

RESIDENTIAL SALES

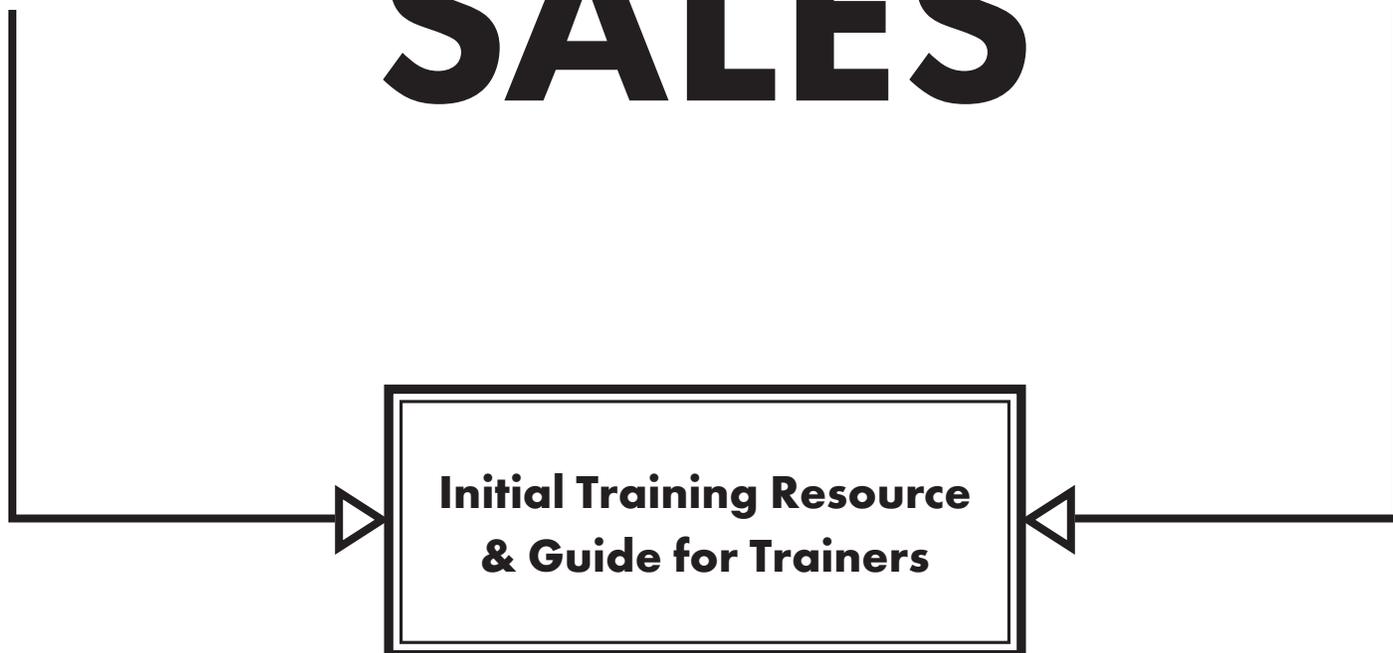
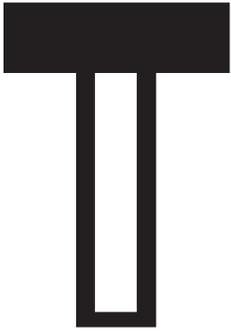


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PROGRAM OVERVIEW



The Residential Sales Trainer's Guide is designed to equip General Managers (GMs) and Sales Managers (SMs) with a structured framework for training new Sales Inspectors (SIs). As a trainer, you are instrumental in shaping the success of your team by providing clear guidance, coaching, and reinforcement of key skills.

This guide will serve as resource to teach, refine, and hone sales skills throughout the training process, ensuring that Sales Inspectors develop the competencies necessary to represent Massey Services professionally, engage with customers effectively, and achieve success in the field. Each section of this guide is designed to be actionable and practical, allowing you to integrate training into daily operations.

Whether you are conducting role-play exercises, leading field training, or verifying knowledge acquisition, this guide will help you stay on track and ensure that every Sales Inspector receives consistent and effective training. Your leadership and engagement are crucial in developing confident, knowledgeable, and results-driven Sales Inspectors who uphold Massey's high standards.

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.

Structure of the Program

This program spans four structured weeks with daily tasks, role-plays, guided fieldwork, and more to mirror real job responsibilities and features:

- **Integrated Learning:** Sales and service training are blended from the beginning. Trainees practice customer engagement, inspections, presentations, and proposals throughout the program.
- **Weekly Service Focus:** Each week centers on one service type—Termite, Pest, or Lawn—selected by the General Manager to align with service area needs.
 - ▶ All coursework, ride-alongs, and hands-on field training are anchored to the selected service.
 - ▶ Trainers may follow the suggested rotation in the example training calendar or adjust as needed.
- **Daily Skill Application:** Trainees engage in daily check-in role-plays, field activities, trainer-led session, and documentation tasks to reinforce the sales process and expectations.
- **Assessment & Evaluation:** The program includes structured checkpoints to measure knowledge, growth, and readiness:
 - ▶ **Massey University Assessments:** Weekly on-line quizzes to reinforce sales knowledge.
 - ▶ **Observation Tools:** Used during field activities and role-plays to provide targeted feedback.
 - ▶ **Skill Evaluation Assessments:** Standardized checkpoints used to confirm performance and training effectiveness.
- **Real-World Readiness:** Everything taught it meant to be applied. This program prepares trainees not just to understand the job, but perform it with confidence.

How to Use This Guide

This guide serves as a structured training tool for General Managers and Sales Managers to effectively onboard and develop new Sales Inspectors. It includes:

- Step-by-step training modules that outline key learning objectives, activities, and assessments.
- Guidance on best training practices, including role-playing, field training, and verification techniques.
- Checklists and evaluation tools to track progress and ensure skill development.
- Trainer Activity Guides to help you deploy an activity, discussion, or other learning tool.
- Trainer Explainers which explain concepts which might not be common knowledge for you.
- Training tips and reminders at all levels: module, block (sub group of a module), and activity.
- Reference materials and appendices with scripts and rubrics for consistent training execution.



THE ACTIVITIES IN THIS GUIDE HAVE AN ESTIMATED COMPLETION TIME. THEY ARE JUST THAT: A GUESS. IT MAY TAKE LESS OR MORE TIME DEPENDING ON EACH SITUATION.

**BEST
TRAINING
PRACTICES**

Foundational Principles & Responsibilities

The Importance of Training

Effective training is the foundation of a successful Sales Inspector. Strong training ensures consistency, improves performance, and fosters confidence in customer interactions. Without structured training, SIs may develop gaps in knowledge or ineffective habits that could impact customer trust and sales success.

How to Prepare for Effective Training

Preparation is key to training success. Trainers should review daily objectives, ensure all necessary materials are available, look at the activity and resource **before** you deploy it, and plan ahead for hands-on learning opportunities. Training sessions should be organized yet adaptable, allowing for real-world application, discussion, and reflection.

The Role of Objectives in Training

Objectives define what trainees must achieve at the end of each session. Clear, measurable objectives provide direction and allow trainers to assess progress effectively. Without well-defined objectives, training can become unfocused and ineffective. Each module, block, and activity comes with a goal and objectives. At the end of each unit or activity use the objectives as a skills-based checklist and ask yourself, "Can my trainee do these things, and can they prove it?"

Learning is Active, Not Passive

Learning happens best when trainers and trainees engage with the material. Passive learning, such as lectures and one-way presentations, leads to lower retention and application. Active learning ensures trainees internalize information through making them interact with the material and with you. This guide uses the following types of active learning in almost every activity:

- Scenario-based role-playing that mirrors real customer interactions.
- Hands-on field training to develop technical and customer engagement skills.
- Guided discussions, reflections, and problem-solving exercises that promote critical thinking.

Additionally, active learning **requires purposeful engagement**. The brain learns best when information is applied, revisited, and reinforced through practical exercises. Trainers should:

- Encourage hands-on participation and discussions.
- Provide structured repetition to solidify key concepts.
- Integrate real-world applications early and often.

The Truth About Multitasking and Split Attention

The concept of "split attention" or "multitasking" is a lie. The human brain is biologically incapable of what most people call "multitasking". Instead of doing multiple things at once, the brain rapidly switches focus between tasks, which is mentally exhausting and inefficient. This leads to:

- **Cognitive Overload:** Switching between tasks depletes mental energy and chemical resources faster.
- **Reduced Efficiency:** Errors increase, and task completion slows down.
- **Mental Fatigue:** Constant task-switching leaves individuals physically drained and less productive.

The Better Approach: Single-Task Focus

To optimize learning and retention, trainees should:

- **Prioritize tasks:** Focus on one skill or learning objective at a time whenever possible.

- **Practice sequential learning:** Complete one task fully before moving on to the next.
- **Eliminate distractions:** Do your best to be in an environment where distractions are minimized.

Training Application

- Ensure training sessions emphasize one core skill, or two related skills, at a time.
- Reinforce the principle that deep focus results in stronger retention.
- Help trainees build habits of organized, goal-oriented work rather than rapid task-switching.

Asking the Right Questions

Trainers should use open-ended, thought-provoking questions to engage trainees and assess their understanding. There are examples included in many of the activities for you to use or follow. Effective questioning techniques include:

- **Encouraging reflection:** “What strategies do you think would work best in this situation?”
- **Checking comprehension:** “Can you explain why this step is important in the sales process?”
- **Guiding critical thinking:** “How would you handle a hesitant customer differently?”

By fostering deeper thinking, trainers help Sales Inspectors develop problem-solving skills essential for their roles.

Role-Playing with Impact

Role-playing is a critical tool for practicing and refining communication and sales techniques in a low-stakes environment. You should be role-playing as much as possible with your trainee.

The Purpose of Role-Play in Training

- **Building Confidence:** Ensures Sales Inspectors feel comfortable initiating conversations, handling objections, and guiding the sales process.
- **Developing Communication Skills:** Reinforces verbal and non-verbal communication, active listening, and questioning techniques.
- **Reinforcing the 8-Step Sales Process:** Allows Sales Inspectors to practice sales techniques before working with real customers.
- **Enhancing Adaptability:** Helps Sales Inspectors adjust responses based on customer cues and objections.
- **Reducing Mistakes in Live Sales Interactions:** Provides a safe environment for practicing and refining approaches.

Why Iterative Role-Play is Necessary

Role-playing must be repeated with increasing complexity or changing scenario elements to reinforce learning. This ensures Sales Inspectors progress from basic scripted interactions to realistic, adaptive conversations. The guided role-plays in this guide include:

- **Skill Progression:** Early role-plays focus on foundational skills, while later sessions incorporate advanced strategies.
- **Immediate Feedback & Refinement Tools:** Trainers provide feedback after each session, allowing for continuous improvement.
- **Building Sales Muscle Memory:** Repeated practice enables Sales Inspectors to instinctively apply best practices.
- **Reducing Anxiety in Real Sales Situations:** Prepares Sales Inspectors for a variety of customer responses.

AI-Driven Speech Analysis (Siro)

Massey is piloting an AI tool called Siro for role-plays. If you are part of the pilot, you will use this tool in every role-play in this guide and in your daily tasks. This tool will help:

- **Evaluate Speech Clarity:** Assesses pacing, tone, and inflection.
- **Measure Engagement Levels:** Identifies vocal inflections that drive better interactions.
- **Provide Data-Driven Feedback:** Analyzes responses for continuous improvement.
- **Enforce Accountability:** Siro reports its data to upper management allowing them to see your engagement and dedication to training your new Sales Inspectors.

Writing Things Down: Trainees

Encouraging trainees to take notes helps reinforce learning and provides a reference for future application. Trainers should incorporate organized note-taking into daily training sessions. Writing helps:

- Organize thoughts and summarize key takeaways.
- Reinforce retention by engaging multiple cognitive processes.
- Create accountability for tracking progress and areas of improvement.

Writing Things Down: Trainers

Just as note-taking benefits trainees, it's equally crucial for you. As managers, you interact with multiple people – team members, customers, and trainees – and juggle numerous responsibilities. Writing things down helps:

- **Maintain Clarity and Organization:** Capture important details from meetings, conversations, and training sessions to prevent information overload.
- **Track Trainee Progress:** Document individual trainee performance, feedback, and development plans to ensure consistent and effective coaching, and reduce confusion especially if you have multiple team members you are training.
- **Enhance Communication:** Record key decisions, action items, and follow-up steps to facilitate clear communication with team members and leadership.
- **Improve Time Management:** By externalizing information, you free up mental space and reduce the risk of forgetting crucial tasks or details.
- **Provide Consistent Feedback:** Document specific examples of trainee performance, both positive and negative, to provide targeted and constructive feedback.
- **Create a Reference for Future Training:** Building a library of notes and training sessions allows for consistent messaging and the ability to find information quickly.

Give your brain a break by writing things down in a dedicated place. Whether it's a digital notebook, a physical journal, or a structured note-taking system, consistent documentation will enhance your effectiveness as a trainer and manager.

Involving Others in Training

Training is not limited to the Sales Manager or General Manager alone. Leveraging experienced Sales Inspectors, Service Managers, and other senior team members as mentors enhances the learning experience. This provides:

- **Different Perspectives:** Experienced team members provide insights that complement their training.
- **Hands-On Guidance:** New hires learn best from those actively performing the job on a regular basis.
- **Collaborative Learning:** Peer-to-peer coaching strengthens team dynamics and knowledge-sharing.

Guidelines for Involving Others in Training

Never dump a trainee on a unsuspecting team member. Be deliberate and prepare both the team member and the trainee:

- **Brief Beforehand:**
 - ▶ Explain the objective and expected outcomes.

- ▶ Review any materials or tools they'll need.
- Verify Afterward:
 - ▶ Confirm the trainee met the objectives.
 - ▶ Address any gaps in learning immediately.

Assigning mentors and training partners fosters a culture of continuous learning and professional growth.

The Service Center is Always Training

Training doesn't stop after onboarding or the initial training period ends—it happens every day in the service center. Every interaction provides an opportunity to reinforce skills, develop new strategies, and model professional behavior. Trainers and managers should:

- **Encourage learning through real-time coaching:** Provide feedback during day-to-day operations.
- **Foster a culture of improvement:** Reinforce that training is an ongoing process, not just a phase.
- **Ensure alignment with company values:** Maintain professionalism and uphold training standards in all interactions.

Why Verification Matters

Verification ensures Sales Inspectors have **absorbed and can apply key concepts**. It is not simply a checklist—it is a **deliberate evaluation of skills and knowledge**. Trainers must assess learning through:

- **Observation:** Watching Sales Inspectors apply skills in training sessions and real-world scenarios, identifying success and areas for improvement, and addressing those items.
- **Practical Demonstrations:** Ensuring Sales Inspectors can execute **inspections, sales presentations, and customer interactions** confidently.
- **Knowledge Checks:** Asking relevant questions to confirm understanding.

Verification Assessments & Training Audit

At key points, trainees will complete **systematic and targeted verification exams** to assess their practical skills and knowledge. These exams are **skills-based, proctored, and serve as checkpoints** for both the **trainee's abilities** and the **trainer's effectiveness**.

- **Weekly online informational assessments** help reinforce learning and track progress.
- **Verification exams are typically not proctored by the trainer.** In cases where alternative proctoring arrangements are necessary, trainers must receive permission before administering an exam.
- **The final evaluation will be conducted by a Regional Manager or Sales Director.**

Training Audits

If a Sales Inspector **fails a verification exam and the retest, a formal training audit** will be conducted to determine gaps and corrective measures.

KEY TRAINER DUTIES

Leading Training Sessions

General Managers (GMs) serve as the primary trainers in the program, responsible for structuring and leading training sessions that align with program objectives. In larger service centers, a Sales Manager (SM) may take the lead on sales training. This includes:

- Delivering lessons in a clear, engaging, and orderly manner.
- Ensuring that training is interactive and encourages participation.
- Balancing theoretical instruction with practical application.

Providing Real-Time Feedback and Coaching

Trainers must actively observe trainees and provide immediate feedback to reinforce learning and correct mistakes. Effective coaching involves:

- Offering constructive feedback during and after exercises.
- Using role-play and field exercises to refine communication and sales techniques.
- Encouraging self-reflection and peer feedback to enhance learning.

Monitoring Trainee Progress

Tracking and verifying progress ensures trainees develop the necessary skills. Trainers should:

- Use checklists and evaluation forms to document skill development.
- Conduct formal and informal knowledge assessments.
- Identify knowledge gaps early and adjust training accordingly.

Creating a Supportive Learning Environment

The training environment should be one of support and accountability. Trainers must:

- Foster a culture of continuous improvement and professional growth.
- Encourage trainees to ask questions and engage in discussions.
- Ensure training remains professional and goal-oriented.

Facilitating Hands-On Learning

Trainees learn best by doing. Trainers should:

- Incorporate field-based training, ride-alongs, and real-world application.
- Gradually transition trainees from observation to active participation.
- Ensure that trainees apply skills in a well-regulated and supervised manner before working independently.



**FEEL FREE TO MODIFY
ANY ACTIVITY TO MEET
YOUR NEEDS.**

Role-Playing and Simulation Exercises

Trainers should leverage role-playing exercises to refine skills before real-world interactions. Effective role-playing:

- Simulates customer interactions and sales scenarios.
- Helps trainees build confidence and adaptability.
- Reinforces best practices and sales techniques through structured practice.

Managing Time and Training Efficiency

Trainers must effectively manage time to ensure all key topics are covered. This includes:

- Prioritizing training objectives to maximize learning in the available timeframe.
- Breaking down sessions into manageable segments.
- Balancing instructional time with hands-on application.

Ensuring Training Objectives Are Met

Each training session should have defined objectives. Trainers are responsible for:

- Clearly communicating goals at the start of each session.
- Reinforcing objectives throughout hands-on training and discussions.
- Assessing whether objectives were met before moving forward.

Collaborating with Leadership and Team Members

Training success requires collaboration with leadership and experienced team members. Trainers should:

- Work closely with Service Managers and, in larger service centers, Sales Managers.
- Leverage experienced Sales Inspectors to mentor trainees.
- Maintain alignment with company standards and training expectations.

Conducting Verification Assessments

Verification assessments ensure that trainees are meeting required competency levels. Trainers should:

- Conduct informal checks daily to gauge comprehension and readiness.
- Prepare trainees for formal verification assessments conducted by a third party.
- Address skill gaps proactively to ensure successful assessment outcomes.

Enforcing Accountability and Conducting Training Audits

If a trainee fails verification assessments or struggles to meet expectations, a training audit may be required. Trainers must:

- Identify performance gaps and implement corrective measures.
- Collaborate with leadership to reassess the training approach.
- Ensure that struggling trainees receive additional support and coaching.

By upholding these responsibilities, General Managers—and in larger service centers, Sales Managers—play a pivotal role in the development of Sales Inspectors, ensuring that they are fully equipped for success in the field.

**EXAMPLE
TRAINING
CALENDAR**

Understanding the Example Training Schedule

This example training schedule provides a structured framework for the residential sales training program. While it follows a service focus order of Pest, Lawn, and Termite, you have the flexibility to adjust the sequence based on training needs and field-training opportunities when necessary.

To tailor this schedule, simply swap out the service-focused ride-alongs, unstructured role-play themes, and Massey University service coursework for those relevant to your chosen service order.

Guided Learning & Progressive Skill Development

This training approach in this calendar is designed to build confidence and competence through structured learning, guided practice, and real-world application.

- **Skill-Based Modules** – Training is grouped by **skills, not time**, allowing focused development of specific competencies.
- **Guided Fieldwork Enhances Ride-Alongs** – These Trainer Guide activities provide **structure and objectivity** to ride-alongs and should be **layered onto existing opportunities** rather than scheduled separately.
 - ▶ They include a **built-in gradual release of responsibility**, transitioning trainees from **observing to assisting and ultimately completing tasks independently** in field training.
- **Guided Role-Plays Are Structured & Skill-Specific** – Built into the **Trainer Guide**, these focus on **specific sales and communication skills** (e.g., closing, handling hesitant customers) and include assessment and **feedback mechanisms**.
- **Daily Check-In Role-Plays as Training Opportunities** – These are **more than just practice**; they are **dedicated moments** for trainers to **teach, coach, and reinforce sales process skills**. While they may have a **service theme or skill focus**, they remain **open-ended**, allowing managers to adapt based on the trainee's progress.
- **Activity Flexibility** – Activities can **introduce or reinforce skills**, depending on prior exposure. If a trainee observed inspections in **Week 1**, **Week 2's** inspection activities should **deepen their understanding and application**.
- **Pre-Work for Service Focus Weeks** – Trainees **must begin service coursework before the week it is scheduled to be the focus** to ensure they have the necessary context for **fieldwork and application**.

EACH WEEK, YOU WILL ACTIVELY PRACTICE AND APPLY ALL EIGHT STEPS OF THE SALES PROCESS.

THE TRAINER GUIDE PROVIDES STRUCTURED FOCUS ON KEY MASSEY SERVICES PRIORITIES WHILE REINFORCING ADAPTABILITY IN REAL-WORLD SCENARIOS.

What This Example Schedule Contains

The training calendar is divided into three key sections:

1. **Daily Tasks** – These include:
 - Role-Plays (structured & unstructured, some with service themes)
 - Trainer Guide & Activities (including guided role-plays)

- Massey University Coursework (digital learning components)
 - Manager Tasks & Documentation (checklists, sales document reviews, and essential discussions)
2. **Weekly Tasks** – These must be completed by the end of the week but allow flexibility in scheduling:
- Ride-alongs & service training
 - Sales document review & practice
 - Fieldwork assignments & sales training exercises
 - Skill evaluations
3. **Trainer Notes & Reminders** – This section provides:
- Scheduling guidance
 - Alternative approaches if an activity cannot be completed as planned
 - Training best practices to maximize efficiency and engagement



THIS EXAMPLE CALENDAR FOCUSES ON FLORIDA. YOU WILL FIND AN EXAMPLE FOR OTHER STATES IN THE SALES SECTION OF MILO IN MASSEY UNIVERSITY.



DO NOT SIT THE NEW SALES INSPECTOR IN FRONT OF A COMPUTER ALL DAY: THAT IS NOT TRAINING, AND A POOR LEARNING PRACTICE.

WEEK 1: OVERVIEW

Service Theme: Overview of all provided services

Focus: Onboarding, Working at Massey, Customer Engagement, The Genesis & The Call, 8-Step Sales Process: Step 1 - The Introduction

Day	Role-Playing @ Check-In	Trainer Guide Activities	Massey University Coursework	Manager Tasks & Docs
1	-	Module 1: Block 1 - Activities 1.1.1 - 1.1.7	- TRM 1116 - Upload Your Filled Out Florida PCID Application - MAN 7002	- SAL 3000: Day 1 Checklist (Some checklist items require your comments.)
2	Steps 1-4	Module 1: Blocks 2-4 - Activities 1.2.1 - 1.4.3 - 1.4.2 is a guided role-play	- SAF 1011 - MAN 7001 (Microlearning - part of Activity 1.4.3)	- Introduce & Provide Initial Review of Core Sales Documents
3	Steps 5-6	Module 2: Blocks 1-2 - Activities 2.1.1-2.2.3* - 2.1.3 is a guided role-play	- MAN 7003 (Microlearning - part of Activity 2.1.3) - Begin Pest (PPP) Coursework	- Introduce Massey Qualifiers & Benefits - Practice DSAR completion and continue reviewing sales documents
4	Steps 7-8	Module 3: Blocks 1-2 - Activities 3.1.1 - 3.2.2 - 3.2.2 is a guided role-play	- Continue PPP Coursework	- Practice DSAR completion and continue reviewing sales documents & Features & Benefits.
5	Steps 1-8 (Pest & Mosquito Focus)	Module 3: Blocks 2-3 - Activities 3.3.1 - 3.3.3	- Continue PPP Coursework - SAL 4001: Week 1 Online Sales Assessment	- SAL 3001: Week 1 Checklist (Some checklist items require your comments.) - Practice DSAR completion and continue reviewing sales documents & Features & Benefits.

Before the Week Ends: Ride-Along, Service, or Sales Training Tasks to Complete

- Ride-Along with a Pest Technician.
- Ride-Along with a Lawn Specialist (if applicable).
- Mosquito Treatment with a Service Manager.
- Lawn Aeration & pH Test with a Service Manager (if applicable).
- Complete the first half of the Pest Coursework on Massey University in preparation for next week.
- Read Chapters 1-7 of the Sales Manual.
- Massey University: SAL 4001: Week 1 Online Sales Assessment



Trainer Notes & Reminders



- ★ **Look ahead and plan accordingly.** Review the training schedule in advance to ensure **all field training, role-plays, and discussions are properly scheduled and prepared.**
- ★ **Schedule and brief all involved parties.** If a **Service Manager, technician, or other team member** is participating in field training, make sure they understand the **goal(s) and expectations** for the session.
- ★ **Use SIRO if your location is part of the pilot.** Trainers participating in the pilot program must use **SIRO AI-driven speech analysis in every role-play** in the guide and in daily tasks. This tool evaluates speech clarity, measures engagement, and provides data-driven feedback.
- ★ **Trainer Guide activities should remain structured but flexible.** Trainers can modify activities to **better suit the training environment or logistics**, but they must **stay within the general framework** to keep training consistent and relevant.
- ★ **Layer Field Activity 2.2.3 into an Existing Ride-Along.** Maximize training efficiency by combining activities where it makes sense.
- ★ **The trainee should begin service coursework before the week it is scheduled to be the focus.** Completing coursework in advance provides essential context for hands-on training and fieldwork, allowing the trainee to apply knowledge more effectively.
- ★ **Do not sit the new Sales Inspector in front of a computer all day: that is not training, and a poor learning practice!**

WEEK 2: OVERVIEW

Day	Role-Playing @ Check-In	Trainer Guide & Activities	Massey University Coursework	Manager Tasks & Docs
1	Steps 1-8 (<i>Pest Scenario w/Roaches & Ants</i>)	Module 4: Block 1 - Activities 4.1.1 - 4.1.2	- Continue/Complete PPP Coursework	- Introduce & Provide Initial Review of Pest-Specific Sales Documents - Practice DSAR completion and continue reviewing sales documents & Features & Benefits.
2	Steps 1-8 (<i>Mosquito Scenario</i>)	Module 4: Block 2 - Activities 4.2.1 - 4.2.2	- <u>Complete PPP Coursework</u>	- Practice DSAR completion and continue reviewing sales documents & Features & Benefits.
3	Steps 1-8 (<i>Pest Scenario w/Mice, Rats, & Other Rodents</i>)	Module 5: Block 1 - Activities 5.1.1 - 5.1.2 - (Do 4.2.2 if not completed)		- Practice DSAR completion and continue reviewing sales documents & Features & Benefits.
4	- Steps 1-8 (<i>Mosquito Scenario</i>) - Working w/Techs & Specialists	Module 5: Block 2 & Module 8 - Activities 5.2.1 - 5.2.2, 8.1.1 - 5.2.2 is a guided role-play	- Begin Lawn (LWN) Coursework - MAN 7000 (<i>Microlearning - part of Activity 8.1.1</i>)	- Practice DSAR completion and continue reviewing sales documents & Features & Benefits.
5	Steps 1-8 (<i>Trainer's Choice</i>)	Module 4: Block 3, Module 5: Block 2 - Skill Evaluation Assessment - Activity 4.3.1 (SAL 3010) - Activity 5.2.3	- Continue LWN Coursework - SAL 4002: Week 2 Online Sales Assessment	- SAL 3002: Week 2 Checklist (<i>Some checklist items require your comments.</i>) - Practice DSAR completion and continue reviewing sales documents & Features & Benefits.

Before the Week Ends: Ride-Along, Service, or Sales Training Tasks to Complete

- **Sales:** Run 5 Sales Appointments with the GM (*preferably in 1 day, 2 days maximum*).
 - ▶ **Appointments 1-3:** The GM provides guidance and feedback as needed.
 - ▶ **By the 4th appointment at the latest,** the trainee must take full responsibility for the sales conversation.
 - The GM only observes and provides support during proposals if absolutely necessary.
- **Secure 1 Pass-It-On Referral** at a current customer's location while in the field.

- **Field Work:** Spend ½ day prospecting in a **New Construction Neighborhood** (or *Massey Neighborhood* if no new construction is available).
- Complete a Roadmap to Success.
- Complete the first half of the Lawn Coursework on Massey University in preparation for next week.
- Read **Chapters 8-13** of the Sales Manual.
- **Massey University: SAL 4002: Week 2 Online Sales Assessment**
- **SAL 3010: Skill Verification & Evaluation Assessment – Graph It Like You Mean It!**



Trainer Notes & Reminders



- ★ **No Field-Training Opportunities for 4.2.2?** No problem! **Reschedule** it or conduct the exercise in the **Service Center** or a suitable nearby area.
- ★ **No Field-Training Opportunities for 5.2.3?** That's okay! **Do additional role-play** or schedule it on **another day**.
- ★ **The Inspection & Graphing Assessment must be complete no later than the first day of Week 3**, if it has not already taken place.
- ★ **Look ahead and plan accordingly.** Review the training schedule in advance to ensure **all field training, role-plays, and discussions** are properly scheduled and prepared.
- ★ **Schedule and brief all involved parties.** If a **Service Manager, technician, or other team member** is participating in field training, make sure they understand the **goal(s) and expectations** for the session.
- ★ **Use SIRO if your location is part of the pilot.** Trainers participating in the pilot program must use **SIRO AI-driven speech analysis in every role-play** in the guide and in daily tasks. This tool evaluates speech clarity, measures engagement, and provides data-driven feedback.
- ★ **Do not sit the new sales inspector in front of a computer all day:** that is not training, and a poor learning practice!

