RESIDENTIAL SALES

Initial Training Resource & Workbook for Learners

MASSEY SERVICES INC.®

V8

TABLE OF CONTENTS

PROGRAM OVERVIEW

Welcome to Massey Services!

At Massey, we believe that every Team Member has the potential to make a lasting impact. You've joined a company that values integrity, innovation, and excellence, and we are thrilled to have you on board.

As a Sales Inspector, you play a vital role in helping customers understand and benefit from our exceptional services. Whether it's Pest Prevention, Lawn & Landscape, Termite Protection, or Mosquito Management, your expertise and professionalism will make a difference in the lives of those we serve.

Your journey begins with this comprehensive training program. It is designed to equip you with the foundational skills, knowledge, and confidence needed to succeed in your role. This workbook will serve as your guide, helping you track your progress, reflect on your learning, and actively engage with the training materials.

Remember, you're not in this alone. Your Manager, team members, and the entire Massey family are here to support you every step of the way. Together, we'll help you grow, thrive, and achieve your goals.

"At Massey Services Our Team Members Make a Difference"

Program Goal and Objectives

Program Goal

The Residential Sales Training Program is designed to empower new Sales Inspectors with the knowledge, skills, and confidence to represent Massey Services as trusted professionals, deliver exceptional customer experiences, and drive lasting business growth through effective sales and service practices.

Program Objectives

By the end of this program, learners will be able to:

1. **Engage Customers Effectively**

   Develop and apply customer engagement skills, including rapport-building, observation, empathy, and communication techniques, to foster trust, uncover customer needs, and maintain professional relationships throughout the entire sales process, from first impressions to post-sale follow-ups.

2. **Conduct Comprehensive Property Inspections**

   Master the use of tools and techniques to perform systematic property inspections that identify conditions, avenues, and sources of issues. Document findings with precision and professionalism, creating detailed graphs that meet Massey's standards and ensure actionable insights.

3. **Explain Customer Problems and Deliver Sales Presentations with Tailored Solutions**

   Translate customer problems into tailored solutions by effectively integrating inspection findings, service recommendations, and sales presentations to build trust and confidence.

4. **Confidently Close Sales and Drive Referral Opportunities**

   Master strategic techniques to qualify opportunities, address customer hesitations, and secure commitments. Leverage customer satisfaction and trust to request referrals naturally, aligning conversations with positive customer experiences and Massey's Pass-It-On program.

5. **Leverage Customer Satisfaction to Build Relationships**

   Reinforce trust and satisfaction post-sale through follow-ups, address concerns, and create opportunities for upselling and cross-selling while maintaining long-term customer relationships during the Follow-Up and Ongoing Engagement phases.

6. **Demonstrate Mastery of Massey's Services, Tools, and Technical Knowledge**

   Develop expertise in identifying pests, plants, and environmental conditions relevant to Massey's services. Master the features, benefits, and guarantees of Massey's offerings while using inspection tools and graphing standards to provide accurate, professional service delivery.

7. **Strategically Manage Time and Territory**

   Master techniques to prioritize tasks, plan efficient routes, and balance competing responsibilities. Develop proactive strategies to maximize productivity and adapt to dynamic customer and operational needs.

Your Training Program

Your Residential Sales Training Program is built to reflect how you'll work in the field—learning by doing, practicing daily, and building confidence one step at a time. The training takes place over four structured weeks and includes:

- **Daily Practice**: Each day includes role-plays, guided activities, and field-based training to help you develop the skills needed for customer engagement, inspections, proposals, and sales.
- **Service Focus**: Each week centers on one type of service—Pest, Termite, or Lawn—selected by your manager based on your local market. All your coursework, ride-alongs, and hands-on learning will focus on that service.
- **Sales and Service Combined**: Sales and service training are blended from the start, helping you connect communication skills to real customer needs and service knowledge.

You'll also complete regular online assessments, receive feedback from your manager, and participate in evaluations to confirm your readiness along the way.

This structure ensures you don't just learn the job—you learn how to perform it with confidence.

What to Expect

- **A Hands-On Approach:** This program emphasizes learning by doing. You'll spend time in the field shadowing experienced team members, conducting inspections, and engaging with customers.
- **Collaborative Learning:** You'll work closely with your Manager, peers, and other Team Members to refine your skills. Daily check-ins and feedback will ensure you stay on track.
- **Guided Progression:** Each week has clear objectives, activities, and assessments to guide your learning. By the end of the program, you'll be equipped to confidently sell Massey's services and deliver exceptional customer experiences.

Facts About The Program

- **Comprehensive Training:** You'll learn about Massey's services, sales philosophy, and technical skills in a structured, step-by-step approach.
- **Flexibility for Real-World Demands:** Training activities are designed to accommodate the realities of working in a busy Service Center, with opportunities to adapt based on market needs.

- **Verification of Skills:** Your progress will be evaluated through role-play exercises, field activities, and assessments, ensuring you're ready to excel in your role.
- **A Foundation for Growth:** This program provides the groundwork for ongoing professional development at Massey.

How To Use This Workbook

- **Purpose of the Workbook:** This workbook is a tool to help you track your learning, reflect on your progress, and engage deeply with the training materials.
- **Structure:** Where applicable, each day is broken down into sections with specific objectives, activities, and space for reflection or notes.
  - Look out for prompts, checklists, and exercises to guide your learning.
- **Tips for Success:**
  - Complete each section as instructed and take time to reflect on what you've learned.
  - Use the space provided for notes and questions. Your Manager is here to help!
  - Be honest in your self-assessments—they are a tool for your growth.

BEST LEARNING PRACTICES

Your Active Role in Learning

Learning isn't something that happens to you; it's something you actively ***do***. This training program is designed to get you involved! You'll be doing hands-on activities, role-playing, and discussions. Remember, the more you engage, the more you'll learn and retain. Ask questions, participate fully, and don't be afraid to make mistakes—that's how you grow!

Focus and Single-Tasking

Forget multitasking! Your brain learns best when you focus on one thing at a time. During training, concentrate on the task at hand, whether it's a role-play, a discussion, or a field exercise. Eliminate distractions as bes you can, and give your full attention to the material. This focused approach will help you learn faster and more effectively.

The Power of Role-Playing

Role-playing is a crucial part of your training. It's your chance to practice real-life sales scenarios in a supportive environment. Don't be afraid to step out of your comfort zone! The more you practice, the more confident you'll become. Use role-playing to refine your communication skills, handle objections, and master the 8-step sales process. Remember, feedback is your friend so use it to improve!

Writing Things Down

Take notes! Writing down key points, trainer feedback, and your own reflections helps solidify your learning. Use your workbook to organize your thoughts, summarize takeaways, and track your progress. This will serve as a valuable reference as you transition into the field. There's space provided in this workbook for you to use.

Asking Questions and Seeking Clarity

Don't hesitate to ask questions! If you're unsure about something, speak up. Your trainers are here to help you understand and succeed. Use open-ended questions to explore different scenarios and challenge yourself to think critically, and asking for clarification is a sign of engagement and a commitment to learning.

Learning is Ongoing

Your training doesn't end when the initial program is complete. Learning is a continuous process. Every interaction, every customer, and every day in the service center is an opportunity to grow. Embrace the culture of continuous improvement and seek feedback from your trainers, peers, and mentors. You're part of a team that's committed to helping you succeed!

Verification and Skill Development

Throughout your training, you'll have opportunities to demonstrate your skills and knowledge. These verification points are designed to ensure you're ready for the field. Take them seriously, and use them as a chance to identify areas where you can improve. Remember, the goal is to build your confidence and competence so you can excel in your role.

MODULES

Activity Overviews,
Worksheets, &
Resources

MODULE 1

Welcome to Massey: Onboarding & Operations

1.1.1 Welcome, Service Center Tour & Team Introductions

GOAL

This part of your training is designed to help you feel welcome from day one. You'll get familiar with your workspace, understand how things operate at Massey, and start building connections with your team while learning the professional standards we follow.

DETAILS

- ESTIMATED TIME: 20-30 Minutes
- DELIVERY MODE: In-Person
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Meet and begin building rapport with you team, supervisors, and mentors.
- Navigate key areas of the Service Center efficiently.
- Identify important resources such as supply areas, form storage, and sales and service equipment.
- Understand workspace cleanliness, shared resources, and daily operational flow.
- Set up your workstation and understand workspace expectations.

1.1.2 Complete Any Remaining Onboarding Paperwork

GOAL

Before starting any work-related activities, you'll complete any remaining and required HR forms, compliance documents, and onboarding paperwork to make sure everything is in place.

DETAILS

- ESTIMATED TIME: 10-20 Minutes
- DELIVERY MODE: In-Person
- FACILITATOR: Office Manager/ HR Representative

OBJECTIVES

By the end of this activity, you will be able to:

- Review and complete any remaining HR, payroll, and employment forms.
- Verify the accuracy of your submitted documentation.

3

1.1.3 Navigating Massey's Digital tools

GOAL

To ensure you can access and navigate Massey's digital tools, complete necessary compliance policies, and begin your assigned LMS coursework.

DETAILS

- **ESTIMATED TIME**: 45 Minutes
- **DELIVERY MODE**: In-Person - Trainer-Guided Hands-On Setup
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

y the end of this activity, you will be able to:

- Log into and navigate Workday, the LMS, and company email.
- Complete all Day 1 mandatory courses in the LMS, including items such as:
    - IT Network Policy
    - Licensing Requirements
    - Mandatory HR Compliance Courses
    - Day 1 New Hire Survey (to be completed within the first 1-3 days)

1.1.4 Introduction to Training Program and Materials

GOAL

To provide you an overview of the training framework, distribute materials, and preview learning objectives to set clear expectations and goals.

DETAILS

- **ESTIMATED TIME**: 10 Minutes
- **DELIVERY MODE**: In-Person
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Familiarize yourself with the training framework, objectives, and structure.
- Understand how training modules are structured, assessed, and applied in the field.
- Learn the function and purpose of role-play and field training.
- Recognize expectations for training participation, assessments, and on-the-job learning.

1.1.5 Why We Do What We Do and How

GOAL

To provide you with a foundational understanding of Massey's mission, core services, and structured sales process to establish early trust-building and customer engagement strategies.

DETAILS

- **ESTIMATED TIME**: 45-60 Minutes
- **DELIVERY MODE**: In-Person & Workbook Task
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Understand Massey's core services and their value to customers.
- Recognize how Massey's mission aligns with its services and customer-first philosophy.
- Learn the 8-Step Sales Process as a structured framework for engaging customers and building trust.

ACTIVITY OVERVIEW

There are 3 items within this activity:

- **1.1.5A** - The Mission Statement
- **1.1.5B -** Guided Notes: Understanding Massey's 8 Step Sales Process
- **1.1.5C -** Reflecting on The 8 Steps

NOTES

Mission Statement

GUIDING PHILOSOPHY

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

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

MISSION

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.

MASSEY SERVICES, INC. CORPORATE SEAL 1986 FLORIDA

Harvey L. Massey,
Founder

1.1.5B Guided Notes: Understanding Massey's 8-Step Sales Process

This page introduces you to the 8-Step Sales Process, Massey's proven methodology for building trust and delivering tailored solutions to customers. Use the space provided to take notes as your Manager introduces each step.

Step 1: Introduction

Purpose:

Example:

Your Notes:

Step 2: Inspection

Purpose:

Example:

Your Notes:

Step 3: Define the Problem

Purpose:

Example:

Your Notes:

Step 4: Describe the Solution

Purpose:

Example:

Your Notes:

Step 5: Qualify Massey Services

Purpose:

Example:

Your Notes:

Step 6: Features & Benefits

Purpose:

Example:

Your Notes:

Step 7: Close the Sale

Purpose:

Example:

Your Notes:

Step 8: Ask for Referrals

Purpose:

Example:

Your Notes:

This process may feel overwhelming at first, but you will revisit and practice these steps frequently throughout your training. Familiarity and confidence will come with practice.

1.1.5C Reflecting on The 8 Steps

Instructions: You've just been introduced to Massey's 8-Step Sales Process, which serves as the foundation for how we engage with customers and provide exceptional service. Use this worksheet to reflect on your initial thoughts about the process.

Step 1: Review the 8-Step Sales Process Take a moment to think about each step. Which ones feel straightforward, and which ones might require more practice?

Step 2: Write Your Reflections In the space below, respond to the following prompts:

1. **Which 2 steps feels the clearest to you right now? Why?**

2. **Which 2 steps do you think will be the most challenging for you? Why?**

Step 3: Discuss Your Reflections Be prepared to review your responses with your Manager. Together, you'll set a plan for future learning and practice.

1.1.6 Checking In

GOAL

To provide you with real-world context for daily responsibilities, sales team workflows, and structured operational check-in

DETAILS

- **ESTIMATED TIME**: 40 Minutes
- **DELIVERY MODE**: In-Person & Workbook Task
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Observe and understand how daily responsibilities, priorities, and schedules are managed.
- Recognize the importance of structured check-ins in tracking progress, addressing challenges, and planning ahead.

ACTIVITY OVERVIEW

There is 1 item within this activity:

- **1.1.6** - Finishing the Day: Check-In Observation Notes

1.1.7 Day 1 Wrap-Up & Reflection

GOAL

To ensure you reflect on your Day 1 experiences, reinforce key learning points, and provide clarity on expectations for the next training day.

DETAILS

- **ESTIMATED TIME**: 20-30 Minutes
- **DELIVERY MODE**: In-Person & Workbook Task
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Summarize key takeaways from Day 1 activities.
- Clarify any outstanding questions or concerns about training.
- Prepare for Day 2 by reviewing upcoming objectives and expectations.

ACTIVITY OVERVIEW

There is 1 item within this activity:

- **1.1.7** - Finishing the Day: Day 1 Reflection Questions

1.1.6&7 Finishing the Day

Instructions: Take a moment to reflect on your first day at Massey Services. Use the space below to record your thoughts and insights based on today's activities and your observations of end-of-day check-ins.

Exercise 1: Check-In Observation Notes (1.1.6)

1. What is one thing you found interesting or insightful about the check-ins?

2. What is one question you have about the check-in process?

Exercise 2: Day 1 Reflection Questions (1.1.7)

1. What did you feel most confident about today?

2. What is one area you want to focus on improving tomorrow?

1.2.1 The Massey Look: Professional Image Matters

GOAL

To ensure you understand why professional appearance matters in customer interactions and establish clear uniform and grooming expectations.

DETAILS

- **ESTIMATED TIME**: 15-20 Minutes
- **DELIVERY MODE**: In-Person
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Understand the role of professional image in building customer trust and credibility.
- Identify and adhere to Massey's uniform and grooming standards.
- Recognize real-world examples of professional vs. unprofessional appearance.

A professional image builds trust. How you present yourself reflects on your credibility and Massey's reputation.

Check out the next page for an overview, and some examples.

NOTES

1.2.1 The Massey Look: Professional Image Matters

Your appearance plays a key role in how customers perceive you and Massey Services. Here are some quick reminders. You should make yourself familiar with the following policies: Policy 308 & Policy 334

Team members are expected to present themselves in a manner appropriate to the standards applicable to their work environment. Your immediate supervisor will discuss any specific or individual dress or grooming requirements. The company retains the exclusive right to define this policy and make decisions on how it is applied.

1.2.2 What's in the Trunk? Massey's Fleet & You

GOAL

To ensure you understand Massey's fleet vehicle policies, maintenance expectations, and proper vehicle organization.

DETAILS

- **ESTIMATED TIME**: 30-45 Minutes
- **DELIVERY MODE**: In-Person
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Identify all necessary equipment inside their assigned vehicle.
- Demonstrate proper organization and maintenance techniques.
- Understand Massey's expectations regarding vehicle cleanliness, safety, and professional appearance.
- Follow company policies regarding fleet vehicle use, maintenance, and inspections.

NOTES

1.2.3

Navigating the Field: Safe & Efficient Vehicle Use

GOAL

To introduce you to real-world vehicle operations, fleet safety policies, and telematics monitoring through hands-on observation and discussion.

DETAILS

- ESTIMATED TIME: 30-45 Minutes
- DELIVERY MODE: Ride-Along
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Demonstrate understanding of Massey's fleet safety policies and best driving practices.
- Recognize the role of telematics in improving safety, efficiency, and accountability.
- Identify key procedures for vehicle readiness, customer site arrival, and compliance monitoring.
- **Begin SAF 1001: Safe Driver Improvement Course if not already begun or completed.**

NOTES

1.3.1 The DSAR: What Is It?

GOAL

To teach you how the Daily Sales Activity Report (DSAR) as a fundamental tool for tracking you daily sales activities, appointments, and potential earnings. This lesson provides a high-level overview of its purpose, how it fits into you daily routine, and why maintaining an accurate DSAR is essential for success.

DETAILS

- ESTIMATED TIME: 30-45 Minutes
- DELIVERY MODE: Trainer-Led Review + Hands-On Practice
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Explain how the DSAR is used to track appointments, lead sources, sales activities, and commission-based earnings.
- Demonstrate basic DSAR completion by logging activities, tracking call-backs, and scheduling follow-ups efficiently.

NOTES

1.3.2 Compliance & Operational Policies

GOAL

To ensure you understand and apply Massey's core operational policies through real-world scenarios and guided discussion.

DETAILS

- **ESTIMATED TIME**: 10-20 Minutes
- **DELIVERY MODE**: In-Person
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, new hires will be able to:

- Understand Massey's safety compliance policies and their impact on daily operations.
- Apply compliance guidelines to real-world decision-making scenarios.
- Recognize that while these policies may not be needed daily, the General Manager or Office Manager is always available as a resource for future guidance.

