

Some **effective ways to schedule termite inspections include**:

**Working with Service Technicians** – Offer termite inspections to current **pest prevention customers** who do not yet have termite protection.

**Calling from the Alpha List** – Reach out to past customers and prospects to offer a **free professional termite inspection**.

**Neighborhood Outreach** – Visit neighbors of existing termite customers to offer **inspections for all wood-destroying insects**.

**Using the Pass-It-On Program** – Gain referrals from satisfied customers.

**Partnering with Realtors** – Offer termite inspections for homes **before they are listed for sale**.

**Re-inspecting Current Termite Customers** – Offer upgrades to **Total Coverage/Total Protection** by recommending **proactive treatments in attics and crawl spaces**.

### Separating the Inspection from the Sale

It's important to recognize the distinction between two critical steps:

- **Setting an appointment for a professional termite inspection**
- **Selling a termite protection plan**

You'll achieve better results by treating these as **separate conversations** in the sales process.

- When setting the appointment, keep the focus on the **inspection itself**—not the sale.
- Emphasize the **value of the written inspection report**, including the detailed graph and graphical analysis that documents conditions and risks.

Your **primary objective**—whether you're knocking on doors, calling previous customers, or speaking with referral partners—is to schedule a **complimentary, professional termite inspection**.

The **sale happens later**, once the customer understands the importance of your findings and the value of Massey's protection options.

## Using a Script to Set Appointments

A well-crafted **script or elevator pitch** is essential when speaking to potential customers, whether:

- **In person** (at the door, at an event, or in a neighborhood).
- **On the phone** (cold calling or following up with past customers).
- **During networking opportunities** (with realtors, home inspectors, or service professionals).

One of the **most common reasons salespeople struggle** with setting appointments is that they try to "**wing it**". Without a **consistent message**, it's easy to get **thrown off-track** by customer responses or start discussing **solutions before the prospect fully understands the problem**.

## The Most Effective Way to Learn a Script:

This process outlines a step-by-step approach to learning and applying your termite inspection script effectively—so your delivery sounds natural, confident, and customer-focused.

### **Step 1: Learn It!**

#### **Start by reading and internalizing the 9 Key Points.**

Before memorizing lines, understand what each part of the script is trying to accomplish. Knowing the "why" behind the words makes it easier to speak with purpose.

### **Step 2: Get Familiar!**

#### **Read the script several times to become comfortable with the flow.**

The more exposure you get, the less robotic it will sound. The goal is to make the script feel like second nature.

### **Step 3: Get Comfortable!**

**Practice out loud with someone you trust.**

Reciting the script to a General Manager, teammate, or friend builds confidence and helps you smooth out awkward phrasing.

**Step 4: Do a Dry Run!**

**Try delivering the script from memory in a real-time setting.**

This step simulates an actual customer interaction and helps you identify what needs polishing before going live.

**Step 5: Use It!**

**Put it into practice by securing a mock appointment.**

Whether you're role-playing or talking to a real prospect, have the other person agree to an inspection—this confirms your delivery is clear and persuasive.

**Confidence comes from preparation.** By working through these steps, you'll deliver your termite script with clarity, confidence, and a natural tone that builds trust and secures more inspections.

## The 9 Key Points of a Successful Script

**Want your script to sound confident and natural?** These 9 key points form the backbone of a successful termite inspection script. Mastering them ensures your conversations are structured, persuasive, and focused on earning trust and setting appointments.

1. **Introduce Yourself & Massey Services** – Establish **credibility** by mentioning the company's reputation.
2. **State Why You're in the Area** – Example: *"I'm in the neighborhood doing some work today."*
3. **Explain What You're Offering** – Example: *"I'm setting up professional termite inspections for homeowners."*
4. **Engage the Customer with a Question** – Example: *"When was the last time you had your home professionally inspected for termites?"*
5. **Emphasize the Comprehensive Inspection** – Highlight that it includes the **attic, crawlspace, interior, and exterior.**
6. **Mention the Written Report** – This establishes **value and credibility.** Example: *"We provide a well-documented written report of our findings."*
7. **Overcome the "I Already Have a Company" Objection** – Example: *"Have you ever compared what you have in writing to other termite protection programs?"*
8. **Create Urgency & Credibility** – Example: *"I am certified to professionally inspect for all five wood-destroying insects."*
9. **Use Reflex Questions to Gather Information** – Instead of asking, *"What's your last name?"*, say: *"How do you spell your last name?"* Reflex questions prompt **automatic responses.**

## Putting the Script into Action

Now that you know the key points, it's time to see how they come together. The following example scripts demonstrate how to apply each element in a real conversation—giving you a confident, professional approach that earns results.