WEEK 3: OVERVIEW

Service Theme: Lawn

Focus: 8-Step Sales Process: 8-Step Sales Process: Steps 5-8 - Qualify Massey Services, Features & Benefits, Closing, Asking for Referrals

Day	Role-Playing @ Check-In	Trainer Guide & Activities	Massey University Coursework	Manager Tasks & Docs
1	- Steps 1-8 (<i>Lawn Scenario</i>) - Knocking on the Door	Module 6: Block 1 - Activities 6.1.1 - 6.1.2	- Continue/Complete LWN Coursework	- Introduce & Provide Initial Review of Lawn-Specific Sales Documents - Practice DSAR completion and continue reviewing sales documents & Features & Benefits.
2	- Steps 1-8 (<i>Lawn Scenario w/Trees & Shrubs</i>) - Delivering New Construction Guarantees	Module 6: Block 2 - Activities 6.2.1 - 6.2.2 - 6.2.2 is a guided role-play	- <u>Complete LWN Coursework</u>	- Practice DSAR completion and continue reviewing sales documents & Features & Benefits.
3	Steps 1-8 (<i>Attic Upgrade Scenario</i>)	Module 7: Block 1 - Activities 7.1.1 - 7.1.2 - 7.1.2 is a guided role-play	- Begin Termite (TRM) Coursework	- Practice DSAR completion and continue reviewing sales documents & Features & Benefits.
4	Steps 1-8 (<i>Attic Upgrade Scenario w/Overcoming Trial Closing & Asking for Referrals</i>)	Module 7: Block 2 & Module 8 - Activities 7.2.1-7.2.2, 8.1.2 - 7.2.2 is a guided role-play	- Continue TRM Coursework	- Practice DSAR completion and continue reviewing sales documents & Features & Benefits.
5	Steps 1-8 (<i>Irrigation Scenario or Trainer's Choice if irrigation is not a provided service</i>)	Module 6: Block 3, Module 7: Block 2 - Skill Evaluation Assessment - Activity 6.2.3 (SAL 3011) - Activity 7.2.3	- Continue TRM Coursework - FDACS 13665 Checklist - SAL 4003: Week 3 Online Sales Assessment	- SAL 3003: Week 3 Checklist (<i>Some checklist items require your comments.</i>) - Practice DSAR completion and continue reviewing sales documents & Features & Benefits.

Before the Week Ends: Ride-Along, Service, or Sales Training Tasks to Complete

- Run a minimum of 5 Sales Appointments throughout the week.
- Ride-Along: Irrigation Technician (*if applicable*).

- Service Manager & New Inspector perform a **Landscape Initial Service**.
- Service Manager & New Inspector perform a **Pest Prevention Initial Service**.
- Service Manager & New Inspector perform a **Mosquito Service**.
- **Pass-It-On Referral: Second Chance!** (if not secured last week).
- Complete the first half of the Termite Coursework on Massey University in preparation for next week.
- Review Chapters 3-8 of the Sales Manual.
- **Massey University Week: SAL 4003: Week 3 Online Sales Assessment**
- **SAL 3011: Skills Evaluation – Qualifying Massey’s Benefits & Features**



Trainer Notes & Reminders



- ★ **Kill 2 birds with 1 stone.** Layer field-training activities from the guide onto existing field-training!
- ★ **The Qualifying Massey’s Benefits & Features Assessment must be done first day of Week 4, if it has not already taken place.**
- ★ **Look ahead and plan accordingly.** Review the training schedule in advance to ensure **all field training, role-plays, and discussions are properly scheduled and prepared.**
- ★ **Schedule and brief all involved parties.** If a **Service Manager, technician, or other team member** is participating in field training, make sure they understand the **goal(s) and expectations** for the session.
- ★ **Use SIRO if your location is part of the pilot.** Trainers participating in the pilot program must use **SIRO AI-driven speech analysis in every role-play** in the guide and in daily tasks. This tool evaluates speech clarity, measures engagement, and provides data-driven feedback.
- ★ **Do not sit the new Sales Inspector in front of a computer all day: That is not training, and a poor learning practice!**

WEEK 4: OVERVIEW

Service Theme: Termite

Focus: 8-Step Sales Process: Steps 1-8

Day	Role-Playing @ Check-In	Trainer Guide & Activities	Massey University Coursework	Manager Tasks & Docs
1	- Steps 1-8 (<i>Termite Scenario</i>) - Cross-Selling Current Customer	Module 8 - Activities 8.3.1	- Continue/Complete TRM Coursework	- Introduce & Provide Initial Review of Termite-Specific Sales Documents - Practice DSAR completion and continue reviewing sales documents & Features & Benefits.
2	Steps 1-8 (<i>Termite Scenario</i>)	Module 9 - Activities 9.1.1	- <u>Complete TRM Coursework</u>	- Practice DSAR completion and continue reviewing sales documents & Features & Benefits. - Prepare trainee for final evaluation
3	Steps 1-8 (<i>Termite Scenario w/Fume</i>)	Module 9 - Activities 9.1.1		- Practice DSAR completion and continue reviewing sales documents & Features & Benefits. - Prepare trainee for final evaluation
4	Steps 1-8 (<i>Trainer's Choice</i>)	Module 9 - Final Skill Evaluation - Activity 9.1.2 (SAL 3012) - See <i>Trainer Notes & Reminders</i>		- Prepare trainee for final evaluation/have trainee participate in final evaluation* (See <i>Trainer Notes & Reminders</i>)
5	Steps 1-8 (<i>Trainer's Choice</i>)	Module 9 - Final Skill Evaluation - Activity 9.1.2 (SAL 3012) - See <i>Trainer Notes & Reminders</i>	- SAL 4004: Final Online Sales Assessment	- SAL 3003: Week 4 Checklist (<i>Some checklist items require your comments.</i>) - Prepare trainee for final evaluation/have trainee participate in final evaluation* (See <i>Trainer Notes & Reminders</i>)

Before the Week Ends: Ride-Along, Service, or Sales Training Tasks to Complete

- Run a minimum of 5 Sales Appointments throughout the week.
- Ride-Along: Termite Monitoring Technician (1/2 day minimum).
- Ride-Along: Termite Technician.
- Service Manager & New Inspector perform a Liquid Termite Service.

- Service Manager & New Inspector perform a Bait Install.
- Review Chapters 9-13 of the Sales Manual.
- Massey University: SAL 4004: Final Online Sales Assessment
- SAL 3012: Final Evaluation – Proposal Simulation & Oral Exam

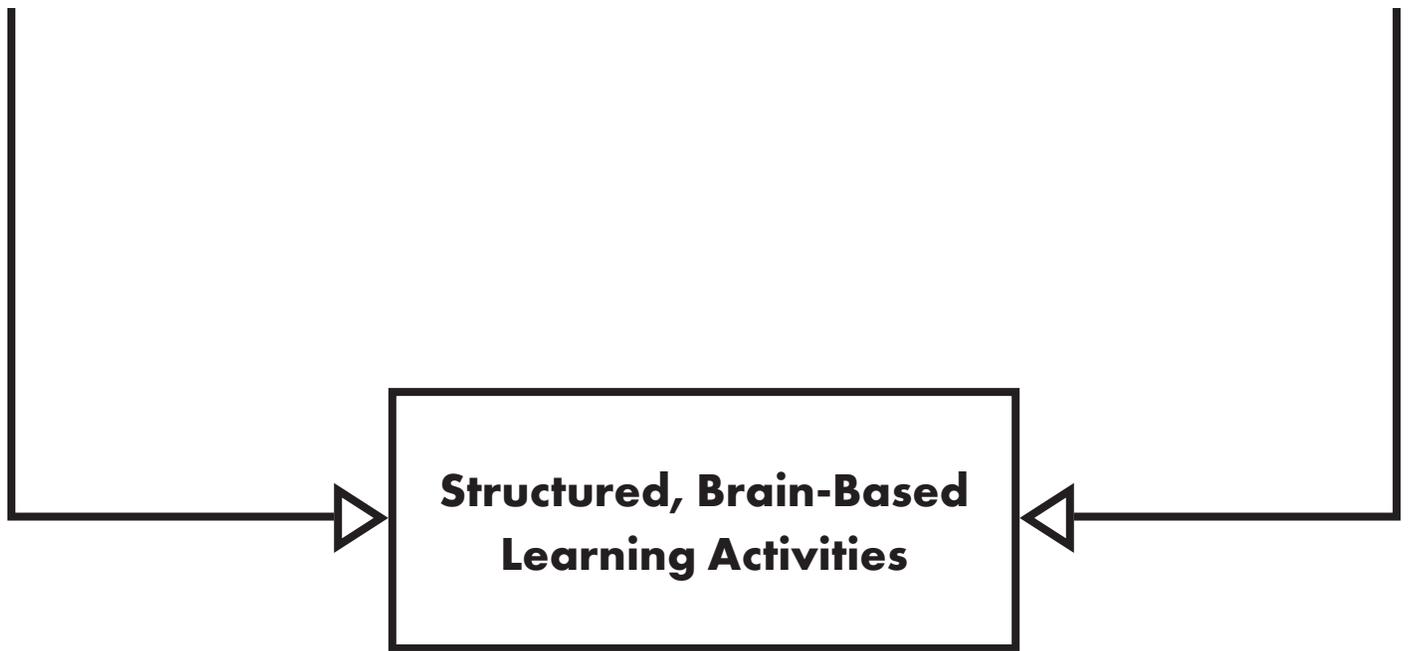


Trainer Notes & Reminders



- ★ Kill 2 birds with 1 stone. Layer field-training activities from the guide onto existing field-training!
- ★ Revisit any guided role-plays to practice specific communication skills or hone in on certain elements like closing techniques or qualifying.
- ★ Final evaluation must be complete no later than one week beyond the end of this final week.
- ★ The Qualifying Massey's Benefits & Features Assessment must be done no later than two days from this day if it has not already taken place.
- ★ Look ahead and plan accordingly. Review the training schedule in advance to ensure all field training, role-plays, and discussions are properly scheduled and prepared.
- ★ Schedule and brief all involved parties. If a Service Manager, technician, or other team member is participating in field training, make sure they understand the goal(s) and expectations for the session.
- ★ Use SIRO if your location is part of the pilot. Trainers participating in the pilot program must use SIRO AI-driven speech analysis in every role-play in the guide and in daily tasks. This tool evaluates speech clarity, measures engagement, and provides data-driven feedback.
- ★ Do not sit the new Sales Inspector in front of a computer all day: That is not training, and a poor learning practice!

MODULES



MODULE 1

Onboarding, Operations, & Professionalism

GOAL

To ensure new Sales Inspectors develop a strong foundation in Massey's mission, daily operations, professional expectations, and field readiness. This module introduces the training structure, company mission, key operational responsibilities, and foundational elements that support success in the role.

OBJECTIVES

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

1. Understand and uphold Massey's professional standards, including appearance, conduct, and communication.
2. Develop awareness of operational responsibilities, policies, and daily expectations.
3. Recognize how professionalism and adherence to operational procedures contribute to trust and credibility.
4. Become familiar with essential tools, reporting processes, and service center workflows.

MODULE BREAKDOWN

This module consists of four structured blocks designed to progressively introduce new Sales Inspectors to Massey's expectations, operations, and communication standards.

The estimated time for Module 1 completion is approximately 10–11 hours (1.5 days), but pacing may vary based on individual needs.

- **Block 1: Day 1 - Core Onboarding Tasks and Introductions** - Focus: Introducing Massey's mission, team, and essential daily processes.
- **Block 2: Professional Image & Field Readiness** - Focus: Professional appearance, vehicle readiness, and fleet policies.
- **Block 3: Daily Operations & Compliance** - Focus: the DSAR and operational responsibilities.
- **Block 4: Block 4: Communication Fundamental & Customer Engagement** - Focus: Developing communication skills and preparing for customer interactions.

MODULE TIPS

- Follow the sequence, but adjust as needed. While activities are structured logically, some flexibility is allowed based on Service Center schedules.
- Monitor pacing and energy levels. Allow short breaks between intensive sessions like role-playing.
- If ahead of schedule, encourage trainees to begin exploring service offerings in more depth or proceed to the next activity.
- Reinforce foundational knowledge and remind trainees that this module is about building understanding and confidence, not perfection.



TIE EVERYTHING BACK TO SALES SUCCESS: EVEN OPERATIONAL TASKS IMPACT CUSTOMER TRUST AND CREDIBILITY—HELP TRAINEES CONNECT THE DOTS.

Block 1: Day 1 - Core Onboarding Tasks & Introductions

Create a Welcoming Environment

Make the new team member feel valued with introductions, a facility tour, and a warm welcome.

Pace the Day

Balance information with breaks and hands-on activities to prevent information overload.



Encourage Interaction

Foster open dialogue and invite questions to build trust and engagement.

GOAL

To ensure the new hire feels welcomed, understands Massey's culture and expectations, and begins building foundational knowledge about the training program and Massey's core services.

OBJECTIVES

By the end of Block 1, new hires will be able to:

1. Engage with the Service Center team and environment through guided tours, team introductions, and discussions of expectations
2. Familiarize themselves with Massey's training materials, program structure, and learning objectives.
3. Describe Massey's core services and sales philosophy, including the 8-Step Sales Process.
4. Navigate and utilize Massey's digital tools, including Workday, LMS, and company email, ensuring they can complete required compliance training and access necessary resources.

AGENDA

Block 1 should take roughly 4.5 hours to complete.

Below are the items which need to be completed today. They do not necessarily need to be completed in the order they are listed, but they must be done by the end of Day 1.

- 1.1.1: Welcome, Service Center Tour & Team Introductions
- 1.1.2: Complete Any Remaining Paperwork
- 1.1.3: Navigating Massey's Digital Tools
- 1.1.4: Introduction to Training Program and Materials
- 1.1.5: Why We Do What We Do and How
- 1.1.6: Checking In
- 1.1.7: Day 1 Wrap-Up & Reflection

REMINDERS

- Ensure the new Sales Inspector has a chance to eat—consider taking them out or ordering in.
- Make sure the new Sales Inspector gets regular breaks.
- Use the checklists in this guide to ensure all necessary items are addressed.
- If the trainee has downtime, encourage observation of office activities (e.g., phone conversations, check-ins with other inspectors) or have them begin items in Massey University:
 - ▶ SAF 1011: Safe Driver Improvement Course Initial
- Take time to jot down your observations and feedback in the notes sections. Don't rely on your memory to hold everything. It won't.



DO NOT SIT THE NEW SALES INSPECTOR IN FRONT OF A COMPUTER ALL DAY: THAT IS NOT TRAINING, AND A BAD FIRST IMPRESSION.

WELCOME, SERVICE CENTER TOUR & TEAM INTRODUCTIONS

GOAL

To create a welcoming first impression, ensure new hires are familiar with Massey's workspace, logistics, and professional expectations, and help them establish early connections with their team.

OBJECTIVES

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

- Meet and begin building rapport with their 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 their workstation and understand workspace expectations.

ACTIVITY OVERVIEW

This activity must be conducted immediately on Day 1, led by a Manager, Mentor, or Designated Team Member. It includes team introductions, a Service Center tour, and workspace expectations to help the new hire feel welcomed, connected, and ready to integrate into daily operations

DETAILS

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

**There's an old saying that goes,
"You only get one chance to
make a good first impression.
So make it count!"**

NOTES

WELCOME TO MASSEY & SERVICE CENTER TOUR

TRAINER'S ACTIONS & CHECKLIST

- Team Introductions & Welcome Discussion.
 - Start with a brief welcome and overview of the day.
 - Introduce the team and key roles (see *Quick Tips for suggestions*).
 - Provide a quick overview of team roles and collaboration, including:
 - ▶ Who does what?
 - ▶ How different teams work together.
 - ▶ Who to reach out to for specific questions or support.
- Service Center Tour & Workspace Overview
 - Lead the new hire through key areas, ensuring they:
 - ▶ Locate workspaces (individual desks, offices, shared areas).
 - ▶ Identify break areas (kitchen, coffee stations, restrooms).
 - ▶ Find supply areas (forms, equipment, tools, PPE, etc.).
 - ▶ Review restricted zones (safety areas, storage, GM's office access).
 - ▶ Understand parking locations and any guidelines.
- Workspace Standards & Safety Resources
 - Reinforce workspace professionalism:
 - ▶ Cleanliness expectations for shared areas.
 - ▶ Workstation organization and shared resource guidelines.
 - Explain safety features
 - ▶ Emergency exits and first aid kit locations.
 - Guide the new hire in workspace setup and expectations:
 - ▶ Where to store personal items.
 - ▶ Workstation organization and cleanliness expectations.
 - ▶ Shared resource usage and collaboration norms.
- Activity Wrap-Up



QUICK TIPS

- ★ **Keep it Pacing Right:** Don't rush, but avoid excessive details—save those for later sessions.
- ★ **Set the Right Tone:** A well-structured tour signals organization, professionalism, and efficiency.
- ★ **Balance introductions:** Avoid overwhelming the new Team Member with too much information or a long list of names. Instead, provide context like this: *"This is Alex, our Office Manager. They'll help you with onboarding paperwork."*

TRAINER MATERIALS

- Service Center Map (if applicable)

ACTIVITY WRAP-UP

- Confirm the new hire is comfortable with their workspace and key areas.
- Provide an opportunity for questions before moving on.

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Check-In:** Confirm the new hire understands workspace responsibilities, team structure, and key resources through questions or a brief task.

COMPLETE ANY REMAINING ONBOARDING PAPERWORK

GOAL

To ensure all employment compliance forms, HR documentation, and onboarding paperwork are completed and submitted before work-related activities begin.

OBJECTIVES

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

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

ACTIVITY OVERVIEW

This activity ensures that all onboarding compliance requirements are met before work-related activities begin. Timing should be flexible based on the availability of the Office Manager or HR Representative, but it must be completed on Day 1. If paperwork is partially completed before the start date, this step serves as a final verification and submission process.

TRAINER'S ACTIONS & CHECKLIST

- Coordinate with the Office Manager or HR Representative to complete any remaining forms
- Review and complete any remaining items such as:
 - The Compensation Plan
 - Any Benefits Items

FEEDBACK, VERIFYING, & ASSESSING

- **Checklist Review:** Office Manager verifies all required forms have been completed and submitted.

DETAILS

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



QUICK TIPS

- ★ **Avoid downtime:** Don't leave the new hire idle if this has to wait until the Office Manager needs to wait until a later time in the day for their part. Use this time for informal shadowing or observational learning opportunities while the Office Manager completes their portion of this task, or move on to the next item in Module 1 Block 1.

TRAINER MATERIALS

- Compensation Plan

NAVIGATING MASSEY'S DIGITAL TOOLS

GOAL

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

OBJECTIVES

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

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



Florida!! The PCID & WDO Endorsement MUST be completed & submitted on Day 1!!!

ACTIVITY OVERVIEW

This session must be completed on Day 1 as new hires will immediately use these systems. The trainer will guide them through the login process for Workday, LMS, and company email. Quick-read compliance policies (2-3 minute reads with a short quiz) are included in Workday/LMS onboarding. A time buffer is allocated for troubleshooting technical issues or additional HR onboarding needs.

DETAILS

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

NOTES

TRAINER'S ACTIONS & CHECKLIST

- Set Up Email & Microsoft Authenticator:
 - Assist the new hire with setting up Microsoft Authenticator on their phone.
 - Ensure successful access to company email **before** proceeding to Workday.
- Workday Navigation:
 - Log in using company email.
 - Navigate the dashboard.
 - Access and review the profile section.
 - Explore the absence portal and how to request time off
- LMS Navigation:
 - Log in using Employee ID.
 - Review the dashboard.
 - Explore key buttons: Help and My Training.
 - Click on the Licensing & Certification box in My Training to access assigned courses and curricula.
 - Review the Notification Icon at the top left of the screen.
- Confirm the assignment and completion of any LMS Day 1 courses and IT security certifications such as:
 - IT Network Policy (KnowBe4 email)
 - Licensing Requirements
 - Mandatory HR Compliance Courses
 - Day 1 New Hire Survey (must be completed withing 3 days)

FEEDBACK, VERIFYING, & ASSESSING

- Trainer verifies the following:
 - ▶ Successful login to email, Workday, & LMS
 - ▶ Day 1 licensing courses are complete:
 - TRM 1116 Florida PCID WDO Endorsement
 - Upload Your Filled Out Florida PCID Application
 - ▶ KnowBe4 training is complete or started
 - ▶ All other Day 1 LMS courses are completed or started



QUICK TIPS

- ★ **Coordinate with IT:** IT can help you out with any email or Internet issues.
- ★ **LMS Help:** Reach out to Learning & Development for help with anything in the LMS.
- ★ **Workday Resources:** The Workday Hub in MILO has job aids for getting started and finding information. There are also learning on demand courses to practice common tasks in Workday. You can find the hub through the link below:
 - ▶ <https://bit.ly/45Hjqju>

TRAINER MATERIALS

- Microsoft Authenticator Setup Guide (on Armyant)
- List of Day 1 LMS Course Assignments & Licensing Requirements

ACTIVITY WRAP-UP

- Ensure the new hire has successfully logged into Workday, LMS, and email.
- Confirm that Microsoft Authenticator is set up and functional.
- Verify that all Day 1 LMS courses have been started and are progressing.
- Reinforce that these tools will be used daily and are critical for success.

INTRODUCTION TO THE PROGRAM & MATERIALS

TRAINER'S ACTIONS & CHECKLIST

- Distribute Essential Materials:
 - Help download The Residential Sale New Sales Inspector Workbook from MILO.
- Trainer-Led Overview:
 - What the training covers and why it's structured this way.
 - How training supports professional growth and success at Massey.
 - Importance of hands-on learning, daily check-ins, and feedback.
 - The role of role-play exercises in skill-building and practical application.
 - How field training is integrated and its importance in real-world application.
- Briefly Review the Workbook:
 - Welcome to Massey
 - Your Training Program
 - What to Expect
 - Facts about the Program
 - How to Use This Workbook
 - Self-reflection example
 - A few example pages

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Discussion:** Ensures new hires understand training expectations and structure.
- **Informal Discussion & Q&A:** Trainer ensures comprehension of training objectives and structure.
- **Trainee Confirmation:** Ability to articulate the key phases of training and expectations.



QUICK TIPS

- ★ **Engagement Tip:** Discuss how the training aligns with Massey's mission and goals. For example:
 - ▶ *Our training is designed to ensure you have the confidence and skills to excel while reflecting Massey's commitment to exceptional customer service.*
- ★ **Training Approach Tip:** Reinforce that role-playing and field training will be critical elements in learning and developing real-world skills.

TRAINER MATERIALS

- The Residential Sale New Sales Inspector Workbook
 - ▶ Located in MILO in the Sales Section

ACTIVITY WRAP-UP

- Q&A Session:
 - Address questions about training, assessments, and certification expectations.
 - Clarify how role-play and field training will be used to develop skills.

WHY WE DO WHAT WE DO AND HOW

GOAL

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

OBJECTIVES

By the end of this activity, new hires 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.

DETAILS

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

ACTIVITY OVERVIEW

This session must be completed on Day 1 to establish a foundational understanding of Massey’s service philosophy and sales approach. Trainers should emphasize how the 8-Step Sales Process aligns with Massey’s mission and service philosophy and can adapt the session based on trainer style (e.g., presentation, discussion, interactive Q&A).

There are 3 items in the Learner Workbook that will be used in this session:

- 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

WHY WE DO WHAT WE DO AND HOW

TRAINER'S ACTIONS & CHECKLIST

- Introduce Massey's Mission Statement:
 - The new hire has a copy on pg.5 of their Workbook (1.1.5A).
 - Discuss how the mission guides all aspects of Massey's operations, particularly in delivering exceptional customer service.
- Explain Massey's Long-Term, Customer Relationship Philosophy:
 - How Massey differentiates itself by prioritizing long-term customer satisfaction over one-time transactions.
 - The role of service guarantees and proactive customer communication.
- Introduce Massey's Core Residential Services:
 - Pest Control Services
 - Termite Treatment and Control Services
 - Lawn Care and Landscape Services
 - Irrigation Services
 - Mosquito Services
- How Massey's Services Align with Customer Needs:
 - Why do customers trust Massey's services?
 - What makes Massey different from competitors?
 - Use customer service brochures to illustrate key offerings and benefits.
- Introduction to the 8-Step Sales Process following the process on the next page.
 - The Learner's Workbook has guided notes on the 8 Steps on pg.6
- Scenario Discussions (see the next page)
- Reflection Activity (1.1.5c, Pg.8 of their Workbook)

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Discussion:** Ensures new hires understand Massey's mission, services, and how structured selling builds trust
- **Trainee Reflection & Workbook Activity:** Ability to articulate how Massey's services connect to customer needs.



QUICK TIPS

- ★ **Relate the Mission Statement:** Use examples of how the mission is applied in daily work, making it tangible and relevant.
- ★ **Simplify:** Focus on key takeaways to avoid overwhelming the new Team Member.
- ★ **Encourage Engagement:** Ask open-ended questions like:
 - ▶ *How do you see yourself contributing to this mission as a Sales Inspector?*
 - ▶ *Which service do you think a homeowner might value most, and why?*
 - ▶ *What makes Massey's approach to pest prevention unique?*
- ★ **Personalize:** Relate the discussions to the Team Member's role by sharing real-world examples and personal stories that showcases Massey's success in meeting customer needs.
- ★ **Use Visuals:** Reference materials like brochures or marketing visuals to illustrate points clearly.
- ★ **Highlight common customer pain points** that each service addresses (e.g., pest safety, lawn appearance, mosquito control for outdoor enjoyment).

TRAINER MATERIALS

- Brochures of Service Offerings (Pest, Lawn, Termite, etc.)

THE 8 STEPS

For each step:

- Name the Step
- **State its Purpose:** Briefly explain what the step is and how the step benefits both Massey and the customer.
- **Provide an Example:** Use a simple, relatable scenario to help illustrate the step.

1. Introduction
2. Inspection
3. Define the Problem
4. Describe the Solution
5. Qualify Massey Services
6. Features & Benefits
7. Close
8. Ask for Referrals

SCENARIO DISCUSSION

After the overview of the 8 Steps, use these scenarios to help engage the trainee with the knowledge they've just acquired. Remember:

- Use questions to gauge their understanding and help you see what they truly have absorbed.
 - ▶ Questions like *"why did you choose that response?"* or *"how does that tie into that step?"*
 - ▶ Use the NOTES to record your observations for future reference.

- **Scenario 1:** A customer asks, *"What makes Massey different?"* How do you respond?
- **Scenario 2:** A customer says, *"I only care about price."* How does the 8-Step Sales Process help shift the conversation?



QUICK TIPS

- ★ **The Learner's Workbook** has guided notes on the 8 Steps on pg.6.
 - ▶ 1.1.5B: Understanding Massey's 8 Step Sales Process
- ★ **Keep It Simple:** Avoid overloading the Team Member with details. This is an overview!
- ★ **Focus on Clarity:** Ensure the Team Member understands the connection between steps and their practical application by asking open-ended questions or having them explain it in their own words.
- ★ **Focus on Connection:** Emphasize how each step connects to delivering exceptional customer service.
- ★ **Use Real-Life Scenarios:** Share personal success stories or common challenges for each step to make the concepts relatable and not over technical.
- ★ **Encourage Participation:** Use open-ended questions to check for understanding. Ask questions like:
 - ▶ *Which step do you think builds the most trust with customers?*
 - ▶ *How do you think you'd feel about presenting solutions?*

WORKBOOK ACTIVITY: 1.1.5C - REFLECTING ON THE 8 STEPS

Purpose: Help the Team Member reflect on the 8-Step Sales Process and identify areas for future focus.

1. **Introduce the Activity:** After explaining the 8-Step Sales Process and scenario discussion, say something like:
 - *Now that we've gone through the steps, I'd like you to reflect on them. Think about which steps feels the most clear to you right now and which ones might seem more challenging.*
2. **Guide Their Reflection:** Prompt the Team Member to review the questions in their workbook (1.1.6c, pg.8) Give them 5 or so minutes. These questions are on the worksheet in their workbook: they can write or type into the workbook, or just think.
 - Which 2 steps feels the clearest to you right now? Why?
 - Which 2 steps do you think will be the most challenging for you? Why?Reassure them that it's okay to be unsure at this stage and that mastery will come with practice.
3. **Example Reflections:** Share examples to help them if needed:
 - Step 3, Define the Problem, makes sense because I like explaining things and figuring out how things work.
 - Step 7, Closing, feels hard because I'm not sure how to ask for a commitment especially when it involves money.

REVIEWING THE REFLECTION & WRAPPING UP

Purpose: Review the Team Member's reflections and align their learning focus with training goals.

1. **Discuss Their Responses:** Ask the Team Member to share their thoughts from their writing.
2. **Provide Feedback:** Acknowledge their insights and encourage growth. Here are some examples:
 - *I can see why Step 3 feels natural for you. Your focus on details will help you define customer problems clearly.*
 - *Closing can be intimidating at first, but we'll work on strategies and build your confidence through practice.*
3. **Set Future Focus:** Tie their reflections to upcoming training:
 - *In our future sessions, we'll spend extra time on [challenging steps] to make sure you feel confident.*
4. **Record Observations:** Use the NOTES section to document thing like:
 - Key strengths identified, areas needing more attention, overall engagement and participation, etc.