NOTES

1.4.1 Communication Fundamentals for Sales Inspectors

GOAL

To introduce and reinforce verbal, nonverbal, and written communication skills through a structured, self-paced LMS course that provides the foundation for effective customer interactions. This course prepares you for live role-playing exercises in Activity 1.4.2.

DETAILS

- **ESTIMATED TIME**: 30-40 Minutes
- **DELIVERY MODE**: LMS
- **FACILITATOR:** LMS

OBJECTIVES

By the end of this activity, you will be able to:

- Recognize how communication impacts customer interactions in sales.
- Understand the three core types of communication (verbal, nonverbal, and written).
- Identify common communication pitfalls and how to avoid them.

ACTIVITY OVERVIEW

MAN 7002: Communication Fundamentals for Sales Inspectors is a self-paced course in your Residential Sales Training Curriculum.

NOTES

1.4.2 Guided Role-Play: Talk the Talk - Sales Conversations

GOAL

To reinforce effective verbal, nonverbal, and written communication skills by having you practice structured customer interactions through role-playing exercises. These scenarios introduce key elements of the sales process while emphasizing clear, professional, and engaging communication.

DETAILS

- ESTIMATED TIME: 45-60 Minutes
- DELIVERY MODE: Guided Role-play
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Apply verbal and nonverbal communication skills in a structured sales interaction.
- Adjust tone, pacing, and word choice based on customer engagement levels.
- Practice active listening and customer rapport-building techniques.
- Apply feedback from trainers and AI analysis (Siro) to refine communication skills.

ACTIVITY OVERVIEW

In this exercise, you will practice real sales conversations using structured role-plays. You'll focus on verbal and nonverbal communication skills, active listening, and handling customer interactions confidently. Through guided practice and feedback, you'll refine your approach and build comfort in engaging with potential customers.

Use the following pages to track your progress and reflect on your experience.

NOTES

1.4.2 Guided Role-Play: Talk the Talk - Sales Conversations

HOW TO USE THESE PAGES

This section is designed to help you track your progress as you practice real sales conversations. Each role-play scenario will focus on key communication skills, allowing you to improve through repetition and feedback.

- ✶ **After each role-play**: Reflect on what went well, record trainer feedback, and make notes on areas for improvement.
- ✶ **For Role-Plays 2 & 3**: You'll also reflect on how you implemented previous feedback and what adjustments you made.

THIS IS A PRACTICE ENVIRONMENT—USE EACH ROUND TO REFINE YOUR SKILLS AND GAIN CONFIDENCE!

Role-Play 1: The Initial Practice

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

1.4.2 Guided Role-Play: Talk the Talk - Sales Conversations

Role-Play 2: Applying Feedback & Refining Skills

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Observations	
How did I implement previous feedback?	Did my adjustments help? Why or why not?

1.4.2 Guided Role-Play: Talk the Talk - Sales Conversations

Role-Play 3: The Final Refinement

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Observations	
How did I implement previous feedback?	Did my adjustments help? Why or why not?

1.4.3 The Role of Engagement: Getting Ready for Module 2

GOAL

To help Sales Inspectors recognize what makes a customer interaction successful and introduce the core engagement skills that will be further developed in Module 2: Customer Engagement.

DETAILS

- **ESTIMATED TIME**: 20-30 Minutes
- **DELIVERY MODE**: Microlearning + Discussion
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Identify key behaviors that contribute to strong customer interactions.
- Analyze effective and ineffective customer engagement approaches.
- Recognize how professionalism, communication, and active listening impact customer trust and retention.

ACTIVITY OVERVIEW

There is 1 item within this activity which contains task within Massey University:

- [ ] Complete MAN 7001 - Customer Engagement: Good vs Bad *with your trainer.*

NOTES

MODULE 2

Engaging with People: The Art of Communication & Connection

2.1.1 Don't Judge a Book by Its Cover? Customers Do

GOAL

To help you recognize how your tone, body language, and demeanor influence customer perceptions and shape early engagement. This session lays the foundation for trust-building behaviors that impact successful customer interactions.

DETAILS

- **ESTIMATED TIME**: Variable (30 Minutes if no field observation is available.)
- **DELIVERY MODE**:Review + Field Observation (if possible) + Scenario-Based Discussion
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Understand how first impressions affect customer trust and engagement.
- Identify key trust-building vs. trust-breaking behaviors in early interactions.
- Observe real-world examples of professional introductions and customer responses.
- Adjust verbal and non-verbal communication in response to customer cues.

ACTIVITY OVERVIEW

There are 2 items within this activity:

- **2.1.1A** - Checklist: Observing First Impressions in the Field
- **2.1.1B -** What Did You Observe?

NOTES

2.1.1A Don't Judge a Book by Its Cover? Customers Do

Instructions: Use this checklist to track behaviors during your ride-along or video observation. Mark what you see and take notes on the impact these actions have on customer engagement, and identify areas for improvement. Check the boxes for the behaviors and actions you observe, then answer the questions in the next worksheet - 2.1.1.B.

Before Approaching the Door

- ☐ The SI's uniform is clean, pressed, and properly worn.
- ☐ The SI's vehicle is parked professionally and does not block driveways or walkways.
- ☐ The SI exits their vehicle with confidence and purpose.
- ☐ The SI is holding any necessary materials (clipboard, referral cards, etc.) in an organized way.
- ☐ The SI's body language is open, upright, and professional.
- ☐ The SI is treating the property respectfully and making mental notes of any customer cues.

Walking Up to the Door

- ☐ The SI walks at a steady, confident pace (not rushed, not sluggish).
- ☐ The SI's hands are free (not in pockets or fidgeting) if they are not holding any materials.
- ☐ The SI maintains good posture, avoiding slouching or crossing their arms.
- ☐ The SI makes eye contact and acknowledges anyone outside or near the home if applicable.
- ☐ The SI approaches the door in a way that is friendly, not aggressive or hesitant.

The Moment Before Speaking

- ☐ The SI appears relaxed and confident before approaching the door.
- ☐ The SI smiles naturally, showing approachability.
- ☐ The SI's stance is open, with feet shoulder-width apart and hands relaxed.
- ☐ The SI is facing the door with a calm and professional demeanor.
- ☐ The SI knocks firmly but politely (or rings the bell), takes a small step back to give space, and removes their sunglasses.

The Opening Greeting

- ☐ The SI introduces themselves clearly with a warm but professional tone.
- ☐ The SI makes eye contact and smiles as they greet the customer.
- ☐ The SI adjusts their volume and pace based on the customer's reaction.
- ☐ The SI ensures their first sentence is clear, professional, and engaging.
- ☐ The SI observes the customer's reaction and adjusts their body language accordingly.

Customers form opinions before you even speak—make every movement, expression, and action work in your favor!

2.1.1B What Did You Observe?

Instructions: Now that you've completed the observation, reflect on what you noticed about the Sales Inspector's first impression. Consider how their body language, tone, and approach influenced customer perception. Use the questions below to guide your analysis and identify key takeaways.

1. What are three trust-building behaviors you observed?

2. What was the most effective first impression technique used?

3. Did you notice any actions that weakened the first impression? How could they be improved?

2.1.2 The Trust Factor – What Builds It, What Breaks It

GOAL

To help you understand how trust is built or broken in customer interactions and practice applying trust-building communication techniques.

DETAILS

- **ESTIMATED TIME**: 30-45 Minutes
- **DELIVERY MODE**: Trainer-Led Discussion + Mini Role-Play
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Identify key trust-building vs. trust-breaking behaviors in sales interactions.
- Apply engagement, empathy, and professionalism to establish credibility.
- Adjust your communication approach based on different customer trust levels.

NOTES

2.1.3 Guided Role-Play: Adapting to Customer Responses

GOAL

To reinforce active listening and customer engagement techniques by analyzing real conversations, discussing key takeaways, and applying skills in structured role-play scenarios.

DETAILS

- **ESTIMATED TIME**: 45-60 Minutes
- **DELIVERY MODE**: Microlearning + Guided Role-Play
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Identify key trust-building vs. trust-breaking behaviors in sales interactions.
- Apply engagement, empathy, and professionalism to establish credibility.
- Adjust your communication approach based on different customer trust levels.

ACTIVITY OVERVIEW

In this exercise, you will build on what you learned in the Active Listening LMS course by applying those skills in structured role-plays. You'll focus on recognizing customer engagement cues, adapting your responses based on tone and body language, and handling different customer interactions effectively. Through guided practice and feedback, you'll refine your ability to listen actively, respond thoughtfully, and maintain professionalism in a variety of scenarios.

Use the following pages to track your progress and reflect on your experience.

NOTES

2.1.3 Guided Role-Play: Adapting to Customer Responses

HOW TO USE THESE PAGES

This section is designed to help you track your progress as you practice real sales conversations. Each role-play scenario will focus on key communication skills, allowing you to improve through repetition and feedback.

- **After each role-play**: Reflect on what went well, record trainer feedback, and make notes on areas for improvement.
- **For Role-Plays 2 & 3**: You'll also reflect on how you implemented previous feedback and what adjustments you made.

THIS IS A PRACTICE ENVIRONMENT—USE EACH ROUND TO REFINE YOUR SKILLS AND GAIN CONFIDENCE!

Role-Play 1: The Initial Practice

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

2.1.3 Guided Role-Play: Adapting to Customer Responses

Role-Play 2: Applying Feedback & Refining Skills

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Observations	
How did I implement previous feedback?	Did my adjustments help? Why or why not?

2.1.3 Guided Role-Play: Adapting to Customer Responses

Role-Play 3: The Final Refinement

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Observations	
How did I implement previous feedback?	Did my adjustments help? Why or why not?

2.2.1 Asking the Right Questions & Clarifying Customer Needs

GOAL

To equip you with the skills to ask effective questions, clarify customer concerns, and guide conversations toward identifying service needs.

DETAILS

- **ESTIMATED TIME**: 45 Minutes
- **DELIVERY MODE**: Trainer-Led Instruction + Structured Practice + Scenario-Based Role-Playing
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Distinguish between open-ended and closed questions and apply them appropriately.
- Use clarifying and follow-up questions to gather meaningful insights from customers.
- Adapt your questioning style based on customer responses and engagement level.

ACTIVITY OVERVIEW

Effective questioning is key to engaging customers, uncovering their concerns, and guiding them toward solutions. This activity will help you refine your ability to ask open-ended, probing, and clarifying, probing questions that encourage meaningful customer interactions. By practicing structured questioning techniques, you will learn how to keep conversations flowing while gathering valuable information that supports the sales process.

NOTES

2.2.1 How Do I Improve My Questions?

Part 1: Open-Ended vs. Closed-Ended Questions

Instructions: Read each customer statement below. Then, rewrite the Sales Inspector's response to convert a closed-ended question into an open-ended one.

Example

Customer Statement: "I'm worried about termites."

Closed Question: "Have you seen any termite damage?" (Closed, limits conversation)

Open Question/Prompt: "What's making you concerned about termites?" (Encourages a more detailed response)

Your Turn

1. Customer Statement: "I've used another company before, and they didn't do much."
   Closed Question: "So, they didn't resolve your pest problem?"
   Open Question/Prompt:

2. Customer Statement: "We've been hearing strange noises in the attic, and in the wall."
   Closed Question: "Was it a scratching sound?"
   Open Question/Prompt:

3. Customer Statement: "My lawn was doing great, and now it's half dead!"
   Closed Question: "Have you been watering it?"
   Open Question/Prompt:

2.2.1 How Do I Improve My Questions?

Part 2: Probing Questions – Digging Deeper

Instructions: Below are initial customer responses. Write a probing question that encourages the customer to share more details.

Example

Customer Statement: "We used to have termites, but we haven't seen them in a while."

Probing Question: "Could you tell me more about where you saw the termites before and what kind of treatment you had?"

Your Turn

1. Customer Statement: "I see ants in my kitchen sometimes, but it's not a big deal."
   Probing Question:

2. Customer Statement: "We spend a lot of time in our backyard, but the mosquitoes are terrible."
   Probing Question:

3. Customer Statement: "We spend a lot of time in our backyard, but the mosquitoes are terrible."
   Probing Question:

2.2.1 How Do I Improve My Questions?

Part 3: Probing Questions – Digging Deeper

Instructions: Below is a short sample conversation. Identify where the Sales Inspector could have asked a better question to keep the conversation going.

Example

Scenario: Sales Inspector: "Do you currently have a pest service?"

Customer: "No, I've never used one before."

Sales Inspector: "Oh, okay. Well, we offer different plans."

1. What could the Sales Inspector have asked instead?

2. Why would that question have improved the conversation?

Asking the right questions helps build trust, uncover real concerns, and keep the conversation moving forward. The more you practice, the more natural and effective your questioning skills will become!

2.2.2 Why Writing It Down Matters

GOAL

To help you develop clear, structured, and useful notetaking habits that support customer engagement, follow-ups, and sales success.

DETAILS

- **ESTIMATED TIME**: 15-45Minutes
- **DELIVERY MODE**: Trainer-Led Instruction w/ Optional Structured Practice + Scenario-Based Role-Playing
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, trainees will be able to:

- Take clear and actionable notes during customer conversations.
- Use a structured note-taking format that fits their work style.
- Recognize how good documentation improves follow-ups and closing rates.

ACTIVITY OVERVIEW

Effective note-taking prevents lost opportunities and strengthens follow-ups. This activity will help you explore how to structure notes efficiently, and how to apply those notes in future interactions.

Note: you can use copies of the workbook pages, or any blank paper your have for this activity.

NOTES

2.2.2 Optional Activity: Why Writing It Down Matters

Part 1: Note-Taking Practice: First Attempt (Unstructured)

Instructions:

- Watch the first few minutes of the customer interaction video with your trainer.
- Take notes however you normally would.

Part 2: Note-Taking Exploration

Instructions:

- Explore the example notetaking formats with your trainer, and pick one of the note-taking formats on following pages.
- Watch another minute or two of the video and use your chosen template and use it to take note.

2.2.2 Structured Template Notes: Example

Customer Information:

📅 Date & Time of Visit:

🏠 Customer Name & Address:

📞 Best Contact Method:

🔎 Reason for Visit:

Customer Concerns & Observations:

Main Issue/Request:

Specific Pests, Lawn Issues, or Structural Concerns:

Customer Priorities:

Visible Signs:

Customer Engagement & Sales Cues:

Level of Engagement: ☐ Interested ☐ Hesitant ☐ Distracted ☐ Concerned ☐ Not Engaged ☐ Other: ________________

Objections Raised:

Follow-Up Questions Asked:

Solutions & Recommendations:

Service(s) Recommended:

Reasoning for Recommendation:

Customer Response:

Next Steps:

Additional Notes:

Why This Format Works

- ✓ Structured Yet Simple – Keeps notes focused without overwhelming details.
- ✓ Sales-Driven – Captures objections, engagement, and key decision factors.
- ✓ Follow-Up Ready – Ensures clear next steps for future interactions.
- ✓ Relationship-Oriented – Helps build long-term trust with customers.

2.2.2 Quadrant Notes: Example

Date:

Customer Name & Address:

Contact Method:

Visit Reason:

Why This Format Works

- ✓ Quick to set up—just draw a cross on the paper.
- ✓ Forces structured, relevant notes instead of scattered thoughts.
- ✓ Helps inspectors immediately see key details at a glance.
- ✓ Personalize: label the quadrants with what you need.

2.2.2 Header Notes: Example

Why This Format Works

- ✓ Works in any notebook without drawing anything.
- ✓ Sections help inspectors stay focused on key details.
- ✓ Prevents overwriting irrelevant details or forgetting key takeaways.
- ✓ Personalize: label the headers with what you need.

2.2.2 Structured Template Notes: Completed Example

Structured Template Format - Completed Example

Customer Information:

📅 Date & Time of Visit: *02/15/2024, 10:30 AM*

🏠 Customer Name & Address: *Jane Smith, 123 Oak Street*

📞 Best Contact Method: *Text preferred, (555) 123-4567*

🔎 Reason for Visit: *New Inquiry – Interested in ongoing pest prevention*

Customer Concerns & Observations:

Main Issue/Request: *Noticed ants in kitchen near sink & pantry*

Specific Pests, Lawn Issues, or Structural Concerns: *Wants to prevent future pest issues*

Customer Priorities: *Safety for kids & pets, avoiding future infestations*

Visible Signs: *No structural damage, occasional ant sightings in pantry*

Customer Engagement & Sales Cues:

Level of Engagement: ☑ Interested ☐ Hesitant ☐ Distracted ☑ Concerned ☐ Not Engaged ☐ Other: ______________

Objections Raised: *Concerned about pet safety with treatments*

Follow-Up Questions Asked: *"How safe are these treatments around children and dogs?"*

Solutions & Recommendations:

Service(s) Recommended: *Quarterly Pest Prevention Plan*

Reasoning for Recommendation: *Preventive service minimizes infestations before they start*

Customer Response: *Interested but wants to review treatment safety details first*

Next Steps: *Email pet-safe treatment info, follow up in 3 days, schedule service if confirmed*

Additional Notes:

Customer Preferences: *Prefers morning appointments, follow-ups via text*

Personal Details for Relationship-Building: *Has a golden retriever named Max, recently renovated kitchen, mentioned summer vacation plans - deep sea fishing!*

2.2.2 Quadrant Notes: Completed Example

Quadrant Format - Completed Example

Date: 2/15/2024 Customer Name & Address: Jane Smith, 123 Oak St.