### **Example Script: Setting Termite Appointments at the Door**

**Inspector:** *"Hi, I'm [Your Name] with Massey Services. I've been doing some work in the neighborhood, and I'm setting up **professional termite and wood-destroying insect inspections** for homeowners."*

If the person isn't the homeowner:

- *"Great! Do you know how I can contact the homeowner?"*

If they are the homeowner:

- *"When was the last time you had your home professionally inspected for termites?"*

Most prospects either **won't know** or will say they **already had it done**. No matter their response, follow up with:

- *"The state recommends having it done **at least once a year**."*
- *"Wouldn't it make sense to have it done again? Our professional inspection includes the attic, crawlspace, interior, and exterior, and we provide a written report of our findings."*

Then, set the appointment:

- *"There's no cost or obligation for this inspection, but I do have to schedule it through our office. What works better for you—later today or tomorrow?"*

Once they select a time, **write it down** and confirm:

- *"How do you spell your last name?"*
- *"What's the best phone number for you?"*
- *"Your home address is [Confirm Address]—correct?"*

 **Pro Tip: Never ask for the last name outright. Instead, ask how to spell it. This reflex question leads to a smoother response.**

### **Example Script: Calling a Massey Customer Without Termite Protection**

**Inspector:** *Hi, this is [Your Name] with Massey Services. Did I catch you at a good time? I just need about 30 seconds.*

 If they respond positively:

- Continue the conversation

 If they respond negatively, ask:

- *When would be a good time for me to call back?*

 If they ask a question like, "What is this about?", say:

- *As a valued Massey Services customer, we're offering **complimentary termite and wood-destroying insect inspections**.*
- *When was the last time you had your home professionally inspected?*

Then, provide education:

- *Did you know that **termites cause more damage to homes than fires and storms combined**?*
- *Most homeowners don't even know they have termites until it's too late.*
- *Would you like to schedule a **free inspection and written report** at your convenience?*

Once they agree, **schedule the appointment** and confirm details.

## **Key Takeaways**

Termite inspections are a vital part of protecting homes and growing your business. The points below reinforce why consistent effort, preparation, and a strong message make all the difference when setting appointments and earning trust.

- **Regular termite inspections** are **critical for home protection**.
- **Creative prospecting strategies** increase termite appointments.
- **A well-crafted script** makes it **easier to set appointments**.
- **Repetition and role-playing** are key to **confidence and success**.
- **Termites don't stop, and neither should we**.

# Chapter 13: Roadmap to Success

The **Roadmap to Sales Success** is a structured tool used by both the **General Manager and the Sales Inspector** to set and track **daily, weekly, and monthly sales activity**.

This roadmap helps **establish clear earnings goals** for the first full month after initial training and serves as a continuous guide for **planning and evaluating future sales performance**.

## Completing the Roadmap

The Roadmap to Sales Success is more than a planning tool—it’s your **personalized strategy for achieving consistent sales performance**. By tracking activity and setting clear goals, this roadmap helps Sales Inspectors stay **focused, motivated, and aligned** with their **earning potential**.

## Goal Setting

This first section helps you define *what you want to earn* and *what you need to sell* to get there. It’s a practical exercise that connects your income goals to the daily effort required to reach them.

### A. How much money do I want to make this month?

- The Inspector enters their desired monthly earnings.

### B. My commission rate is:

- The Inspector records their commission percentage.

### C. The dollars I need to sell to achieve my goal is...

- This is calculated by dividing the Inspector’s earnings goal (A) by their commission rate (B).