GOAL

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

OBJECTIVES

By the end of this activity, new hires 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.



Lead by Example—Your Team is Watching! The way you engage in check-ins will set expectations for how they should approach their own daily routines in the future.

DETAILS

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

ACTIVITY OVERVIEW

This activity should occur at the end of Day 1, or whenever check in opportunities occur, to expose new hires to team routines and daily operations. If a live check-in is not available, a trainer-led discussion on daily operational expectations should be conducted instead.

NOTES

TRAINER'S ACTIONS & CHECKLIST

- Learner Workbook Reflection:
 - Direct the new hire to complete the observation reflection exercise on pg.10 of their workbook.
 - ▶ 1.1.6 - Finishing the Day: Observation Notes
 - Ensure they answer guided questions about what they observed, such as:
 - ▶ What stood out most about the check-in process?
 - ▶ How did the manager prioritize tasks and communication?
 - ▶ How do structured check-ins contribute to daily success?
 - Remind them they will review their responses in the Day 1 Wrap-Up & Reflection activity.
- End-of-Day Check-In for Other Team Members:
 - Allow the new hire to observe the GM's end-of-day check-in with other Team Members.
 - Ensure they take notes on:
 - ▶ Verification of Daily Production
 - ▶ Review of Daily Paperwork
 - ▶ M&S Usage
 - ▶ Follow-up service or communication
 - ▶ Complaint Log
 - ▶ Cancellation Log
 - ▶ Equipment requirements
 - ▶ Assignments for the next day's work and materials distribution
 - Explain the purpose of these check-ins and how they help track progress, address challenges, and plan ahead.

FEEDBACK, VERIFYING, & ASSESSING

- **Trainee Reflection:** Document key takeaways from the observation in a checklist or reflection worksheet.
- **Trainer Discussion:** Review and clarify observations, expectations, and key operational themes.
- **Observation-Based Reflection:** Trainer ensures the trainee understands the purpose and structure of daily check-ins.



QUICK TIPS

- ★ **Set the Example:** Use the observed check-ins with other Team Members to model effective communication and structure.
- ★ **Engage Actively:** During the post-observation debrief, ask open-ended questions like:
 - ▶ "What stood out the most about the check-in process?"
 - ▶ "Why do you think we do this every day?"
- ★ **Make it Relatable:** Explain how these daily check-ins contribute to their success in managing their own sales responsibilities.

TRAINER MATERIALS

- Any materials relating to the check-in process.

ACTIVITY WRAP-UP

- Post-Observation Debrief:
 - Discuss key takeaways with the new hire.
 - Reinforce why structured check-ins matter for individual and team performance.
 - Answer any questions about the process.

TRAINER'S ACTIONS & CHECKLIST

- Direct the new hire to complete their end-of-day workbook reflection on pg.10.
 - 1.1.7 - Day 1 Reflection Questions
- Facilitate an Afternoon Reflective Check-In:
 - Guide the new hire through discussing their Day 1 experiences.
 - Encourage them to use their workbook reflections to structure their thoughts.
 - Ask open-ended questions, such as:
 - ▶ *What was the most valuable thing learned today?*
 - ▶ *Were there any challenges or uncertainties?*
 - ▶ *How do you see today's lessons applying to your role?*
- Trainer-Led Review:
 - Summarize key accomplishments from Day 1.
 - Highlight major takeaways from each session (Mission, Services, 8-Step Sales Process, Check-In Observations, etc.).
 - Reinforce the importance of professionalism, engagement, and active learning.
- Q&A Session
 - Provide an open forum where trainees can ask about processes, expectations, or next steps.
 - Address any lingering questions from earlier sessions.
- Preview Day 2 Objectives & Next Steps:
 - Give a brief overview of the schedule and key learning objectives for Day 2.
 - Emphasize how lessons from Day 1 will be built upon in future sessions.



QUICK TIPS

- ★ **Encourage Open Dialogue:** Create a relaxed atmosphere to help trainees express thoughts freely.
- ★ **Engage Actively:** During the wrap-up, ask open-ended questions like:
 - ▶ *What surprised you most about today?*
 - ▶ *What are you looking forward to tomorrow?*

TRAINER MATERIALS

- Any notes taken about items to address during the wrap-up.

ACTIVITY WRAP-UP

- Q&A Session
- Day 2 Preview

FEEDBACK, VERIFYING, & ASSESSING

- **Trainee Reflection:** Complete the workbook activity.
- **Trainer Discussion:** Review and clarify observations, expectations, and key themes.
- **Observation-Based Reflection:** Trainer ensures new hires are comfortable with Day 1 takeaways and prepared for Day 2.

WORKBOOK ACTIVITY: 1.1.7 - FINISHING THE DAY

Purpose: Encourage the new Team Member to reflect on Day 1, observe best practices during check-ins, and prepare for Day 2

1. Have the new Team Member observe at least one end-of-day check-in with another Team Member.
 - Prompt them to note:
 - One thing they found interesting or insightful.
 - One question they have about the process.
2. Preview Day 2 objectives and provide clarity on what they should prepare for.
3. Facilitate the new Team Member's reflective check-in session.
 - Encourage them to jot down their answers to:
 - What did you feel most confident about today?
 - What is one area you want to focus on improving tomorrow?
4. Review their answers and address any immediate questions.

Block 2: Professional Image & Field Readiness

Lead by Example

Maintain your own professional appearance and vehicle organization—new hires will follow your lead.



Make it Interactive

Get trainees involved—have them physically inspect vehicles, test their knowledge, and complete hands-on exercises.

GOAL

To ensure new hires understand and apply Massey's standards for professional appearance, vehicle readiness, and fleet safety policies, reinforcing how these elements contribute to credibility, efficiency, and customer trust.

AGENDA

Block 2 should take approximately 1.5-2 hours to complete, not including the Massey University Course SAF 1011: Driver Safety Improvement.

These tasks can be completed in any order if adjustments are needed based on scheduling and availability.

The following activities must be completed during Block 2:

OBJECTIVES

By the end of Block 2, new hires will be able to:

1. Demonstrate professional grooming and uniform standards that align with Massey's expectations
2. Maintain a clean, organized, and fully equipped vehicle to project professionalism and support efficient fieldwork.
3. Understand daily and weekly vehicle maintenance responsibilities, including fleet policies and safety procedures.
4. Recognize how vehicle telematics and tracking systems enhance safety, efficiency, and accountability.

- 1.2.1: The Massey Look: Professional Image Matters
- 1.2.2: What's in the Trunk? Massey's Fleet & You
- 1.2.3: Navigating the Field: Safe & Efficient Vehicle Use

REMINDERS

- Trainers should reinforce that first impressions start before customer engagement. A professional image and a well-maintained vehicle build credibility before a single word is spoken.
- All field training should be hands-on whenever possible. Avoid passive instruction—let trainees physically check their vehicles, organize equipment, and apply best practices.
- Safety and compliance should be emphasized throughout this block. Ensure all new hires are aware of fleet policies, maintenance responsibilities, and telematics monitoring expectations.
- Ensure all Sales Inspectors have the Samsara app installed on their iPad and know how to use it for fleet tracking and compliance monitoring.



TIE EVERYTHING TO CUSTOMER TRUST: EVERY STANDARD IN THIS BLOCK EXISTS TO ENHANCE CREDIBILITY AND CUSTOMER CONFIDENCE—MAKE SURE TRAINEES UNDERSTAND THE BIGGER PICTURE.

THE MASSEY LOOK: PROFESSIONAL IMAGE MATTERS

TRAINER'S ACTIONS & CHECKLIST

- Explain Massey's Professional Standards:
 - Professional appearance builds credibility and trust with customers.
 - This is not about personal style—it's about meeting company expectations.
- Review Uniform & Grooming Guidelines:
 - Uniform Expectations (Reference Policy 334: Uniforms)
 - ▶ Different service roles have different uniform requirements.
 - ▶ Ensure trainees know their specific uniform expectations.
 - Grooming Standards (Reference Policy 308: Dress & Grooming)
 - ▶ Cover hair & facial hair, tattoos & piercings, and hygiene.
- Presentation Requirements:
 - Uniforms must be clean, pressed, and in good condition.
 - Shoes must be polished and well-maintained.
 - No hoodies, sweaters, or non-uniformed clothing.
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Review:** Discuss key takeaways from the customer perception discussion.
- **Trainee Reflection:** Ensure responses align with company expectations.



QUICK TIPS

- ★ **Your trainees will look to you as the standard!** Make sure your uniform, grooming, and overall presentation align with company expectations.
- ★ **Learner Workbook Alert:** there is an overview of the uniform and grooming standards in the Learner's Workbook on pg.11.

TRAINER MATERIALS

- Uniform & Grooming Policy Guide (Policy 308 & 334)
- Visual Scenario Examples of professional vs. unprofessional appearance if you have them

ACTIVITY WRAP-UP

- Complete the Scenario Analysis: Judging a Book by It's Cover (next page)

SCENARIO ANALYSIS: JUDGING A BOOK BY ITS COVER

Purpose: Help trainees recognize how professional appearance impacts customer trust and perception.

1. Introduce the Scenario:

- Explain that first impressions matter, and customers judge professionalism based on appearance.
- This is not about personal style but aligning with Massey's uniform and grooming standards.

2. Present Examples: (Choose one option or both!)

- **Option 1: Images** – Show trainees approved/unapproved grooming styles and uniform examples if you have them, or use yourself as an example.
- **Option 2: Descriptions** – Provide short written profiles or use the examples like the ones below:
 - ▶ **Example 1:** *Carlos arrives at his afternoon appointment in a clean, pressed uniform with all required patches and his name tag properly secured. His boots are polished, his belt is fastened, and his hair is neatly groomed. His short beard is trimmed and well-maintained.*
 - ▶ **Example 2:** *Jake arrives at his morning appointment wearing a wrinkled but tucked-in uniform shirt. A coffee stain is visible on his right cuff, and his name tag is missing. He is wearing old sneakers instead of work boots. Otherwise, his appearance is neat.*

3. Facilitate Discussion:

- ▶ What stands out in each example?
- ▶ How do you think a customer would react to each person?
- ▶ What small adjustments could the unprofessional example make to meet Massey's standards?

4. Tie it Back to Massey's Standards:

- ▶ Ask trainees to identify violations in the weak example.
- ▶ Reference Policy 308 (Grooming) and Policy 334 (Uniforms) to clarify expectations.

WHAT'S IN THE TRUNK? MASSEY'S FLEET & YOU

TRAINER'S ACTIONS & CHECKLIST

- Tour the Vehicle & Equipment Identification:
 - Guide trainees in inspecting their assigned vehicle.
 - Ensure they locate and identify all required equipment for their role.
 - Review proper storage and organization of tools, paperwork, and safety gear.
- Vehicle Cleanliness & Professional Image:
 - Emphasize that a clean, well-maintained vehicle reflects professionalism and builds customer confidence.
 - Discuss daily & weekly maintenance tasks, including interior/exterior cleaning.
 - Reinforce expectations for vehicle decals, appearance, and secure storage.
- Fleet Policy Review:
 - Company Vehicle Use:
 - ▶ Vehicles must not be used for personal purposes.
 - ▶ No unauthorized drivers or passengers.
 - ▶ Smoking and vaping are strictly prohibited in all company vehicles.
 - ▶ Vehicles should be parked in secure, authorized locations.
 - Maintenance Responsibilities (Policy 501):
 - ▶ Vehicles must be clean, decaled, and in good repair.
 - ▶ Tire pressure, fluids, and lights must be checked regularly.
 - ▶ Repairs must follow the Holman Fleet Maintenance process.
 - Fueling and Expense Management:
 - ▶ Wright Express (WEX) gas cards are assigned to vehicles, not individuals.
 - ▶ PINs are issued by service center.
 - Violations & Reporting:
 - ▶ Toll & red light violations are payroll deducted.
 - ▶ Team members must report accidents or vehicle damage immediately.



QUICK TIPS

- ★ If the exact vehicle is unavailable for this session, use a similar model within the fleet to conduct this task.

TRAINER MATERIALS

- Fleet Policy Reference Guides
 - ▶ Policy 501: Vehicle Maintenance Responsibilities
 - ▶ Policy 305: Vehicle Responsibility Agreement

ACTIVITY WRAP-UP

- Mock Vehicle Check & Maintenance Task:
 - Guide trainees through a mock vehicle inspection.

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Ensure trainees correctly identify equipment and maintain organization.
- **Mock Maintenance Task:** Trainees conduct a basic vehicle inspection and report findings.

NAVIGATING THE FIELD: SAFE & EFFICIENT VEHICLE USE

TRAINER'S ACTIONS & CHECKLIST

- Pre-Ride Preparation:
 - Locate and identify the visible telematics hardware in the vehicle.
 - Explain what the equipment does and doesn't do.
 - Show Samsara Telematics Support Page in MILO.
 - Review Policy 505: Telematics Coaching.
 - Show the Samsara app and ensure it is installed on the trainee's iPad.
- Live Ride-Along Observation:
 - The trainee will observe a General Manager or designated individual operating a company vehicle.
 - Highlight safe driving behaviors and adherence to company policies.
 - Reinforce that company vehicles are for business use only, with no unauthorized passengers or personal errands.
- Post Ride-Along
 - Telematics Data Review:
 - ▶ Demonstrate how Massey's Samsara telematics system tracks driver behavior, including:
 - Speeding, stop sign violations, and seat belt usage.
 - Engine idling, acceleration/deceleration, and location tracking.
 - Explain how telematics data is reviewed for coaching and compliance monitoring.
 - Show example reports and videos if available.
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Review:** Scenario Discussions
- **Trainee Reflection:** Have the trainee answer the question:
 - ▶ *How does telematics support efficiency & accountability?*



QUICK TIPS

- ★ Use the ride-along as an opportunity to reinforce positive habits. Point out safe driving behaviors in real time and relate them to telematics data to make coaching more impactful.

TRAINER MATERIALS

- Fleet Policy Reference Guides
 - ▶ Policy 505: Telematics Coaching
- Samsara Support Page
 - ▶ <https://bit.ly/4hXjRn>
- Samsara App
- Example Samsara reports and videos

LMS ASSIGNMENTS

- SAF 1011: Safe Driver Improvement Course

ACTIVITY WRAP-UP

- Scenario Discussion:
 - What should you do if a telematics alert is triggered?*
 - How does fleet tracking improve safety and efficiency?*
 - ▶ Encourage the trainee to provide insights on how they would handle different telematics alerts.
- Post-Ride Training: SAF 1011: Safe Driver Improvement Course

Block 3: Daily Operations & Compliance

Make it Hands-On

Avoid passive policy reading—engage trainees with real examples and application-based exercises.



Encourage Continuous Learning

Remind trainees that time management and compliance skills improve over time—they don't need to perfect everything immediately, but they must develop good habits early.

GOAL

To provide new hires with a structured understanding of the DSAR and compliance policies.

OBJECTIVES

By the end of Block 3, new hires will be able to:

1. Use the Daily Sales Activity Report (DSAR) to organize and track daily tasks, appointments, and follow-ups.
2. Understand and comply with Massey's and safety reporting policies.

AGENDA

Block 3 should take roughly 1 hour to complete.

The activities in Block 3 can be completed in any order based on scheduling needs.

The following activities must be completed during Block 3:

- 1.3.1: The DSAR: What Is It?
- 1.3.2: Compliance & Operational Policies: Real-World Scenarios

REMINDERS

- The DSAR is a daily-use tool, not just another form. Reinforce that SIs should begin using it as their daily planner and tracker from **no later** than Day 2 of training
- Compliance is ongoing. While policies may not be used daily, it is essential that all team members understand and know where to find them when needed.
- The General Manager or Office Manager is always available as a resource. Team members should ask questions if they need clarification on policies or reporting expectations.



TIE EVERYTHING BACK TO PRODUCTIVITY: EMPHASIZE THAT PROPER TRACKING, COMPLIANCE, AND ORGANIZATION LEAD TO GREATER EFFICIENCY, FEWER MISTAKES, AND BETTER RESULTS.

GOAL

To introduce Sales Inspectors to the Daily Sales Activity Report (DSAR) as a fundamental tool for tracking their daily sales activities, appointments, and potential earnings. This lesson provides a high-level overview of its purpose, how it fits into their 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, new hires 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.

ACTIVITY OVERVIEW

The Daily Sales Activity Report (DSAR) is more than just a form—it's an essential tool that Sales Inspectors use every day to track their sales progress, appointments, and overall performance. This lesson provides a high-level introduction to what the DSAR is, why it matters, and how it helps Sales Inspectors manage their daily workflow. Trainees will review a sample DSAR, discuss its role in the sales process, and begin developing the habit of using it as a key part of their success.

NOTES

TRAINER'S ACTIONS & CHECKLIST

- Trainer-Led Discussion:
 - Explain the following:
 - ▶ What is the DSAR?
 - ▶ Why do Sales Inspectors fill out a DSAR every day?
 - ▶ How does the DSAR help with tracking leads, sales, and appointments
 - ▶ What key information does the DSAR track, and why does it matter?
 - ▶ Use the following policies
 - PP 1104 - <https://bit.ly/3GfLYs5>
 - PP 1104-A - <https://bit.ly/4lFvxVT>
- Reviewing a Sample DSAR:
 - Walk through a completed DSAR, highlighting how information flows from leads to sales tracking.
 - Discuss how Sales Inspectors use the DSAR to stay organized, indicate services sold, and managing follow-ups.
 - Explain how the 1-31 Logbook works.
- Tying the DSAR to the Daily Workflow:
 - Reinforce that trainees will complete a DSAR every day moving forward.
 - Explain that the DSAR will be part of their daily and weekly training tasks, keeping them accountable for tracking their activity.
 - Discuss how a well-maintained DSAR helps managers support Sales Inspectors and identify opportunities for improvement.
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Ensure trainees understand the purpose of the DSAR beyond just filling out paperwork.
- **Trainee Paperwork Review:** Confirm that trainees can identify key components of the DSAR and explain what they do why they matter.



QUICK TIPS

- ★ **Keep the lesson introductory**—trainees will get hands-on DSAR experience every day.
- ★ **Reinforce that the DSAR is a tool for success, not just paperwork**
- ★ **Tie the DSAR into daily & weekly tasks**, ensuring that trainees understand it will be used continuously.

TRAINER MATERIALS

- Blank DSARs
- Example of Completed DSARs
- PP 1104 Daily Sales Activity Report
- PP 1104-A Daily Sales Activity Report (w/example DSAR)

ACTIVITY WRAP-UP

- Trainer Review & Discussion:
 - Reinforce the role of the DSAR as a daily tracking tool.
 - Discuss how trainees will apply what they've learned as they complete the DSAR each day.
 - Address any questions.
- Trainee Self-Reflection Discussion:
 - What part of the DSAR seems most useful to you?
 - How do you see the DSAR helping you stay organized and accountable?
 - What challenges might you face in keeping up with the DSAR daily, and how can you address them?

COMPLIANCE & OPERATIONAL POLICIES

TRAINER'S ACTIONS & CHECKLIST

- Trainer Overview:
 - Safety & Incident Reporting (Procedures for workplace safety and customer incidents)
- Scenario-Based Discussion:
 - **Scenario 1:** A team member drops a container on their foot and breaks their toe while resupplying at the Service Center. What happens next?
 - **Scenario 2:** An incident occurs during an appointment and the customer is injured. What are the immediate reporting steps?
- Compliance Simulation Exercise:
 - Walk through the steps for reporting injuries, ensuring proper documentation.



QUICK TIPS

- ★ **Keep It Practical!** Policies are easier to understand when applied to real situations—use examples that relate to their actual job tasks.
- ★ **Remind Them of Resources!** The General Manager and Office Manager are always available if a policy or procedure is unclear.

TRAINER MATERIALS

- Example Injury Report

FEEDBACK, VERIFYING, & ASSESSING

- Scenario-Based Discussion & Policy Simulation
- Trainer-Guided Q&A & Reflection

ACTIVITY WRAP-UP

- Trainer Review & Discussion:
 - Ensure trainees understand the correct procedures for handling compliance-related tasks.
 - Reinforce why these policies exist and how they can impact daily operations.
 - Review an example expense report as a reference to clarify proper documentation and submission steps.
- Reflection Discussion: "How Do These Policies Affect My Daily Work?"
 - Use this question to probe the trainee's understanding:
 - ▶ *Who should you go to if you have questions about compliance?*

Block 4: Communication Fundamental & Customer Engagement

Reinforce Confidence

Many trainees may feel nervous in early role-plays—encourage progress over perfection.



Progressive Learning

Each activity builds upon the last. Guide trainees through the sequence smoothly.

GOAL

To develop foundational verbal, nonverbal, and written communication skills that help new hires engage with customers effectively. This block builds confidence in customer interactions, reinforces professionalism, and prepares trainees for Module 2: Customer Engagement.

OBJECTIVES

By the end of Block 4, new hires will be able to:

1. Communicate clearly and confidently in customer-facing interactions.
2. Understand that verbal and nonverbal communication builds trust and engagement.
3. Recognize how professionalism and emotional control impact customer relationships.
4. Develop basic active listening and objection-handling strategies.

AGENDA

Block 4 should take approximately 1.5-2 hours to complete.

These activities build progressively, reinforcing core communication and professionalism skills. They should be completed in order if possible.

The following activities must be completed during Block 4:

- 1.4.1: Communication Fundamentals (LMS Course)
- 1.4.2: Guided Role-Play: Talk the Talk - Sales Conversations
- 1.4.3: The Gateway to Module 2 - The Role of Engagement

REMINDERS

- Be patient and adaptable. Some trainees may struggle with communication skills—coaching takes time.
- Trainees may need extra time for role-play confidence. Allow flexibility for additional practice where needed.
- Adapt to individual learning needs. Not every trainee will engage the same way, so adjust your approach to support their growth.
- Encourage trainees to take notes in their workbook. Self-reflection and feedback will help reinforce learning.
- Set the example. Trainees will mirror your communication style, professionalism, and approach to customer interactions.



KEEP IT REAL: RELATE COMMUNICATION LESSONS TO REAL CUSTOMER INTERACTIONS SALES INSPECTORS WILL EXPERIENCE.

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 trainees 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, new hires 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

Trainees will complete an interactive LMS course introducing key communication principles. This course provides foundational knowledge of verbal, nonverbal, and written communication and prepares trainees for live role-playing exercises in **Activity 1.4.2**.

TRAINER'S ACTIONS & CHECKLIST

- Introduce the LMS Course (Before Assignment)
 - Explain that this course lays the foundation for effective communication in sales interactions.
 - Emphasize that the course must be completed before **Activity 1.4.2 (Guided Role-Play)** if at all possible.
- Monitor Course Progress
 - Verify that all trainees have completed the course and passed any required knowledge checks.
- Facilitate a Brief Discussion (If Needed)
 - Ask open-ended questions to reinforce key takeaways:
 - ▶ *What was the biggest communication takeaway from the course?*
 - ▶ *Which communication type do you feel strongest in? Which needs improvement?*



QUICK TIPS

- ★ **Ensure Completion Before Role-Playing:** This course must be finished before Activity 1.4.2 to ensure trainees are prepared.
- ★ **You should complete the course yourself at least once so you have the information from the course.**
 - ▶ You can do this on your own.
 - ▶ Or, you can sit with your trainee and work on it together.
- ★ **Encourage Self-Reflection:** Remind trainees that communication is a skill that improves with practice.

FEEDBACK, VERIFYING, & ASSESSING

- **Verification:** Successful completion of the LMS course

LMS ASSIGNMENTS

- MAN 7002 - Communication Fundamentals for Sales Inspectors

GUIDED ROLE-PLAY: TALK THE TALK - SALES CONVERSATIONS

GOAL

To reinforce effective verbal, nonverbal, and written communication skills by having trainees practice structured customer interactions through guided 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, new hires 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.
- Receive feedback from trainers and AI analysis (Siro) to refine communication skills.

ACTIVITY OVERVIEW

Trainees will participate in multiple iterations of role-play scenarios based on interactions with Mrs. Wells, a fictional current customer. Each iteration changes key aspects of the conversation, requiring trainees to adapt their communication approach.

 The goal is to refine communication skills, not close a sale. This activity is about confidence, clarity, and responsiveness.

NOTES

GUIDED ROLE-PLAY: TALK THE TALK - SALES CONVERSATIONS

TRAINER'S ACTIONS & CHECKLIST

- Ensure Activity 1.4.1 is Complete
- Ensure Siro is set up (if you are part of the AI pilot program)
- Deliver the Role-Play Using the Trainer Activity Guide
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Review:** Provide individual feedback after each role-play on tone, clarity, and engagement.
- **AI Speech Analysis (Siro):** Evaluate speech pacing, clarity, and engagement (if available)
- **Trainee Reflection:** Trainees reflect on their own strengths and areas for improvement.



QUICK TIPS

- ★ **Encourage Adaptability:** Each scenario is different—trainees should adjust tone, pacing, and engagement accordingly.
- ★ **Focus on Clarity, Not Perfection:** The goal is to practice effective communication, not memorize a script.
- ★ **Debrief After Each Role-Play:** Discuss what went well and what could be improved to reinforce learning.

TRAINER MATERIALS

- Role-Play Script: 4+1 (it's in the appendix!)
- AI Speech Analysis (Siro) Feedback Guide

ACTIVITY WRAP-UP

- Review the following:
 - AI speech analysis (if applicable)
 - Trainer notes
- Address key items you observed and noted in the role-play rubrics.
- Trainee Reflection:** Ask the trainee:
 - ▶ *Reflect on your progress—what improvements did you notice across all three role-plays?*
 - ▶ *What key skill will you focus on strengthening moving forward?*



This activity requires the completion of two role-play rounds. Round 1 is required. For the second round, choose either Round 2 or 3 based on the trainee's performance and areas for improvement, or complete all three rounds. You may repeat any round for additional practice.

Please use your professional judgment to determine which second round, or if all three rounds, will provide the most valuable learning experience.

DEPLOYMENT GUIDE

Purpose: This activity allows trainees to apply communication skills in realistic customer interactions, reinforcing clarity, engagement, and adaptability. By role-playing different versions of the same sales scenario, trainees will refine their verbal and nonverbal communication techniques, receive structured feedback, and prepare for real-world customer interactions.

Getting Started & What To Do

General Notes:

- You should allot about 10 minutes for each role-play.
- You are not constrained to that time. If you need more or less time, that is your call.
- This activity follows a **progressive skill-building approach**, layering communication skills across multiple role-play iterations.
- You should adjust the role of Mrs. Wells for role-plays 2 and 3 based on the scenario parameters in each role-play.

Why This Works:

- Ensures progressive development rather than overwhelming trainees.
- Allows trainers to focus on key engagement skills in each iteration.
- Focuses on key engagement techniques before adding complexity
- Helps trainees adapt to different customer responses instead of relying on a script

During the Activity:

- You will adjust the role of the customer in each role-play to reflect different engagement challenges.
- Observe and track trainee performance, noting strengths and improvement areas using the provided rubrics on the facing page of the role-play guide.
- Record AI Speech Analysis (Siro) results where applicable.

After Each Role-Play:

- Provide feedback on the focus items using the rubric and providing guidance on areas needing improvement and praise for areas where the trainee is met or exceeded expectations.
- Encourage self-reflection.
- The Learner Workbook, Pg.20, has space for the trainee to record their observations of themselves, your feedback, and more.
- Guide a debrief discussion to reinforce learning points.
- Provide feedback on observations and any AI insights (if applicable).

Deploying the Role-Play

Step 1: Explain the Activity

- Review the key takeaways from the Communication Fundamentals LMS course.
- Discuss the importance of verbal, nonverbal, and written communication in sales conversations.
- Inform the trainee that script adjustments will be made after the first role-play to test their adaptability.
 - ▶ You can decide if you want to let them know the adjustments, or let it play out naturally.

Step 2: Warm-Up & Scenario Prep

- Use the **4+1 Script** located in the appendix.
 - ▶ The Learner also has the script in their appendix.
- Read through the script with the trainee to build familiarity before role-playing.

Step 3: Role-Play Scenarios & Adjustments

- **Instructions for the Trainee:**
 - ▶ Follow the assigned scenario and make sure you are engaging with the “customer.”
 - ▶ Pay attention to engagement cues and adjust your delivery accordingly.
 - ▶ Listen to trainer feedback on strengths and areas for improvement.
- **Trainer Actions:**
 - ▶ Act as the customer in each role-play scenario, making scenario adjustments when directed.
 - ▶ Provide live feedback on:
 - Tone, pacing, and engagement level to ensure clear and confident delivery.
 - Handling objections and overcoming customer concerns in a professional manner.
 - ▶ Observe how the trainee adjusts their approach based on customer responses and scenario changes.

ROUND 1 - HELLO MRS. WELLS: A BASIC INTERACTION

Scenario Note: A basic, ideal interaction where the customer is neutral but open to conversation. Follow the script as it is written.

Trainer Role: Observe and assess the trainees clarity, structure, and body language.

Rubrics Used:

- Verbal Communication
- Nonverbal Communication

Focus Areas:

- Speaking clearly and confidently with appropriate pacing and tone.
- Using open body language and appropriate gestures to reinforce the message.
- Establishing rapport naturally and keeping the conversation fluid.

Trainer Observations:

- Does the trainee sound natural and engaging, or scripted and robotic?
- Are verbal clarity and pacing appropriate for a confident introduction?
- Is the trainee using effective non-verbal communication, such as eye contact and posture?

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: <ul style="list-style-type: none"> • Uses a steady, natural pace for clarity. • Adjusts tone based on customer engagement. • Provides explanations without overwhelming the customer. 	