Contact Method: (123) 456-7890, js@email.com, prefers email and text

Visit Reason: New Inquiry - Interested in pest prevention

Why This Format Works

- ✓ Quick to set up—just draw a cross on the paper.
- ✓ Forces structured, relevant notes instead of scattered thoughts.
- ✓ Helps inspectors immediately see key details at a glance.
- ✓ Personalize: label the quadrants with what you need.

Customer Concerns	Engagement Cues & Notes
Wants to confirm that our service is safe for pets and children. Son has asthma. Ants in the kitchen near the sink and pantry	Involved in convo. Nodding and asking qs. (esp. treatment types and methods) Dog is giant! Ask what kind it is.
Observations	**Next Steps & Follow-Up Actions**
Quick Look Around: -No structural issues -Dampness under sink (may be a leak)let customer know she might need a plumber. -Open containers in pantry. -Saw brown patches on grass, let customer know and offer lawn services.	Send print info on our pet-safe treatments (wants to share with partner) Book inspection. Follow up in a week (2/25/2024)

2.2.2 Header Notes: Completed Example

Header Format - Completed Example

Date: 2/15/2024

Customer Name & Address: Jane Smith, 123 Oak St.

Contact Method: (123) 456-7890, js@email.com, prefers email and text.

Visit Reason: New Inquiry - Interested in pest prevention

Customer Concerns:

- Ants in kitchen (sink & pantry areas).
- Wants assurance treatments are pet-safe.

What Was Discussed:

- Explained different treatment options (bait vs. sprays).
- Customer asked follow-up questions about effectiveness.

Customer Reactions & Engagement:

- Seemed engaged, nodded when discussing prevention plan.
- Asked about exterior coverage—concerned about entry points.

Next Steps & Follow-Up:

1. Email pet-safe treatment options to have in print.
2. Schedule technician visit for exterior inspection.
3. Follow-up in one week.

Observations

-Family got back from vacay. to Iceland!
-Two very fluffy cats and a parakeet.
-Lady in a full leg cast, offer to bring the trash can up (put note in account)
-Shrubs looking bad, talk to cust. about our services.

Why This Format Works

- ✓ Works in any notebook without drawing anything.
- ✓ Sections help inspectors stay focused on key details.
- ✓ Prevents overwriting irrelevant details or forgetting key takeaways.
- ✓ Personalize: label the headers with what you need.

2.2.3 Field Training: Recognizing Customer Cues & Questioning

GOAL

To provide yous with real-world exposure to customer interactions, allowing them to observe engagement cues, practice structured questioning, and gain service-specific insights during a guided ride-along.

DETAILS

- ESTIMATED TIME: Variable
- DELIVERY MODE: Field Training – Ride-Along with Guided Practice & Structured Observation
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Observe & recognize verbal, nonverbal, and behavioral cues in customer interactions.
- Analyze customer engagement through structured note-taking during live interactions.
- Practice structured questioning techniques in a guided, real-time environment.
- Identify at least two service-specific takeaways based on the service focus of the ride-along.

ACTIVITY OVERVIEW

This ride-along observation will provide real-world exposure to how Sales Inspectors engage with customers. You will observe, take structured notes, and analyze how verbal and nonverbal communication impact the interaction. The goal is to strengthen your understanding of active listening, effective questioning, and professionalism in customer interactions

Key Focus Areas:

- ✓ Observe rapport-building techniques.
- ✓ Identify verbal and nonverbal customer cues.
- ✓ Analyze questioning and listening strategies.
- ✓ Note service-specific observations.
- ✓ Practice guided questioning.

NOTES

2.2.3 Ride-Along Observation Worksheet

Use these pages to write your observations, record your activities, and note trainer feedback.

Section 1: Ride-Along Observation Notes

1. **Rapport & Introductions:**
   - How did the Sales Inspector introduce themselves?
   - What was the customer's initial reaction?
2. **Communication Cues:**
   - Note key verbal and nonverbal cues from both the Sales Inspector and the customer.
   - How did the sales inspector respond to the customer cues?
3. **Questioning & Listening:**
   - What types of questions were asked?
   - How did the Sales Inspector follow up on customer responses?
4. **Service-Specific Observations:**
   - Note 2 key service specific observations.

2.2.3 Ride-Along Observation Worksheet

Section 2: Try It Out (Guided Practice)

Guided Questioning:

- What questions did you ask the customer?
- How did the customer respond?
- What did you learn from your interactions?

Section 3: Trainer Feedback

- Strengths
- Areas for Improvement

Section 4: Self-Reflection

- What stood out most during today's interactions?
- What techniques will you incorporate in the future?
- What are your strengths?
- What needs improvement?
- Set one goal for your next interaction.

MODULE 3

Getting Started with Sales: Creating Opportunities & the 8-Step Sales Process

3.1.1 The Importance of *The Call* & Sales Mindset

GOAL

To help you establish the mindset of a successful Massey Sales Inspector by reinforcing the role of prospecting, relationship-driven selling, and structured outreach in creating consistent sales opportunities.

DETAILS

- ESTIMATED TIME: 30-45 Minutes
- DELIVERY MODE: Trainer-Led Discussion + Self-Reflection & Goal Setting
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Explain the importance of prospecting and sales calls in Massey's sales framework.
- Define expectations for daily call volume, lead generation, and follow-ups.
- Understand and apply the "Counselor Selling" approach in prospecting and customer engagement.

ACTIVITY OVERVIEW

Prospecting is the foundation of every successful sales career at Massey. Every appointment, every sale, and every customer relationship begins with a conversation. In this activity, you will explore the importance of prospecting, the Massey "Counselor Selling" philosophy, and key strategies to develop a strong sales mindset.

NOTES

3.1.2 Creating Sales Opportunities: The 4+1 Program

GOAL

To teach you how to maximize every lead opportunity through the 4+1 Prospecting Program, ensuring they develop proactive strategies for consistent lead generation and appointment setting.

DETAILS

- ESTIMATED TIME: 20-30 Minutes
- DELIVERY MODE: Trainer-Guided Discussion
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Define Massey's primary lead sources and explain how sales opportunities are created.
- Implement the 4+1 Prospecting Method to turn a single lead into multiple outreach opportunities.
- Identify creative ways to generate additional prospects from limited leads.
- Develop an action plan for integrating 4+1 prospecting into daily workflows.

ACTIVITY OVERVIEW

This activity is designed to provide you with a deep understanding of Massey's 4+1 Prospecting Program and how it expands lead generation opportunities.

NOTES

3.1.2 How Will I Use the 4+1 Program?

Instructions: Answer the following reflection questions to ensure you understand how to apply structured prospecting strategies in your daily work.

1. How does the 4+1 approach help you maximize sales opportunities?

2. What questions or concerns do you have about implementing th 4+1 Program at this moment?

3. What is one key takeaway from this exercise?

3.1.3 Making the First Move: Cold Calling & Appointments

GOAL

To develop your confidence and effectiveness in making first-contact cold calls, engaging potential customers, and successfully setting appointments.

DETAILS

- **ESTIMATED TIME**: 30-60 Minutes
- **DELIVERY MODE**: Trainer-Led Discussion + Mini Role-Play + Optional Learner Workbook Extension Activity
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Structure an effective cold call using a Cold Call Script.
- Confidently engage customers and handle initial objections with professionalism.
- Adjust tone, word choice, and delivery based on AI and trainer feedback.

ACTIVITY OVERVIEW

This activity will help you develop confidence and effectiveness in making first-contact cold calls, engaging potential customers, and successfully setting appointments. You will practice structuring calls, handling objections, and refining your approach through trainer feedback and AI-assisted coaching (Siro).

NOTES

3.1.3 Drafting the Cold Call Script

Cold Call Structure & Best Practices

A well-structured cold call increases engagement and improves your chances of setting an appointment. Use this framework to guide your approach:

1. Opening Statement – Capture attention quickly.
   - Example: *Good morning, Ms. White. My name is [Your Name] with Massey Services. I was just at your neighbor's home discussing a [pest/lawn issue], and I wanted to offer you a complimentary inspection.*
2. Value Proposition – Explain why the call is relevant.
   - Example: *Many homeowners in your area have noticed similar issues, and I'd love to provide you with a professional assessment at no cost.*
3. Engagement Question – Invite discussion.
   - Example: *Have you noticed any [common problem] around your home or yard?*
4. Handling Objections – Address concerns calmly.
   - Common Objection: *I'm not interested right now.*
   - Response: *I completely understand! Our inspections are complimentary and informative—would you be open to a quick check-up while I'm in the area?*
5. Closing the Call – Confirm the next step.
   - Example: *Would Tuesday or Wednesday after 3:00 PM work better for your schedule?*

Structuring My Own Cold Call Script

Using the cold call structure, draft your own call script for one of the following lead types:

- **Web Lead:** A homeowner who inquired about lawn care services but hasn't scheduled an appointment.
- **Referral Lead**: A neighbor was referred by an existing customer who received pest control service.
- **Neighborhood Outreach (+1):** You completed an inspection and are now reaching out to nearby homeowners.

My Cold Call Script:

- Opening Statement:
- Value Proposition:
- Engagement Question:
- Handling Objections:
- Closing the Call:

3.1.3 Cold Call Mini-Role-Play Personal Notes

Scenario 1

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Scenario 2

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Scenario 3

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

3.2.1 Step 1 – The Introduction: Structuring the Conversation

GOAL

To help you develop a clear, confident, and structured introduction for customer interactions, ensuring they establish credibility and engagement from the start.

DETAILS

- ESTIMATED TIME: 30-45 Minutes
- DELIVERY MODE: Trainer Walkthrough + Scenario-Based Discussion
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Structure a professional, trust-building sales introduction.
- Adapt their introduction based on different customer reactions.
- Refine their tone, body language, and clarity for confident delivery.

ACTIVITY OVERVIEW

A strong first impression sets the tone for the entire sales conversation. In this session, you will break down the components of an effective sales introduction, draft their own, and refine it through informal role-play practice.

NOTES

3.2.1 Drafting Your Introduction

Part 1: Understanding the Structure

A successful introduction should:

- Establish credibility (Who you are and why you're here).
- Create engagement (Make the customer feel at ease).
- Set the stage for the conversation (Introduce the purpose naturally).

Part 2: Draft Your Sales Introduction

Use the guide below to help draft your introduction:

1. Opening Statement – Who You Are & Why You're Here
2. Customer Engagement – Relating to the Customer's Needs.
3. Transition – Setting Up the Next Steps.

Part 3: Scenario-Based Adjustments – Handling Customer Responses

Your trainer will guide you through some scenario-based practice, adjusting customer reactions. Use this space to take notes on what worked and what you can improve.

1. The Rushed Customer

2. The Skeptical Customer

3. The Interested Customer

Part 4: Final Refinement & Self-Reflection

Answer the following questions about what you've learned:

1. What did you improve the most in your introduction?

2. What's one thing you'll continue to work on?

3. What is one key takeaway about crafting an delivering your introduction?

3.2.2 Guided Role-Play: Delivering a Strong Sales Introduction

GOAL

To reinforce how to confidently introduce yourself, ask the right questions to understand the customer's needs, and then smoothly move into scheduling the inspection through applying skills in structured role-play scenarios.

DETAILS

- ESTIMATED TIME: 60 Minutes
- DELIVERY MODE: Guided Role-Play + Siro Audio Analysis
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Deliver a structured, confident introduction that establishes trust.
- Use fact-finding techniques to uncover customer concerns and needs.
- Adapt their questioning based on customer engagement cues.
- Transition naturally from introduction to scheduling the inspection.

ACTIVITY OVERVIEW

This activity provides you with a structured environment to practice live customer interactions. Through guided role-playing and AI-assisted feedback (Siro), you'll refine your tone, pacing, and engagement while developing natural, customer-focused questioning strategies. You'll participate in multiple practice rounds, receiving real-time coaching from your trainer after each attempt. The goal is to ensure you deliver a strong, confident introduction that builds credibility, engages the customer, and smoothly transitions into the next steps of the conversation.

Use the following pages to track your progress and reflect on your experience.

NOTES

3.2.2 Guided Role-Play: Delivering a Strong Sales Introduction

HOW TO USE THESE PAGES

This section is designed to help you track your progress as you practice real sales conversations. Each role-play scenario will build upon the previous one, guiding you through a natural flow of conversation from introduction to fact-finding, and then to transitioning into the inspection.

- **After each role-play**: Reflect on what went well, record trainer feedback, and make notes on areas for improvement.
- **Adapt and Adjust:** In each subsequent role-play, focus on implementing the feedback you received and recognizing how customer engagement shifts as you move through the conversation

THIS IS A PRACTICE ENVIRONMENT—USE EACH ROUND TO REFINE YOUR SKILLS AND GAIN CONFIDENCE!

Role-Play 1: Delivering a Strong Introduction

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

3.2.2 Guided Role-Play: Delivering a Strong Sales Introduction

Role-Play 2: Fact-Finding & Gathering Customer Insights

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Observations	
How did I implement previous feedback?	Did my adjustments help? Why or why not?

3.2.2 Guided Role-Play: Delivering a Strong Sales Introduction

Role-Play 3: Transitioning to the Inspection

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Observations	
How did I implement previous feedback?	Did my adjustments help? Why or why not?

3.3.1 Mapping the Customer Journey in the 8 Steps

GOAL

To help you understand the 8-Step Sales Process from the customer's perspective and recognize how each step builds trust, engagement, and momentum toward the sale.

DETAILS

- **ESTIMATED TIME**: 15-30 Minutes
- **DELIVERY MODE**: Trainer-Guided Discussion + Optional Customer Journey Mapping Exercise
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Analyze the customer experience at each step of the 8-Step Sales Process.
- Explain how skipping or rushing a step affects the overall sales interaction.

ACTIVITY OVERVIEW

The 8-Step Sales Process is designed to guide customers through their decision-making journey. But what does each step feel like from the customer's perspective? In this exercise, you'll map out the customer experience at each stage of the process, identifying how trust is built and what happens if a step is rushed or skipped.

NOTES

3.3.1 The 8-Step Sales Process at a Glance

Step	Sales Inspector Action	Customer Perspective
1. The Introduction	Build rapport, establish credibility.	What first impression am I getting? Do I trust this person?
2. The Inspection	Conduct a thorough assessment. Present findings visually.	Is this a real problem? Do I feel confident in their expertise?
3. Define the Problem	Clearly articulate the issue and its implications.	Do I understand why this is a problem? How serious is it?
4. Describe the Solution	Present a clear, tailored solution.	Does this solve my problem? Is this worth my investment?
5. Qualify Massey Services	Position Massey as the best provider.	Why should I trust this company over others?
6. Features & Benefits	Explain key advantages and unique benefits.	What makes this solution right for me?
7. Close	Confirm agreement and finalize details.	Do I feel confident in this decision?
8. Ask for Referrals	Reinforce trust and encourage referrals.	Am I happy with this experience? Would I recommend this service?

Optional: Customer Journey Mapping Exercise

Using the table below, map out the customer's experience at each step of the 8-Step Sales Process. Step 1 has been filled in as an example.

Step	What the Customer Expects	What the Customer Feels	What Builds Trust?
1	*A professional, confident Sales Inspector who is approachable*	*Curious but cautious—wondering if they should listen.*	*A warm, confident tone and professional body language*
2			
3			

3.3.1 The 8-Step Sales Process at a Glance

Step	What the Customer Expects	What the Customer Feels	What Builds Trust?
2			
3			
4			
5			
6			
7			
8			

3.3.2 Making the Connection: The Role of Each Step

GOAL

To help you understand how each step in the 8-Step Sales Process prepares for the next, reinforcing the importance of smooth transitions and avoiding disjointed sales conversations.

DETAILS

- ESTIMATED TIME: 30-45 Minutes
- DELIVERY MODE: Trainer-Guided Discussion
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Identify how each step of the sales process builds trust and momentum.
- Explain how completing each step correctly makes the next one easier.
- Recognize the consequences of missing or rushing a step.

ACTIVITY OVERVIEW

A well-executed sales process is fluid and logical—each step should feel like a natural progression. This activity helps you understand the cause-and-effect relationship between steps and challenges them to anticipate what happens next.

NOTES

3.3.3 Common Mistakes & Best Practices

GOAL

To help you recognize, analyze, and avoid common mistakes in the sales process while reinforcing best practices that build customer trust and improve sales performance.

DETAILS

- **ESTIMATED TIME**: 20-30 Minutes
- **DELIVERY MODE**: Trainer-Guided Discussion
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Identify how each step of the sales process builds trust and momentum.
- Explain how completing each step correctly makes the next one easier.
- Recognize the consequences of missing or rushing a step.

ACTIVITY OVERVIEW

Even experienced sales professionals make mistakes, but the best ones learn and adjust quickly. In this discussion, you will:

- Analyze real-world sales mistakes to identify what went wrong.
- Explore best practices that lead to customer trust and stronger sales performance.

NOTES

MODULE 4

Inside, Outside, Over & Under: The Inspection & Graphing Process

4.1.1 Why Inspections Matter & Systematic Inspections

GOAL

To ensure you understand the significance of inspections in building trust, identifying customer needs, and reinforcing service recommendations. This session combines discussion and hands-on execution of Massey's systematic inspection process.