## Performance Factors

Understanding your performance metrics—like proposal ratio, closing rate, and penetration—allows you to calculate what’s working and where you can improve. This section breaks down how to use those numbers to predict and improve your sales results.

### New Inspectors:

Standard performance metrics include

- **Proposal Ratio**

### Roadmap to Sales Success

- A. How much money do I want to make this month? \$ \_\_\_\_\_
- B. My Commission Rate is: \_\_\_\_\_ %
- C. The dollars I need to sell to achieve my goals is (A ÷ B): \$ \_\_\_\_\_

Company Average Performance Factors (From the month-ending Daily Check-In Report)  
Or use Company Standards from the Trainer’s Guide

	Proposal Ratio (1)	Closing Rate (2)	Penetration % (3)	Avg. Svc. Sold Price (Total sales/svcs Sold) (4)
D. Office				
E. Creative				
F. Overall				

### Performance Requirements to Achieve My Desired Sales (C)

- G. Workdays this month: \_\_\_\_\_
- H. The # of sales (jobs) that I need to make are \_\_\_\_\_. (C ÷ F.4.)
- I. To make \_\_\_\_\_ (H) sales, I need to have \_\_\_\_\_ people buy from me. (H × F.3.)
- J. To have \_\_\_\_\_ (I) people buy from me, I need to see \_\_\_\_\_ new appointments this month. (I × F.2.)
- K. To see \_\_\_\_\_ (J) new appointments this month, I need to see \_\_\_\_\_ appointments/day. (J ÷ G)

To impact my Performance Requirements to achieve my desired sales, I need to:

Area to impact	The actions I need to take to impact are:	Which should result in the following expectation(s):
Activity (Leads Seen/Day)		
Lead Efficiency (Proposals made from Leads Seen)		
Selling Effectiveness (services sold, sales made)		

*Roadmap to Success*

- **Closing Rate:**
  - 75% on office/web
  - 33% on creative
  - 50% overall
- **Penetration Rate: 200%**

### **Experienced Inspectors:**

Past performance data is taken from the **Daily Check-in Report** at the end of the previous month. The Inspector enters:

- D. Proposal Ratio**
- E. Closing Rate**
- F. Penetration %**

To calculate the **average service sold price**, divide total sales dollars by the number of services sold. Enter this figure into the first table.

## **Performance Requirements to Achieve Sales Goals**

Once goals and performance metrics are set, the next step is to break those numbers down into realistic, daily targets. This ensures that each day contributes meaningfully toward reaching monthly sales goals. The following steps help Inspectors understand *how much activity is required—and where to focus their efforts*.

- G. Enter the number of workdays for the month** (excluding Saturdays).
- H. Calculate the number of sales needed** to reach the goal by dividing total sales dollars (C) by the average sold price (F4).
- I. Determine the number of sold customers** needed based on the penetration rate.
- J. Calculate the number of appointments needed** by dividing the number of sold customers (I) by the closing rate (F2).
- K. Determine the number of appointments needed per day** by dividing total appointments needed (J) by the number of workdays (G).

## **Action Plan for Success**

With your sales goals and performance targets in place, it's time to translate them into action. This plan helps you and your manager align on what success looks like—and how to get there. Together, you'll map out the daily habits and weekly activities that keep progress on track and performance growing.

- **Identifying key activities needed** to achieve each target.
- **Setting expectations** for daily and weekly performance.
- **Monitoring progress during daily check-ins** to ensure consistency and make adjustments as needed.

By following this structured plan, Sales Inspectors can **stay on track, refine their sales strategies, and continuously improve their performance.**

## **Why This Matters**

The **Roadmap to Sales Success** ensures that Sales Inspectors have **clear goals, measurable progress, and a structured plan for achieving success.** By breaking down **sales targets into daily and weekly activities,** this tool keeps performance **focused and achievable.**

Regular monitoring and adjustments help Sales Inspectors **stay on course, improve efficiency, and maximize earning potential.** With **consistent effort and strategic planning,** success is not just a possibility—it's an expectation.