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: <ul style="list-style-type: none"> • Uses open posture and gestures to reinforce messages. • Maintains eye contact to build trust. • Avoids closed-off or distracting body language. 	

ROUND 2 - HELLO MRS. WELLS: A DISTRACTED CUSTOMER

Scenario Note: Mrs. Wells appears disengaged—checking her phone, giving short answers, or displaying minimal interest. The trainee must recognize the disengagement cues and adjust their approach to regain attention and sustain engagement.

Trainer Role: Observe and assess the trainees clarity, structure, body language, and reactions to the customer.

Rubrics Used:

- Verbal Communication
- Nonverbal Communication
- Active Listening

Focus Areas:

- Adjusting tone, pacing, and energy to recapture customer attention.
- Using active listening and follow-up questions to encourage interaction.
- Recognizing and responding to non-verbal cues of disinterest effectively.

Trainer Observations:

- How well does the trainee notice disengagement and pivot their approach?
- Does the trainee use appropriate follow-up questions to regain attention?
- Is the trainee's body language open and engaging rather than passive or defensive?

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: <ul style="list-style-type: none"> • Uses a steady, natural pace for clarity. • Adjusts tone based on customer engagement. • Provides explanations without overwhelming the customer. 	

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: <ul style="list-style-type: none"> • Uses open posture and gestures to reinforce messages. • Maintains eye contact to build trust. • Avoids closed-off or distracting body language. 	

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: <ul style="list-style-type: none"> • 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. 	

ROUND 3 - HELLO MRS. WELLS: CONCERNS ARISE

Scenario Note: Mrs. Wells is hesitant about giving referrals due to concerns about privacy and uncertainty about neighbors' interest. However, with the right approach, she will ultimately agree to provide referrals. The trainee must navigate her hesitation professionally, build trust, and handle concerns effectively.

Trainer Role: Observe and assess the trainees clarity, structure, body language, and handling of the customer's hesitations.

Rubrics Used:

- Verbal Communication
- Active Listening
- Skepticism & Reframing Concerns

Focus Areas:

- Acknowledging the customer's concern before responding.
- Using active listening and empathy to validate concerns.
- Reframing the referral request in a trust-building, low-pressure way.

Trainer Observations:

- How effectively does the trainee acknowledge concerns before responding?
- Does the trainee use positive language to reframe objections rather than being dismissive?
- Is the final resolution structured and confident, leading the customer toward an agreement?

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.
	<p>Listens attentively, acknowledges concerns, and asks follow-up questions. Examples:</p> <ul style="list-style-type: none"> • 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. 	

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: <ul style="list-style-type: none"> • Acknowledges customer doubts without becoming defensive. • Uses clear, positive language to reframe hesitation into curiosity. • Provides reassurance through facts, testimonials, or service benefits. 	

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: <ul style="list-style-type: none"> • Uses a steady, natural pace for clarity. • Adjusts tone based on customer engagement. • Provides explanations without overwhelming the customer. 	

THE ROLE OF ENGAGEMENT: GETTING READY FOR MODULE 2

TRAINER'S ACTIONS & CHECKLIST

- Complete MAN 7001 - Customer Engagement: Good vs Bad *with the trainee.*
- Trainer-Led Discussion: Discuss the key engagement elements:
 - Active listening, empathy, professionalism, and rapport-building.
 - Analyze how professionalism impacts customer trust. Here are some example questions:
 - ▶ *What verbal and nonverbal cues made the positive interaction work?*
 - ▶ *What were the biggest takeaways from the video examples?*
 - ▶ *How does professional behavior impact long-term customer retention?*

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Review & Reflection:** Discussion of the microlearning and wrap-up



QUICK TIPS

- ★ **Movie Time:** You should complete MAN 7001 on your own so you have context for this activity. It will take you about 8 minutes.
 - ▶ It is best to complete it with the trainee each time.
- ★ **Encourage Observation:** Have *trainees* focus on both verbal and nonverbal communication cues in the video examples.
- ★ **Tie It to Real Scenarios:** Relate engagement strategies to situations Sales Inspectors will face in the field.

LMS ASSIGNMENTS

- MAN 7001 - Customer Engagement: Good vs Bad

ACTIVITY WRAP-UP

- Debrief and wrap-up: Summarize the key takeaways and address any questions or comments.

MODULE 2

Engaging with People: The Art of Communication & Connection

GOAL

To develop Sales Inspectors' ability to engage with customers professionally, recognize engagement cues, ask insightful questions, and document key customer details for effective follow-ups.

OBJECTIVES

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

1. Establish trust and professionalism through effective first impressions, engagement cues, and active listening techniques.
2. Use verbal and nonverbal communication strategies to build rapport and adapt to customer interactions.
3. Apply structured questioning techniques to uncover customer needs, clarify concerns, and guide conversations.
4. Organize and document key customer details efficiently, ensuring clear and useful records for future follow-ups.

MODULE BREAKDOWN

This module consists of two structured blocks designed to help new Sales Inspectors develop foundational communication skills, recognize customer engagement cues, and refine their ability to ask effective questions.

The estimated time for Module 2 completion is approximately 4.5 hours + variable ride-along times, but pacing may vary based on individual needs.

- **Block 1: Communicating with Customers & Building Trust** - Focus: Establishing strong first impressions, trust-building behaviors, and active listening skills to enhance customer interactions.
- **Block 2: Listening to Customer Needs & Listening to Customer Needs & Gathering Information** - Focus: Training Sales Inspectors to effectively recognize, clarify, and respond to customer needs using structured questioning and active listening techniques, and exploring structured notetaking

MODULE TIPS

- **Follow the Sequence:** Block 1 must be completed in order to ensure a strong communication foundation.
- **Encourage Self-Reflection:** Many of these exercises require trainees to evaluate their communication habits. Help them identify strengths and areas for improvement.
- **Prepare for Field Training:** Ensure that ride-alongs are planned within the service that the trainee is currently learning (Pest, Lawn, Termite).
- **Reinforce Application:** The goal is to make communication skills habitual—tie every lesson back to real-world customer interactions.



**FACILITATE DISCUSSION: COMMUNICATION IS NOT PASSIVE—
TRAINEES SHOULD BE ACTIVELY ENGAGED IN DISCUSSIONS, ROLE-
PLAY EXERCISES, AND FIELD TRAINING.**

Block 1: Communicating with Customers & Building Trust

First Impressions Set the Tone

Mirror the professionalism and engagement you expect from trainees.



Encourage Trainees to Adapt Not Memorize

Real conversations aren't scripted.

GOAL

To establish foundational customer engagement skills by helping trainees understand the impact of first impressions, trust-building, and active listening in sales conversations.

OBJECTIVES

By the end of Block 1, new hires will be able to:

1. Recognize how first impressions influence customer trust and credibility.
2. Identify and apply trust-building behaviors in customer interactions.
3. Interpret verbal, nonverbal, and behavioral cues to gauge customer engagement.
4. Use active listening techniques to respond effectively and adapt conversations.

AGENDA

Block 1 should take roughly 1.5-2 hours to complete, plus any variable time for field training in **Activity 2.1.1** if it is available.

If possible, activities should be completed in the order listed below to ensure a logical progression of learning.

- 2.1.1: Don't Judge a Book by Its Cover? Customers Do
- 2.1.2: The Trust Factor – What Builds It, What Breaks It
- 2.1.3: Guided Role-Play: Adapting to Customer Responses

REMINDERS

- **If there is an LMS course assigned to the trainee** in the sales training, you need to take the course before they do or with them. These are small, microlearnings designed to tie into training activities.
- **Encourage discussion:** These topics involve self-awareness and customer perception. Trainees may need time to reflect and adjust.
- **Keep it practical:** Trainees should focus on realistic, actionable skills they can apply immediately in sales interactions; avoid getting lost in academic discussions.
- **Make role-plays feel real:** Trainees won't always get an "ideal" customer; help them practice adapting to different reactions.
- **Use real-world examples:** Where possible, incorporate live observations or personal experiences to reinforce learning.
- **Help trainees self-correct:** Ask guided questions to help them identify their own areas for improvement rather than simply telling them what went wrong.



BAD HABITS START EARLY. IF YOU LET SMALL ENGAGEMENT MISTAKES SLIDE NOW, THEY'LL BECOME OBSTACLES IN THE FIELD. CORRECT THEM EARLY, REINFORCE BEST PRACTICES, AND DON'T ASSUME THEY'LL "FIGURE IT OUT LATER."

DON'T JUDGE A BOOK BY ITS COVER? CUSTOMERS DO

GOAL

To help Sales Inspectors recognize how their 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.

OBJECTIVES

By the end of this activity, trainees 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

This session introduces Sales Inspectors to the importance of first impressions beyond verbal communication. First impressions begin the moment an SI arrives on a property—before they even speak. Trainees will explore how movement, body language, and demeanor affect customer perceptions through guided discussion and scenario analysis. Trainees will analyze different customer reactions and discuss effective strategies for making strong first impressions in each situation.

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

NOTES

DON'T JUDGE A BOOK BY ITS COVER? CUSTOMERS DO

TRAINER'S ACTIONS & CHECKLIST

- Ensure trainees understand the importance of first impressions before beginning the discussion-based scenarios.
- Facilitate discussion and reflection on prior training (Massey Look & Engagement Lessons from Module 1).
- Field Observation (Live or Recorded/Scripted)
 - Live Observation (Preferred Option): If possible, have the trainee observe a General Manager or senior SI introducing themselves to a customer.
 - Recorded Observation (Alternative): Use a video example of strong and weak introductions. You can use the beginning of the links to the left, or use one of your own if you have one.
 - Scripted Option (Alternative): Model a strong and weak first impression for the trainee.
- Learner Workbook Alert:** The learner has a checklist and observation worksheet starting on pg. 24 they will use.
- Use the Trainer Activity Guide
 - Trainer-Guided Discussion: The First Impression Chain
 - Mini Discussion-Based Scenarios
- Activity Wrap-Up
 - Facilitate a discussion on key takeaways and areas for improvement based on the observations and scenario discussions.

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observations & Feedback:** Reinforce key trust-building behaviors based on field observation and role-play.
- **Wrap-Up Discussion in the Activity Wrap-Up**

ACTIVITY WRAP-UP

- Wrap-Up Discussion. Use the following questions to wrap up this activity:
 - ▶ *What did you notice about the impact of different nonverbal cues in the scenarios?*
 - ▶ *How do small cues like posture, eye contact, and pace influence customer perception in each scenario?*
 - ▶ *What was the most surprising thing you learned about first impressions today?*
 - ▶ *If you could refine one aspect of how a Sales Inspector introduces themselves in these scenarios, what would it be?*
 - ▶ *How will you apply these insights to real customer interactions?*



QUICK TIPS

- ★ **First Impressions Happen Fast!** Research shows that customers form opinions within seconds—help trainees focus on strong openings.
- ★ **Tie It to Customer Trust:** Reinforce that customers buy from people they trust—first impressions are the first step.
- ★ **Going into the field?** Layer this in—connect role-play to real customer moments.

TRAINER MATERIALS

- Links to Videos:
 - ▶ <https://bit.ly/4hymiUl>
 - ▶ <https://bit.ly/4iJzlmS>

TRAINER-GUIDED DISCUSSION: THE FIRST IMPRESSION CHAIN

Purpose: A customer's first impression of a Sales Inspector begins long before the first words are spoken. From the moment they see the company vehicle, observe how the SI approaches the door, and interpret body language, they are forming opinions. This discussion helps trainees recognize how their presence, movement, and energy establish trust and credibility before a single word is exchanged. Use this guide to frame your discussion.

Step 1: Before You Speak

- Discuss how appearance, vehicle presentation, and movement impact customer perception.
- What does body language communicate before a word is spoken?
- How should SIs carry themselves walking up to a property?

Step 2: The Walk to the Door

- How should an SI move with confidence and purpose?
 - ▶ What does a closed-off stance vs. open posture communicate?
 - ▶ What does the customer see before the SI knocks?

**Even if no one is home,
there's probably a
camera watching you.
Always assume you are being
watched.**



Step 3: The Greeting & First Words

- How should tone, volume, and pace be adjusted?
- What small cues indicate whether the customer is engaged or hesitant?

MINI DISCUSSION-BASED SCENARIOS

Purpose: This exercise allows trainees to analyze first impression techniques in different customer scenarios through facilitated discussion. By considering various customer reactions, they will develop adaptability and confidence in early interactions. The goal is to reinforce how tone, body language, and word choice influence customer perception and engagement.

Instructions

Present the following scenarios and guide trainees in a discussion exploring effective first impression strategies:

- The Observed Approach: "Imagine you are walking up to a house and notice the customer watching you from the window before you even reach the door. How does this observation influence your approach? What nonverbal cues are critical in this scenario, and how would you use them to put the customer at ease?"
- The Skeptical Greeting: "You arrive at the door, and the customer answers with their arms crossed, a furrowed brow, and a curt, 'Yes?' How do you interpret this body language? What adjustments to your tone, posture, and initial words are necessary to establish a more positive connection?"
- The Warm Invitation: "A customer opens the door with a smile, an open posture, and says, 'Oh, come on in! Tell me what brings you here.' How does this immediate warmth shape your interaction? How do you maintain a professional demeanor while responding to their enthusiasm?"

Debrief and Analysis:

- After exploring each scenario, facilitate a debriefing discussion, focusing on:
- Analyzing the impact of different nonverbal cues from both the customer and the Sales Inspector.
- Identifying effective strategies for adapting to various customer reactions.
- Reinforcing the importance of presence, movement, tone, and confidence in building positive first impressions.
- Provide specific feedback on strategies and approaches discussed by the trainees.

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.

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.

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.

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

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),

THE TRUST FACTOR – WHAT BUILDS IT, WHAT BREAKS IT

TRAINER'S ACTIONS & CHECKLIST

- Trainer-Guided Discussion: What Builds & Breaks Trust?
 - Discuss why trust is the foundation of all sales interactions.
 - What builds trust? (Transparency, empathy, active listening, responsiveness).
 - What damages trust? (Overpromising, dismissing concerns, poor follow-through).
 - Ask trainees for real-world examples of when they felt immediate trust or distrust in a sales interaction.
- Scenario-Based Mini-Role-Play

The trainer will take on the role of the customer, while the trainee must adapt their communication style based on the customer's level of trust. The trainer may choose to inform the trainee of the trust level beforehand or allow them to recognize and respond to it naturally.

- The trainer plays the role of the customer at any stage of the sales process, presenting a trust level (skeptical, neutral, engaged, etc.).
- The trainee introduces themselves and engages the customer, adjusting their tone, approach, and response based on the trainer's cues.
- Trainer provides real-time feedback on their approach, tone, and trust-building strategies.
- Rotate roles and repeat with adjustments.

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Discussion & Coaching:** Reinforce trust-building strategies based on observed role-play performance.
- **Trainee Self-Assessment:** Identify one key trust-building behavior they want to improve.
- **Guided Reflection Discussion:** "How Can I Build Trust in Every Interaction?"



QUICK TIPS

- ★ **Help trainees recognize** that even skeptical customers can be engaged if trust is established early.
- ★ **Reinforce that honesty and transparency** are more powerful than trying to 'sell' something too quickly.

ACTIVITY WRAP-UP

- Guided Reflection Discussion:** "How Can I Build Trust in Every Interaction?" Use the following questions to wrap up this activity:
 - ▶ *How did you adjust your approach when interacting with different trust levels, and what worked best?*
 - ▶ *What specific behaviors or phrases seemed to build trust most effectively?*
 - ▶ *What are some common mistakes that could unintentionally break trust, and how can you avoid them?*



Feel free to have a little fun with the role-plays!

GUIDED ROLE-PLAY: ADAPTING TO CUSTOMER RESPONSES

TRAINER'S ACTIONS & CHECKLIST

- Complete MAN 7003 - Decoding Cues: The Power of Active Listening *with the trainee*
 - Trainer-Led Reflection Discussion of the course.
 - ▶ Guide the trainee through key engagement takeaways:
 - What verbal and non-verbal cues signaled engagement or disengagement?
 - What adjustments improved the customer experience?
 - How can these strategies be applied to real sales interactions?
- Deliver the Role-Play Using the Trainer Activity Guide
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Discussion & Coaching:** Ensure tone, engagement, and listening skills are effectively applied.
- **Guided Reflection Discussion:** Guide the trainee to identify one specific improvement area for future interactions.
- **AI Speech Analysis (Siro):** Evaluate speech pacing, clarity, and engagement (if available)



This activity requires the completion of two role-play rounds. Round 1 is required. For the second round, choose either Round 2 or 3 based on the trainee's performance and areas for improvement, or complete all three rounds. You may repeat any round for additional practice.

Please use your professional judgment to determine which second round, or if all three rounds, will provide the most valuable learning experience.



QUICK TIPS

- ★ Reinforce that tone and body language shape the customer's trust as much as words.
- ★ Each customer is different—flexibility and adaptation make the best sales conversations.

TRAINER MATERIALS

- Role-Play Script: Door-knocking
- AI Speech Analysis (Siro) Feedback Guide

LMS ASSIGNMENTS

- MAN 7003 - Decoding Cues: The Power of Active Listening

ACTIVITY WRAP-UP

- Review the following:
 - AI speech analysis (if applicable)
 - Trainer notes
- Address key items you observed and noted in the role-play rubric.
- Trainer Feedback & Wrap-Up: Ask trainee to reflect:
 - What adjustments did you make during the role-play?
 - How did your approach impact the conversation?
 - What strategies will you focus on improving?

DEPLOYMENT GUIDE

Purpose: This activity allows trainees to apply active listening and engagement techniques in realistic customer interactions. By progressively adjusting customer scenarios, trainees will refine their ability to recognize engagement cues, adapt communication strategies, and build trust effectively.

Getting Started & What To Do

General Notes:

- You should allot about 10 minutes for each role-play.
- You are not constrained to that time. If you need more or less time - that is your call.
- Follow a progressive skill-building approach to reinforce listening, engagement, and adaptability.
- You should adjust the role of customer for role-plays 2 and 3 based on the scenario parameters in each role play.

Why This Works:

- Ensures progressive development rather than overwhelming trainees.
- Allows trainers to focus on key engagement skills in each iteration.
- Reinforces core listening and communication techniques before adding complexity.
- Helps trainees adapt to different customer responses rather than relying on a script.

During the Activity:

- Facilitate three structured practice rounds, making scenario adjustments in rounds 2 and 3 as directed.
- Observe verbal and non-verbal communication.
- Track trainee performance using the provided rubrics.
- Offer real-time coaching after each round.
- Encourage self-reflection before moving to the next round.
- Record AI Speech Analysis (Siro) results where applicable.

After Each Role-Play:

- Provide feedback on the focus items using the rubrics and thinking about:
 - ▶ What went well?
 - ▶ What could be improved?
 - ▶ How did their introduction feel different after adjustments?
- Encourage self-reflection.
- Provide feedback on observations and any AI insights (if applicable).

Deploying the Role-Play

Step 1: Explain the Activity

- Confirm completion of Active Listening microlearning.
- Discuss key takeaways, including recognizing engagement cues, adjusting tone, and responding effectively.
- Inform the trainee that script adjustments will be made after the first role-play to test their adaptability.
 - ▶ You can decide if you want to let them know the adjustments, or let it play out naturally.

Step 2: Warm-Up

- Use the **Door Knocking Script** located in the appendix.
 - ▶ The Learner also has the script in their appendix.
- Read through it together to build familiarity before live role-playing.
- Emphasize engagement cues (customer tone, pacing, hesitations, or enthusiasm).

Step 3: Role-Play Scenarios & Adjustments

- **Instructions for the Trainee:**
 - ▶ Follow the script and make sure you are engaging with the “customer”.
 - ▶ Pay attention to engagement cues and adjust your delivery accordingly.
 - ▶ Pay attention to trainer feedback on strengths and areas for improvement.
- **Trainer Actions:**
 - ▶ Act as the customer in each role-play scenario, making scenario adjustments when directed.
 - ▶ Provide live feedback on:
 - Tone, pacing, and engagement level.
 - Clarity and confidence in the introduction.
 - The trainee’s ability to establish credibility and trust.
 - ▶ Observe how the trainee adjusts their introduction based on the scenario changes.

ROUND 1 – WHO’S AT THE DOOR? A BASIC INTERACTION

Scenario Note: A basic, ideal interaction where the customer is neutral but open to conversation. Follow the script as it is written.

Trainer Role: Observe and assess confidence, clarity, and structure.

Rubrics Used:

- Engagement & Connection
- Nonverbal Communication
- Verbal Communication

Focus Areas:

- Speaking clearly and confidently with a natural, engaging tone.
- Using open body language and eye contact to reinforce engagement.
- Establishing rapport and keeping the conversation flowing.

Trainer Observations:

- How well does the trainee set the tone for a positive interaction?
- Does the trainee naturally engage the customer without sounding scripted?
- Is the trainee using body language effectively?

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: <ul style="list-style-type: none"> • 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. 	

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: <ul style="list-style-type: none"> • Uses open posture and gestures to reinforce messages. • Maintains eye contact to build trust. • Avoids closed-off or distracting body language. 	

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: <ul style="list-style-type: none"> • Uses a steady, natural pace for clarity. • Adjusts tone based on customer engagement. • Provides explanations without overwhelming the customer. 	

ROUND 2 – WHO’S AT THE DOOR? THE CUSTOMER IS RESISTING

Scenario Note: The customer is hesitant or skeptical about the interaction. The trainee must adjust their tone and responses to maintain engagement.

Trainer Role: Observe and assess how the trainee handles the customer's concerns.

Rubrics Used:

- Active Listening
- Engagement & Connection
- Skepticism & Reframing Concerns

Focus Areas:

- Identifying skeptical customer cues (short answers, hesitation, deflecting, hiding behind their door).
- Using active listening and clarification to build trust.
- Adjusting approach to maintain an open and engaging conversation.

Trainer Observations:

- How well does the trainee identify hesitation and adapt their approach?
- Is the trainee able to reframe concerns without being pushy?
- Does the trainee engage the customer in a way that builds trust?

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.
	<p>Listens attentively, acknowledges concerns, and asks follow-up questions. Examples:</p> <ul style="list-style-type: none"> • 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. 	

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: <ul style="list-style-type: none"> • 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. 	

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: <ul style="list-style-type: none"> • Acknowledges customer doubts without becoming defensive. • Uses clear, positive language to reframe hesitation into curiosity. • Provides reassurance through facts, testimonials, or service benefits. 	

ROUND 3 – WHO’S AT THE DOOR? THE DISMISSIVE CUSTOMER

Scenario Note: The customer is dismissive, distracted, and ultimately rejects the Sales Inspector outright. The trainee must remain professional, manage emotions, and close the conversation respectfully.

Trainer Role: Observe and assess how the trainee navigates the customer’s emotional state and responds to their objections.

Rubrics Used:

- Emotional Control & Professionalism
- Responding to Objections & Handling Rejection

Focus Areas:

- Remaining calm & composed despite the rude behavior.
- Acknowledging frustration and redirecting the conversation toward a productive outcome.
- Handling rejection professionally while maintaining rapport..

Trainer Observations:

- How well does the trainee maintain composure and avoid reacting emotionally?
- Does the trainee validate the customer’s frustration without escalating the situation?
- Is the conversation closed professionally, even after rejection?

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: <ul style="list-style-type: none"> • 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. 	

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.
	<p>Addresses objections professionally, reframes concerns with confidence, and provides clear solutions.</p> <p>Examples:</p> <ul style="list-style-type: none"> • 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. 	

Block 2: Listening to Customer Needs & Gathering Information

Model Strong Questioning

Trainees will mirror your approach—demonstrate open-ended, effective questions in your own interactions.



Resist the Urge to Fill Silence

Silence can feel uncomfortable, but don't rush to fill it. Give trainees time to process and respond. Let them navigate the discomfort—it's part of the learning process.

GOAL

To equip Sales Inspectors with the skills to recognize, clarify, and respond to customer needs through structured questioning, active listening techniques, and effective note-taking. This block strengthens their ability to gather essential information, interpret customer concerns, document interactions, and guide conversations effectively.

OBJECTIVES

By the end of Block 2, new hires will be able to:

1. Differentiate between open-ended and closed questions and apply them effectively in customer interactions.
2. Use clarifying and follow-up techniques to uncover customer needs and refine engagement.
3. Recognize verbal and nonverbal customer engagement cues to adjust their approach dynamically.
4. Employ effective note-taking strategies to capture key details during customer interactions.

AGENDA

Block 2 should take approximately 1-1.5 hours, plus the variable time for the Field Training Ride-Along.

The following activities must be completed in order, as each builds upon the previous one:

- **2.2.1: Asking the Right Questions & Clarifying Customer Needs**
- **2.2.2: Why Writing It Down Matters**
- **2.2.3: Field Training: Recognizing Customer Cues & Questioning**

REMINDERS

- **Build on Block 1:** This block refines the communication and engagement strategies introduced in Block 1 and connect new concepts to previous lessons.
- **Encourage Adaptability:** Trainees should practice adjusting their questions and engagement style based on customer responses, not just sticking to a script.
- **Use Field Training for Real-World Practice:** The Ride-Along is critical in this block. Ensure the trainee actively participates when appropriate, not just observes.
- **Make It Practical:** This block is about refining real-world questioning techniques, not hypothetical discussions. Focus on application and feedback.
- **Make Documentation a Habit:** Reinforce that documenting customer interactions immediately prevents lost details and improves follow-ups. The best time to record notes is right after the conversation before moving on to the next task.



GREAT QUESTIONS UNCOVER CUSTOMER NEEDS. WEAK QUESTIONS SHUT CONVERSATIONS DOWN. TEACH TRAINEES HOW TO GUIDE THE CONVERSATION, NOT JUST CONTROL IT.

ASKING THE RIGHT QUESTIONS & CLARIFYING CUSTOMER NEEDS

TRAINER'S ACTIONS & CHECKLIST

- Introduce the importance of effective questioning in uncovering customer needs.
- Use the Trainer Activity Guide:
 - Discussion & Lesson: The Art of Questioning.
 - ▶ Need help with this topic? There is a Trainer Explainer at the end of this lesson for assistance if you need it.
 - Facilitate practice exercises where trainees convert and refine customer questions in their Learner Workbook.
 - Run through the mini scenarios and observe trainee performance.
 - ▶ Provide live feedback on question structure, clarity, and adaptability.
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Evaluate how well the trainee applies questioning techniques during role-plays.
- **Workbook Activity:** “How Did I Improve My Questions?”
- **AI Feedback (if available):** If using AI tools (like Siro), review insights on speech clarity and engagement.



QUICK TIPS

- ★ **Encourage adaptability.** The best sales conversations aren't scripted—help trainees practice responding to real customer behavior, not just memorizing questions.
- ★ **Use real examples.** Have trainees think of times they asked or received poorly phrased questions and discuss what would have worked better.
- ★ **Make it interactive.** Instead of just explaining open vs. closed questions, have trainees rewrite weak questions into stronger ones.

TRAINER MATERIALS

- Trainer Explainer:
 - ▶ Trainer Discussion Guide for Questioning Techniques

ACTIVITY WRAP-UP

- Wrap-Up Questions
 - How did your instinctive response compare to the improved versions?*
 - Which types of questions do you feel most comfortable asking?*
 - Where do you think you need the most improvement in customer conversations?*
- Verify completion of workbook activity & self-assessment checklist.

GUIDED DISCUSSION: THE ART OF QUESTIONING

Purpose: This activity helps trainees understand different types of questions and how they apply to sales.

Trainer Instructions: The Art of Questioning

Trainer-Guided Discussion – 5-7 minutes

- Explain that asking the right questions leads to better customer insights and stronger engagement.
- Reinforce that open-ended, probing, and impact questions guide customers toward solutions.
- Discuss common mistakes, such as:
 - ▶ Leading with closed questions that shut down conversation too quickly.
 - ▶ Overusing 'Why' questions, which can feel like an interrogation.
 - ▶ Failing to clarify responses, missing deeper customer concerns.
- **Trainer Tip:** Ask trainees to share examples of poor sales questions they've heard or experienced.

WORKBOOK ACTIVITY: HOW DO I IMPROVE MY QUESTIONS?

Purpose: This activity helps trainees refine their questioning techniques by practicing restructuring weak questions into stronger, more engaging ones. It builds on the Trainer-Guided Discussion and prepares trainees for role-playing.

Trainer Instructions: How Do I Improve My Questions

Workbook Exercise – 10 minutes

- Trainees will restructure weak or ineffective questions into more effective versions on pg. 32 of their Learner Workbook in a brief, 3-part exercise.
- Example Scenario for Trainer Explanation:
 - ▶ Weak Question: "Do you see any pests in your home?" (Closed, limits conversation.)
 - ▶ Improved Question: "What pest activity have you noticed in your home recently?" (Encourages detailed response.)
- Take a few moments to review their work with them and make comments.

ACTIVITY: MINI-SCENARIOS

Purpose: Trainees will practice refining weak customer questions through real-time discussion and feedback. This exercise helps them recognize how small adjustments in phrasing and structure can lead to better customer engagement, uncovering concerns more effectively and guiding conversations toward solutions.

Trainer Instructions For: Mini-Scenarios Set #1**Trainer & Trainee Practice: Part 1 – 10 minutes**

- Read the setup and customer statement aloud.
- Deliver the weak SI question and allow the trainee to respond.
- Have the trainee adjust and rephrase the weak question for better engagement.
- Discuss their response—was it open-ended, closed, or too leading?
- If needed, provide a strong example before moving on to the next scenario.