DETAILS

- **ESTIMATED TIME**: 60 Minutes
- **DELIVERY MODE**: Trainer-Guided Discussion + Hands-On Practice
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Explain the purpose of inspections in Massey's sales process.
- Introduce and set expectations for customers before an inspection.
- Execute a mini-systematic inside-out inspection following Massey's structured approach.
- Use and explain key inspection tools (moisture meters, probes, flashlights, etc.).

ACTIVITY OVERVIEW

A structured inspection is more than just a checklist—it is a trust-building moment that guides customers through their concerns while reinforcing Massey's expertise. This activity helps you develop strong inspection habits that ensure consistency, customer confidence, and smooth sales transitions. Through guided discussion and hands-on practice, you will learn how to execute inspections systematically, setting the stage for service recommendations.

NOTES

4.1.2 Identifying & Documenting Key Findings

GOAL

To ensure you can recognize key inspection findings, differentiate between active and inactive conditions, and document results clearly to support service recommendations.

DETAILS

- **ESTIMATED TIME**: 30-45 Minutes
- **DELIVERY MODE**: Trainer-Guided Discussion + Hands-on Practice
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Identify common pest activity signs, structural vulnerabilities, and environmental risk factors.
- Differentiate between active vs. inactive conditions.
- Prepare findings for a smooth transition into customer recommendations..

ACTIVITY OVERVIEW

Effective inspections rely on a Sales Inspector's ability to identify key findings and clearly differentiate active from inactive conditions to guide customer decisions. This activity ensures you develop strong observation skills and the ability to categorize findings accurately, leading to more confident and precise service recommendations.

NOTES

4.2.1 Measure Twice, Graph Once

GOAL

To ensure you can accurately measure properties, create professional property graphs, and label key elements to support service recommendations.

DETAILS

- **ESTIMATED TIME**: 75 Minutes
- **DELIVERY MODE**: Hands-on Measurement + Trainer-guided Demonstration
- **PERSON**: General Manager

OBJECTIVES

By the end of this activity, you will be able to:

- Measure property dimensions using Massey's standardized method.
- Apply graphing best practices to create clear, professional property diagrams.
- Label key property elements, entry points, and risk factors.
- Use the graph as a visual sales tool when presenting findings to the customer.

ACTIVITY OVERVIEW

Accurate property measurement and clear graphing are essential in creating customer trust and reinforcing service recommendations. This activity trains you to measure properties effectively, document findings through professional graphs, and label key elements that enhance service presentations. By ensuring accuracy and clarity in measurement and graphing, you will strengthen you ability to communicate findings confidently.

NOTES

4.2.2 Field Training: Live Inspection & Graphing Practice

GOAL

To provide real-world exposure to live inspections, customer interactions, and property graphing, ensuring you gain confidence in applying their training to actual field situations.

DETAILS

- ESTIMATED TIME: Variable
- DELIVERY MODE: Ride-Along
- PERSON: General Manager or Experience Inspector

OBJECTIVES

By the end of this activity, you will be able to:

- Observe and document a full property inspection using Massey's systematic process.
- Participate in measuring, graphing, and documenting property details accurately.
- Assist in explaining findings to customers under trainer supervision.
- Apply customer engagement and questioning techniques in live inspections.

ACTIVITY OVERVIEW

This ride-along places the you in real-world inspection environments, transitioning from observation to structured, hands-on application in graphing and customer engagement.

NOTES

4.2.2 Ride-Along Observation Worksheet

Use these pages to write your observations, record your activities, and note trainer feedback.

Section 1: Ride-Along Observation Notes

1. Inspection Process:
   - What inspection steps did you observe?
   - How did the inspector introduce themselves to the customer?
   - What tools were used during the inspection?
   - What documentation methods were used?
2. (If Involved) Customer Engagement & Interaction:
   - How did the inspector establish trust with the customer?
   - What questions did the customer ask?
   - How did the inspector explain their findings?

4.2.2 Ride-Along Observation Worksheet

- What was the customer's reaction?

3. **Key Inspection Findings:**
    - What were the major findings during the inspection?
    - Were there any signs of active or inactive pest/lawn issues?
    - How did the inspector prioritize these findings for the customer if they were present?

4. **Graphing & Documentation:**
    - What measurements were taken?
    - How was the graph structured?
    - What details were emphasized in the graph?
    - Which inspection tool do you want to learn more about?

4.2.2 Ride-Along Observation Worksheet

Section 3: Trainer Feedback

- Strengths
- Areas for Improvement

Section 4: Self-Reflection

- What part of the inspection process felt most natural to you?
- How confident do you feel about conducting an inspection independently? Why or why not?
- What is one specific skill or technique you will focus on improving before your next practice inspection?
- What was your biggest takeaway from today's ride-along?

Section 2: Try It Out (Guided Practice)

- What did you measure and what tools did you use?
- What was the most difficult element of the inspection?
- If you interacted with a customer, what did you learn from your interactions?

4.3.1 Evaluation: Graph It Like You Mean It

GOAL

To assess your ability to independently conduct a full inspection, accurately measure and document property details, and create a professional graph following Massey's standards. This is a summative assessment, proctored by your trainer or a third party (another GM, Sales Manager, or Regional Manager), to verify readiness for independent inspections.

DETAILS

- ESTIMATED TIME: Variable
- DELIVERY MODE: Assessment
- PERSON: Designated Proctor

OBJECTIVES

By the end of this activity, trainees you be able to:

- Conduct a structured, independent inspection using Massey's systematic process.
- Accurately measure and document property layouts for graphing.
- Draw and present a completed graph that visually supports service recommendations.
- Confidently explain findings and justify solutions to a proctor.
- Properly use all required tools during the inspection process.

ACTIVITY OVERVIEW

The you will conduct a full property inspection, document you findings, and produce a professional graph without direct trainer assistance. The proctor will evaluate you performance using the passing criteria and the assessment rubric on the following pages.

NOTES

4.3.1 Proctor Guide Excerpt: Graph It Like You Mean It

Assessment Criteria

- **The trainee will independently:**
  1. Conduct a structured, systematic property inspection using Massey's process.
  2. Accurately measure and document property layouts for graphing.
  3. Draw and present a complete graph that aligns with Massey's graphing standards.
  4. Confidently explain findings and justify solutions to the proctor.
  5. Properly use all required tools during the inspection process.
- **The proctor will evaluate the trainee based on the Rubric on the following page.**

Passing Criteria

The trainee must score "Meets Expectations" or higher in all five categories to pass.

To pass this assessment, the trainee must score "**Meets Expectations**" or higher in all five categories.

- If **one** category is marked "**Needs Improvement**", the trainee may receive immediate coaching and attempt a retest of **that particular element** right away.
- If **two or more** categories are marked "**Needs Improvement"**, the trainee must r**epeat the full assessment after additional training.**

Retest Allowances:

- **First Retest**: May be conducted immediately following targeted feedback and correction from the trainer.
- **Second Retest**: Allowed only after re-teaching and additional practice. Trainer must confirm the trainee is ready to proceed.
- **Third failure**: The trainee's progress and training plan must be reviewed by a Regional Manager or Sales Director. Any further retests require their approval and oversight.

Post-Assessment: Proctor Debrief & Sign-Off

- Review the trainee's inspection process and graphing accuracy and, provide feedback.
- If the General Manager is not the proctor, complete and submit the assessment form to the General Manager. The GM will upload the assessment form to Massey University.

4.3.1 Proctor Guide Excerpt: Graph It Like You Mean It

Category	Needs Improvement	Meets Expectations	Exceeds Expectations	Proctor Notes
Inspection Process	Skipped steps, inconsistent or incomplete approach. Missed major areas. Did not follow Massey's inside-out method.	Conducted a thorough inspection using Massey's systematic approach. Followed inside-out, clockwise process.	Demonstrated a confident, structured approach. Recognized subtle signs and adjusted techniques accordingly.	
Measurement Accuracy	Major errors in measurements, incorrect documentation, or skipped key areas.	Measurements were recorded accurately, with minimal errors. Adjustments made for unique property features.	Exceptional precision, with well-documented adjustments for irregular layouts or obstructions.	
Graph Clarity & Accuracy	Graph missing key property elements, poor labeling, lacks readability. Disorganized layout	Graph includes all required structures, entry points, problem areas, and treatment zones. Properly labeled and proportional.	Graph is highly detailed, professional, and customer-friendly. Layout is clear and enhances the sales conversation.	
Findings Explanation & Customer Communication	Struggled to articulate findings clearly or provide logical recommendations.	Findings were explained confidently and clearly, with logical recommendations. Used simple, effective language.	Findings were presented persuasively, adapting explanations to customer understanding. Strong confidence and clarity.	
Tool Usage & Documentation	Used tools incorrectly or inconsistently. Failed to document findings properly.	Used all required tools appropriately. Recorded findings clearly and professionally.	Efficient, proper use of tools with a well-structured documentation process. Minimal wasted motion.	

MODULE 5

Problem → Solution: Defining the Issue & Presenting the Fix

5.1.1 What's the Problem? Defining the Issue for the Customer

GOAL

To help you structure clear, customer-friendly explanations of your findings so customers fully understand the problem, urgency, and impact.

DETAILS

- **ESTIMATED TIME**: 30-45 Minutes
- **DELIVERY MODE**: Trainer-Guided Discussion + Inspection Findings Exercise
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Identify and explain common pest, termite, and lawn-related problems.
- Use structured explanations to simplify complex findings for customers.
- Differentiate between urgent issues vs. long-term risks to position solutions accordingly.
- Use graphs, documentation, and visuals to reinforce the credibility of their findings.

ACTIVITY OVERVIEW

Customers act when they understand the problem and feel its urgency—not just because they're told. In this exercise, you will:

- Learn how to explain findings clearly in a way customers understand.
- Frame findings in a way that creates urgency and impact.
- Practice structuring explanations using the Findings → Problem → Consequences Explanation structure.

NOTES

5.1.1 What's the Problem? Defining the Issue for the Customer

Instructions: Think about why customers act on certain problems but ignore others. Complete the tasks below and discuss with your trainer.

Exercise 1: What Makes a Problem 'Real' to the Customer?

1. Write down two reasons why a customer might not take action even when they have a pest, termite, or lawn issue.

2. Why might customers ignore or downplay a problem?

3. How can you explain a problem in a way that makes the customer feel urgency?

Exercise 2: Findings → Problem → Consequences

The Framework

- **Findings**: What was observed?
- **Problem**: Why is this an issue?
- **Consequences**: What happens if left untreated?

Example Problem – Pest

- **Findings**: Evidence of termite activity near the foundation.
- **Problem**: Termites weaken wood, compromising structural integrity.
- **Consequences**: If untreated, damage can escalate into costly repairs.

Your Turn:

5.1.1 What's the Problem? Defining the Issue for the Customer

1. **Pest Problem**
   - Findings:
   - Problem:
   - Consequence:
2. **Lawn Problem**
   - Findings:
   - Problem:
   - Consequence:
3. **Mosquito Problem**
   - Findings:
   - Problem:
   - Consequence:

5.1.2 Adapting to Customer Reactions

GOAL

To help you adapt your findings explanations to different customer reactions, reinforcing urgency and clarity without overwhelming the customer.

DETAILS

- **ESTIMATED TIME**: 30-45 Minutes
- **DELIVERY MODE**: Trainer-Guided Discussion + Mini-Role-Play Scenarios
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Recognize common customer reactions and hesitations.
- Adjust their explanations to maintain clarity, engagement, and urgency.
- Reinforce the Findings → Problem → Consequences framework dynamically in conversation.
- Guide the conversation toward the next step: a service recommendation.

ACTIVITY OVERVIEW

Customers don't always accept problems at face value—they react with skepticism, hesitation, or dismissal. This activity builds on previous training by helping you adapt your explanations based on customer reactions. Through discussion and a mini-role-play, you will refine your ability to reinforce urgency while maintaining customer trust and engagement.

NOTES

5.2.1 Presenting Solutions the Right Way

GOAL

To enable you to accurately define a customer's problem through effective review of key documentation (Massey Folder, inspection graph, graphical analysis, specification sheets, and worksheets) and then present tailored solutions using the Findings → Solution → Benefit structure.

DETAILS

- **ESTIMATED TIME**: 45-60 Minutes
- **DELIVERY MODE**: Trainer-Guided Discussion & Demonstration + Scenario Role-Play Practice
- **FACILITATOR**: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Confirm that the customer fully acknowledges the problem using key questions.
- Review documentation to identify the Avenues, Conditions, and Sources indicating potential and real infestations.
- Validate findings with Fast Fact Sheets and the Massey Proposal Folder.
- Present a solution that directly links the defined problem to a recommended service, clearly articulating the benefits.
- Adjust the presentation based on customer feedback and smoothly transition to scheduling the next step.

ACTIVITY OVERVIEW

Customers don't just want to hear a list of services—they need to understand why a solution matters to their specific concerns. This session helps you to connect inspection findings to solutions in a way that makes sense to customers, frame recommendations positively, avoiding fear tactics or overcomplicated explanations, and transition smoothly from presenting solutions to scheduling services.

NOTES

5.2.1 Presenting Solutions the Right Way

Instructions: For each of the following scenarios, write how you would explain the problem to the customer and transition into the recommended solution.

Exercise 1: Connecting the Problem to the Solution

1. Termites have been found in a customer's crawlspace, but they don't see visible damage and are unsure if treatment is necessary.
   - Your Explanation:
   - Your Solution:
2. A homeowner's lawn has been taken over by crabgrass and they want it eliminated.
   - Your Explanation:
   - Your Solution:
3. A customer has seen roaches in their kitchen and they have tried DIY treatments. Despite the failure of their treatments, they continue to think they can handle it on their own.
   - Your Explanation:
   - Your Solution:

5.2.2 Guided Role-Play: Steps 3 & 4: Presenting Solutions

GOAL

To ensure you can confidently transition from problem definition to service recommendation, reinforcing value and addressing customer concerns.

DETAILS

- **ESTIMATED TIME**: 45-60 Minutes
- **DELIVERY MODE**: Guided Role-Play + Feedback Discussion
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Present service recommendations in a way that aligns with customer concerns.
- Use value-driven communication to highlight benefits rather than just listing services.
- Address common customer objections with professionalism and confidence.
- Transition smoothly into closing discussions while maintaining customer trust.

ACTIVITY OVERVIEW

This session focuses on presenting Massey's service solutions effectively. Instead of simply listing services, you will learn how to connect customer concerns with the right service plan, reinforcing the value and long-term benefits of Massey's offerings. This session follows a structured role-play format, helping you refine their approach in different customer scenarios.

NOTES

5.2.2 Guided Role-Play: Steps 3 & 4: Presenting Solutions

HOW TO USE THESE PAGES

This section is designed to help you track your progress as you practice real sales conversations. Each role-play scenario will focus on key skills, allowing you to improve through repetition and feedback.

- **After each role-play**: Reflect on what went well, record trainer feedback, and make notes on areas for improvement.
- **For Role-Plays 2 & 3**: You'll also reflect on how you implemented previous feedback and what adjustments you made.

THIS IS A PRACTICE ENVIRONMENT—USE EACH ROUND TO REFINE YOUR SKILLS AND GAIN CONFIDENCE!

Role-Play 1: The Initial Practice

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

5.2.2 Guided Role-Play: Steps 3 & 4: Presenting Solutions

Role-Play 2: Applying Feedback & Refining Skills

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Observations	
How did I implement previous feedback?	Did my adjustments help? Why or why not?

5.2.2 Guided Role-Play: Steps 3 & 4: Presenting Solutions

Role-Play 3: The Final Refinement

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Observations	
How did I implement previous feedback?	Did my adjustments help? Why or why not?

5.2.3 Field Training: Presenting Solutions in the Wild

GOAL

To provide you with a structured, real-world experience in defining problems, presenting solutions, and reinforcing value-driven recommendations in live customer interactions.

DETAILS

- ESTIMATED TIME: Variable
- DELIVERY MODE: Ride-Along with Guided Practice & Structured Observation
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Observe how experienced Sales Inspectors transition from problem identification to presenting service recommendations.
- Confidently present solutions in a structured and engaging way.
- Adapt their approach based on live customer interactions and responses.

ACTIVITY OVERVIEW

This ride-along provides real-world experience in presenting solutions, handling objections, and reinforcing value-driven recommendations in live customer interactions. You will observe experienced Sales Inspectors or other Massey team members, practice engaging with customers, and refine your approach based on feedback.

NOTES

5.2.3 Ride-Along Observation Worksheet

Use these pages to write your observations, record your activities, and note trainer feedback.

Section 1: Ride-Along Observation Notes

1. **Solution Presentation:**
    - How did the Sales Inspector transition from identifying the problem to presenting the solution?
    - What words or phrases did they use to highlight the value of the service?
    - How did they build customer confidence?
2. **Customer Engagement & Interaction:**
    - Note customer reactions (interest, hesitation, etc.).
    - If they came up, how were objections handled?
    - How did the Sales Inspector adapt to customer reactions?
3. **Moving to the Closes:**
    - How did the Sales Inspector transition to discussing next steps?
    - What strategies were used to encourage commitment?
    - Were there any missed opportunities to strengthen the solution presentation?

5.2.3 Ride-Along Observation Worksheet

Section 2: Try It Out (Guided Practice)

- What part of the solution did you present?
- How did the customer respond?

Section 3: Trainer Feedback

- Strengths
- Areas for Improvement

Section 4: Self-Reflection

- How effectively did I connect the presented solution to the customer's specific concerns?
- If I could replay one moment from the ride-along, what would it be, and what would I do differently?
- Which aspect of presenting solutions do I find most challenging, and what specific steps can I take to improve?
- What was your biggest takeaway from today's ride-along?