Mini-Scenario 1: A Customer Inquiry

- **The Setup:** *You're speaking with a homeowner who hasn't noticed any pest issues and doesn't see the need for service.*
- **Customer Comment:** *I haven't noticed any bugs, so I don't think I need pest control.*
- **Weak SI Question:** *Are you sure?* (Closed-ended, dismissive.)
- **Trainer Prompt:** *How can we reframe this to keep the conversation open?*
- **Example Fix:** *What types of pest issues have you had in the past?* (Encourages detailed response.)

Mini-Scenario 2: A Customer Concern

- **The Setup:** *This customer has tried another lawn service before but wasn't satisfied.*
- **Customer Comment:** *I've used another lawn company before, but I wasn't happy.*
- **Weak SI Question:** *Why didn't you like them?* (Can sound confrontational in the wrong tone of voice.)
- **Trainer Prompt:** *What's a way to show curiosity without sounding critical?*
- **Example Fix:** *What were you hoping to see from a lawn service that they didn't provide?* (Encourages the customer to share expectations.)

Mini-Scenario 3: A Customer Hesitation

- **The Setup:** *The customer is hesitant to commit to a full treatment plan.*
- **Customer Comment:** *I'm not sure I want to commit to a full treatment plan yet..*
- **Weak SI Question:** *Do you just want a one-time service then?* (Might push a decision too soon.)
- **Trainer Prompt:** *How can we guide the customer to explore options instead?*
- **Example Fix:** *What concerns do you have about starting a full plan?* (Opens conversation instead of forcing a choice.)

Trainer Instructions For: Mini-Scenarios Set #2

Trainer & Trainee Practice: Part 2 – 10 minutes

- Read the setup and customer statement aloud.
- Allow the trainee to respond naturally with their instinctive question.
- Evaluate their response—did it encourage conversation, or did it shut it down?
- Discuss adjustments—how could their question be improved?
- Provide an example fix if needed before moving to the next scenario.

Mini-Scenario 4: A Customer Inquiry

- **The Setup:** *You're speaking with a homeowner who wants a simple, low-cost option.*
- **Customer Comment:** *I just want a basic service, nothing fancy*
- **Trainee's Instinctive Response: ??? (Let the trainee respond.)**
 - ▶ **Trainer Evaluation:** *Does this response encourage more conversation or shut it down?*
- **Example Fix:** *What does 'basic service' mean to you? That way, I can make sure you get exactly what you need. (Clarifies expectations while keeping the conversation open.)*

Mini-Scenario 5: A Customer Concern

- **The Setup:** *The customer is worried about being locked into a long-term agreement.*
- **Customer Comment:** *I don't want to sign a contract—I don't like being locked into commitments.*
- **Trainee's Instinctive Response: ??? (Let the trainee respond.)**
 - ▶ **Trainer Evaluation:** *Does this response encourage more conversation or shut it down? How can you reassure the customer while still leading them toward a solution?*
- **Example Fix:** *I understand! Our goal isn't to lock you into something—it's to provide ongoing protection. Would it help if I explained how our service plan works? (Frames the response in a reassuring and informative way)*

Mini-Scenario 6: A Customer Skepticism

- **The Setup:** *The customer is questioning the pricing and comparing it to other options.*
- **Customer Comment:** *This seems too expensive compared to what I've seen elsewhere*
- **Trainee's Instinctive Response: ??? (Let the trainee respond.)**
 - ▶ **Trainer Evaluation:** *Does this response encourage more conversation or shut it down? How can you acknowledge their concern while reinforcing the value of our service?*
- **Example Fix:** *"I completely understand. Pricing is important, but it's also about what you're getting for that price. Would it help if I explained what sets Massey's service apart? (Acknowledges concern while keeping the conversation focused on value.)*

THE ART OF EFFECTIVE QUESTIONING

Asking the right questions is one of the most critical skills a Sales Inspector can develop. A **well-structured question can build trust, uncover hidden concerns, and guide customers toward a solution.** This explainer will help you teach trainees how to use **open-ended, probing, and impact questions effectively**, while avoiding common questioning mistakes—like making customers feel interrogated or forcing rushed answers.

This explainer is designed to help you with this task and follows three key principles:

1. **Open-ended questions uncover details and create engagement.**
2. **Probing questions dig deeper into specific concerns.**
3. **Impact questions highlight urgency and reinforce the value of Massey's services.**

Effective questioning starts with knowing when to use open-ended vs. closed questions.

Closed Questions

- **Definition:** Lead to short, specific answers (yes/no, a number, or a fact).
- **Purpose:** Use when verifying facts, confirming details, or narrowing down choices.
- **Examples:**
 - ▶ *Have you ever had a termite inspection before? (Yes/No)*
 - ▶ *When was the last time you had your lawn treated? (Date/Time)*
- **Watch Out:** Too many closed questions in a row can feel like a checklist or an interview, which may cause the customer to disengage.

Open-Ended Questions

Definition: Invite discussion and detailed responses.

Purpose: Use to gather information, understand concerns, and build trust.

Examples:

- *What concerns do you have about your home's pest protection? (Encourages details.)*
- *Tell me more about what you've noticed in your lawn recently. (Opens dialogue.)*
- **Watch Out:** Open-ended questions can lead to long or off-topic responses if not guided well. Be ready to steer the conversation back with a focused follow-up or summary.

Best Practices

- ✓ Start with **What, How, or Tell me about...** instead of "Do you" or "Is there."
- ✓ Use **open-ended questions first** to gather information, then **closed questions to confirm details.**
- ✓ Avoid **rapid-fire closed questions**—this can feel like an interrogation.

Probing Questions: Digging Deeper

Once a customer provides an initial response, probing questions help gather more details and clarify their true concerns.

- **Definition:** Encourage the customer to expand on their initial response.
- **Purpose:** Use when clarifying vague statements or identifying root concerns.
- **Examples:**
 - ▶ *You mentioned seeing pests in your kitchen. Can you tell me when you started noticing them? (Clarifies timeline)*
 - ▶ *What do you mean when you say your lawn isn't as healthy as it used to be? (Encourages detail.)*

✦ Customers don't always express their real concerns at first. A probing question lets them elaborate naturally instead of feeling pressured.

Impact Questions: Creating Urgency & Value

Impact questions help customers understand why taking action now is important.

- **Definition:** Highlight the consequences of inaction or the benefits of a solution.
- **Purpose:** Use when motivating the customer to see the importance of Massey's services.
- **Examples:**
 - ▶ *If left untreated, termites can cause serious structural damage. How would that impact your home's value? (Creates urgency.)*
 - ▶ *How important is long-term pest prevention for your family's health and comfort? (Reinforces value.)*

✦ Avoid fear-based selling! Instead of scaring the customer into a sale, use impact questions to help them see the real-life benefits of acting now.

What NOT to Do: The 'Why Question' Problem

✘ Avoid starting too many questions with 'Why.'

- **Why Questions** can feel confrontational or put customers on the defensive, like they have to justify themselves.
- Instead, rephrase as 'What' or 'How' questions to make the conversation more open.

Example Fixes: Poor → Better

- *Why haven't you scheduled pest control before?*
→ *What concerns have kept you from scheduling pest control in the past?*
- *Why do you want a lawn service now?* → *How do you see a lawn service helping your property long-term?*

Overview

Great questioning is about curiosity, not interrogation.

- ✓ Use **open-ended** questions to gather insight.
- ✓ Use **probing** questions to dig deeper.
- ✓ Use **impact** questions to create urgency.
- ✓ Avoid too many 'Why' questions—opt for 'What' and 'How' instead.

TRAINER'S ACTIONS & CHECKLIST

- Use the Trainer Activity Guide:
 - Trainer-Led Discussion: Why Do Notes Matter?
 - ▶ The Trainer Explainer, What Makes a Good Note?, is there to help you if you need it.
 - Optional Activity Extension
 - ▶ Notetaking Practice
 - ▶ Unstructured notes
 - ▶ Structured notes examples
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Review:** Evaluate trainee notes for clarity, completeness, and organization.
- **Trainee Self-Reflection:** “What details did I capture? What did I miss?”



QUICK TIPS

- ★ **Encourage trainees to develop a habit** of taking notes during every interaction—not just after!
- ★ **Teach trainees to write notes they can understand later**—rushed, messy notes won't be helpful.
- ★ **Remind trainees that notes aren't just for them**—managers and team members may rely on them too!
- ★ **Keep it simple!** Focus on the most-used features—trainees don't need a full system breakdown yet.
- ★ **Encourage accuracy!** Notes should be clear, professional, and useful for future follow-ups.

TRAINER MATERIALS

- Trainer Explainer:
 - ▶ What Makes a Good Note?
- Customer Interaction Video Clip: <https://bit.ly/4iJzlmS>

ACTIVITY WRAP-UP

If completed the optional extension:

- Learner Self-Reflection:** Ask the trainee questions like these to help them reflect on what they've learned.
 - *What was one important detail you captured correctly in your notes?*
 - *What was one detail you missed or didn't record clearly?*
 - *How will you adjust your note-taking approach to improve accuracy?*
 - *What will you do differently in your next customer interaction?*

EFFECTIVE NOTE-TAKING FOR SALES INSPECTORS

Purpose: To equip Sales Inspectors with effective notetaking strategies for capturing key details during customer interactions, improving recall, and enhancing overall customer engagement.

Video Link for Optional Activity: <https://bit.ly/4iJzlmS>

Step 1: Trainer-Guided Discussion: The Importance of Notetaking

- Use the following questions to initiate a discussion on the importance of note-taking in a sales context:
What happens if you forget key details after an appointment?
- *Why is notetaking critical in sales and customer engagement?*
- *How have notes (or lack of them) helped or hurt you in past jobs?*

Optional Step 2: Note-Taking Exploration

Initial Note-Taking:

- Watch the first minute or so of the video together.
- Have the trainee take notes using their preferred method as you watch.

Self-Assessment and Discussion:

- Guide the trainee to review their notes and discuss the process. Prompt self-reflection with questions like:
 - ▶ *What key information did you capture?*
 - ▶ *What information did you miss?*
 - ▶ *Are your notes clear and understandable to you?*

Analysis of Effective Note-Taking:

- Facilitate a discussion on the characteristics of effective note-taking.
- Use the Trainer Explainer (if needed) to highlight elements such as:
 - ▶ Organization and structure
 - ▶ Use of keywords and abbreviations
 - ▶ Prioritization of key information
 - ▶ Clarity and conciseness

Template Exploration:

- Introduce the note-taking template examples provided at the end of this lesson.
 - ▶ The templates are also in their workbook on pg. 39.
- Guide the trainee to explore the different templates and their structures..

Template Selection and Application:

- Have the trainee select one template they want to try.
- Rewatch the same clip or another minute or so of the video.
- Have the trainee use their chosen template to take notes.

Comparative Review and Iteration:

- Guide the trainee to compare their template-based notes with their initial notes.
- Discuss the effectiveness of the template in terms of clarity, structure, and information capture.
- Encourage the trainee to identify improvements and adjustments.

Emphasis on Practice and Patience:

- Reiterate that note-taking is a skill that develops with practice.
- Encourage the trainee to focus on consistent practice with a chosen method before experimenting with alternatives.



GOOD NOTES = FUTURE SALES. THE DETAILS CAPTURED TODAY CAN BE THE REASON A CUSTOMER SIGNS UP FOR SERVICES TOMORROW.

WHAT MAKE'S A GOOD NOTE?

Purpose: This guide provides a general overview of the basics of notetaking for the trainer. It also contains examples of different notetaking formats.

A Good Note Is...

- **Clear & Concise** – Captures key points without unnecessary details.
- **Actionable** – Includes next steps, follow-ups, and reminders.
- **Structured** – Organized so it's easy to review later.
- **Accurate** – Reflects what the customer actually said and what was observed.

Common Note-Taking Mistakes:

- **Writing too much** – Notes shouldn't be a full transcript!
- **Leaving out key details** – Forgetting dates, objections, or service preferences.
- **Being too vague** – "Customer was concerned" isn't helpful; *why were they concerned?*

What is the best format for taking notes?

- There is no single "correct" or "best" method or format.
- Each person is different, and what makes sense and works for one person, may be the opposite for another.
- There are some general rules:
 - ▶ Simpler is better
 - ▶ Find a structure and stick to it
 - ▶ Give yourself space to return and make edits and additions

How can you teach or help if the possibilities are endless?

- This guide provides 3 examples for basic, strategic notetaking.
 - ▶ A structured, guided, template format
 - ▶ A free-form, quadrant-based approach
 - ▶ A free-form, heading-based approach
- There are blank versions in the Learner Workbook.
- These options are there to help you, help the trainee to find or develop a method which works for them.

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!

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.

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

Wants to confirm that our service is safe for pets and children. Son has asthma.

Ants in the kitchen near the sink and pantry

Engagement Cues & Notes

Involved in convo.

Nodding and asking qus. (esp. treatment types and methods)

Dog is giant! Ask what kind it is.

Observations

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.

Next Steps & Follow-Up Actions

Send print info on our pet-safe treatments (wants to share with partner)

Book inspection.

Follow up in a week (2/25/2024)

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.

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.

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.

FIELD TRAINING: RECOGNIZING CUSTOMER CUES & QUESTIONING

GOAL

To provide Sales Inspectors 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.

OBJECTIVES

By the end of this activity, trainees 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 provides trainees with real-world exposure to customer interactions, allowing them to observe engagement cues, structured questioning, and service-specific processes in action. Trainees will begin by shadowing a mentor, taking notes on communication strategies and customer responses, before gradually

transitioning into guided participation. The session concludes with a debrief discussion to reinforce key takeaways and ensure they can apply these skills in future customer interactions.

Layer this Activity onto an Existing Ride-Along. Maximize training efficiency by combining activities where it makes sense.



DETAILS

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

NOTES

FIELD TRAINING: RECOGNIZING CUSTOMER CUES & QUESTIONING

TRAINER'S ACTIONS & CHECKLIST

- Before the Ride-Along:
 - Direct the trainee to the Ride-Along Observation Worksheet (Workbook, pg. 45).
 - Ensure the trainee understands their role during the observation phase and when they may engage.
 - If the ride-along trainer is not the GM, confirm a post-ride debrief with the GM.
 - Read through the Trainer Explainer on the next page and keep it handy for reference.
- During the Ride-Along:
 - Guide the trainee through passive observation, ensuring they:
 - ▶ Take notes on customer engagement cues.
 - ▶ Identify questioning techniques used during the interaction.
 - ▶ Observe service-specific processes relevant to the visit.
 - Introduce the trainee to the customer and obtain permission for their participation.
 - ▶ If the customer does not grant permission, ensure the trainee steps back and observes.
 - When appropriate, transition to guided participation, having the trainee ask customer questions.
 - After a customer interaction, use these questions to prompt discussion & reflection:
 - ▶ *What engagement cues did the customer display?*
 - ▶ *How effective were the questions in gathering useful information?*
 - ▶ *What could have been done differently?*
- Activity Wrap-Up: Post Ride-Along



QUICK TIPS

- ★ **Encourage Observational Awareness!** Have trainees focus on both verbal and nonverbal engagement cues to refine their active listening skills.
- ★ **Guide, Don't Overwhelm!** When coaching trainees in live settings, provide 1-2 immediate takeaways rather than overwhelming them with corrections.
- ★ **Make It Real!** Discuss specific customer interactions to reinforce learning rather than keeping the debrief theoretical.

TRAINER MATERIALS

- Trainer Explainer: Conducting the Ride-Along (next page)

ACTIVITY WRAP-UP

- Lead a post-visit debrief discussion with the trainee, reviewing:
 - Engagement cues and questioning effectiveness.
 - Two service-specific takeaways from the visit.
 - Areas for improvement in future interactions.
- If the trainer is not the GM, provide a brief follow-up report on trainee progress.

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observations & Feedback:** Reinforce key behaviors based on field observations.
- **Ride-Along Reflection:** Trainee Workbook.
- **Wrap-Up Discussion in the Activity Wrap-Up**

CONDUCTING THE RIDE-ALONG

Purpose: This guide provides step-by-step instructions for conducting a successful ride-along, ensuring the trainee observes, participates, and receives structured coaching while maintaining professionalism and customer trust.

Preparing for the Ride-Along

- **Introduce the Ride-Along:** Before heading into the field, explain to the trainee what they will be observing, practicing, and expected to do.
- **Clarify Expectations:**
 - ▶ The trainee will observe first before practicing engagement with customers.
 - ▶ They must be mindful of body language and professionalism, even when not speaking.
 - ▶ If they are asked a question they're unsure of, they should redirect to the trainer rather than guessing.

Customer Introductions & Permission

- **It is critical to obtain the customer's permission before including the trainee in any conversation.**
- **Example Customer Introduction:**
 - ▶ *Good morning, Mr. Bell! It's good to see you. Before we begin, I'd like to introduce my trainee, John Doe. He's been learning about working with customers today, and I'd like to give him some real-world experience. Would you be comfortable with him observing and maybe asking a couple of questions?*
- **Important Notes:**
 - ▶ If the customer is not comfortable with the trainee participating or being on their property, the trainee must step back and observe from a distance or wait in the vehicle if asked.
 - ▶ If the customer allows participation, the trainee should let the trainer lead first and follow their cues.
 - ▶ If entering a customer's home, never assume permission—always ask!

Observational Phase (Passive Learning)

- The trainee shadows the trainer or experienced SI and takes structured notes in their workbook.
- **Key Observations to Focus On:**
 - ▶ How does the trainer establish rapport and credibility?
 - ▶ What questioning techniques are used to gather customer information?
 - ▶ How does the customer respond (verbal and nonverbal engagement cues)?
 - ▶ **Service-Specific Takeaways:** What steps of the service process should the trainee note?

Guided Practice Phase (Active Learning)

- **Transition to Trainee Participation:** The trainer should select a natural moment for the trainee to engage the customer.
- **The trainer should frame the interaction for the customer:**

- ▶ Example Handoff Statement: *Alex has been learning about customer engagement today, and I'd like to give them some practice if that's okay with you. (assuming a yes response) Alex, why don't you ask Mr. Bell your questions.*
- **Key Trainer Responsibilities:**
 - ▶ Observe and guide the conversation to keep it professional and valuable.
 - ▶ Step in if the trainee struggles or needs redirection.
 - ▶ Encourage the trainee to listen actively and ask follow-up questions.

Service-Specific Takeaways (Reflective Learning)

- At the end of each customer visit, the trainer and trainee should identify two key takeaways related to the specific service being observed.
- **Examples:**
 - ▶ **Pest Service:** *What signs of pest activity were checked before making a recommendation?*
 - ▶ **Lawn Service:** *What environmental conditions did the trainer note when assessing the lawn?*
 - ▶ **Termite Inspection:** *How was potential termite damage identified before treatment options were discussed?*
- Make sure the trainee documents these takeaways in their workbook.

Post-Visit Reflection & Trainer Discussions

- At the end of each customer visit, conduct a short debrief session with the trainee
- **Debrief Discussion Prompts:**
 - ▶ *What engagement cues did the customer display?*
 - ▶ *How effective were the questions in gathering useful information?*
 - ▶ *What went well, and what could have been improved?*
- Make sure the trainee documents these takeaways in their workbook.

Post-Ride Reflection & Trainer Discussions

- At the end of the ride-along, wrap things up with the trainee.
- Lead a post-visit debrief discussion with the trainee, reviewing:
 - ▶ What they learned about engagement cues and questioning effectiveness.
 - ▶ Two service-specific takeaways from the visit.
 - ▶ Areas for improvement in future interactions.
- If the trainer is not the GM, be prepared to take part in the GM's review with the trainee.
 - ▶ If the person conducting the ride-along is not the General Manager, they should participate in a follow-up debrief with the GM whenever possible.
 - ▶ If a joint debrief is not possible, the ride-along trainer must debrief with the GM separately and provide a brief follow-up report on trainee progress.

MODULE 3

Getting Started with Sales

Creating Opportunities & The 8-Step Sales Process

GOAL

Helping Sales Inspectors develop the foundational skills and confidence to create sales opportunities, initiate customer interactions, and transition conversations effectively through the 8-Step Sales Process.

MODULE BREAKDOWN

Module 3 consists of three structured blocks with activities designed to progressively introduce and refine key sales techniques.

The estimated time for Module 3 completion is approximately 4-5 hours, but timing may vary based on role-playing exercises and discussion depth.

OBJECTIVES

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

1. Develop a proactive sales mindset, focusing on lead generation, structured outreach, and appointment setting.
2. Utilize Massey's 4+1 Prospecting Program to maximize opportunities from office leads, web leads, service leads, and neighborhood outreach.
3. Deliver a confident, trust-building introduction, positioning the sales conversation for success.
4. Implement fact-finding techniques to uncover customer concerns and position the inspection as the next logical step.
5. Recognize how each step of the 8-Step Sales Process builds trust and momentum, ensuring smooth transitions and avoiding common mistakes.

- **Block 1: Answering The Call – Creating Opportunities & Opening the Door** - Focus: Establishing a strong foundation in sales mindset, daily expectations, and prospecting strategies. This block emphasizes the importance of lead generation, structured outreach, and consistent sales opportunities.
- **Block 2: Developing Confidence in the Sales Introduction** - Focus: Training SIs on executing Step 1 of the 8-Step Sales Process (The Introduction) effectively. This includes making a strong first impression, engaging the customer, fact-finding, and setting up the inspection.
- **Block 3: The Sales Process in Action – Transitions, Trust & Timing** - Focus: Helping SIs understand how each step of the 8-Step Sales Process builds trust and momentum, ensuring smooth transitions and avoiding common mistakes.

MODULE TIPS

- **Follow the Sequence:** Activities should be completed in order whenever possible, as each builds on the last.
- **Encourage Self-Reflection:** Many of these exercises require trainees to evaluate their habits and newfound skills—help them identify strengths and areas for improvement.
- **Use Role-Playing to Build Confidence:** The more trainees engage in live sales conversations, the smoother their real interactions will be.



TIE EVERYTHING BACK TO THE CUSTOMER JOURNEY: ENSURE TRAINEES SEE THE BIG PICTURE, NOT JUST INDIVIDUAL STEPS

Block 1: Answering the Call - Creating Opportunities & Opening the Door

Balance Coaching with Challenging

Encourage trainees while pushing them to refine their techniques—growth comes from constructive feedback.



Keep It Practical

Always tie discussions back to real-world applications—avoid overly theoretical discussions that don't translate to sales success.

GOAL

To establish a strong foundation in sales mindset, daily expectations, and prospecting strategies. This block reinforces the importance of lead generation, structured outreach, and appointment setting.

OBJECTIVES

By the end of Block 1, trainees will be able to:

1. Develop a proactive sales mindset, focusing on lead generation, structured outreach, and appointment setting.
2. Utilize Massey's 4+1 Prospecting Program to maximize opportunities from office leads, web leads, service leads, and neighborhood outreach.
3. Practice structured cold calling and appointment setting, refining engagement strategies through role-play and AI-assisted feedback.
4. Deliver a confident, trust-building introduction, positioning the sales conversation for success.

AGENDA

Block 1 should take roughly 1.5-2 hours to complete.

If possible, activities should be completed in the order listed below to ensure a logical progression of learning.

- 3.1.1: The Importance of *The Call* & Sales Mindset
- 3.1.2: Creating Sales Opportunities: The 4+1 Program
- 3.1.3: Making the First Move: Cold Calling & Appointment Setting

REMINDERS

- **Follow the Sequence:** Activities should be completed in order whenever possible, as each builds on the last.
- **Encourage Active Participation:** Sales is a skill-based discipline—trainees should be practicing, not just listening.
- **Use Role-Playing to Build Confidence:** The more trainees engage in live sales conversations, the smoother their real interactions will be.
- **Reinforce the Counselor Selling Approach:** Encourage trainees to build trust through consultative conversations, emphasizing problem-solving over pushy sales tactics.

EVERY LEAD IS A SALES OPPORTUNITY! TRAINEES SHOULD ALWAYS BE THINKING BEYOND THEIR IMMEDIATE LEADS—EACH CONVERSATION IS A CHANCE TO EXPAND OUTREACH, BUILD TRUST, AND GENERATE ADDITIONAL OPPORTUNITIES.



THE IMPORTANCE OF *THE CALL* & SALES MINDSET

GOAL

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

OBJECTIVES

By the end of this activity, trainees 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.

DETAILS

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

ACTIVITY OVERVIEW

A strong sales mindset is the foundation of success in residential sales. This activity helps trainees understand the role of prospecting in building lasting customer relationships and business growth. Through guided discussion and self-reflection, trainees will explore how their approach to sales calls shapes customer interactions, drives lead generation, and contributes to Massey’s overall success. This session also introduces Massey’s structured expectations for prospecting, ensuring trainees develop the discipline and confidence needed to create opportunities consistently.

NOTES

THE IMPORTANCE OF *THE CALL* & SALES MINDSET

TRAINER'S ACTIONS & CHECKLIST

- Before the Activity:
 - Ensure trainees have read the relevant chapters of the Sales Manual: The Call & The Genesis
- Trainer-Led Discussion: The Genesis of Selling
 - Introduce the importance of prospecting in the Massey sales process.
 - Discuss the Counselor Selling philosophy—how it fosters trust and long-term customer relationships.
 - Tie lead generation to problem-solving for customers, reinforcing that successful prospecting is about providing solutions, not just making dials.
 - Reinforce Massey's expectations for daily call volume, lead generation, and follow-ups, and ask the trainee:
 - ▶ How does every call contribute to long-term success beyond just today's sale?
- Goal-Setting: The Roadmap to Success
 - Ensure the trainee completes an example Roadmap to Success
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Discussion:** Ensure trainees understand the importance of sales calls and their role in generating business.
- **Goal-Setting Review:** Trainees should outline specific sales goals in alignment with Massey's expectations.



QUICK TIPS

- ★ **Keep It Positive:** Many new salespeople fear rejection. Reframe setbacks as learning opportunities rather than failures.
- ★ **Be Honest!** Being successful takes time, effort, and grit. Make sure you're not giving your trainee's the impression that as soon as they're on their own they'll be rolling in money.
- ★ **Hitting call targets is important,** but what truly builds momentum is when a customer remembers you as a trusted resource, not just another salesperson.

TRAINER MATERIALS

- Sales Manual - Chapters 5 & 13
- Roadmap to Success

ACTIVITY WRAP-UP

- Clarify expectations and answer any questions or concerns.
- Reinforce that quota expectations exist because sales is a numbers game, but also a trust game.
- Reinforce best practices for persistence, professionalism, and self-discipline.
- Provide feedback on goal-setting and encourage accountability.

CREATING SALES OPPORTUNITIES: THE 4+1 PROGRAM

GOAL

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

OBJECTIVES

By the end of this activity, trainees 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 trainees with a deep understanding of Massey's 4+1 Prospecting Program and how it expands lead generation opportunities. Rather than jumping straight into cold calls, trainees will analyze various lead sources, discuss best prospecting strategies, and complete structured exercises to develop proactive lead generation habits.

 This session is critical for helping new Sales Inspectors develop proactive lead generation habits and confidence in prospecting.

DETAILS

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

NOTES

CREATING SALES OPPORTUNITIES: THE 4+1 PROGRAM

TRAINER'S ACTIONS & CHECKLIST

- Trainer-Led Introduction: Where Do Massey's Sales Come From?
 - Explain Massey's primary lead sources and how they generate opportunities
 - Provide an overview of each of the following:
 - ▶ Office Leads
 - ▶ Web Leads
 - ▶ Service Leads
 - ▶ New Construction Leads
 - ▶ Creative Leads: Door-knocking, door hanging and community engagement
 - Ask trainees to identify which lead sources they think generate the most business. Discuss.
 - Discuss how a single lead can generate additional appointments
 - Review The Drill
- 4+1 Program Walkthrough: Expanding a Lead into Multiple Prospects
 - Discuss the 4+1 Prospecting Program and why it's essential for long-term sales success
 - Break down each component of the 4+1 approach
 - Provide examples of how a single lead can generate additional appointments
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Discussion & Coaching:** Review discussion and any prospecting materials to provide strategic insights.
- **Workbook Self-Reflection:** "How Will I Use the 4+1 Program?"
- **Trainee Action Plan Review:** Ensure the trainee has a personalized outreach strategy.



QUICK TIPS

- ★ **Every Lead is an Opportunity!** Encourage trainees to think beyond direct leads—every conversation is a chance to expand outreach.
- ★ **Consistency Wins!** Reinforce that success comes from consistent daily prospecting—a single day without calls means missed sales opportunities.

TRAINER MATERIALS

- Sales Manual - Chapter 5 & 6
- Examples of door hangers, or any other lead generating materials

ACTIVITY WRAP-UP

- Have the trainee complete the self-reflection in the Learner Workbook Self-Reflection: "How Will I Use the 4+1 Program?" on pg. 50.
 - Review the self reflection with the trainee.
- Clarify expectations and answer any questions or concerns.

MAKING THE FIRST MOVE: COLD CALLING & APPOINTMENTS

TRAINER'S ACTIONS & CHECKLIST

- Cold Call Breakdown & Guided Practice
 - Explain the structure of a successful cold:
 - ▶ Opening Statement – Capture attention quickly.
 - ▶ Value Proposition – Why the call is relevant.
 - ▶ Engagement Question – Invite discussion.
 - ▶ Handling Objections – Address concerns calmly.
 - ▶ Closing the Call – Confirm the next step.
 - Optional Extension: Learner Workbook: “Structuring My Own Cold Call Script”
- Use the Trainer Activity Guide
 - Deploying the options extension
 - Deploying the mini-role-playing scenarios
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Discussion & Coaching:** Review cold call effectiveness and recommend improvements.
- **AI Feedback Report (if available):** Evaluate vocal tone, engagement, and call clarity.
- **Trainee Self-Reflection:** “Structuring My Own Cold Call Script” Exercise.