MODULE 6

Why Massey? Proving Our Value & Presenting Features & Benefits

6.1.1 Why Massey? Positioning Our Value

GOAL

To equip you with the ability to confidently position Massey's unique value proposition by reinforcing key differentiators, building trust, and ensuring prospects understand why Massey is the superior choice.

DETAILS

- ESTIMATED TIME: 45 Minutes
- DELIVERY MODE: Trainer-Guided Discussion + Customer Statement Application + Hands-On Practice
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Communicate Massey's unique selling points clearly and confidently.
- Apply Massey's value qualifiers to address common customer questions and concerns.
- Integrate company qualifiers into customer conversations to reinforce trust.

ACTIVITY OVERVIEW

This exercise will help you confidently communicate Massey's unique value to customers. By identifying key differentiators and learning how to apply them in real conversations, you'll be able to position Massey as the best choice without focusing on competitor comparisons.

NOTES

6.1.1 Why Massey? Positioning Our Value

Instructions: Review the following Massey Value Qualifiers and write down how each one builds customer confidence.

Exercise 1: Understanding Massey's Differentiators

Massey Value Qualifier	How Does This Build Trust with Customers?
Largest privately held pest, lawn, and termite provider in the industry	
Two-time recipient of the EPA Pesticide Environmental Stewardship Program Champion	
700,000+ happy, satisfied customers	
Money-back guarantee on all services	
Full-service provider: pest, lawn, termite	
Written pricing guarantee—no surprise upcharges	

6.1.1 Why Massey? Positioning Our Value

Instructions: Below are customer statements that may arise in conversations. Your task is to match each statement with an appropriate Massey Value Qualifier and craft a response that reinforces Massey's value.

Exercise 2: Applying Massey's Value in Customer Conversations

1. I'm from North Dakota, I've never heard of Massey Services. Why should I choose you?
   - Massey Qualifier:
   - Your Response:
2. It's all just chemicals that kill everything and poison the earth.
   - Massey Qualifier:
   - Your Response:
3. Why should I pay more for Massey when other companies are cheaper?
   - Massey Qualifier:
   - Your Response:

6.1.1 Why Massey? Positioning Our Value

4. I've had bad experiences with other pest control companies not showing up on time. I think I should just handling things myself.
    - Massey Qualifier:
    - Your Response:

5. I don't want a long-term contract, I just need a one-time treatment.
    - Massey Qualifier:
    - Your Response:

6. This will make the 3rd company I've got coming out for this problem with my yard. You, the landscape company thats coming to fix my sprinklers, and the pest company I just fired for their botched job - and I didn't even get my money back from them.
    - Massey Qualifier:
    - Your Response

6.2.1 Presenting Features & Benefits Effectively

GOAL

To ensure you can confidently present Massey's services in a way that highlights customer benefits rather than just listing features. This activity reinforces Step 6 – Features & Benefits of the 8-Step Sales Process by helping trainees structure their explanations around customer concerns.

DETAILS

- ESTIMATED TIME: 30-45 Minutes
- DELIVERY MODE: Trainer-Guided Discussion + Feature-to-Benefit Mapping Exercise
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Clearly differentiate between features and benefits in customer conversations.
- Structure service presentations to focus on customer value rather than technical details.
- Adapt explanations based on customer priorities (health, safety, property value, convenience).

ACTIVITY OVERVIEW

This exercise will help you practice transitioning from listing features to explaining customer-driven benefits. By structuring your explanations around customer priorities, you will learn to make service recommendations that feel relevant, natural, and valuable.

NOTES

6.2.1 Presenting Features & Benefits Effectively

Instructions: Match the following Massey features to their corresponding customer benefits, then identify which feature would best address each concern and write a response that connects the feature to a clear benefit.

Exercise 1: Understanding Features & Benefits

Feature	Customer Benefit
Aeration included in service	
Annual irrigation inspection	
Customized pest prevention plan	
Guaranteed pricing for two years	
Money-back guarantee	
Web removal as part of service	

Exercise 2: Applying Feature-to-Benefit Thinking

1. I don’t want to keep paying for pest control if I don’t see any bugs.
   - Massey Qualifier:
   - Your Response:

6.2.1 Presenting Features & Benefits Effectively

2. Why should I pay for aeration when my lawn looks fine? How do I know this will actually help my lawn stay healthy?
   - Massey Qualifier:
   - Your Response:
3. What if I'm not happy with the results?
   - Massey Qualifier:
   - Your Response:
4. I had a bad experience with another company raising my prices after I signed up.
   - Massey Qualifier:
   - Your Response:

6.2.2 Guided Role-Play: Selling Solutions with Value

GOAL

To ensure you can confidently present Massey's services by framing features in a way that highlights customer benefits. This activity reinforces Step 6 – Features & Benefits of the 8-Step Sales Process by helping you transition from simply listing services to positioning them as solutions.

DETAILS

- ESTIMATED TIME: 60-90 Minutes
- DELIVERY MODE: Guided Role-Playing + Feedback
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Clearly differentiate between features and benefits in customer conversations.
- Structure service presentations to focus on customer value rather than technical details.
- Adapt explanations based on customer priorities (health, safety, property value, convenience).

ACTIVITY OVERVIEW

This session provides a structured role-play experience where you will refine you ability to present Massey's services using a feature-to-benefit approach. Instead of simply listing features, you will practice positioning services in a way that connects to customer priorities, reinforcing the value and long-term benefits of Massey's offerings.

NOTES

6.2.2 Guided Role-Play: Selling Solutions with Value

HOW TO USE THESE PAGES

This section is designed to help you track your progress as you practice real sales conversations. Each role-play scenario will focus on key skills, allowing you to improve through repetition and feedback.

- **After each role-play**: Reflect on what went well, record trainer feedback, and make notes on areas for improvement.
- **For Role-Plays 2 & 3**: You'll also reflect on how you implemented previous feedback and what adjustments you made.

THIS IS A PRACTICE ENVIRONMENT—USE EACH ROUND TO REFINE YOUR SKILLS AND GAIN CONFIDENCE!

Role-Play 1: The Initial Practice

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

6.2.2 Guided Role-Play: Selling Solutions with Value

Role-Play 2: Applying Feedback & Refining Skills

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Observations	
How did I implement previous feedback?	Did my adjustments help? Why or why not?

6.2.2 Guided Role-Play: Selling Solutions with Value

Role-Play 3: The Final Refinement

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Observations	
How did I implement previous feedback?	Did my adjustments help? Why or why not?

6.3.1 Evaluation: Qualifying Massey's Benefits & Features

GOAL

To provide you with a structured, real-world experience in presenting Massey's value to customers. This assessment focuses on **Step 5 - Qualify Massey Services and Step 6 – Features & Benefits** by ensuring you can confidently communicate service advantages, reinforce trust, and transition smoothly into recommendations in live customer interactions.

DETAILS

- **ESTIMATED TIME**: Variable
- **DELIVERY MODE**: Assessment
- **PERSON**: Assigned Proctor

OBJECTIVES

By the end of this activity, trainees you be able to:

- Demonstrate their ability to present Massey's services effectively in a structured, scenario-based evaluation.
- Adapt their responses based on different customer concerns, objections, and buying signals.
- Reinforce Massey's differentiators while maintaining professionalism and engagement.
- Navigate customer pushback and skepticism while controlling the conversation.
- Exhibit confidence in transitioning to next steps (scheduling, referrals, or disengaging professionally when necessary).

ACTIVITY OVERVIEW

This assessment evaluates the your ability to confidently present Massey's value in structured, scenario-based customer interactions. The proctor will evaluate you performance using the passing criteria and the example assessment rubric on the following pages.

NOTES

6.2.3 Proctor Guide Excerpt: Qualifying Massey's Benefits...

During the Assessment: Deploying & Assessing the Scenarios

- The proctor selects one scenario from each category at random to assess the trainee, each from a different category:
  - Skeptical/Hesitant Customer – Evaluates the trainee's ability to establish trust, handle objections, and reinforce Massey's value.
  - Price-Conscious or Confrontational Customer – Assesses how well the trainee reframes pricing concerns and manages pushback.
  - Controlled Failure Scenario – Ensures the trainee can maintain professionalism and composure when handling rejection.
- The proctor will use the Assessment Rubric provided in each category to score performance fairly and objectively by evaluating trainee's ability to:
  - Present Massey's services confidently.
  - Address customer concerns without escalating tension.
  - Transition the conversation smoothly.
  - Handle rejection professionally.
  - The trainee must adapt their approach to the scenario while demonstrating confidence and clarity.

Passing Criteria

The trainee must score "Meets Expectations" or higher in at least 11 out of 15 total rubric categories across all three scenarios.

- No more than 2 "Needs Improvement" scores per scenario rubric.
- If a trainee receives 3 or more "Needs Improvement" scores in any one scenario rubric, that scenario is considered failed.
- If a trainee fails two or more scenarios, a full retest is required after additional training.
- If a trainee fails only one scenario, targeted coaching and a partial retest may be assigned at the trainer's and proctors agrees discretion.

Retest Guidelines:

Retest Allowances:

- **First Retest**: May be conducted immediately following targeted feedback and correction from the trainer.
- **Second Retest**: Allowed only after re-teaching and additional practice. Trainer must confirm the trainee is ready to proceed.
- **Third failure**: The trainee's progress and training plan must be reviewed by a Regional Manager or Sales Director. Any further retests require their approval and oversight.

Post-Assessment: Proctor Debrief & Sign-Off

- Review the trainee's inspection process and graphing accuracy.
- Provide feedback on strengths and areas for improvement.
- If the General Manager is not the proctor, complete and submit the assessment form to the General Manager. The GM will upload the assessment form to Massey University.

6.2.3 Proctor Guide Excerpt: Example Assessment Rubric

Category	Needs Improvement	Meets Expectations	Exceeds Expectations	Proctor Notes
Building Trust & Engagement	Trainee struggles to engage the customer, fails to address skepticism, or over-explains without connecting to customer concerns.	Trainee maintains engagement and addresses skepticism with clear, benefit-driven responses. Builds moderate trust.	Trainee confidently engages the customer, naturally addressing concerns and reinforcing Massey's credibility. Establishes strong trust.	
Explaining Massey's Value	Trainee provides unclear or overly technical explanations. Fails to connect features to benefits.	Trainee explains Massey's value clearly, connecting features to benefits in a way the customer understands.	Trainee presents Massey's differentiators persuasively, adapting explanations based on customer reactions.	
Handling Skepticism Professionally	Struggles to reframe objections or reinforce service importance. May become defensive or uncertain.	Acknowledges concerns and provides logical, structured responses. Remains professional.	Skillfully reframes skepticism, using examples, testimonials, or facts to reinforce service need.	
Guiding the Conversation	Trainee struggles to steer the discussion, allowing the customer to dominate or derail it.	Trainee keeps the conversation focused, guiding the customer toward service understanding.	Trainee proactively leads the conversation, addressing concerns before they arise.	
Closing the Interaction	Trainee ends the conversation abruptly or without a clear next step.	Trainee transitions smoothly to a closing statement or scheduled follow-up.	Trainee confidently closes, ensuring the customer leaves with a strong impression of Massey's value.	

MODULE 7

**Sealing the Deal:
Closing the Sale &
Generating Referrals**

7.1.1 Closing with Confidence

GOAL

To ensure you can confidently transition from presenting services to closing the sale using structured closing techniques. This activity reinforces **Step 7 – Closing** of the 8-Step Sales Process while helping you handle last-minute hesitations and secure customer commitments.

DETAILS

- **ESTIMATED TIME**: 45 Minutes
- **DELIVERY MODE**: Trainer-Guided Discussion + Scenario-Based Conversations + Feedback
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Recognize and respond to buying signals in customer interactions.
- Apply structured closing techniques to guide customers toward a confident "yes."
- Overcome last-minute hesitations without sounding forceful.

ACTIVITY OVERVIEW

This session focuses on helping you develop confidence in closing sales conversations naturally and effectively. Instead of pushing a sale, you will learn how to recognize buying signals, apply structured closing techniques, and handle common last-minute concerns.

NOTES

7.1.2 Guided Role-Play: Getting a "Yes" & Closing the Sale

GOAL

To provide you with structured role-play practice in applying closing techniques in progressively challenging customer interactions. This activity reinforces **Step 7 – Closing** of the 8-Step Sales Process, ensuring you can confidently secure commitments and begin to transition into referrals.

DETAILS

- ESTIMATED TIME: 45-60 Minutes
- DELIVERY MODE: Guided Role-Play + Feedback
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Apply multiple closing techniques based on customer engagement and reactions.
- Overcome last-minute hesitations with confidence and professionalism.
- Transition smoothly from closing into securing referrals.

ACTIVITY OVERVIEW

This session provides a structured role-play experience where you can practice handling different customer responses when closing a sale. Each round increases in complexity, requiring you to adjust you closing approach based on the scenario and explore different closing strategies.

NOTES

7.1.2 Guided Role-Play: Getting a "Yes" & Closing the Sale

HOW TO USE THESE PAGES

This section is designed to help you track your progress as you practice real sales conversations. Each role-play scenario will focus on key skills, allowing you to improve through repetition and feedback.

- **After each role-play**: Reflect on what went well, record trainer feedback, and make notes on areas for improvement.
- **For Role-Plays 2 & 3**: You'll also reflect on how you implemented previous feedback and what adjustments you made.

THIS IS A PRACTICE ENVIRONMENT—USE EACH ROUND TO REFINE YOUR SKILLS AND GAIN CONFIDENCE!

Role-Play 1: The Initial Practice

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

7.1.2 Guided Role-Play: Getting a "Yes" & Closing the Sale

Role-Play 2: Applying Feedback & Refining Skills

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Observations	
How did I implement previous feedback?	Did my adjustments help? Why or why not?

7.2.1 Securing Referrals: Expanding Your Leads

GOAL

To ensure you can confidently ask for referrals, complete the Pass-It-On process, and correctly finalize all required sales paperwork. This activity reinforces **Step 8 – Asking for Referrals** & Finalizing the Sale of the 8-Step Sales Process.

DETAILS

- **ESTIMATED TIME**: 30-45 Minutes
- **DELIVERY MODE**: Trainer-Guided Discussion + Scenario-Based Conversations
- **FACILITATOR:** General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Ask for referrals confidently without sounding pushy.
- Explain the Pass-It-On program and its benefits to customers.

ACTIVITY OVERVIEW

Asking for referrals is an essential part of Massey's sales process, ensuring continued business growth through satisfied customers. This session helps you refine you ability to request referrals naturally and confidently while explaining the Pass-It-On program. You will participate in a structured discussion, review best practices, and engage in guided referral request exercises to develop a professional and effective approach.

NOTES

7.2.2 Guided Role-Play: Growing Leads, Not Weeds

GOAL

To ensure you can confidently conduct a full follow-up conversation that verifies customer satisfaction and secures referrals while reinforcing trust and long-term engagement.

DETAILS

- ESTIMATED TIME: 45-60 Minutes
- DELIVERY MODE: Guided Role-Play + Feedback
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Conduct a structured follow-up conversation that builds rapport and ensures customer satisfaction.
- Ask for referrals confidently as a natural extension of the conversation.
- Adjust their approach based on customer responses to maintain trust and engagement.

ACTIVITY OVERVIEW

This role-play exercise simulates real-world follow-up conversations with customers. You will practice handling different customer responses while ensuring satisfaction and securing referrals. Trainers will provide real-time coaching and feedback to refine you communication techniques.

NOTES

7.2.2 Guided Role-Play: Growing Leads, Not Weeds

HOW TO USE THESE PAGES

This section is designed to help you track your progress as you practice real sales conversations. Each role-play scenario will focus on key skills, allowing you to improve through repetition and feedback.

- **After each role-play**: Reflect on what went well, record trainer feedback, and make notes on areas for improvement.
- **For Role-Plays 2 & 3**: You'll also reflect on how you implemented previous feedback and what adjustments you made.

THIS IS A PRACTICE ENVIRONMENT—USE EACH ROUND TO REFINE YOUR SKILLS AND GAIN CONFIDENCE!

Role-Play 1: The Initial Practice

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

7.2.2 Guided Role-Play: Growing Leads, Not Weeds

Role-Play 2: Applying Feedback & Refining Skills

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Observations	
How did I implement previous feedback?	Did my adjustments help? Why or why not?

Referral Roundup: Growing Leads, Not Weeds

Role-Play 3: The Final Refinement

What went well?	Trainer Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

Observations	
How did I implement previous feedback?	Did my adjustments help? Why or why not?

7.2.3 Completing & Submitting the Sales Packet

GOAL

To ensure you correctly complete, verify, and submit all required sales documents, ensuring compliance and accuracy in the sales process.

OBJECTIVES

By the end of this activity, you will be able to:

- Identify all required documents in a complete sales packet.
- Accurately complete each form and verify for errors.
- Understand submission protocols to ensure timely processing.

DETAILS

- ESTIMATED TIME: 30-45 Minutes
- DELIVERY MODE: Trainer-Guided Documentation Review + Hands-On Practice
- FACILITATOR: General Manager or Designated Individual

ACTIVITY OVERVIEW

Completing and submitting a sales packet is a critical final step in the sales process. This session provides you with the comprehensive knowledge and hands-on practice needed to ensure documentation is completed accurately and submitted correctly. You will review required documents, assemble a mock sales packet, and perform a final accuracy check before submission. By reinforcing organization and attention to detail, this activity helps you develop professional habits that minimize errors and streamline processing.