ACTIVITY WRAP-UP

- Review the following:
 - AI speech analysis (if applicable)
 - Trainer notes
 - Address key items you observed and noted in the role-play rubric.
- Trainee Self-Reflection. Ask the following questions:
 - What is one key takeaway from this exercise?
 - What is one area of cold calling you feel most confident in? An area to improve in? How will you work on it?
 - What adjustments did you make during the role-play? How did your approach impact the conversation?



QUICK TIPS

- ★ Reinforce that tone and body language shape the customer’s trust as much as words.
- ★ Each customer is different—flexibility and adaptation make the best sales conversations.
- ★ Use AI Insights Wisely! Leverage Siro AI feedback to provide datadriven coaching on pacing, tone, and engagement.

TRAINER MATERIALS

- AI Speech Analysis (Siro) Feedback if applicable

STRUCTURING MY COLD CALLS

Purpose: This activity helps trainees practice structuring their cold call script, ensuring they can confidently engage potential customers, address objections, and set appointments. By guiding trainees through script development, trainers reinforce best practices for initiating conversations and maintaining engagement.

Step 1: Setting Up the Activity (3-5 Minutes)

- Provide an overview of why structured cold calls matter, emphasizing:
 - ▶ How a well-planned call increases engagement and appointment conversion.
 - ▶ The importance of confidence, tone, and pacing.
 - ▶ Why cold calls should sound natural and professional—not robotic or overly scripted.
- Review the types of interactions a Sales Inspector might have:
 - ▶ **Face-to-Face:** A meeting on the prospect’s property.
 - ▶ **Phone:** Over the phone with a prospect.
 - ▶ **Random:** Encounters out in the world (e.g. standing in line for lunch and you strike up a conversation)
- Ask the trainee: *Which type of interaction do you feel most comfortable with at the moment? Why?*

Step 2: Optional Extension: Workbook Exercise – Drafting the Cold Call Script (5-10 Minutes)

Instructions for the Trainee:

- Select interaction type from the provided options.
- Draft a cold call script using the structured call format:
 - ▶ **Opening Statement:** Introduce yourself and establish relevance.
 - ▶ **Value Proposition:** Explain why the call is beneficial.
 - ▶ **Engagement Question:** Invite discussion and assess the customer’s interest.
 - ▶ **Handling Objections:** Prepare responses for common concerns.
 - ▶ **Closing the Call:** Confirm the next step.

Trainer Actions:

- Walk through a sample script before the trainee writes their own.
- If needed, provide a pre-written example to demonstrate the expected structure.
- Observe the trainee’s script and challenge them to refine weak areas, such as:
 - ▶ Are they clearly introducing themselves and the service?
 - ▶ Does their value proposition make the call relevant and appealing?



ACTIVITY TIPS

- ★ **Confidence is Key!** Even a well-structured call will fail if it sounds hesitant—help trainees own their words.
- ★ **Encourage Personalization!** Cold calls should follow a framework, but every customer is different—trainees should adjust tone and approach as needed.
- ★ **Teach Them to Expect Objections!** Many customers will initially push back; overcoming objections is part of the job.
- ★ **Practice Breeds Improvement!** Encourage trainees to refine their script over time, adjusting based on real interactions.

- ▶ Have they prepared responses for potential objections?

Refining the Script Through Discussion (5 Minutes)

- **Instructions for the Trainee:**
 - ▶ Read their script out loud to the trainer.
 - ▶ Identify any areas that feel unnatural or could be improved.
 - ▶ Discuss strategies to improve tone, engagement, and confidence.
- **Trainer Actions:**
 - ▶ Listen to the script and provide targeted feedback on clarity, pacing, and tone.
 - ▶ Reinforce that the best calls feel like conversations, not rehearsed speeches.
 - ▶ Suggest refinements, such as:
 - Making the opening statement more engaging.
 - Adjusting phrasing to sound more natural.
 - Strengthening objection handling techniques.

COLD CALL MINI-ROLE-PLAY GUIDE

Purpose: Trainees will practice delivering cold call pitches based on different lead sources and scenarios using guided role-play. This exercise refines their ability to confidently engage potential customers, handle objections, and generate appointments. AI-assisted feedback (Siro) will evaluate tone, pacing, and engagement effectiveness (if available).

Part 1: Setup & Explanation (5 Minutes)

- Explain the purpose of the exercise: Practicing cold calling in different situations.
- Emphasize that cold calls should sound natural and professional, not overly scripted while maintaining structure.
- You may share the Trainee Actions with the trainee if you wish, or keep them to yourself to see how the trainee does without the guidance.
- Read the scenario for the trainee and let them respond.
- Do a quick warm-up exercise where the trainer demonstrates a cold call that sounds forced or overly scripted vs. a natural, customer-led conversation. Ask trainees to point out the differences (tone, pacing, response to objections).

Part 2: Cold Call Role-Play Scenarios (15-20 Minutes)

The trainee will initiate a cold call based on the scenarios. Trainers will provide real-time feedback after each call.

Scenario 1: You have just completed a termite inspection at 1543 Quail Hollow. Now, you are cold calling a neighbor, in-person, to offer a complimentary inspection. You knock on the door and the door opens...

- **Trainee Action:**
 - ▶ The trainee must introduce themselves and explain the reason for the call.

- ▶ They should mention the recent inspection and why a complimentary check-up might be beneficial.
- ▶ They will attempt to engage the customer and schedule an appointment.
- **Trainer Feedback & Corrections:**
 - ▶ Assess clarity and confidence in delivery.
 - ▶ Identify any missed engagement opportunities.
 - ▶ Provide corrections to improve phrasing and tone.

Scenario 2: A homeowner submitted an online request for a lawn care analysis, but they haven't scheduled an appointment yet. You call their number and they answer the phone...

- **Trainee Action:**
 - ▶ The trainee initiates the call and introduces themselves.
 - ▶ They remind the customer about their inquiry and provide value for scheduling the analysis.
 - ▶ They navigate hesitations and attempt to set a date.
- **Trainer Feedback & Corrections:**
 - ▶ Identify if the trainee built rapport and provided a compelling reason to schedule.
 - ▶ Ensure that hesitations were handled with confidence.
 - ▶ Suggest refinements in word choice or delivery.

Scenario 3: You are at a grocery store to pick up some lunch, when another customer initiates a conversation about your job once they notice your Massey Uniform. You decide to introduce yourself and get the ball rolling...

- **Trainee Action:**
 - ▶ The trainee must naturally engage in conversation without sounding overly sales-driven.
 - ▶ They should introduce themselves and reference how Massey Services helps with the problem being discussed.
 - ▶ They will work to gauge interest and, if appropriate, offer a complimentary inspection or service information.
- **Trainer Feedback & Corrections:**
 - ▶ Ensure the trainee effectively engages in the conversation without coming off as pushy.
 - ▶ Assess how well they transition from casual conversation to offering a service.
 - ▶ Provide feedback on how to create urgency or interest while maintaining a natural flow.

Part 3: AI Feedback & Adjustments (If available)

- Use Siro AI to evaluate each trainee's tone, pacing, and engagement effectiveness.
- Trainers provide real-time coaching based on AI analysis and their observations.
- Trainees redo their cold call incorporating feedback, refining their delivery and confidence.
- Encourage trainees to practice different lead sources to become adaptable in any sales situation.

Block 2: Developing Confidence in the Sales Introduction

Model the Right Behavior

Demonstrate a professional, engaging introduction before expecting trainees to do the same.



Challenge Without Overwhelming

Gradually introduce complexity—don't rush adjustments before the trainee is ready.

GOAL

To train Sales Inspectors on executing Step 1 of the 8-Step Sales Process (The Introduction) effectively. This block focuses on making a strong first impression, engaging the customer, fact-finding, and setting up the inspection.

OBJECTIVES

By the end of Block 1, trainees will be able to:

1. Deliver a structured, confident sales introduction that builds credibility and trust.
2. Use strategic questioning to uncover customer needs and concerns.
3. Adjust their introduction and approach based on customer engagement cues.
4. Transition smoothly from introduction to fact-finding and into the inspection phase of the sales process

AGENDA

Block 2 should take roughly 1.5-2 hours to complete.

If possible, activities should be completed in the order listed below to ensure a logical progression of learning.

- **3.2.1:** Step 1 – The Introduction: Structuring the Conversation
- **3.2.2:** Guided Role-Play: Delivering a Strong Sales Introduction & Strategic Fact-Finding

REMINDERS

- **Follow the Sequence:** Activities should be completed in order whenever possible, as each step builds upon the previous one.
- **Encourage Active Participation:** Role-playing and live practice are essential—trainees learn best through hands-on engagement.
- **Make Adjustments Based on the Trainee:** Some trainees will need more time or guidance—adjust pacing as necessary.
- **Connect to the Larger Sales Process:** Remind trainees that the introduction is just the first step—how they open the conversation impacts the entire sales interaction.



REMEMBER: YOUR INTRODUCTION STARTS BEFORE YOU SPEAK. FROM THE MOMENT YOU STEP OUT OF THE VEHICLE, YOUR BODY LANGUAGE, EXPRESSION, AND ENERGY ALREADY INFLUENCE CUSTOMER PERCEPTION.

STEP 1 – THE INTRODUCTION: STRUCTURING THE CONVERSATION

TRAINER’S ACTIONS & CHECKLIST

- Ensure trainees have read the relevant information about introductions in the Sales Manual.
 - Chapter 7: The 8-Step Sales Process
- Use the Trainer Activity Guide:
 - Trainer-Led Discussion: Breaking Down the Introduction.
 - Building the Introduction
 - ▶ Personalized Practice: Draft & Deliver
 - Scenario-Based Adjustments
- Activity Wrap-Up
 - Have the trainee complete the self-reflection in the Learner Workbook: “Refining My Introduction”.

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation & Role-Play Evaluation:** Ensure clarity, confidence, and engagement.
- **Trainee Self-Assessment:** Reflection on improvements and adjustments.



QUICK TIPS

- ★ **First Impressions Begin Before You Speak:** Your body language and initial energy set the stage—make sure trainees practice confidence inside and outside of the conversation.
- ★ **Confidence Matters!** Even the best script will fail if the delivery is hesitant—encourage natural confidence.
- ★ **Adaptability is Key.** Ensure trainees know how to adjust their introduction based on customer responses.
- ★ **Avoid Sounding Scripted.** Trainees should practice structure, not memorization.

TRAINER MATERIALS

- Sales Manual - Chapter 7

ACTIVITY WRAP-UP

- Review the self reflection with the trainee.
- Provide final feedback on structure, clarity, and confidence.
- Discuss common mistakes and how to avoid them.
- Trainee updates their finalized introduction in their workbook.

BREAKING DOWN THE INTRODUCTION

Purpose: This activity helps trainees develop a structured, confident introduction that establishes credibility, engages customers, and sets the stage for successful sales conversations. By breaking down each component of the introduction and practicing real-world scenarios, trainees will refine their delivery, tone, and adaptability.

Step 1: Trainer Walkthrough: Breaking Down the Introduction (5-7 Minutes)

- Tie back to Module 2: Remind trainees that first impressions matter, and their introduction starts before they speak.
 - ▶ Example Trainer Prompt: *Think back to what we covered about first impressions. Your introduction starts before you speak—how you approach the customer, your body language, and even your expression as you walk up all contribute to setting the tone. How do we make sure we start strong?*
- Break Down the Three Elements of a Strong Introduction:
 - ▶ **Establish Credibility:** Who you are and why you're here.
 - ▶ **Create Engagement:** Make the customer feel at ease.
 - ▶ **Set the Stage:** Naturally introduce the purpose of the conversation.
- Model a Professional Introduction: Provide an example before trainees attempt their own.

Step 2: Personalized Practice: Draft & Deliver (10 Minutes)

- **Trainee Actions:**
 - ▶ Draft their personalized introduction using the Personal Practice Sheet (Workbook, pg. 55).
 - ▶ Deliver their introduction to the trainer for immediate feedback.
 - ▶ Focus on tone, pacing, body language, and clarity in their delivery.
- **Trainer Actions:**
 - ▶ Observe and assess each trainee's introduction.
 - ▶ Provide specific feedback on:
 - ▶ Confidence and body language.
 - ▶ Clarity and engagement.
 - ▶ Smoothness of the transition into the conversation.
- If needed, model alternative approaches and have the trainee adjust and retry.

Step 3: Scenario-Based Adjustments – Handling Customer Responses (10 Minutes)

- **Trainee Actions:**
 - ▶ Practice adapting their introduction based on different customer scenarios.
 - ▶ Consider tone and approach adjustments for the following scenarios:
 - Customer is rushed and distracted – How do they adjust?
 - Customer is skeptical – How do they establish credibility?

3.2.1 TRAINER ACTIVITY GUIDE

- Customer seems interested – How do they naturally transition forward?
- **Trainer Actions:**
 - ▶ Present each scenario one at a time.
 - ▶ Observe how the trainee modifies their approach.
 - ▶ Provide coaching on how to pivot conversations smoothly.

GUIDED ROLE-PLAY: DELIVERING A STRONG SALES INTRODUCTION

GOAL

This guided role-play builds on the previous sales introduction practice and introduces fact-finding techniques to guide the conversation into the inspection phase. The goal is for Sales Inspectors to confidently deliver introductions, ask strategic fact-finding questions, and transition smoothly into setting the inspection.

OBJECTIVES

By the end of this activity, trainees 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 trainees with a structured, low-pressure environment to practice live customer interactions. Through guided role-playing and AI-assisted feedback (Siro), trainees will refine their tone, pacing, and engagement while developing natural, customer-focused questioning strategies.

Trainees will participate in multiple practice rounds, receiving real-time coaching from their trainer after each attempt. The goal is to ensure they deliver a strong, confident introduction that builds credibility, engages the customer, and smoothly transitions into the next steps of the conversation.

DETAILS

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

NOTES

GUIDED ROLE-PLAY: DELIVERING A STRONG SALES INTRODUCTION

TRAINER'S ACTIONS & CHECKLIST

- Set Up the Role-Play Activity
- Deliver the Role-Play using the Trainer Activity Guide on the following pages
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation & Role-Play Evaluation:** Ensure clarity, confidence, and engagement.
- **Trainee Self-Assessment:** Reflection on improvements and adjustments.



QUICK TIPS

- ★ **Encourage Natural Adjustments!**
Help trainees move away from a rigid script and develop a conversational approach.
- ★ **Engagement is Key!** A successful introduction isn't just about speaking—it's about reading the customer's cues and responding appropriately.
- ★ **Guide the Flow of Conversation!**
Ensure the trainee understands that each round is a natural continuation of the sales discussion.

TRAINER MATERIALS

- Sales Manual - Chapter 7

ACTIVITY WRAP-UP

- Post-Role-Play Discussion.
 - Trainer-Led Discussion:
 - ▶ How well did the trainee adjust after each round?
 - ▶ What specific phrase or technique improved engagement?
 - ▶ Where did they struggle?
 - ▶ Set an improvement focus for the trainee for the next time you practice.
 - ▶ AI Feedback (Siro) (if available):
 - Highlight key voice clarity, pacing, and engagement insights.
 - Identify any filler words or awkward pauses.
 - Trainee Self-Reflection:
 - Lead the trainee in reflecting on the role-play and their progress with questions like these:
 - ▶ *What was your strongest area in the role-play?*
 - ▶ *What is one thing you will improve before your next customer interaction, whether its live or in a role-play like this?*

Alert! How to Move from One Round to the Next

This role-play sequence is not iterative (i.e. practicing the same skill in different scenarios). Instead, it is progressive, meaning each round builds upon the previous one. The trainer should guide the trainee through a natural flow of conversation, moving from introduction to fact-finding, and then to transitioning into the inspection.

To ensure a smooth transition between rounds, trainers should:

- **Set the Context for Each Round** – Before beginning a new round, explain how the previous interaction leads into the next step of the sales conversation.
- **Summarize Key Takeaways** – Before moving forward, quickly reinforce what the trainee did well and where they can adjust.
- **Encourage Adaptation** – As the trainee moves from introduction to fact-finding to inspection setup, help them recognize shifts in customer engagement and how to respond accordingly.

DEPLOYMENT GUIDE

Purpose: This activity allows trainees to apply active listening and engagement techniques in realistic customer interactions. By progressively adjusting customer scenarios, trainees will refine their ability to recognize engagement cues, adapt communication strategies, and build trust effectively.

Getting Started & What To Do

General Notes:

- You should allot about 10 minutes for each role-play.
- Adjust time as needed based on trainee progress.
- Follow a progressive skill-building approach to reinforce listening, engagement, and adaptability.

Why This Works:

- Ensures progressive development rather than overwhelming trainees.
- Allows trainers to focus on key engagement skills in each iteration.
- Reinforces core listening and communication techniques before adding complexity.
- Helps trainees adapt to different customer responses rather than relying on a script.

During the Activity:

- Facilitate three structured practice rounds, making scenario adjustments in rounds 2 and 3 as directed.
- Observe verbal and non-verbal communication.
- Track trainee performance using the provided rubrics.
- Offer real-time coaching after each round.
- Encourage self-reflection before moving to the next round.

- Record AI Speech Analysis (Siro) results where applicable.

After Each Role-Play:

- Provide feedback on the focus items using the rubrics and thinking about:
 - ▶ What went well?
 - ▶ What could be improved?
 - ▶ How did their introduction feel different after adjustments?
- Encourage self-reflection.
- Provide feedback on observations and any AI insights (if applicable).

Deploying the Role-Play

Step 1: Explain the Activity (3-5 Minutes)

- Confirm completion of Activity 3.2.1: Breaking Down the Introduction and review key takeaways.
- Discuss important elements, including:
 - ▶ Recognizing engagement cues (customer tone, pacing, hesitations, enthusiasm).
 - ▶ Adjusting tone and approach based on the customer's response.
 - ▶ Responding confidently and naturally to different scenarios.
- Inform the trainee that script adjustments will be made after the first role-play to test their adaptability.
 - ▶ You can decide whether to inform them of the adjustments beforehand or let them play out naturally.

Step 2: Warm-Up (5 Minutes)

- Instructions for the Trainee:
 - ▶ **Use the prepared introduction from Activity 3.2.1 as the base script.**
 - ▶ Read through the introduction out loud with the trainer.
 - ▶ Identify key engagement cues to look for in customer responses.
- Trainer Actions:
 - ▶ Walk through the trainee's scripted introduction together.
 - ▶ Emphasize how body language, tone, and pacing impact first impressions.
 - ▶ Reinforce that a sales introduction is a conversation, not a script—trainees should adjust naturally based on customer reactions.

Step 3: Role-Play Scenarios & Adjustments (10 Minutes/Role-Play)

- Instructions for the Trainee:
 - ▶ Deliver your prepared introduction in a live role-play scenario with your trainer acting as the customer.
 - ▶ Pay attention to engagement cues and adjust your delivery accordingly.
 - ▶ Pay attention to trainer feedback on strengths and areas for improvement.
- Trainer Actions:
 - ▶ Act as the customer in each role-play scenario, making scenario adjustments when directed, and responding based on the trainee's performance.

- ▶ Provide live feedback on:
 - Tone, pacing, and engagement level.
 - Clarity and confidence in the introduction.
 - The trainee’s ability to establish credibility and trust.
- ▶ Modify the second role-play scenario to introduce challenges, following the scenario prompts, or use your own.
- ▶ Observe how the trainee adjusts their introduction based on your feedback

ROUND 1 – DELIVERING A STRONG INTRODUCTION

Trainer Role: Observe and assess confidence, clarity, and structure.

Rubrics Used:

- Verbal Communication
- Engagement & Connection

Focus Areas:

- Confidence & clarity in introduction.
- Natural tone and pacing.
- Engaging the customer early.

Trainer Coaching Tips:

- If the introduction sounds robotic, prompt: “How would you naturally introduce yourself to a neighbor?”
- Reinforce that first impressions matter—body language, tone, and pacing must be intentional.

Transitioning to Round 2:

- Trainer summarizes the introduction’s effectiveness and asks: *Now that you’ve established rapport, how would you shift the conversation to better understand the customer’s needs? Ask me your questions.*
- Introduce the next challenge: Asking strategic questions to uncover customer concerns.

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: <ul style="list-style-type: none"> • 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. 	

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: <ul style="list-style-type: none"> • Uses a steady, natural pace for clarity. • Adjusts tone based on customer engagement. • Provides explanations without overwhelming the customer. 	

3.2.2 TRAINER ACTIVITY GUIDE

ROUND 2 – FACT-FINDING & GATHERING CUSTOMER INSIGHTS

Trainer Role: Observe and assess confidence, clarity, and structure.

Rubrics Used:

- Active Listening
- Strategic Questioning

Focus Areas:

- Asking open-ended questions.
- Encouraging customer dialogue.
- Identifying customer concerns & priorities.

Trainer Coaching Tips:

- If the trainee is only asking closed-ended questions, prompt them to reframe with “What” or “How” instead of “Do you” or “Is there.”
- Remind them that fact-finding should feel conversational, not like an interrogation

Transitioning to Round 3:

- Trainer summarizes how the trainee engaged the customer and asks: *Now that you’ve gathered key insights, how will you guide them toward the next step? Sell me on the inspection.*
- Introduce the next challenge: Positioning the inspection as the logical next step.

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: <ul style="list-style-type: none"> • 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. 	

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: <ul style="list-style-type: none"> • 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. 	

ROUND 3 – TRANSITIONING TO THE INSPECTION

Trainer Role: Observe and assess confidence, clarity, and structure.

Rubrics Used:

- Nonverbal Communication
- Verbal Communication

Focus Areas:

- Explaining the inspection process clearly.
- Positioning the inspection as a logical next step.
- Handling any customer hesitation.

Trainer Coaching Tips:

- If the transition feels forced, encourage them to soften the approach with an example like this: *The next step is a thorough inspection—I’d be happy to take a look and give you a tailored solution.*
- If it comes up, help them recognize common objections and prepare smooth responses.

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: <ul style="list-style-type: none"> • Uses open posture and gestures to reinforce messages. • Maintains eye contact to build trust. • Avoids closed-off or distracting body language. 	

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: <ul style="list-style-type: none"> • Uses a steady, natural pace for clarity. • Adjusts tone based on customer engagement. • Provides explanations without overwhelming the customer. 	

Block 3: The Sales Process in Action – Transitions, Trust & Timing

Guide Trainees Through Transitions

Help trainees understand that each step should naturally lead into the next—avoid treating steps as separate, disconnected actions.

GOAL

To help Sales Inspectors understand how each step of the 8-Step Sales Process builds trust and momentum, ensuring smooth transitions and avoiding common mistakes.

OBJECTIVES

By the end of Block 1, trainees will be able to:

1. Deliver a structured, confident sales introduction that builds credibility and trust.
2. Use strategic questioning to uncover customer needs and concerns.
3. Adjust their introduction and approach based on customer engagement cues.
4. Transition smoothly from introduction to fact-finding and into the inspection phase of the sales process

AGENDA

Block 2 should take roughly 1-1.5 hours to complete.

If possible, activities should be completed in the order listed below to ensure a logical progression of learning.

- **3.3.1:** Mapping the Customer Journey in the 8 Steps
- **3.3.2:** Making the Connection: The Role of Each Step
- **3.3.3:** Common Mistakes & Best Practices

REMINDERS

- **Emphasize the Customer's Perspective:** The 8-Step Sales Process isn't just a checklist—it's a journey that builds trust at each stage.
- **Facilitate Discussion-Based Learning:** Use guided discussion and scenario-based exercises to reinforce key concepts and practical application..
- **Help Trainees Recognize Patterns:** Common sales pitfalls happen when a step is skipped, rushed, or executed poorly—help them identify these patterns early.



SKIPPING STEPS CREATES SALES FRICTION! IF A TRAINEE RUSHES OR SKIPS A STEP, THE CUSTOMER EXPERIENCE SUFFERS. REINFORCE THAT A SMOOTH, STRUCTURED SALES PROCESS BUILDS CREDIBILITY AND MAKES CLOSING EASIER.

MAPPING THE CUSTOMER JOURNEY IN THE 8 STEPS

TRAINER'S ACTIONS & CHECKLIST

- Before the Activity:
 - Review the 8-Steps of Selling
- Use the Trainer Activity Guide:
 - Trainer-Led Discussion: The Customer Experience
 - Optional Extension: Customer Journey Mapping Exercise
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation & Review:** Evaluate customer journey maps for completeness and understanding.
- **Trainee Self-Reflection Discussion**



QUICK TIPS

- ★ **First Impressions Begin Before You Speak:** Your body language and initial energy set the stage—make sure trainees practice confidence inside and outside of the conversation.
- ★ **Confidence Matters!** Even the best script will fail if the delivery is hesitant—encourage natural confidence.
- ★ **Adaptability is Key.** Ensure trainees know how to adjust their introduction based on customer responses.
- ★ **Avoid Sounding Scripted.** Trainees should practice structure, not memorization.

TRAINER MATERIALS

- Sales Manual - Chapter 7

ACTIVITY WRAP-UP

- Trainer Discussion & Review & Reflection:
 - Review their workbook activity if needed
 - Ask trainees:
 - ▶ *What happens if a Sales Inspector skips or rushes a step?*
 - ▶ *Which steps are most critical for trust-building?*
 - ▶ *How can we ensure smooth transitions between steps?*
 - ▶ *Which step do you think is the most critical for trust-building? Why?*
 - Reinforce that sales is about guiding the customer, not just following a script.
 - Encourage trainees to keep their Journey Map as a reference during future training.

THE CUSTOMER EXPERIENCE

Purpose: This activity allows trainees to gain an understanding of the customer points of view of the 8-Step Sales Process and highlights how the steps are connected. Trainees will use their workbook to map the customer's journey through the 8-Step Sales Process, identifying:

- What the customer expects at each step.
- How does the customer feel at this stage?
- What happens when a step is skipped, rushed, or poorly executed.

Step 1: Trainer Discussion: "The Customer Experience"

- Introduce the 8-Step Sales Process using the 8-Step Sales Process at a Glance at the end of this activity.
 - ▶ It is also in the Learner Workbook on pg. 62
- Ask trainees:
 - ▶ How do customers feel at each step?
 - ▶ What do they expect from us?
 - ▶ What builds trust at this moment?
 - ▶ What makes a customer hesitant to move forward? How does a strong introduction or fact-finding phase help overcome this?
- Challenge trainees to see the process from the customer's perspective, not just as a checklist.

Optional Step 2: Customer Journey Mapping Exercise:

- Direct trainees to the Customer Journey Worksheet (Learner Workbook, pg. 62).
- Have trainees document what the customer is thinking & feeling at each step of the 8-Step Sales Process.
- Guide them to connect each step to trust-building and engagement strategies.
- Allow 5-7 minutes for individual mapping before discussing their answers.

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?

MAKING THE CONNECTION: THE ROLE OF EACH STEP

TRAINER'S ACTIONS & CHECKLIST

- Trainer Walkthrough: What's the Role of Each Step?
 - Review the 8-Step Sales Process and its key objectives.
 - Ask: *What is the main goal of this step* for each sales step.
 - ▶ Note: Trainee's can reference their notes from Day 1 (Activity 1.1.6.B) if they need to.
 - Discuss how properly completing one step makes the next step easier.
- Step Connection Exercise: Linking the Steps Together
 - Guide the trainee through the step connections in a discussion format.
 - Ask guiding questions like:
 - ▶ *How does the Inspection set up the Graphing step?*
 - ▶ *Why is Setting Expectations essential before presenting the Proposal?*
 - ▶ *How does Following Up reinforce long-term customer trust?*
- Trainer Challenge: What If We Skip a Step?
 - Present "What if" scenarios where a step is skipped, rushed, or poorly executed.
 - Have trainees explain the impact and discuss how they would recover.
 - Example Challenge Questions:
 - ▶ *What happens if you move straight to the Proposal without Graphing first?*
 - ▶ *If a customer objects during the Proposal, how does the Setting Expectations step help?*
 - ▶ *What's the risk of skipping the Follow-Up step after closing the sale?*
- Activity Wrap-Up



QUICK TIPS

- ★ **Don't Treat the Sales Process as a Checklist!** Steps should feel seamless, not robotic—trainees should see them as natural progressions, not tasks to "get through."
- ★ **Challenge Trainees to Think Ahead:** Have them predict what happens if a step is skipped or done poorly.
- ★ **Use Real Scenarios!** Relate discussion points to real-world examples and challenges trainees might face in the field.

TRAINER MATERIALS

- Any sales process documents.

ACTIVITY WRAP-UP

- Trainer Discussion & Review:
 - How well do trainees understand the purpose of each step?
 - Can they logically connect the steps and anticipate the next move?
 - Do they recognize the risks of skipping or rushing steps?

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation & Role-Play Evaluation:** Ensure clarity, confidence, and engagement.
- **Trainee Self-Assessment:** Reflection on improvements and adjustments.

COMMON MISTAKES & BEST PRACTICES

GOAL

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

OBJECTIVES

By the end of this activity, trainees 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, trainees will:

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

 Instead of just listing mistakes, trainees should critically analyze examples and propose solutions.

DETAILS

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

NOTES

COMMON MISTAKES & BEST PRACTICES

TRAINER'S ACTIONS & CHECKLIST

- Use The Trainer Activity Guide:
 - Trainer Discussion
 - Mistakes Review
 - Best Practices Guide - Winning Behaviors in Sales
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation & Feedback Evaluation:** Ensure clarity, confidence, and engagement.
- **Trainee Self-Assessment:** Reflection on improvements and adjustments.