NOTES

7.2.3 The Sales Forms

Core Forms

1. MS-131: Start Sheet
2. Agreement (unique to each service)
3. Rate card (unique to each service)
4. MS-051: Inspection graph
5. MS-050: Graphical analysis
6. Referral call back sheet (no form number, universal)
7. MS-135: Thank You card

Service-Specific Forms

GreenUp-Lawn (Lawn only)

- MS-057A: Agreement
- MS-111A: Rate card
- MS-080: Spec sheet
- MS-069: Uncontrollable weed alert
- MS-144: Soil pH test form
- MS-059: Irrigation maintenance decline or accept form
- Decline Letter
- Completion Certificate for Sod

Irrigation

- Likely uses the irrigation maintenance decline or accept form (MS-059)

Pest

- MS-208: Agreement
- MS-209A: Rate card
- MS-105: Spec sheet
- Beg Bug Service Preparation Checklist
- German Roach Full Prep Service Checklist
- Flea & Tick Prevention Checklist

Termite

- Would have its own agreement and rate card?
- Consumer Notice Form (Department of Agriculture form)
- Fumigation Service Affidavit
- Fumigation preparation List for Vikane
- MS-142: Attic Decline
- Completion Certificate for Fume

We know there are a lot of forms—but each one plays a role in protecting our customers, our team, and the company. Make sure every proposal you submit for the final evaluation includes all the required documentation and reflects the specific service type you're recommending.

Having a complete, signed, and properly filled-out packet is critical—not just for training, but for liability, claims, and customer clarity out in the real world.

If you're unsure about which forms to include or how to organize them, your Office Manager is a great resource—don't hesitate to ask for support.

MODULE 8

Time is Money: Time & Territory Management

8.1.1 Plan. Prioritize. Perform: Time Management

GOAL

To help you structure you daily schedules efficiently, ensuring you can prioritize revenue-generating activities while managing follow-ups and administrative tasks.

DETAILS

- ESTIMATED TIME: 20-25 Minutes
- DELIVERY MODE: LMS Microlearning + Trainer-Guided Discussion + Individual Planning Task
- FACILITATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Apply effective prioritization techniques to organize your daily tasks.
- Develop a structured schedule that balances inspections, lead generation, follow-ups, and administrative work.

ACTIVITY OVERVIEW

A well-structured day maximizes productivity and revenue generation. This activity introduces you to prioritization techniques to ensure you can effectively allocate time to high-value activities. You and your trainer will view a brief LMS microlearning module together, discuss best practices together, and complete a daily scheduling exercise to apply learned concepts.

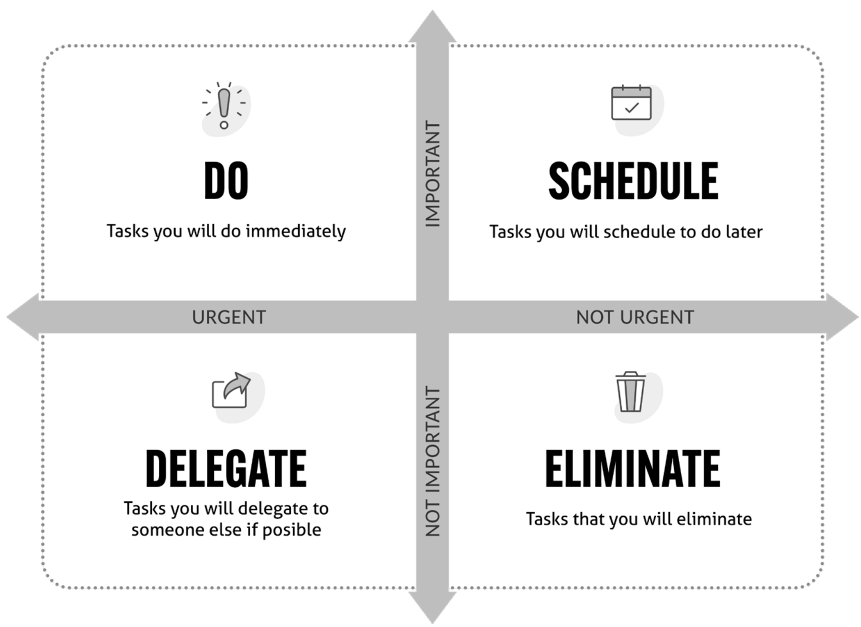
NOTES

8.1.1 Plan. Prioritize. Perform: Time Management

Managing your daily workflow effectively is critical to your success as a Sales Inspector. Your ability to prioritize tasks ensures that you stay organized, maximize sales opportunities, and maintain efficiency throughout the day. In this exercise, you will categorize tasks using the Eisenhower Matrix and apply these prioritization strategies to a daily schedule.

MAN 7000 REVIEW: THE EISENHOWER MATRIX

The Eisenhower Matrix is a prioritization tool that helps separate tasks by urgency and importance. Understanding how to classify your work ensures that you stay focused on revenue-generating activities while maintaining operational efficiency.



Priority Quadrant	Definition	Example Task
Q1: Urgent & Important	Must be done now; directly impacts revenue	Set appointments, lead generation
Q2: Important but Not Urgent	High impact but can be scheduled	Customer follow-ups, scheduling revisits to optimize driving efficiency
Q3: Urgent but Not Important	Time-sensitive but low long-term impact	Last-minute paperwork, responding to a non-critical request
Q4: Neither Urgent Nor Important	Low impact, can be eliminated or rescheduled	Checking emails too frequently, excessive admin work

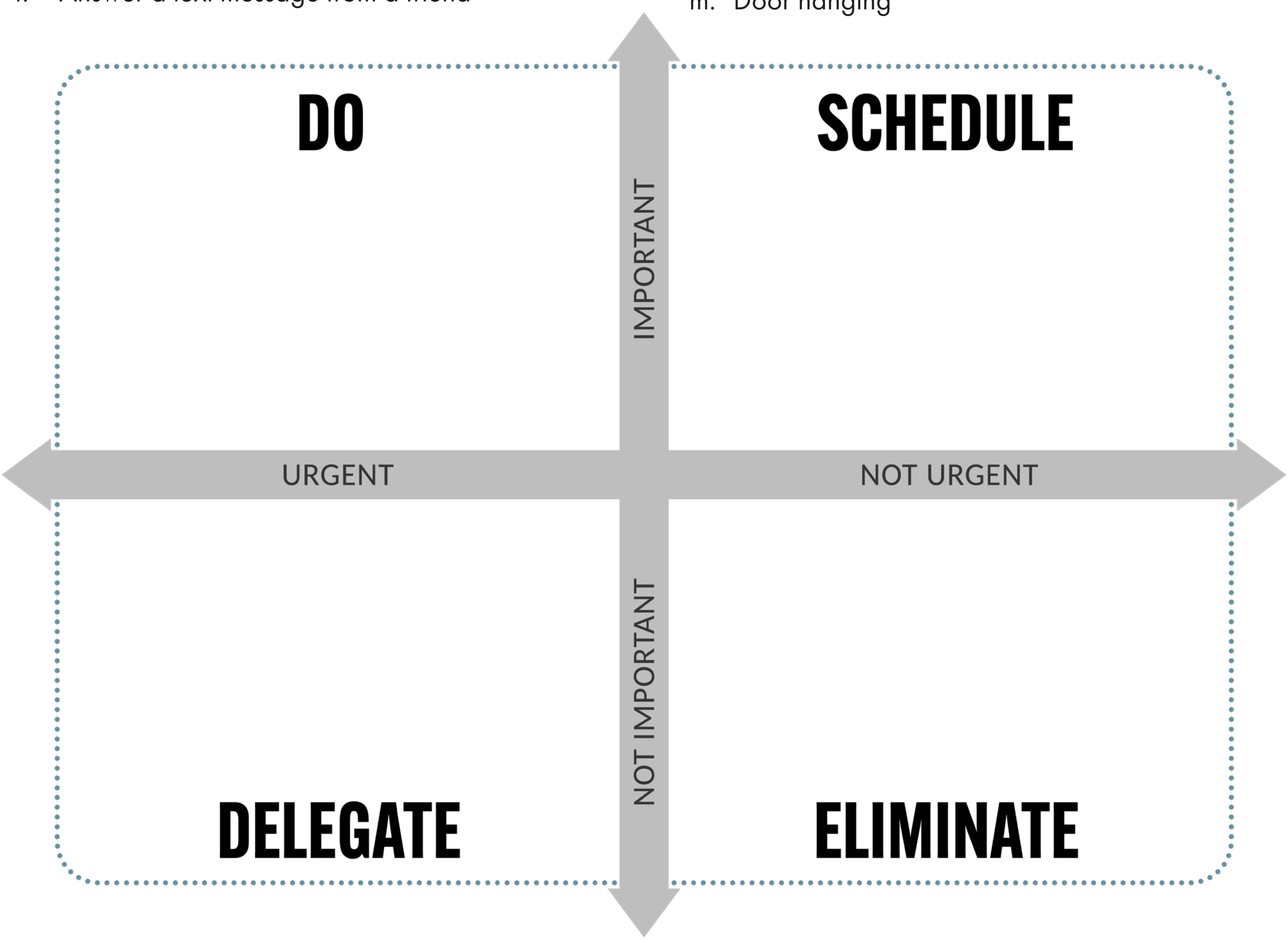
8.1.1 Live Task Prioritization Exercise: What's On My Plate?

<u>NO LEAD = NO APPOINTMENT = NO SALE.</u> **Set appointments may dictate your structure, but lead generation and smart scheduling MUST be built into your day.**

Exercise 1: Prioritizing Practice

Below is a list of common tasks a Sales Inspector may encounter. Your goal is to categorize each task into the appropriate quadrant of the matrix. Write the corresponding task letter in the quadrant where you believe it belongs.

a. Customer appointment at 10:30 AM on the east side of town
b. Customer appointment at 2:00 PM on the west side of town.
c. Call back a lead from yesterday
d. Organize your vehicle for efficiency
e. Enter DSAR data from morning appointments
f. Answer a text message from a friend
g. Lunch break
h. Deliver a referral card to a customer's neighbor on the west side of town.
i. Follow up with a customer about a previous visit
j. Drop off signed paperwork at the service center
k. Make cold calls to schedule future appointments
l. Check-in with your manager
m. Door hanging



8.1.1 Live Task Prioritization Exercise: What's On My Plate?

Exercise 2: Making a Schedule

Now that you have categorized tasks, use the blank schedule template below to plan your workday. Place your set appointments from your DSAR first, then build in time for lead generation, follow-ups, operational tasks, and personal breaks.

TIME	PLANNED TASK
8:00 AM	
8:30 AM	
9:00 AM	
9:30 AM	
10:00 AM	
10:30 AM	
11:00 AM	
11:30 AM	
12:00 PM	
12:30 PM	
1:00 PM	
1:30 PM	
2:00 PM	
2:30 PM	
3:00 PM	
3:30 PM	
4:00 PM	
4:30 PM	
5:00 PM	

ALIGN YOUR SCHEDULE WITH THE DSAR TO ENSURE YOU ARE ACCURATELY TRACKING TASKS AND FOLLOW-UPS.

8.1.1 Live Task Prioritization Exercise: What's On My Plate?

Exercise 3: Self-Reflection

Complete the following prompts to solidify your understanding of prioritization and its impact on your role. You will discuss your responses with your trainer.

A WELL-PLANNED DAY MEANS FEWER MISSED OPPORTUNITIES AND MORE SUCCESSFUL SALES INTERACTIONS!

1. What was your biggest takeaway from this exercise?

2. What adjustments can you make to your daily planning to improve efficiency?

3. How does using the DSAR help you stay organized and increase sales success?

8.1.2 Route Planning: Callbacks & Leadwork Efficiency

GOAL

To you understand the impact of strategic route planning, ensuring you can efficiently integrate callbacks and leadwork into their pre-set sales appointments.

DETAILS

- **ESTIMATED TIME**: 15 Minutes
- **DELIVERY MODE**: Trainer-Guided Discussion + Learner Workbook Review
- **FACILI**TATOR: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Recognize how poor field planning wastes time and reduces sales opportunities.
- Identify best practices for structuring callbacks and leadwork around set appointments.
- Use examples to discuss and apply route planning strategies effectively.

ACTIVITY OVERVIEW

Efficient field planning ensures that you minimize wasted time and maximize you customer engagement opportunities. This activity introduces you to effective vs. ineffective route planning by discussing real-world examples and evaluating pre-set schedules. you will review good and bad examples of route planning from the Learner Workbook and discuss how to optimize schedules to reduce unnecessary travel and maximize customer interactions.

NOTES

8.1.2 Route Planning: Good vs. Bad Examples

Optimized Scheduling → Minimized Travel & Maximum Efficiency

Key Features of an Efficient Schedule

- ✓ Clustered appointments in the same general area to reduce drive time.
- ✓ Leadwork strategically placed between set sales appointments.
- ✓ Follow-ups positioned near previous sales or other appointments, allowing for smooth transitions.
- ✓ Time-blocking ensures minimal wasted time between stops

Note: These example schedules are generalized locations used for illustrative purposes, not specific addresses.

Example: Optimized Daily Schedule (Orlando, FL)

1. 8:30 AM - Winter Park, FL (Set Sales Appointment)
2. 10:00 AM - Baldwin Park, Orlando, FL (Follow-Up Referral Visit)
3. 12:30 PM - Downtown Orlando, FL (Leadwork - Doorhanging/Doorknocking)
4. 2:00 PM - Lake Eola Park, Orlando, FL (Set Sales Appointment)
5. 4:00 PM - Millenia, Orlando, FL (Follow-Up Referral Visit)

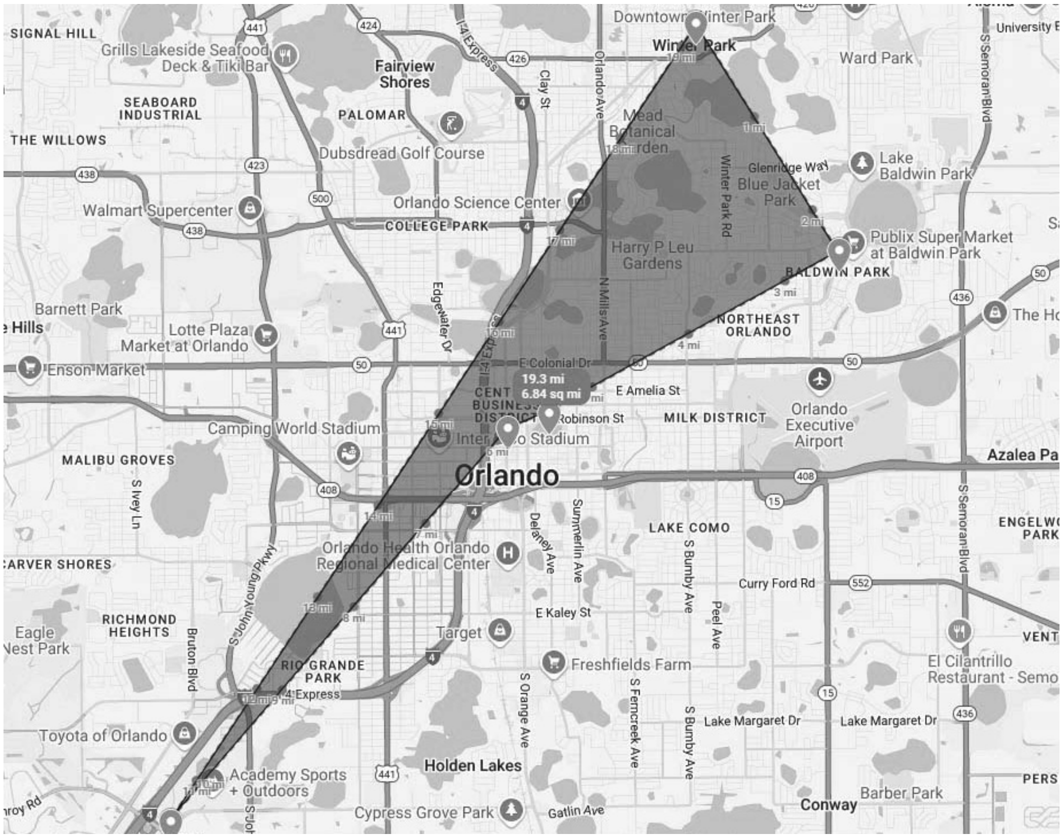
Inefficient Scheduling → Excessive Travel & Time Wasted

Common Mistakes in an Inefficient Schedule

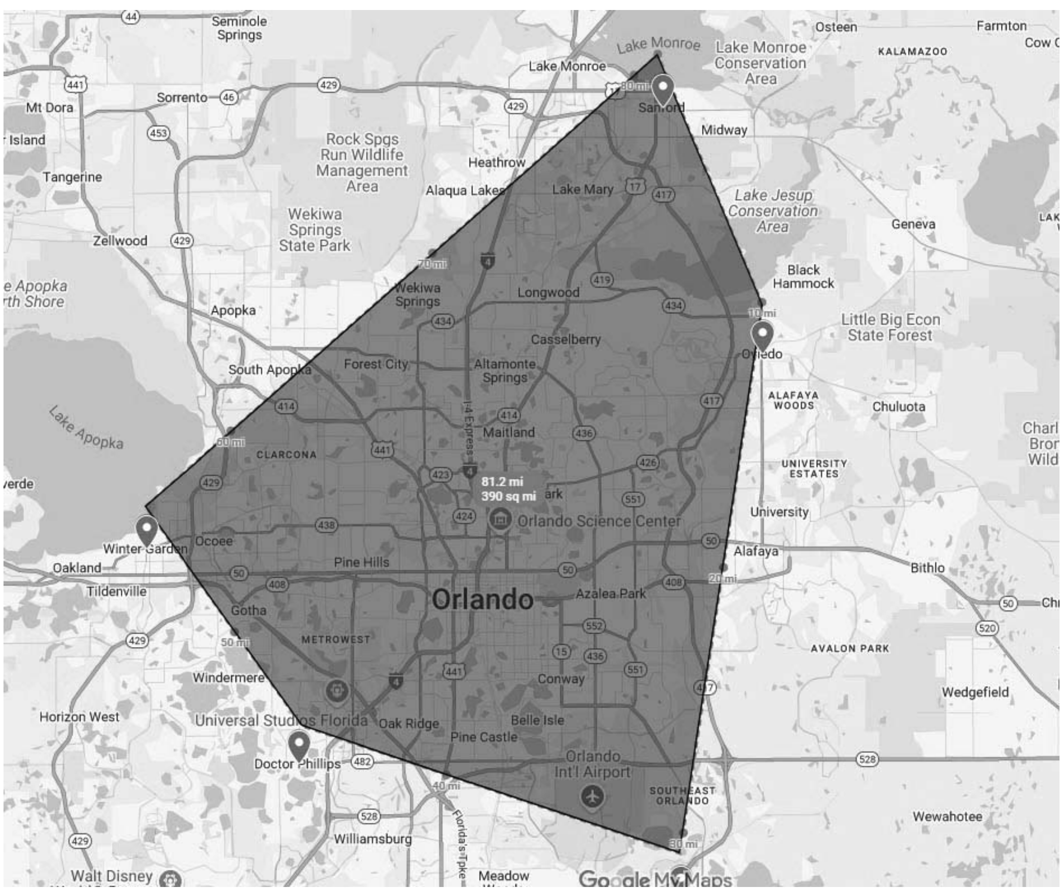
- ✖ Significant, avoidable drive time between locations, leading to lost productivity.
- ✖ Leadwork and follow-ups placed randomly, making them harder to fit in.
- ✖ Poor planning results in backtracking across the city multiple times a day.