QUICK TIPS

- ★ **Encourage Self-Reflection!**
Help trainees analyze their own tendencies and past missteps.
- ★ **Make it Conversational!** Trainees should feel comfortable sharing and discussing real concerns.
- ★ **Focus on Solutions!** Mistakes happen—what matters is how they recognize and adjust to improve their sales performance.

TRAINER MATERIALS

- Any documents or materials relating to the subject at hand

ACTIVITY WRAP-UP

- Trainer Discussion & Guided Trainee-Self Reflection:
 - Ask the trainee to reflect on what they've learned and apply it to their own sales approach.
 - Use the following prompts to help guide discussion:
 - ▶ *What's one mistake you now feel more confident avoiding?*
 - ▶ *Which best practice do you want to implement immediately?*
 - ▶ *How will you handle a sales conversation if something doesn't go as planned?*

COMMON MISTAKES & BEST PRACTICES

Purpose: This activity helps Sales Inspectors recognize, analyze, and avoid common mistakes in the sales process while reinforcing best practices that build customer trust and improve sales performance. Through guided discussion, trainees will critically analyze real-world sales mistakes, explore effective solutions, and develop strategies to maintain credibility and professionalism in their sales conversations.

Trainer Discussion – What Are the Biggest Mistakes at Each Step? (10 Minutes)

- Lead an open discussion about common mistakes that can derail the sales process.
- Challenge the trainee to identify why these mistakes happen and how they impact the customer experience.
- *Ask: Have you ever encountered or made any of these mistakes, even in past jobs?*
- Guide them to think critically about how missteps create friction in the sales conversation..

Step 2: Mistakes Review – Sales Pitfalls in Action (10 Minutes)

- Trainer Instructions:
 - ▶ Present real-world sales mistakes based on actual customer interactions.
 - ▶ Use scenario-based examples where the trainee must:
 - ▶ Identify the mistake in each example.
 - ▶ Explain the impact on customer trust and engagement.
 - ▶ Suggest how to correct or prevent the mistake in future sales conversations.
- Example Trainer Prompts:
 - ▶ A Sales Inspector skips the Inspection step and jumps to pricing—what’s the problem?
 - ▶ An SI rushes through the introduction without building rapport—how does this impact the sale?
 - ▶ A customer raises an objection, and the SI gets defensive—how should it have been handled

Step 3: Best Practices Guide – Winning Behaviors in Sales (5 Minutes)

- Trainer Instructions:
 - ▶ Share stories of high-performing Sales Inspectors and their success strategies.
 - ▶ Reinforce key behaviors that build trust and lead to effective closing.
 - ▶ Discuss practical ways for trainees to apply these best practices in their daily customer interactions.
- Example Trainer Discussion Questions:
 - ▶ *What makes a top-performing Sales Inspector different from an average one?*
 - ▶ *How can we shift from mistake-prone habits to high-performance behaviors?*
 - ▶ *What small habit changes can have the biggest impact on customer trust?*

MODULE 4

Inside, Outside, Over & Under

The Inspection & Graphing Process

GOAL

To equip Sales Inspectors with the skills and confidence to conduct thorough property inspections, identify key findings, and create professional, sales-driven property graphs that support service recommendations. By the end of this module, trainees will smoothly integrate inspections into the sales process, reinforcing trust and customer engagement.

OBJECTIVES

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

1. Explain the role of inspections in building trust and identifying customer needs.
2. Perform systematic property inspections, identifying key findings across pest, termite, and lawn evaluations.
3. Differentiate between active and inactive conditions to prioritize customer recommendations.
4. Accurately measure and document property layouts for graphing.
5. Create professional property graphs that visually support inspection findings.

MODULE BREAKDOWN

Module 4 consists of three structured blocks with activities designed to progressively introduce and refine key sales techniques.

The estimated time for Module 4 completion is approximately 6 hours + variable ride-along time, but timing may vary based on individual needs.

- **Block 1: The Role of Inspections in the Sales Process** - Focus: Understanding why inspections matter, how they build trust, how to introduce them to customers, and an introduction to inspection tools and systematic execution.
- **Block 2: Performing Systematic Property Inspections** - Focus: Hands-on training in executing Massey's inspection methods, identifying key findings, and differentiating active vs. inactive conditions.
- **Block 3: Verification Assessment** - Focus: Demonstrating independent proficiency in conducting full property inspections, accurately measuring and documenting details, and producing Massey-standard graphs.

MODULE TIPS

- **Follow the Sequence:** Activities should be completed in order whenever possible, as each builds on the last.
- **Training Must Be Hands-On:** This module is about application, not just discussion. SIs should be actively measuring, graphing, and presenting findings throughout training.



GRAPHING IS A SALES TOOL, NOT JUST A TASK: MAKE SURE TRAINEES UNDERSTAND THAT GRAPHS HELP CLOSE SALES BY VISUALLY REINFORCING FINDINGS AND RECOMMENDATIONS.

Block 1: The Role of Inspections in the Sales Process

Encourage Observation Before Action

New trainees may feel the need to rush into recommendations—help them focus on listening, observing, and gathering insights before offering solutions.

GOAL

To establish a strong foundation for Sales Inspectors by emphasizing the role of inspections in building customer trust, guiding the customer conversation, and performing thorough, systematic inspections. This block ensures trainees can confidently execute inspections and classify findings

AGENDA

Block 1 should take roughly 2-2.5 hours to complete depending on discussion depth and hands-on practice.

If possible, activities should be completed in the order listed below to ensure a logical progression of learning.

- 4.1.1: Why Inspections Matter & Systematic Inspections
- 4.1.2: Identifying & Documenting Key Findings

OBJECTIVES

By the end of Block 1, trainees will be able to:

1. Explain how inspections build trust and enhance customer confidence
2. Guide customers through the inspection process and manage expectations.
3. Perform a systematic inside-out inspection using Massey's step-by-step method.
4. Document findings clearly to support service recommendations.

REMINDERS

- **Build a Strong Foundation:** Inspections are not just about finding problems—they're about guiding the customer toward a solution.
- **Make It Hands-On:** Ensure trainees physically handle inspection tools before they go into the field.
- **Emphasize Confidence:** Customers trust inspectors who sound knowledgeable and explain things clearly—coaching on tone, pacing, and clarity is key.
- **Reinforce that inspections are about engagement, not just fact-finding.** Help trainees communicate findings effectively
- **Encourage structured note-taking.** Accurate documentation supports customer confidence and sales conversations.



INSPECTIONS ARE MORE THAN JUST A TASK—THEY SHAPE THE SALES CONVERSATION!

WHY INSPECTIONS MATTER & SYSTEMATIC INSPECTIONS

GOAL

To ensure Sales Inspectors 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.

OBJECTIVES

By the end of this activity, trainees 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 trainees develop strong inspection habits that ensure consistency, customer confidence, and smooth sales transitions. Through guided discussion and hands-on practice, Sales Inspectors will learn how to execute inspections systematically, setting the stage for service recommendations.

DETAILS

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

NOTES

WHY INSPECTIONS MATTER & SYSTEMATIC INSPECTIONS

TRAINER'S ACTIONS & CHECKLIST

- Gather any materials or tools you need relating to inspections
- Use the Trainer Activity Guide:
 - Trainer Guided Demonstration
 - Hands-On Systematic Inspection Execution
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Can the trainee explain why inspections matter?
- **Trainee Demonstration:** Walkthrough of using and explaining tools effectively.



QUICK TIPS

- ★ **Encourage hands-on practice.** Trainees should physically use tools rather than just observe.
- ★ **Reinforce clear, confident communication.** Trainees should be able to explain inspection findings in customer-friendly language.
- ★ **Help trainees avoid information overload**—guide them to highlight only critical findings rather than listing everything they see.

TRAINER MATERIALS

- Inspection tools: flashlight, moisture meter, probe, etc.
- Example inspection checklists and documentation templates.
- Sales Manual reference on inspections

ACTIVITY WRAP-UP

- Debrief Questions for Trainees:
 - How did your confidence change after conducting the inspection?
 - What part of the inspection felt the most natural? What was the most challenging?
 - How can you adjust your approach to better engage the customer?
- Review Key Takeaways:
 - Inspections are not just fact-finding; they shape the entire sales conversation.
 - Clarity and confidence in tool usage increase customer trust.
 - Structured documentation supports better service recommendations and follow-ups.

WHY INSPECTIONS MATTER & SYSTEMATIC INSPECTIONS

Purpose: This guide provides structured steps for trainers to introduce, demonstrate, and refine inspection execution skills. By following this structured approach, trainers ensure that Sales Inspectors understand why inspections matter, engage with customers effectively, and build confidence in their technical and communication abilities.

Trainer Instructions:

Step 1: Step 1: Trainer-Guided Discussion

- Introduce Inspections as a Trust-Building Tool:
 - ▶ Discuss how inspections differentiate Massey's services by providing value before a sale is made.
 - ▶ Reinforce that a structured inspection guides the sales conversation and helps customers feel informed.
 - ▶ Ask: What do customers expect from an inspection? What concerns might they have.
- Expectation Setting & Customer Communication:
 - ▶ Explain the importance of setting clear expectations before starting the inspection.
 - ▶ Model an introduction where the Sales Inspector frames the inspection process for the customer.

Step 2: Hands-On Systematic Inspection Execution

- Trainer Demonstration:
 - ▶ Walk trainees through a small-scale property inspection using the Service Center and Massey's inside-out, clockwise method.
 - ▶ Highlight key focus areas: foundation, entry points, moisture-prone areas, and structural risks
 - ▶ Demonstrate the correct use of tools (flashlight, probe, moisture meter, etc.) and explain findings in a customer-friendly manner.
- Trainee Practice:
 - ▶ The trainee perform a guided inspection, following the same step-by-step process.
 - ▶ Trainer observes and provides real-time coaching on execution, tool usage, and communication.
 - ▶ The trainee sets expectations, conducts the inspection, and verbalizes key findings..
- Trainee Practice:
 - ▶ The trainee introduces the inspection to a customer.
 - ▶ The trainer evaluates clarity, confidence, and engagement.
 - ▶ Provide coaching and adjustments as needed.
- Trainer Feedback & Refinement
 - ▶ Provide feedback on confidence, tool usage, and customer-friendly explanations.
 - ▶ Reinforce structured note-taking habits to support future recommendations.
 - ▶ Discuss what went well and where adjustments are needed.

IDENTIFYING & DOCUMENTING KEY FINDINGS

TRAINER'S ACTIONS & CHECKLIST

- Use the Trainer Activity Guide:
 - Recognizing Key Inspection Findings
 - Active vs. Inactive Classification Exercise
 - Hands-On Documentation Practice
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Can the trainee accurately identify and classify findings?
- **Trainee Demonstration:** Walkthrough of explaining key findings and their significance.
- **Trainer Coaching:** Ensure the trainee can connect findings to service recommendations with confidence



QUICK TIPS

- ★ **Encourage observation before action.** Trainees should take time to assess conditions fully before making determinations.
- ★ **Help simplify explanations.** Trainees should be able to describe findings in clear, customer-friendly language.
- ★ **Reinforce active vs. inactive classification**—ensuring accuracy builds credibility and trust with customers.

TRAINER MATERIALS

- Example inspection reports (filled & blank versions)
- Images/examples of active vs. inactive conditions

ACTIVITY WRAP-UP

- Debrief Questions for Trainees:
 - What challenges did you face in identifying and documenting findings?
 - How can you simplify findings so customers understand them?
 - How does strong documentation help reinforce trust in your recommendations?
- Review Key Takeaways:
 - Identifying key findings correctly builds credibility and supports sales.
 - Clear documentation prevents confusion and increases service adoption.
 - Inspections must lead into well-structured, confident recommendations.

IDENTIFYING & DOCUMENTING KEY FINDINGS

Purpose: This activity helps Sales Inspectors develop a confident, customer-friendly approach to guiding the inspection conversation. By structuring expectations, engaging customers appropriately, and smoothly transitioning into findings, trainees will ensure a seamless experience that builds trust and prepares for the next steps.

Trainer Instructions:

Step 1: Recognizing Key Inspection Findings

- Discussion:
 - ▶ Explain how inspections reveal customer concerns and service opportunities.
 - ▶ Introduce common findings for pests, moisture, structural risks, and conducive conditions.
 - ▶ Use images/examples to highlight subtle indicators that trainees may otherwise miss.
- Active vs. Inactive Classification Exercise:
 - ▶ Show examples of active infestations vs. old/inactive conditions.
 - ▶ Trainees practice identifying and classifying findings using real or simulated examples.
 - ▶ Discuss why accurate classification matters in prioritizing service recommendations.

Step 2: Hands-On Documentation Practice

- Trainer Demonstration:
 - ▶ Walk through proper documentation techniques, emphasizing:
 - Clarity in descriptions
 - Accuracy in measurement
 - Use of consistent terminology
 - Avoiding overly technical jargon when summarizing findings
- Trainee Practice:
 - ▶ Trainees complete mock documentation of an inspection report based on provided scenarios.
 - ▶ Trainer reviews and provides real-time feedback on documentation clarity.
 - ▶ Emphasize how well-documented findings transition into effective recommendations.

Block 2: Performing Systematic Property Inspections

Reinforce Active Learning

Inspections are a physical, visual process—model to trainees by engaging with real properties, not just training materials.



Help Trainees Develop an Inspection Routine

Consistency is key; a structured approach ensures nothing is missed and allows for faster, more efficient inspections over time.

GOAL

To provide trainees with the skills to accurately measure properties, document findings, and create professional graphs while reinforcing inspection techniques through hands-on field training. Live application ensures SIs can smoothly transition from findings to service recommendations.

OBJECTIVES

By the end of Block 2, trainees will be able to:

1. Measure property dimensions accurately and document findings.
2. Apply Massey's graphing standards to create clear, sales-driven property graphs.
3. Perform live inspections and document findings in a real-world setting.
4. Use graphs to visually support their sales conversation and reinforce service recommendations.

AGENDA

Block 2 should take roughly 3 hours to complete, not including any field training and depending on discussion depth and hands-on practice.

If possible, activities should be completed in the order listed below to ensure a logical progression of learning.

- 4.2.1: Measuring, Graphing, & Labeling a Property
- 4.2.2: Field- Training: Inspection & Graphing Practice

REMINDERS

- **Use field ride-alongs as an opportunity for guided correction and real-time coaching.**
- **Encourage clean, professional documentation—sloppy graphs reduce credibility.**
- **Encourage Trainees to Slow Down & Observe:** New SIs may rush—help them focus on small details that customers might overlook



GRAPHS ARE A SALES TOOL, NOT JUST PAPERWORK! ENSURE TRAINEES KNOW HOW TO USE THEM TO CLOSE DEALS.

TRAINER'S ACTIONS & CHECKLIST

- Gather All Tools and Materials Needed
- Review The Sales Manual - Chapter 8
- Use the Trainer Activity Guide:
 - Measurement & Graphing Fundamentals
 - Hands-on Graphing Practice
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Can the trainee accurately measure and transfer dimensions onto a graph?
- **Trainee Demonstration:** Completed graph should be clear, properly labeled, and formatted professionally.
- **Trainer Coaching:** Ensure trainees can explain their graphs confidently and connect them to service recommendations.



QUICK TIPS

- ★ **Reinforce consistency.** Trainees should follow a structured measurement routine for accuracy.
- ★ **Encourage precision!** Small errors in graphing can lead to misunderstandings and customer doubts.
- ★ **Model clarity.** Graphs should be easy to read and clearly highlight key findings for customer discussions

TRAINER MATERIALS

- The Sales Manual - Chapter 8
- Measuring tools (tape measures, wheels, etc.)
- Example property graphs (ideal & poor examples)
- Graphing paper & pens (black, blue, red, green)

ACTIVITY WRAP-UP

- Debrief Questions for Trainees:
 - What was the most challenging part of graphing?
 - How can you make your graphs clearer for customers?
 - How does an accurate graph support the sales conversation?
- Review Key Takeaways:
 - Precision in measurements & labeling builds credibility.
 - A well-drawn graph reinforces findings and supports recommendations.
 - Standardized formatting ensures clarity and professionalism.

MEASURE TWICE, GRAPH ONCE

Purpose: This guide provides trainers with a step-by-step approach to teaching accurate property measurement and graphing. By following this structure, trainers help Sales Inspectors develop a consistent process for documentation, ensuring that graphs effectively support customer trust and service recommendations.

Trainer Instructions: Teaching the Inspection Process

Step 1: Measurement & Graphing Fundamentals

- Trainer-Guided Discussion:
 - ▶ Explain why accurate measurements and clear graphs reinforce trust in service recommendations.
 - ▶ Introduce Massey's standardized property measurement process.
 - ▶ Show examples of strong vs. weak property graphs and discuss common errors.
- Trainer Demonstration:
 - ▶ Measure a sample area in or around the Service Center, demonstrating how to record dimensions accurately.
 - ▶ Transfer measurements onto a graph, showing step-by-step labeling techniques outlined in the Sales Manual.

Step 2: Hands-On Graphing Practice

- Trainee Practice:
 - ▶ Trainees measure a designated area and record findings.
 - ▶ Convert measurements into a clear, properly labeled property graph.
 - ▶ Trainer reviews and provides feedback, correcting inaccuracies and reinforcing best practices.
 - ▶ Repeat the process two more times with increasingly intricate sample locations
- Trainer-Led Adjustments:
 - ▶ Ensure trainees include structures, access points, and problem areas.
 - ▶ Emphasize clarity and professional formatting in graph presentation.

FIELD TRAINING: LIVE INSPECTION & GRAPHING PRACTICE

TRAINER'S ACTIONS & CHECKLIST

- Before the Ride-Along:
 - Confirm that the trainee has completed previous training activities on inspections and graphing.
 - Direct the trainee to the Ride-Along Observation Worksheet (Workbook, pg. 71).
 - Ensure the trainee understands their role during the observation phase and when they may engage.
 - If the ride-along trainer is not the GM, confirm a post-ride debrief with the GM.
 - Read through the Trainer Explainer on the next page and keep it handy for reference.
- During the Ride-Along:
 - Guide the trainee through passive observation, ensuring they:
 - ▶ Take notes on customer engagement cues.
 - ▶ Identify how findings are documented in inspections.
 - ▶ Observe how inspection tools are used.
 - If the customer is present, introduce the trainee to the customer and obtain permission for their participation.
 - ▶ If the customer does not grant permission, ensure the trainee steps back and observes.
 - Transition to guided participation, having the trainee assist in measuring, graphing, and documentation.
 - Provide real-time coaching as the trainee begins explaining basic findings to customers.
 - Use live correction if the trainee struggles with explanations or measuring techniques.
 - Encourage the trainee to engage in follow-up questioning after the inspection.
- Activity Wrap-Up: Post Ride-Along

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observations & Feedback:** Reinforce key behaviors based on field observations.
- **Ride-Along Reflection:** Trainee Workbook.
- **Wrap-Up Discussion in the Activity Wrap-Up**



QUICK TIPS

- ★ **Keep the Focus on Inspection & Graphing!** This ride-along is about technical skill application, not just customer engagement.
- ★ **Encourage Hands-On Learning!** The sooner the trainee practices real measurements and graphing, the faster they will gain confidence.

TRAINER MATERIALS

- Materials relating to inspection findings
- Inspection tools

ACTIVITY WRAP-UP

- Conduct a Ride-Along Debrief:
 - How well did the trainee handle measurements and graphing?
 - How confident does the trainee feel about doing an independent inspection?
 - What areas need improvement before they transition to working independently?
- Trainer Feedback & Next Steps:
 - Provide constructive coaching on graph accuracy and field execution.
 - If the trainer is not the GM, provide a brief follow-up report on trainee progress.

CONDUCTING THE RIDE-ALONG

Purpose: This guide provides step-by-step instructions for conducting a successful ride-along, ensuring the trainee observes, participates, and receives structured coaching while maintaining professionalism and customer trust.

Preparing for the Ride-Along

- **Introduce the Ride-Along:** Before heading into the field, explain to the trainee what they will be observing, practicing, and expected to do.
- **Set Clear Expectations:**
 - ▶ The ride-along is designed to reinforce inspection techniques, property measurements, and graphing accuracy.
 - ▶ The trainee will observe first, then gradually participate in measuring, graphing, and engaging customers
- **Confirm Training Readiness:**
 - ▶ Ensure the trainee has completed previous inspection & graphing exercises.
 - ▶ Direct the trainee to the Ride-Along Observation Worksheet (Workbook, pg. ___).

Customer Introductions & Permission

- **It is critical to obtain the customer's permission before including the trainee in any conversation.**
- **Example Customer Introduction:**
 - ▶ *Good afternoon, Mr. Bell! It's good to see you. I'd like to introduce John, our trainee today. He's learning about inspections and will be assisting me. Would you be comfortable with him helping out and maybe asking a couple of questions?*
- **Important Notes:**
 - ▶ If the customer is not comfortable with the trainee participating or being on their property, the trainee must step back and observe from a distance or wait in the vehicle if asked.
 - ▶ If the customer allows participation, the trainee should let the trainer lead first and follow their cues.
 - ▶ If entering a customer's home, never assume permission—always ask!

The Ride-Along: Observational Phase (Passive Learning)

- The trainee should shadow the trainer, focusing on:
 - ▶ How inspections are systematically conducted.
 - ▶ Measurement techniques and graphing accuracy.
 - ▶ Customer engagement during inspections.
 - ▶ How findings are documented and communicated.
- **Key Observations to Track:**
 - ▶ How does the trainer prioritize key findings during the inspection?
 - ▶ What measurement tools are used, and how are they applied?

- ▶ How does the trainer ensure graph accuracy and clarity?
- ▶ How are problem areas explained in simple terms for the customer?

The Ride-Along: Guided Practice Phase (Active Learning)

- Transition the trainee into measuring, graphing, and assisting in documentation.
- Gradually Increase Responsibility:
 - ▶ Start with simple measuring tasks.
 - ▶ Have the trainee document findings on their graph.
 - ▶ Move into explaining key findings under trainer supervision.
- Live Coaching & Correction:
 - ▶ Step in when necessary to ensure accuracy.
 - ▶ Allow the trainee to self-correct and refine their technique.
 - ▶ Reinforce best practices for clear, professional graphing.

Block 3: Skill Verification & Evaluation Assessment

Prepare for Unexpected Situations

Real-world inspections won't always go as planned—help trainees develop the ability to adapt to different customer personalities, property conditions, and environmental factors.

GOAL

To assess whether trainees can independently conduct a full inspection, accurately measure and graph properties, and communicate findings confidently to customers.

OBJECTIVES

By the end of Block 3, trainees will be able to:

1. Conduct a full property inspection without trainer guidance.
2. Accurately measure and document property dimensions.
3. Draw a completed, professional graph that visually supports findings.
4. Confidently explain findings and justify recommendations to a proctor.
5. Demonstrate readiness for independent inspections through a structured assessment.

AGENDA

Block 3 serves as an important assessment checkpoint to ensure that Sales Inspectors can apply all previously learned inspection and graphing skills independently. The evaluation is proctored, and trainees must complete an inspection, measure and document property details, and create a graph that meets Massey's standards.

The proctor, not the trainer, is responsible for overseeing this assessment, ensuring an objective evaluation of the trainee's skills. The assessment is typically conducted at a designated testing site, which may not be the trainee's home service center. This setup provides a neutral environment to accurately gauge the trainee's ability to perform an independent inspection and graphing exercise under real-world conditions.

- **4.3.1: Evaluation: Independent Inspection & Graphing Exercise**

REMINDERS

- **Measurement & Graphing are Sales Tools, Not Just Paperwork:** Trainees must see these skills as critical for building trust and closing sales, not just a documentation task.
- **Inspection Consistency is Key:** Reinforce inside-out, clockwise inspections and clear, structured documentation to ensure consistency across all trainees.
- **Reinforce Massey's Graphing Standards:** Every graph should be clear, consistent, and professional—avoid messy, unclear, or incomplete documentation.



SET THE TRAINEE UP FOR SUCCESS! ENSURE THEY UNDERSTAND EXPECTATIONS IN ADVANCE.

EVALUATION: GRAPH IT LIKE YOU MEAN IT

GOAL

To assess the Sales Inspector's ability to independently conduct a full inspection, accurately measure and document property details, and create a professional graph following Massey's standards.

DETAILS

- **ESTIMATED TIME:** Variable
- **DELIVERY MODE:** Skill Evaluation
- **PERSON:** Designated Proctor

OBJECTIVES

By the end of this activity, trainees will 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 trainee will conduct a full property inspection, document their findings, and produce a professional graph without direct trainer assistance. The proctor will evaluate their performance using the assessment rubric.



A THIRD-PARTY PROCTOR (SUCH AS ANOTHER GM, SALES MANAGER, OR REGIONAL MANAGER) IS PREFERRED FOR THIS SKILLS ASSESSMENT, BUT NOT REQUIRED. IF A THIRD-PARTY PROCTOR IS NOT READILY AVAILABLE, THE TRAINER MAY PROCTOR THE ASSESSMENT. EXPECTATIONS SHOULD BE COMMUNICATED IN ADVANCE.

NOTES

EVALUATION: GRAPH IT LIKE YOU MEAN IT

TRAINER'S ACTIONS & CHECKLIST

- Before the Assessment:
 - Confirm whether the assessment will take place at:
 - ▶ A designated testing site such as the Service Center or another public location.
 - ▶ A live customer interaction (if available and appropriate).
 - Ensure the trainee has all necessary tools.
 - Review expectations with the trainee but do not coach them during the assessment.
 - Ensure the proctor has the Assessment Guide and understands the evaluation criteria if you are not proctoring this assessment.
- During the Assessment:
 - The trainer should not be present during the assessment if they are not proctoring it.
- Post Assessment:
 - Debrief: The proctor reviews the trainee's inspection process, measurement accuracy, and graphing quality with the trainee.
 - Feedback & Next Steps:
 - ▶ If the trainee passes, they are cleared for independent inspections.
 - ▶ If they need improvement, assign targeted practice and a retest.
 - ▶ If they fail multiple categories, require additional training before reassessment.
 - Documentation & Reporting:
 - ▶ The proctor submits the completed rubric and results form to the Massey University LMS assignment.



QUICK TIPS

- ★ **Set the Trainee Up for Success!** Ensure they understand expectations in advance.
- ★ **Let the Proctor Lead!** The proctor evaluates performance—trainers should not intervene if they are present and not the proctor.
- ★ **Encourage Professionalism!** The trainee must be able to explain findings clearly and confidently.
- ★ **Review the Results!** Trainers should review assessment outcomes with the trainee and you and discuss areas for improvement.

LMS ASSIGNMENTS

- SAL 3010: Skill Verification & Evaluation Assessment - Graph It Like You Mean It!

TRAINER MATERIALS

- Materials relating to inspection findings
- Inspection tools
- Assessment guide

FEEDBACK, VERIFYING, & ASSESSING

- **Proctor Observations & Feedback:** Reinforce key behaviors based on observations and evaluations.

PROCTOR GUIDE: GRAPH IT LIKE YOU MEAN IT

CONDUCTING THE ASSESSMENT

Purpose: This skills assessment evaluates the new Sales Inspector's ability to conduct a full inspection, accurately measure and document property details, and create a professional graph following Massey's standards.

Pre-Assessment: Trainer Responsibilities

- Select a suitable property for the assessment (Service Center, training site, or customer location).
- Provide necessary tools and forms to the trainee.
- Review assessment expectations with the trainee beforehand if you won't be present.

Trainee Assessment Criteria (Independent Performance)

1. Conduct a structured property inspection using Massey's process.
2. Accurately measure and document property layouts for graphing.
3. Create and present a complete graph aligned with Massey's standards.
4. Confidently explain findings and justify solutions to the proctor.
5. Properly use all required tools.



ACTIVITY TIPS

- ★ **Stay Objective!** The assessment is about verifying competency, not coaching.
- ★ **Let the Trainee Lead!** Do not intervene unless safety or major errors occur.

Proctor Evaluation Responsibilities

1. Evaluate trainee performance using the provided Rubric.
2. Circle the performance category and briefly explain the rating. **DO NOT** leave comments blank!
3. Complete the Results form.

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 **repeat 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.

PROCTOR GUIDE: GRAPH IT LIKE YOU MEAN IT

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.

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.	

Trainee Information

- Trainee Name: _____
- Proctor Name: _____
- Assessment Date: _____ Assessment Location: _____
- Assessment Attempt: 1 2 3

Proctor Observations & Comments:

General Observations:

Strengths Displayed:

Areas for Improvement:

Evaluation Rating & Next Steps:**Next Steps (if failed second retest or needing improvement)**

Read the directions in the box on the next page and select the category, then follow the directions to upload these results.

Evaluation Component	Pass	Retest	Final Attempt – Additional Training Required
Inspection & Graph	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes			
<ul style="list-style-type: none"> • If this is the first or second attempt, “Needs Improvement” indicates the trainee may retest after coaching from the trainer. • If this is the third attempt, any “Fail” indicates the trainee has not demonstrated readiness after multiple opportunities. <ul style="list-style-type: none"> ▶ No further retests should be scheduled without approval from a Regional Manager or Sales Director. ▶ A training audit may be initiated to determine next steps or reassignment. 			