Example: Inefficient Schedule (Orlando, FL)

1. 8:30 AM - Lake Nona, Orlando, FL (Follow-Up Referral Visit)
2. 10:00 AM - Winter Garden, FL (Set Sales Appointment)
3. 12:30 PM - Oviedo, FL (Leadwork - Doorhanging/Doorknocking)
4. 2:00 PM - Dr. Phillips, Orlando, FL (Set Sales Appointment)
5. 4:00 PM - Sanford, FL (Follow-Up Referral Visit)



Optimized Scheduling → ~7 square miles



Inefficient Scheduling → ~82 square miles

8.1.3 Work Smart, Live Well, Make It Count

GOAL

To help you identify and avoid time-wasting habits and develop sustainable work habits that balance productivity with personal well-being.

DETAILS

- **ESTIMATED TIME**: 15-20 Minutes
- **DELIVERY MODE**: Trainer-Guided Discussion + Learner Workbook Reflection
- **FACILITATOR**: General Manager or Designated Individual

OBJECTIVES

By the end of this activity, you will be able to:

- Recognize common time-wasting behaviors that reduce sales efficiency.
- Learn strategies to stay focused and productive throughout the workday.
- Understand that sustainable work habits promote long-term success and prevent burnout.

ACTIVITY OVERVIEW

Sales Inspectors rely on efficient time management to maintain productivity and work-life balance. Without structure, distractions, inefficiencies, and mental fatigue can reduce your performance. This activity engages you in recognizing time-wasting behaviors, understanding their impact, and developing realistic strategies to enhance focus, productivity, and personal well-being.

NOTES

8.1.3 Resource: Sales Productivity & Time Traps

Understanding Productivity & Time Traps

Sales success isn't **just** about working hard—**it's about working smart**. Time-wasting habits can creep into a Sales Inspector's day without them realizing it. This section explores common time traps, their impact, and strategies to maintain focus and efficiency.

The Cost of Poor Time Management

- ✖ Frequent context switching and "multitasking" leads to mental exhaustion and reduced performance.
- ✖ Poor scheduling creates wasted time between appointments.
- ✖ A lack of structured breaks can lead to burnout, reducing long-term effectiveness.

Common Time Traps & Their Fixes

- Frequent Administrative Disruptions – Solution: Set dedicated time blocks for paperwork instead of stopping between customer interactions.
- Inefficient Scheduling – Solution: Use strategic route planning and prioritize callbacks effectively.
- Overloading the Day – Solution: Set realistic goals and schedule breaks to maintain energy.

Self-Reflection Questions:

1. What are your biggest time-wasting habits?

2. How does your current daily structure impact your productivity?

3. What adjustments can you make to minimize distractions?

4. What steps will you take to balance efficiency with work-life sustainability?

BEING PRODUCTIVE ISN'T ABOUT DOING MORE—IT'S ABOUT DOING WHAT MATTERS MOST. PLAN SMARTER, MINIMIZE DISTRACTIONS, AND TAKE CARE OF YOURSELF FOR LONG-TERM SUCCESS.

MODULE 9

Ready to Run: Final Evaluations & Striking Out On Your Own

9.1.1 The Final Countdown: Getting Ready for the Assessment

GOAL

To ensure that you are fully prepared for the Final Evaluation Assessment by reviewing expectations, required materials, and any last-minute coaching needs.

DETAILS

- ESTIMATED TIME: Variable
- DELIVERY MODE: Assessment
- FACILITATOR: Regional Manager and/or Sales Director

OBJECTIVES

By the end of this activity, you will:

- Confirm that you understand the structure and expectations of the final evaluation.
- Identify any final areas of focus or reinforcement before the assessment.

NOTES

9.1.1 The Final Countdown: Self-Checklist

Instructions: Use this checklist to help confirm your readiness for the final evaluation. Review each item carefully and check the boxes for the skills and knowledge you are confident in demonstrating. If you have any uncertainties, speak with your trainer and address those items before the evaluation.

- ☐ I can **confidently transition through all steps of the sales process** and adjust my approach as needed.
- ☐ I can **analyze and interpret an inspection report, graph, and customer profile** to structure a compelling sales proposal.
- ☐ I can **clearly present Massey's services**, **connecting solutions to customer needs** and reinforcing value.
- ☐ I can **handle objections effectively**, addressing customer concerns while keeping the conversation solution-focused.
- ☐ I can **close a sale with confidence**, using appropriate techniques to guide the customer to a commitment.
- ☐ I can **accurately and completely** prepare sales packets, including **all required documents** and information.
- ☐ I understand **how to ask for and secure referrals** as part of the sales process.
- ☐ I have practiced **maintaining a professional demeanor**, including attire, communication style, and customer engagement.
- ☐ I understand **how I will be evaluated**, including the assessment structure, scoring criteria, and expectations
- ☐ I am prepared to **answer oral exam questions about key sales process elements**, including, but not limited to: prospecting, introductions, inspections, closing, securing referrals, etc.
- ☐ I am prepared to **demonstrate my skills in a structured, professional setting** under evaluation conditions.

9.1.2 Final Evaluation

GOAL

To assess your ability to independently conduct a complete sales proposal, including presenting a solution, addressing customer concerns, closing the sale, and completing all related documentation, using real customer materials in a simulated customer interaction.

DETAILS

- ESTIMATED TIME: Variable
- DELIVERY MODE: Assessment
- FACILITATOR: Regional Manager and/or Sales Director

OBJECTIVES

By the end of this activity, the you will:

- Select and submit a set of real-world proposals that demonstrate your understanding of multiple service types.
- Professionally deliver each proposal in a live simulation, explaining findings and recommendations clearly.
- Navigate questions, objections, and customer scenarios with confidence and professionalism.
- Use appropriate closing techniques and outline logical next steps.
- Ensure all submitted sales packets are complete, accurate, and properly documented.
- Demonstrate your understanding of key sales process concepts through a structured oral exam.

ACTIVITY OVERVIEW

This final evaluation is a simulation-based assessment designed to measure your ability to present and defend real-world service proposals. Your trainer will help the you select and submit 3 actual sales packets—each representing a different service—that the you completed during training.

During the simulation, the you will present each proposal to the evaluator, who will act as the customer. The evaluator will introduce questions, objections, or disengaged behavior to assess the your ability to explain services clearly, handle concerns professionally, and close each sale. The assessment concludes with a structured oral exam to evaluate additional sales knowledge not observed during the proposals.

This capstone evaluation confirms the your readiness to operate independently in the field and ensures their documentation, delivery, and decision-making meet Massey's standards.

Phase	Time (Min.)	Purpose
1. Live Proposal Simulation	~60	The trainee presents all 3 services from their submitted packets to the proctor, who acts as the customer. The proctor introduces questions and objections to assess the trainee's communication, objection handling, and closing skills for each proposal.
2. Oral Exam	15-20	Respond to a series of structured questions covering topics not directly observed during the proposal (e.g., prospecting, introductions, securing referrals).
3. Debrief	30	Proctor will provide structured feedback to the trainee and trainer on their performance in the simulated proposal presentation and oral exam and any next steps which need to be taken.

9.1.2 Proctor Guide Excerpt: Final Evaluation - Proposal

Role of the Proctor

- Act as the customer throughout the proposal simulation.
- Remain in character and introduce objections or questions during each proposal.
- Do not coach or provide feedback until the full simulation and oral exam are complete.
- Administer the Oral Exam after the final proposal has been delivered.
- Score both components using the appropriate rubrics.

Proposal Simulation: Passing Criteria

- The trainee must score Meets Expectations or higher ***in all*** primary rubric categories.
- One "Needs Improvement" may be allowed with targeted coaching.
- Two or more "Needs Improvement" ratings require a full simulation retest.

Proposal Simulation: Retest Guidelines:

- 1st Retest: Allowed after trainer-led coaching and corrective practice.
- 2nd Retest: Only with trainer sign-off. A new set of proposals must be used.
- 3rd Attempt: Requires Regional Manager or Sales Director approval and evidence of additional training.

Oral Exam: Passing Criteria

- The trainee must score Meets Expectations or higher in 4 of 5 categories.
- One "Needs Improvement" triggers a targeted retest for that category.

Oral Exam: Retest Guidelines:

- 1st Retest: Allowed after targeted coaching with a new question.
- 2nd Retest: Requires trainer sign-off. Use a different question.
- 3rd Attempt: Requires Regional Manager or Sales Director approval and documented retraining.

Post-Assessment: Proctor Debrief & Sign-Off

- Debrief with the trainee and trainer to review strengths and areas for improvement.
- Submit completed rubrics and trainee materials to the General Manager or Trainer.
- Ensure results are recorded in Massey University for training documentation.

9.1.2 Proctor Guide Excerpt: Example Assessment Rubric

Category	Needs Improvement	Meets Expectations	Exceeds Expectations	Proctor Notes
Sales Process Execution	Misses or jumbles key steps across proposals; lacks logical flow or consistency.	Follows a clear, structured flow for each proposal with appropriate transitions.	Delivers each proposal with strong structure and adjusts flow based on customer reactions or proposal needs.	
Proposal Delivery	Lacks clarity, confidence, or persuasive framing; explanation is incomplete or overly scripted.	Communicates the value of each service clearly and confidently with appropriate tone and structure.	Delivers polished, customer-focused proposals with strong engagement, adapting to each service type.	
Use of Sales Materials	Fails to reference or integrate key elements from inspection reports, graphs, or customer notes.	References inspection details, graphs, and relevant documentation to support the proposal.	Seamlessly integrates all materials into the sales conversation to build value and trust.	
Customer Engagement & Objection Handling	Appears disengaged or reactive; struggles to address objections or misreads cues.	Listens attentively, responds to objections professionally, and adjusts delivery as needed.	Actively engages the "customer," responds with empathy, and reframes objections to move the sale forward.	
Closing & Next Steps	Does not attempt to close or fails to define clear next steps.	Clearly asks for the sale and outlines logical next steps with the customer.	Uses tailored closing techniques across services, confirms agreement, and reinforces customer confidence.	
Sales Packet Accuracy & Completeness	One or more packets are incomplete, contain errors, or lack required forms.	Packets are complete with accurate documentation and minimal errors.	All packets are professionally prepared, well-organized, and ready for processing.	
Professionalism & Demeanor	Appearance, tone, or behavior is inconsistent or unprofessional; lacks confidence.	Maintains professional tone, clear communication, and confident presence throughout.	Consistently exhibits polish, presence, and professionalism across all proposals.	

9.1.2 Proctor Guide Excerpt: Oral Evaluation & Sample Rubric

Select one question from each of the five categories: Prospecting, Introductions, Inspections, Closing, and Referrals. Evaluators may select from the provided questions or create their own, ensuring alignment with the Massey Services Sales Manual and the role. If the proctor creates their own question, they must write it into the rubric.

Evaluation Guidance

For each question, the evaluator should assess the trainee's response based on these criteria:

- **Clarity**: Is the response easily understood? Does the trainee articulate the concepts in a clear and organized manner?
- **Accuracy**: Is the information presented correct and in line with the Massey Services' expectations? Does the trainee demonstrate a solid understanding of the material?
- **Professionalism**: Does the trainee present themselves in a professional manner? Do they use appropriate language and demonstrate the expected demeanor of a Massey Services Sales Inspector?

Rating Scale:

- **NI (Needs Improvement):** The response demonstrates a significant lack of understanding or omits key information. The response may be unclear, inaccurate, or unprofessional.
- **ME (Meets Expectations):** The response is satisfactory and demonstrates a general understanding of the topic. The trainee provides accurate information with reasonable clarity and professionalism.
- **EE (Exceeds Expectations):** The response is thorough, accurate, and demonstrates a strong command of the subject matter. The trainee communicates clearly, concisely, and professionally, and may provide insightful examples or applications.

Feedback Documentation:

If the evaluator marks "Needs Improvement" (NI) for a trainee's response, they must provide written feedback in the "Notes" section. This written feedback must:

- **Clarify why the response did not meet expectations:** The feedback should specifically identify the shortcomings of the response.
- **Provide a specific suggestion on how the trainee can improve to reach "Meets Expectations":** The feedback should offer actionable advice on how the trainee can enhance their understanding or delivery.

Example Questions & Question Level Rubric	NI	ME	EE
Why is it important to tailor your introduction based on the service being proposed, and how might your approach differ between a pest and termite customer?	☐	☐	☐
A customer says, 'I want to think about it.' What would you do next, and how can you guide the conversation toward a confident decision without being pushy?	☐	☐	☐
How can your daily schedule support effective prospecting, and what tools or strategies do you use to stay organized in the field?	☐	☐	☐
(Blank for custom question)	☐	☐	☐
Notes			

APPENDIX

Scripts, Blank Rubrics, & More

ROLE-PLAYING SCRIPTS

4 + 1 Script

A Sales Inspector knocks on The Wells' door. Mrs. Wells opens the door.

Inspector: Hello Mrs. Wells, do you have a minute?

Mrs. Wells: Sure.

Inspector: My name is [Inspector's Name], and I wanted to thank you for being a loyal Massey Services Landscape customer for the last two years.

Mrs. Wells: I have enjoyed the service, thank you.

Inspector: Great! I will let your lawn specialist, Billy, know your positive comments about the service. Also, as the Massey Inspector for your neighborhood, I spend some mornings and afternoons talking to homeowners in your neighborhood about Landscape, Pest, and Termite services. I came to your door today, Mrs. Wells, to ask permission to use your lawn as a referral as I talk to homeowners in your neighborhood.

Mrs. Wells: I don't see why not.

Inspector: Great! Thank you! Have you heard of our Massey Services Reward Program?

Mrs. Wells: Rewards Program?

Inspector: Let me explain. Our rewards program is called Pass-It-On, which rewards you with a $25 Publix gift card for every new customer you refer. If they buy a service, they will receive a $10 Publix gift card. The more family, friends, and neighbors you refer, the more groceries we can help you pay for. How does that sound?

Mrs. Wells: I can give a referral right now. John next door and my husband and I play golf with him every so often. Let him know you talked to me. I have seen a Quality First lawn truck in front of his house. That may be the company he uses for his lawn. Not sure who the other neighbors use, but feel free to talk to them as well.

Inspector: Thank you for the referral, Mrs. Wells. I will circle back to you to let you know if your neighbor signs up with our services.

Mrs. Wells: Good luck!

Inspector: Thanks again, Mrs. Wells. If you have any more family, friends, or neighbors you wish to refer, please call my Service Center with the information. I will make contact the same day you leave the information.

Mrs. Wells and the Inspector shake hands. Mrs. Wells closes the door. The Inspector begins the 4 + 1 activity.

THE PASS-IT-ON PROGRAM IS FREQUENTLY UPDATED. BE SURE TO REPLACE ANY OUTDATED LANGUAGE IN THE SCRIPT WITH THE MOST CURRENT OFFER DETAILS IF THE EXPLANATION PROVIDED IS NO LONGER ACCURATE.

139 Prospecting the Neighbor Script

A Sales Inspector knocks on the neighbor's door next to Mr. Wells. John, the neighbor, opens the door.

Inspector: Hello, John. Do you have a minute?

John: Sure, what's up?

Inspector: My name is [Inspector's Name]. Just a few minutes ago, I was talking with your neighbor, Mr. Wells, about his Landscape Service with Massey Services. He's been a happy, satisfied customer for the last couple of years. I was wondering if Mr. Wells has ever shared his satisfaction with his lawn and landscape service with you?

John: You mean Larry and Linda Wells?

Inspector: Yes.

John: Yes, during a golf outing, Larry may have mentioned he liked his lawn service company.

Inspector: Glad to hear that. Do you have a current provider?

John: Yes, Quality First.

Inspector: Have you ever compared services?

John: No, I haven't.

Inspector: Let me ask you, what do you like about Quality First?

John: Nice people at Quality First. They seem to do okay.

Inspector: If you could change anything about their service, what would it be?

John: The lawn looks good. However, I was not happy I had to replace 500 square feet of turf from chinch bug damage a few months ago.

Inspector: John, what if I were to tell you that if Massey Services was your provider at the time you had chinch bug damage, that $500 plus you spent on new sod would have been on Massey Services' dime, not yours?

John: So you're telling me you guarantee the lawn from damage like I had?

Inspector: Yes. With our Monthly Landscape Program, we replace any new insect damage in your lawn. Not only do we include insect damage replacement for your lawn, we include insect damage on trees and shrubs up to 10 feet with a 4-inch trunk or less.

John: Then I guess it would be a good idea to at least see what Massey Services can do for my lawn and shrubs. Go ahead and write something up for me.

Inspector: I will be glad to provide you with a detailed written analysis. I encourage you to walk the property with me so we can discuss the needs that I find and what solutions we offer.

John: Okay, let's go.

Door Knocking Script

A Sales Inspector is knocking on neighbor's doors well beyond the Wells' house. At the 11th door, someone opens the door. She has a bag in hand and looks ready to leave the house.

Inspector: Hello! Sorry to interrupt I will only take a minute of your time. I am _____ Massey Services. Is that okay?

Homeowner: I will be leaving in a few minutes. What can I do for you?

Inspector: I was talking to homeowners in your neighborhood about concerns about lawns lacking color. I could not help but notice your lawn lacks color is some areas of your lawn.

Homeowner: Yes, it has been a concern. My husband fertilizes the yard himself.

Inspector: Others in the neighborhood have told me the same frustration. I offered some homeowners a complimentary pH soil analysis & water management audit that provides instant results. In some lawns lacking color the pH was lower than it should be. In other lawns irrigation was and issue. Have you had your lawn's pH checked & irrigation checked lately?

Homeowner: Like I said my husband does the lawn himself. But I am sure he does not know how to do either.

Inspector: I would be glad to provide you a detailed written analysis that may help correct the color issues in your lawn. At least the report will help your husband know if the color issue is more than just putting down more fertilizer.

Homeowner: Okay, I am good with that. Write up what you find, and I will give to him tonight

Inspector: Perfect. If you would like we can walk the property together to see what issues you are having.

Homeowner: Sorry, like I said I have to leave soon. So, I really can’t talk long.

Inspector: How about I perform my inspection while you’re out, and write up a report. Then I can set an appointment with you and your husband at a time convenient for you both.

Homeowner: That sounds good. Here is my cell number 407-555-7378. Call me tonight after 6:00 p.m.

Inspector: Thank you and I look forward speaking with you both tonight with my findings.

Homeowner: Great! Thank you!

Phone Approach to Cross-Sell

Pest Prevention and Landscape to Current Customers (Using the Prospect's First Name)

Let's start smiling and dialing!

"Hello [Prospect's First Name] (pause) [Prospect's First Name], I am [Inspector's Name] with Massey Services. Is this a bad time to speak for just a moment?

[Good Morning/Afternoon/Evening] [Prospect's First Name], our records show you currently have [Lawn or Pest Prevention] service with Massey Services. I wanted to find out if our service is meeting your expectations? I am happy to hear that, and I will let your Technician, [Technician's Name], know you are satisfied with the service they are performing.

Also, I wanted to let you know included in your annual [Lawn or Pest Prevention] service is an annual complimentary [Lawn & PH soil analysis or Lawn and Irrigation audit or exterior pest pressure assessment or pest analysis, etc.] inspection and a comprehensive written analysis of your home and property. I am available to inspect your [Landscape, property, home and landscape] on [Day of the week option #1] or [Day of the week option #2], which day would be better for you?"

(See alternative if they will not be home.)

Alternative (If customer is not home but gives you permission to inspect the outside):

"I understand you will not be home, however, in order to complete an annual [Lawn & PH soil analysis or Lawn and Irrigation audit or exterior pest pressure assessment or pest analysis, etc.] inspection, would you mind if I performed an outside inspection of your [Landscape, property, home and landscape] then provide a written analysis and leave it on your door?

Great, I will be on your property on [Specific date and time] to do the outside inspection. Please review the information I will be leaving in a Massey Services door bag. Will you be available/home next [Day of the week] for me to share my findings? Perfect! I will call you then! Thank you, and we are very happy to have you as a Massey Customer!"

SINGLE-POINT RUBRICS

Single Point Rubrics

Active Listening

For demonstrating attentiveness, acknowledging concerns, and responding appropriately.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Listens attentively, acknowledges concerns, and asks follow-up questions. Examples: • Does not interrupt and allows the customer to fully express concerns. • Uses follow-up questions to clarify understanding. • Shows engagement through nodding and verbal affirmations.	

De-Escalation & Managing Difficult Customers

For handling aggressive, frustrated, or rude customers effectively.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Uses de-escalation techniques to redirect a tense or difficult interaction. Examples: • Acknowledges frustration without mirroring negative energy. • Slows speech, lowers tone, and maintains a neutral stance to defuse tension. • Shifts the conversation toward solutions while setting clear boundaries.	

Single Point Rubrics

Emotional Control & Professionalism

For maintaining composure & professionalism under pressure.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Remains calm, professional, and composed in challenging interactions. Examples: • Controls tone and body language to avoid escalating the situation. • Maintains professionalism even when the customer is rude or dismissive. • Responds with patience and confidence, not frustration or defensiveness.	

Engagement & Connection

For establishing rapport, making interactions feel natural, and keeping the customer engaged.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Establishes rapport and makes the interaction feel personal and engaging. Examples: • Uses a friendly and approachable demeanor that puts the customer at ease. • Finds a small personal connection to make the conversation feel natural. • Shows enthusiasm and genuine interest in the interaction.	

Single Point Rubrics

Nonverbal Communication

For using body language, eye contact, and gestures to reinforce engagement.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Maintains open body language, steady eye contact, and appropriate gestures. Examples: • Uses open posture and gestures to reinforce messages. • Maintains eye contact to build trust. • Avoids closed-off or distracting body language.	

Qualifying Massey & Framing Benefits

For effectively positioning Massey's value by qualifying the company and connecting features to customer benefits.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Uses clear, structured language to qualify Massey's value and connect features to customer benefits. Examples: • Clearly connects features to customer benefits, including value-added differentiators. • Uses company qualifiers (e.g., service guarantees, reputation) to build trust and reinforce credibility. • Frames explanations around customer priorities (e.g., safety, convenience, cost-effectiveness) while keeping responses clear and concise.	

Single Point Rubrics

Responding to Objections & Handling Rejection

For addressing customer concerns professionally, reframing objections, and maintaining composure in rejection.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Addresses objections professionally, reframes concerns with confidence, and provides clear solutions. Examples: • Acknowledges the concern before responding. • Uses positive language to reframe objections or de-escalate frustration. • Maintains composure and closes the conversation professionally even if the customer refuses service.	

Skepticism & Reframing Concerns

For overcoming hesitation & skepticism in customer interactions.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Recognizes customer skepticism and confidently reframes concerns into opportunities. Examples: • Acknowledges customer doubts without becoming defensive. • Uses clear, positive language to reframe hesitation into curiosity. • Provides reassurance through facts, testimonials, or service benefits.	

Single Point Rubrics

Strategic Questioning

For asking purposeful, open-ended questions that encourage customer dialogue and uncovers key concerns.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Uses well-structured open-ended questions that invite discussion and uncover customer concerns. Examples: • Begins with "What" or "How" instead of "Do you" or "Is there." • Builds on customer responses with relevant follow-ups • Adjusts questioning based on customer engagement level.	

Supporting Claims with Evidence

For reinforcing credibility through the effective use of documentation, inspection findings, and tangible proof.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Uses the inspection graph, Fast Fact Sheets, and proposal materials to justify findings. Examples: • Points to specific areas in the inspection graph to reinforce findings. • Uses Fast Fact Sheets to validate explanations. • Clearly explains how findings connect to customer concerns.	

Single Point Rubrics

Verbal Communication

For delivering clear, confident, and professional speech in customer interactions.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Speaks clearly and confidently at an appropriate pace. Examples: • Uses a steady, natural pace for clarity. • Adjusts tone based on customer engagement. • Provides explanations without overwhelming the customer.	

Value-Based Communication

For positioning service costs as long-term investments rather than immediate expenses.

I wonder...	Standards	I like...
Evidence of areas that may need growth and improvement.	Ideals performance or metrics for this activity.	Evidence of meeting or exceeding the standards.
	Frames the service as a proactive investment rather than just an expense. Examples: • Uses real-world comparisons (e.g., "This is like routine car maintenance—preventative action saves money long-term.") • Highlights cost savings through prevention rather than repair. • Adjusts framing of price based on customer priorities.	

ASSESSMENT RUBRICS

PROCTOR GUIDE: ASSESSMENT FORM: RUBRIC & COMMENTS

Category	Needs Improvement	Meets Expectations	Exceeds Expectations	Proctor Notes
Inspection Process	Skipped steps, inconsistent or incomplete approach. Missed major areas. Did not follow Massey's inside-out method.	Conducted a thorough inspection using Massey's systematic approach. Followed inside-out, clockwise process.	Demonstrated a confident, structured approach. Recognized subtle signs and adjusted techniques accordingly.	
Measurement Accuracy	Major errors in measurements, incorrect documentation, or skipped key areas.	Measurements were recorded accurately, with minimal errors. Adjustments made for unique property features.	Exceptional precision, with well-documented adjustments for irregular layouts or obstructions.	
Graph Clarity & Accuracy	Graph missing key property elements, poor labeling, lacks readability. Disorganized layout	Graph includes all required structures, entry points, problem areas, and treatment zones. Properly labeled and proportional.	Graph is highly detailed, professional, and customer-friendly. Layout is clear and enhances the sales conversation.	
Findings Explanation & Customer Communication	Struggled to articulate findings clearly or provide logical recommendations.	Findings were explained confidently and clearly, with logical recommendations. Used simple, effective language.	Findings were presented persuasively, adapting explanations to customer understanding. Strong confidence and clarity.	
Tool Usage & Documentation	Used tools incorrectly or inconsistently. Failed to document findings properly.	Used all required tools appropriately. Recorded findings clearly and professionally.	Efficient, proper use of tools with a well-structured documentation process. Minimal wasted motion.	

RUBRIC: SKEPTICAL/HESITANT CUSTOMERS

Category	Needs Improvement	Meets Expectations	Exceeds Expectations	Proctor Notes
Building Trust & Engagement	Trainee struggles to engage the customer, fails to address skepticism, or over-explains without connecting to customer concerns.	Trainee maintains engagement and addresses skepticism with clear, benefit-driven responses. Builds moderate trust.	Trainee confidently engages the customer, naturally addressing concerns and reinforcing Massey's credibility. Establishes strong trust.	
Explaining Massey's Value	Trainee provides unclear or overly technical explanations. Fails to connect features to benefits.	Trainee explains Massey's value clearly, connecting features to benefits in a way the customer understands.	Trainee presents Massey's differentiators persuasively, adapting explanations based on customer reactions.	
Handling Skepticism Professionally	Struggles to reframe objections or reinforce service importance. May become defensive or uncertain.	Acknowledges concerns and provides logical, structured responses. Remains professional.	Skillfully reframes skepticism, using examples, testimonials, or facts to reinforce service need.	
Guiding the Conversation	Trainee struggles to steer the discussion, allowing the customer to dominate or derail it.	Trainee keeps the conversation focused, guiding the customer toward service understanding.	Trainee proactively leads the conversation, addressing concerns before they arise.	
Closing the Interaction	Trainee ends the conversation abruptly or without a clear next step.	Trainee transitions smoothly to a closing statement or scheduled follow-up.	Trainee confidently closes, ensuring the customer leaves with a strong impression of Massey's value.	

Rubric: Price-Conscious or Confrontational Customers

Category	Needs Improvement	Meets Expectations	Exceeds Expectations	Proctor Notes
Confidence & Professionalism	Trainee appears hesitant, defensive, or struggles to control the conversation.	Trainee remains composed, guiding the conversation confidently while respecting the customer's concerns.	Trainee takes full control of the conversation, confidently handling objections while maintaining professionalism.	
Framing Value Over Cost	Focuses too much on price without reinforcing long-term value. May struggle to justify Massey's pricing.	Frames pricing as an investment, emphasizing benefits over cost without overselling.	Persuasively communicates Massey's value, reinforcing long-term benefits and using real-world comparisons.	
Handling Pushback & Challenging Customers	Struggles to redirect the conversation when challenged. May become defensive or overly aggressive.	Navigates objections professionally, maintaining control of the conversation while reinforcing Massey's advantages.	Seamlessly manages objections, using rapport, storytelling, and confidence to turn skepticism into interest.	
Managing Customer Expectations	Overpromises or provides unclear service expectations.	Clearly communicates what Massey's service includes and does not include.	Effectively sets expectations while reinforcing long-term benefits.	
Adapting to Customer Reactions	Struggles to pivot responses based on customer cues.	Adjusts approach based on customer reactions, maintaining composure.	Reads the customer effectively, adapting in real time to maintain engagement.	

Mod. 6 Rubric: Controlled Failure

Category	Needs Improvement	Meets Expectations	Exceeds Expectations	Proctor Notes
Maintaining Professionalism Under Pressure	Trainee becomes flustered, defensive, or disengages unprofessionally.	Remains professional and composed, even when the customer is unreceptive.	Handles rejection with confidence, leaving a positive impression and keeping the door open for future engagement.	
Recognizing When to Disengage	Pushes too hard or disengages too soon, missing opportunities to reinforce Massey's presence.	Knows when to disengage professionally, ensuring Massey is still seen positively.	Ends the conversation on a strong note, planting a future opportunity for re-engagement.	
Leaving a Lasting Impression	Customer is left frustrated or uninterested due to poor interaction management.	Customer leaves the interaction with a neutral impression of Massey.	Customer, despite rejecting service, respects the trainee's professionalism and Massey's brand.	
Active Listening & Response	Fails to acknowledge customer concerns, repeating scripted responses.	Listens actively and responds thoughtfully to customer objections.	Uses active listening to engage the customer and tailor responses effectively.	
Professional Demeanor & Confidence	Appears uncertain or unprepared, impacting customer trust.	Maintains professionalism and confidence, even when facing rejection.	Displays high confidence, keeping the interaction respectful and engaging despite customer pushback.	

Mod. 9 Rubric 1: Proposal Simulation

Category	Needs Improvement	Meets Expectations	Exceeds Expectations	Proctor Notes
Sales Process Execution	Misses or jumbles key steps across proposals; lacks logical flow or consistency.	Follows a clear, structured flow for each proposal with appropriate transitions.	Delivers each proposal with strong structure and adjusts flow based on customer reactions or proposal needs.	
Proposal Delivery	Lacks clarity, confidence, or persuasive framing; explanation is incomplete or overly scripted.	Communicates the value of each service clearly and confidently with appropriate tone and structure.	Delivers polished, customer-focused proposals with strong engagement, adapting to each service type.	
Use of Sales Materials	Fails to reference or integrate key elements from inspection reports, graphs, or customer notes.	References inspection details, graphs, and relevant documentation to support the proposal.	Seamlessly integrates all materials into the sales conversation to build value and trust.	
Customer Engagement & Objection Handling	Appears disengaged or reactive; struggles to address objections or misreads cues.	Listens attentively, responds to objections professionally, and adjusts delivery as needed.	Actively engages the "customer," responds with empathy, and reframes objections to move the sale forward.	
Closing & Next Steps	Does not attempt to close or fails to define clear next steps.	Clearly asks for the sale and outlines logical next steps with the customer.	Uses tailored closing techniques across services, confirms agreement, and reinforces customer confidence.	
Sales Packet Accuracy & Completeness	One or more packets are incomplete, contain errors, or lack required forms.	Packets are complete with accurate documentation and minimal errors.	All packets are professionally prepared, well-organized, and ready for processing.	
Professionalism & Demeanor	Appearance, tone, or behavior is inconsistent or unprofessional; lacks confidence.	Maintains professional tone, clear communication, and confident presence throughout.	Consistently exhibits polish, presence, and professionalism across all proposals.	

Rubric 2: Oral Evaluation Sample

Example Questions & Question Level Rubric	NI	ME	EE
Why is it important to tailor your introduction based on the service being proposed, and how might your approach differ between a pest and termite customer?	☐	☐	☐
A customer says, 'I want to think about it.' What would you do next, and how can you guide the conversation toward a confident decision without being pushy?	☐	☐	☐
How can your daily schedule support effective prospecting, and what tools or strategies do you use to stay organized in the field?	☐	☐	☐
(Blank for custom question)	☐	☐	☐

Notes