Proctor Signature: _____

Trainee Signature: _____

Trainer Signature: _____

Date: _____

MODULE 5

Problem → Solution

Defining the Issue & Presenting the Fix

GOAL

To equip Sales Inspectors with the skills to define customer problems clearly and present tailored solutions effectively, ensuring smooth transitions between Step 3: Define the Problem and Step 4: Present the Solution in the 8-Step Sales Process.

MODULE BREAKDOWN

Module 5 consists of two structured blocks with activities designed to ensure that Sales Inspectors can clearly define customer problems and present solutions.

The estimated time for Module 5 completion is approximately 3-4 hours + variable ride-along time, but timing may vary based on individual needs.

OBJECTIVES

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

1. Accurately define the customer's problem based on inspection findings.
2. Translate technical findings into clear, customer-friendly explanations.
3. Use visual aids (graphs, photos, documentation) to reinforce credibility.
4. Transition from problem identification to a logical service recommendation.
5. Address customer concerns, ensuring clarity, confidence, and trust.

- **Block 1: Defining the Problem – The Art of Problem Identification** - Focus: Helping customers understand their issue through structured problem definition techniques.
- **Block 2: Presenting the Solution – Guiding the Customer to a Decision** - Focus: Using structured communication techniques to present findings and confidently recommend services.

MODULE TIPS

- **Avoid Jargon.** Customers don't buy what they don't understand—trainees should practice simplifying explanations
- **Teach Logical Flow.** Ensure trainees see the natural connection between problem definition and solution presentation—one leads directly to the other.
- **Coach for Confidence.** A hesitant or unclear solution presentation undermines trust—encourage trainees to speak with certainty.



STEP 3 & 4 ARE MAKE-OR-BREAK: IF THE CUSTOMER DOESN'T FULLY UNDERSTAND THE PROBLEM, THEY WON'T BUY THE SOLUTION—CLARITY IS CRITICAL!

Block 1: Defining the Problem – The Art of Problem Identification

Teach the Power of Framing

The way a problem is positioned determines how a customer reacts. Guide trainees to frame findings in a way that highlights urgency without causing fear through your examples and demonstrations.

GOAL

To help Sales Inspectors clearly define the customer’s problem in a way that makes them see the urgency and necessity of a solution. This block ensures they can complete **Step 3 — Define the Solution** — of the 8-Step Sales process by communicating findings with clarity, confidence, and credibility.

OBJECTIVES

By the end of Block 1, trainees will be able to:

1. Translate inspection findings into simple, customer-friendly explanations.
2. Differentiate between urgent issues vs. long-term risks to position solutions accordingly.
3. Use graphs, documentation, and visuals to reinforce the credibility of their findings.
4. Guide the conversation toward the next step: a service recommendation.

AGENDA

Block 1 should take roughly 1-1.5 hours to complete depending on discussion depth and hands-on practice.

If possible, activities should be completed in the order listed below to ensure a logical progression of learning.

- 5.1.1: What’s the Problem? Defining the Issue for the Customer
- 5.1.2: Adapting to Customer Reactions

REMINDERS

- **Follow the Sequence:** Activities should be completed in order whenever possible, as each builds on the last.
- **Avoid Technical Jargon:** If a customer doesn’t understand, they won’t buy. Keep explanations clear and relatable.
- **Tie Back to Inspection Observations:** Help the trainee connect findings → problem → consequences.
- **Make the Customer Feel the Impact:** Customers act when they feel urgency. Teach trainees to frame findings in a way that highlights risk and consequences, without causing a sense of dread.



A POORLY EXPLAINED PROBLEM IS THE SAME AS NO PROBLEM. IF THE CUSTOMER DOESN’T UNDERSTAND THE ISSUE, THEY WON’T SEE THE NEED TO FIX IT—TRAINEES MUST REFINE THEIR ABILITY TO MAKE PROBLEMS REAL AND RELATABLE.

WHAT'S THE PROBLEM? DEFINING THE ISSUE FOR THE CUSTOMER

GOAL

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

OBJECTIVES

By the end of this activity, trainees 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 on problems they understand—not just what they're told. This session teaches SIs how to define issues clearly, confidently, and persuasively.

Key Focus Areas:

- Making findings clear & relatable (no tech jargon).
- Framing findings to create urgency & impact.
- Structuring explanations logically—from findings to problem to risk.

DETAILS

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

NOTES

WHAT'S THE PROBLEM? DEFINING THE ISSUE FOR THE CUSTOMER

TRAINER'S ACTIONS & CHECKLIST

- Use the Trainer Activity Guide:
 - Trainer Discussion: What Makes a Problem 'Real' to the Customer
 - Problem Breakdown Exercise
 - ▶ Learner Workbook pgs. 78-80
 - Framing the Problem for Urgency & Impact
 - ▶ Problem scenario exercises
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation & Feedback:** How well did the SI explain problems clearly and impactfully?
- **Trainer Discussion & Coaching:** Review key adjustments made during the exercise.



QUICK TIPS

- ★ **Coach trainees to avoid too much "science talk."** Guide them to simplify explanations so customers can easily understand the issue and its impact.
- ★ **Every problem has a consequence.** Help trainees connect findings to potential risks so customers feel urgency and understand why action is necessary.
- ★ **Teach trainees to "make it real."** Encourage the use of analogies, real-world comparisons, and customer-friendly language to reinforce understanding.

TRAINER MATERIALS

- Sales Manual - Chapter 7

ACTIVITY WRAP-UP

- Trainer Review & Discussion:
 - Provide final feedback on clarity, urgency, and simplicity.
 - Reinforce that the customer must feel the problem—not just hear it.
 - Feel free to present the trainee with another scenario and have them respond without writing out their response.
 - Trainee Self-Reflection Discussion:
 - ▶ Use questions or prompts like this to help the trainee think about the activity and their abilities:
 - *Think about your responses from the previous exercises, and identify one area where you can improve in explaining problems to customers.*
 - *What action can you take to improve your clarity and impact?*

FINDINGS → PROBLEM → CONSEQUENCES

Purpose: This trainer activity guide provides a structured approach to teaching Sales Inspectors how to clearly define and explain customer problems in a way that drives action. By reinforcing clarity, urgency, and simplicity, trainers ensure that trainees can position problems effectively and transition customers toward solutions.

Trainer Instructions: How to Explain the Problem

Step 1: Trainer Discussion – What Makes a Problem ‘Real’ to the Customer?

- Key Points to Cover:
 - ▶ Customers act on perceived risk & urgency, not just technical details.
 - ▶ Many customers ignore problems they don’t fully understand or that seem minor.
 - ▶ Common communication mistakes:
 - Overcomplicating with technical jargon.
 - Providing vague or generic statements.
 - Failing to convey urgency.
- Demonstrate a good vs. poor explanation
 - ▶ Examples:
 - **Poor Example:** *You have subterranean termites in the soil.*
 - **Good Example:** *Your home has active termite activity underground, which means they are feeding on the wooden structure. If left untreated, they can cause costly damage to your home's foundation.*
- Emphasizing Urgent vs. Long-Term Issues:
 - ▶ **Urgent Example:** Active moisture in a termite-prone area (requires immediate treatment).
 - ▶ **Long-Term Risk Example:** A potential pest entry point that could lead to future infestation (should be addressed preventively).
- Using Graphs & Visual Aids for Credibility:
 - ▶ Demonstrate how to use a property graph or inspection documentation to reinforce findings.
 - *Here’s where we found termite activity, and this documentation helps us track the progression of damage.*
- Learner Workbook pg. 78-79:
 - ▶ Have trainees complete Exercise 1 (pg. 79) in their workbook. Afterward, review their work and facilitate a discussion using the following guiding questions.
 - *What do you think makes customers more likely to act?*
 - *Have you ever had a customer who didn’t seem concerned? Why do you think that was?*

Step 2: Identifying & Framing the Problem, Learner Workbook pgs. 79-80

- Introduce the Findings → Problem → Consequences Explanation structure, explaining how each component helps clarify and create urgency for the customer
 - ▶ **Findings:** What we observed.

- ▶ **Problem:** Why it's an issue.
- ▶ **Consequences:** What happens if left untreated.
- Present three real-world customer problems (one pest, one termite, one lawn) to the trainee.
 - ▶ Have the trainees use Exercise 2 on pgs. 79-80 in their workbook to craft their response.
 - ▶ Have them share their response.
 - Things for you to observe & discuss after each scenario:
 - ◆ What made each explanation strong or weak?
 - ◆ How did they establish urgency?
 - ◆ Did their explanation avoid using too much technical jargon?
 - Example questions to ask the trainee to help them refine their approach:
 - ◆ *How would you improve your explanation?*
 - ◆ *What customer concerns might come up?*
 - ◆ *How would you respond to skepticism?*
 - Reinforce key concepts: Clarity, Urgency, Simplicity.

ADAPTING TO CUSTOMER REACTIONS

GOAL

To help Sales Inspectors adapt their findings explanations to different customer reactions, reinforcing urgency and clarity without overwhelming the customer.

OBJECTIVES

By the end of this activity, trainees 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 Sales Inspectors adapt their explanations based on customer reactions. Through discussion and role-play, trainees will refine their ability to reinforce urgency while maintaining customer trust and engagement.

DETAILS

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

NOTES

ADAPTING TO CUSTOMER REACTIONS

TRAINER'S ACTIONS & CHECKLIST

- Use the Trainer Activity Guide:
 - Trainer Discussion – Recognizing Customer Hesitation
 - Customer Scenario Practice – Adapting to Customer Reactions
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Ensure the trainee demonstrates clarity and confidence when adapting their explanation to customer reactions.
- **Trainer Coaching:** Guide trainees to refine their ability to transition smoothly between identifying findings, explaining the issue, and handling customer pushback.



QUICK TIPS

- ★ **Teach Adaptability.** Customers have different concerns—trainees must adjust their tone, approach, and level of detail accordingly.
- ★ **Encourage Confidence.** Hesitation in an SI's explanation makes customers more likely to delay or ignore the issue.
- ★ **Less is More.** If the explanation gets longer with each objection, it's time to simplify!
- ★ **Don't forget about MILO!** Sometimes a customer can stump a trainee—remind them that MILO is a valuable resource with information at their fingertips.

TRAINER MATERIALS

- Sales Manual - Chapter 8

ACTIVITY WRAP-UP

- Provide quick feedback on clarity, urgency, and adaptability.
- Reinforce that customers need to feel urgency, not just hear it.
- Ask the trainee the following questions and discuss their responses:
 - What was the most difficult reaction to handle?*
 - What's one way you can improve your response next time?*
 - How can you adjust your approach based on different personality types?*

ADAPTING TO CUSTOMER REACTIONS

Purpose: This trainer activity guide provides Sales Inspectors with the ability to adjust their problem explanations based on customer reactions. By recognizing hesitation, skepticism, or lack of urgency, trainees will refine their approach to ensure the customer fully understands the risk and necessity of action.

Trainer Instructions: How to Adapt to the Customer

Step 1: Trainer Discussion – Recognizing Customer Hesitation (5-10 Minutes)

- Key Points to Cover:
 - ▶ Customers may hesitate for various reasons. Here are some examples:
 - Skepticism → *I've never had this issue before.*
 - Downplaying urgency → *I'll deal with it later.*
 - Distrust or cost concerns → *How do I know I really need this?*
 - ▶ The way an SI responds determines whether the customer moves forward or walks away.
 - ▶ Reinforce the core idea: The problem explanation must be adapted based on the customer's reaction—**not just repeated with more force.**
- Demonstrates how to transition from problem explanation to service recommendation.

Step 2: Mini-Role-Play – Adjusting the Explanation (15-20 Minutes)

- Activity Instructions:
 1. Trainer presents a real-world inspection finding (choose from pest, termite, or lawn).
 2. Trainee reviews the problem using the Findings → Problem → Consequences method.
 3. Trainer introduces a common customer reaction (skeptical, dismissive, hesitant, etc.).
 4. Trainee must adjust their explanation and transition toward a service recommendation.
 - The Trainer should observe the responses and provide real-time feedback and guidance.
- Example Role-Play Scenarios:
 - ▶ **Customer Skepticism:** *I've never had this issue before.*
 - SI should reinforce evidence and risk: *That's common! Many homeowners don't realize termites are present until damage has already started. That's why early treatment is important.*
 - ▶ **Customer Downplays Urgency:** *Ehhh...I'll think about it and get back to you.*
 - SI should emphasize risk timeline: *I completely understand wanting time to consider! However, waiting too long can allow the issue to spread, making solutions more expensive down the road.*
 - ▶ **Customer Asks for More Details:** *Can you explain exactly why this is a problem? I don't I really understand.*
 - SI should balance education with simplicity: *Of course! What we're seeing here is [brief explanation], which leads to [consequence]. That's why taking care of it **now** is important."*

Block 2: Presenting the Solution – Guiding the Customer to a Decision

Model Confident, Customer-Centered Communication

The way you present solutions directly impacts how trainees learn to do the same. Use clear, structured explanations that tie back to customer concerns, and avoid listing features without context.

GOAL

To help Sales Inspectors refine their ability to confidently present solutions (Step 4) in real-world customer interactions by reinforcing structured solution framing, engagement techniques, and the transition from problem identification to service recommendations.

OBJECTIVES

By the end of Block 2, trainees will be able to:

1. Transition smoothly from defining a problem to recommending a service solution.
2. Present solutions in a structured, customer-friendly way using the Findings → Solution → Benefit approach.
3. Adapt their presentation based on real customer engagement cues and reactions.

AGENDA

Block 2 should take approximately 2-2.5 hours to complete, plus the variable time for the Field Training Ride-Along.

If possible, activities should be completed in the order listed below to ensure a more logical progression of learning.

- 5.2.1: Presenting Solutions the Right Way
- 5.2.2: Guided Role-Playing Steps 3 & 4: Presenting Solutions
- 5.2.3: Field Training: Presenting Solutions in the Wild

REMINDERS

- **Follow the Progression If Possible:** Start with structured learning (5.2.1, 5.2.2) before moving to live application (5.2.3). But they can occur after a ride-along as a way to reinforce or dive into the skills and knowledge.
- **Encourage Adaptability:** Customer responses will vary—train trainees to adjust their approach without losing confidence.
- **Keep the Focus on Steps 3 & 4:** Avoid shifting into too far into objection handling—this block is about defining problems, presenting solutions effectively, and interacting with customers.



WHEN CUSTOMERS GRASP THEIR PROBLEM, A WELL-PRESENTED SOLUTION FEELS LIKE THE LOGICAL NEXT STEP. MAKE SURE THE TRAINEE GUIDES THE CONVERSATION TOWARDS THAT NATURAL SOLUTION, RATHER THAN FORCING A RECOMMENDATION.

PRESENTING SOLUTIONS THE RIGHT WAY

GOAL

To enable Sales Inspectors 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.

OBJECTIVES

By the end of this activity, trainees 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 trainees 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.

DETAILS

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

NOTES

PRESENTING SOLUTIONS THE RIGHT WAY

TRAINER'S ACTIONS & CHECKLIST

- Use the Trainer Activity Guide:
 - Defining the Problem & Presenting Solutions
 - Learner Workbook Activity "Connecting the Problem to the Solution" on pgs. 82-83
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Review:** Assess the trainee's ability to define the problem accurately and connect it to a recommended solution.
- **Self-Reflection Exercise:** The trainee identifies key takeaways and areas for improvement in problem definition and solution presentation.
- **GM Follow-Up (if applicable):** If the trainee completed this activity with a different trainer, they should follow up with the GM or designated trainer to review their performance and receive additional coaching



QUICK TIPS

- ★ **Teach Confirmation First.** If the customer doesn't acknowledge the problem, they won't care about the solution—train SIs to confirm understanding before moving forward.
- ★ **Adaptation is Key.** A great solution presentation adjusts to the customer's concerns and reactions—help trainees practice flexibility.
- ★ **Guide, Don't Overwhelm.** Trainees should frame solutions in a way that is clear and customer-focused, not overly technical or complicated.

TRAINER MATERIALS

- Sample Massey Folder, inspection graphs, and graphical analyses.
- Copies of Fast Fact Sheets and the Massey Proposal Folder.

ACTIVITY WRAP-UP

- Recap key steps with the trainee: confirming understanding, defining the problem, and presenting the solution using the Findings → Solution → Benefit structure.
- Discuss individual takeaways and strategies for improvement.
 - Use questions like these:
 - ▶ What do you think went well in your explanations and transitions?
 - ▶ Where do you need to improve?
 - ▶ What did you learn from your trainer's feedback?

DEFINING THE PROBLEM & PRESENTING SOLUTIONS

Purpose: This activity enables trainees to accurately define customer problems and connect them to relevant solutions. By practicing structured questioning, reviewing inspection documentation, and applying the Findings → Solution → Benefit framework, trainees will enhance their ability to guide customers toward informed decisions.

Trainer Instructions: Findings → Solution → Benefit

Step 1: Confirm Customer Understanding & Step 3: Define the Problem

- Introduce the importance of confirming the customer's acknowledgment of the issue.
 - ▶ Using open-ended questions/prompts like:
 - *What issue concerns you the most today?*
 - *Please explain what you're seeing? Have you ever noticed anything like this before?*
 - *How important is it for you to get this addressed now?*
- **Walk through the documentation** (Massey Folder, inspection graph, graphical analysis, specification sheets, worksheets) and model how to identify key indicators (Avenues, Conditions, Sources) to the customer.
 - ▶ Examples:
 - *See this area I've marked on the graph; this moisture condition is what's feeding the wood rot and creating an ideal environment for termites. What concerns do you have about that?*
 - *Looking at these droppings along the baseboard, we can see evidence of rodent activity. Have you noticed any noises or sightings of rodents in your home?*
- Demonstrate how to validate findings with the Fast Fact Sheets and Massey Proposal Folder.
 - ▶ Example:
 - *Here's a resource that explains how moisture buildup contributes to pest infestations. Based on what we found, I recommend looking at our preventative services. Let me walk you through how this service prevents future issues.*

Step 2: Introduce the Findings → Solution → Benefit Structure

- Explain the structure:
 - ▶ **Findings:** What we observed during the inspection.
 - ▶ **Solution:** The recommended service and why it is needed.
 - ▶ **Benefit:** How it solves the problem and provides peace of mind.
- Model a solution presentation using clear, jargon-free language.
 - ▶ Examples:
 - *I observed moisture buildup in your crawl space, which is a factor in termite infestations. Our termite protection service addresses this issue by creating a protective barrier, giving you long-term peace of mind.*
 - *Your lawn has multiple dry patches due to an inconsistent irrigation schedule. I recommend our irrigation maintenance service to regulate watering and ensure your lawn remains healthy. This will*

save you time and effort in future upkeep.

- *I noticed rodent droppings near your kitchen area, indicating possible rodent activity. Our exclusion service will seal potential entry points and eliminate the risk of future infestations, protecting your home and family.*
- Transition smoothly into scheduling the next step.

Step 3: Trainer Demonstration: Steps 3&4

- Model a solution presentation using the structure above.
- Highlight key elements of clear, engaging recommendations:
 - ▶ No jargon – Keep it simple.
 - ▶ Emphasize benefits, not just services.
 - ▶ Smooth transition to scheduling the next step.
- Review Documentation: Open the Massey Folder and navigate the inspection graph.
- Identify Key Indicators: Point out Avenues, Conditions, and Sources on the graph.
 - ▶ Confirm Customer Understanding: Ask a confirmation question such as:
 - ◆ *Now that we've gone over what's happening, what concerns you most about this issue?*
 - ◆ *Does this align with what you've noticed at home?*
 - ◆ *What else have you seen that you want me to address?*
- Present the Solution:
 - ▶ **Findings:** What was observed during the inspection.
 - ▶ **Solution:** Recommended service and why it's needed.
 - ▶ **Benefit:** How it addresses the problem and provides peace of mind.
- Transition Smoothly: Guide the conversation into scheduling the next step.

Step 4: Learner Workbook Activity: Pgs. 82-83

- Using Exercise 1 on pg. 82, Have trainees outline their own Findings → Solution → Benefit structure for the provided problem.
- There are 3 scenarios in the activity.
- Help the trainee complete the exercise by providing guidance and service knowledge where needed.
- Review each response and provide feedback and suggestions.:

GUIDED ROLE-PLAY: STEPS 3 & 4: PRESENTING SOLUTIONS

TRAINER'S ACTIONS & CHECKLIST

- Trainer Demonstration: Framing the Solution
- Set Up Role-Play Activity
- Deliver the Role-Play Using the Trainer Activity Guide
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Discussion & Coaching:** Assess trainee's ability to present solutions and overcome objections.
- **Hands-On Evaluation:** Observe how well the trainee uses graphs, Fast Fact Sheets, and objection-handling techniques.
- **Guided Reflection Discussion:** Guide the trainee to identify one specific improvement area for future interactions.
- **AI Speech Analysis (Siro):** Evaluate speech pacing, clarity, and engagement (if available)

ACTIVITY WRAP-UP

- Review the following:**
 - AI speech analysis (if applicable)
 - Trainer notes
 - Recap key lessons from each role-play scenario.
- Address key items you observed and noted in the role-play rubric.
- Trainer Feedback & Wrap-Up: Ask trainee to reflect:**
 - What adjustments did you make during the role-play?
 - How did your approach impact the conversation?
 - What strategies will you focus on improving?



QUICK TIPS

- ★ **Sell the solution, not just the service.** Ensure trainees connect their recommendations to customer concerns.
- ★ **Confidence sells!** A hesitant recommendation weakens trust. Reinforce tone, pacing, and conviction.
- ★ **Objections are opportunities!** Encourage trainees to view pushback as a chance to provide more value.

TRAINER MATERIALS

- Sample inspection findings from real customer cases.
- Service brochures and pricing options.
- Prepared role-play scripts or outlines with customer reactions.

This activity requires the completion of two role-play rounds. Round 1 is required. For the second round, choose either Round 2 or 3 based on the trainee's performance and areas for improvement, or complete all three rounds. You may repeat any round for additional practice.

Please use your professional judgment to determine which second round, or if all three rounds, will provide the most valuable learning experience.



DEPLOYMENT GUIDE

Purpose: This guided role-play activity provides trainees with guided practice in presenting service recommendations and overcoming customer objections. By engaging in realistic customer interactions, trainees refine their ability to align solutions with customer concerns, use value-driven communication, and confidently transition into closing discussions while maintaining trust.

Getting Started & What To Do

General Notes:

- Before this role-play activity, you should have an outline of how you want the scenario to play out, or you can write a brief script.
- You should allot about 10 minutes for each role-play.
- Adjust time as needed based on trainee performance.
- Each scenario is progressive, increasing in complexity or introducing a new variable.
- Trainer acts as the customer and provides feedback after each round.

Why This Works:

- Ensures progressive development rather than overwhelming trainees.
- Allows trainers to focus on key engagement skills in each iteration.
- Focuses on key engagement techniques before adding complexity
- Helps trainees adapt to different customer responses instead of relying on a script

During the Activity:

- Facilitate at least two structured practice rounds, following the scenario guidelines.
- Track trainee performance using the provided rubrics to target specific skills and abilities.
- Offer real-time coaching after each round.
- Encourage self-reflection before moving to the next round.
- Record AI Speech Analysis (Siro) results where applicable.

After Each Role-Play:

- Provide feedback on the focus items using the rubrics and thinking about:
 - ▶ What went well?
 - ▶ What could be improved?
 - ▶ How did their performance change after adjustments?
- Encourage self-reflection.
- Provide feedback on observations and any AI insights (if applicable).

Deploying the Role-Play

Step 1: Explain the Activity

- Review the trainee's completion of Activity 5.2.1 (Defining the Problem & Presenting Solutions).
- Discuss key takeaways about transitioning from problem identification to recommendation.
- Inform the trainee that adjustments will be made after each role-play to challenge adaptability.
- Provide them with role-play objectives before beginning.

Step 2: Warm-Up & Scenario Prep

- Provide an overview of the Findings → Solution → Benefit structure.
- Explain the first customer scenario and review expectations.
- Encourage the trainee to focus on tone, pacing, and engagement cues.

Step 3: Role-Play Scenarios & Adjustments

- **Instructions for the Trainee:**
 - ▶ Follow the assigned scenario and make sure you are engaging with the "customer."
 - ▶ Pay attention to engagement cues and adjust your delivery accordingly.
 - ▶ Apply the Findings → Solution → Benefit structure to frame recommendations effectively.
 - ▶ Listen to trainer feedback on strengths and areas for improvement.
- **Trainer Actions:**
 - ▶ Act as the customer in each role-play scenario, keeping to the assigned scenario details.
 - ▶ Provide live feedback on:
 - Tone, pacing, and engagement level to ensure clear and confident delivery.
 - Clarity and confidence in the service recommendation to establish credibility.
 - Handling objections and overcoming customer concerns in a professional manner.
 - ▶ Observe how the trainee adjusts their approach based on customer responses and scenario changes.

ROUND 1 – THE DISBELIEVING CUSTOMER: OVERCOMING SKEPTICISM

Customer Mindset: They don't believe the issue is as serious as the Sales Inspector is presenting.

Trainer Role: Observe and assess confidence, clarity, and structure.

Rubrics Used:

- Skepticism & Reframing Concerns
- Strategic Questioning
- Supporting Claims with Evidence

Focus Areas:

- Supporting findings with clear evidence from the inspection graph and Fast Fact Sheets.
- Reframeing skepticism into awareness of risks and long-term consequences.
- Maintaining confidence without being pushy.

Trainer Observations:

- Does the trainee use data and visual aids effectively?
- Do they address skepticism without appearing dismissive?
- Is the transition into the solution smooth and logical?

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.
	<p>Recognizes customer skepticism and confidently reframes concerns into opportunities. Examples:</p> <ul style="list-style-type: none"> • Acknowledges customer doubts without becoming defensive. • Uses clear, positive language to reframe hesitation into curiosity. • Provides reassurance through facts, testimonials, or service benefits. 	

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.
	<p>Uses well-structured open-ended questions that invite discussion and uncover customer concerns.</p> <p>Examples:</p> <ul style="list-style-type: none"> • 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.
	<p>Uses the inspection graph, Fast Fact Sheets, and proposal materials to justify findings. Examples:</p> <ul style="list-style-type: none"> • 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. 	

ROUND 2 – THE DEFENSIVE CUSTOMER: MANAGING EMOTIONAL REACTIONS

Customer Mindset: They feel personally attacked by the findings (e.g., believing that discovering roaches implies they are unclean).

Trainer Role: Observe and assess confidence, clarity, and structure.

Rubrics Used:

- Emotional Control & Professionalism
- De-Escalation & Managing Difficult Customers

Focus Areas:

- De-escalating emotions by focusing on solutions rather than blame.
- Reassuring the customer while maintaining professionalism.
- Highlighting Massey's approach as proactive, not judgmental.

Trainer Observations:

- Does the trainee acknowledge the customer's feelings without getting defensive?
- Do they redirect the conversation toward problem-solving?
- Is the recommendation framed as helpful and beneficial, rather than accusatory?

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: <ul style="list-style-type: none"> • 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. 	

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: <ul style="list-style-type: none"> • 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. 	

ROUND 3 – THE COST-CONSCIOUS CUSTOMER: ADDRESSING PRICE OBJECTIONS

Customer Mindset: They believe the service is too expensive or are hesitant to commit.

Trainer Role: Observe and assess confidence, clarity, and structure.

Rubrics Used:

- Engagement & Connection
- Responding to Objections & Handling Rejection
- Value-Based Communication

Focus Areas:

- Frame the service as an investment rather than an expense.
- Use cost-comparison techniques to highlight long-term savings.
- Close with confidence, ensuring the customer sees value over price.

Trainer Observations:

- Does the trainee articulate value clearly?
- How well do they handle price concerns without lowering the service's perceived worth?
- Is the transition into scheduling the service smooth and confident?

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: <ul style="list-style-type: none"> • 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. 	

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.
	<p>Addresses objections professionally, reframes concerns with confidence, and provides clear solutions.</p> <p>Examples:</p> <ul style="list-style-type: none"> • 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. 	

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.
	<p>Frames the service as a proactive investment rather than just an expense. Examples:</p> <ul style="list-style-type: none"> • 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. 	

FIELD TRAINING: PRESENTING SOLUTIONS IN THE WILD

GOAL

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

OBJECTIVES

By the end of this activity, trainees 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 trainees with hands-on experience in defining customer problems and presenting tailored solutions in real-world sales conversations. The session follows a structured approach, gradually increasing the trainee's participation level from passive observation to independent practice. By focusing on Steps 3 and 4 of the 8-Step Sales Process, trainees will refine their ability to transition from problem identification to service recommendation in live customer interactions. Trainers will guide and assess the trainee's approach, ensuring clear, confident, and customer-focused solution presentations.

By focusing on Steps 3 and 4 of the 8-Step Sales Process, trainees will refine their ability to transition from problem identification to service recommendation in live customer interactions. Trainers will guide and assess the trainee's approach, ensuring clear, confident, and customer-focused solution presentations.

DETAILS

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

Layer this Activity onto an Existing Ride-Along. Maximize training efficiency by combining activities where it makes sense.



NOTES

FIELD TRAINING: PRESENTING SOLUTIONS IN THE WILD

TRAINER'S ACTIONS & CHECKLIST

- Before the Ride-Along:
 - Ideally, the trainee has completed Activity 5.2.1 and Activity 5.2.2 if not those should immediately follow.
 - Direct the trainee to the Ride-Along Observation Worksheet (Workbook, pgs. 88-90.)
 - Ensure the trainee understands their role during the observation phase and when they may engage.
 - If the ride-along trainer is not the GM, confirm a post-ride debrief with the GM.
 - Read through the Trainer Explainer on the next page and keep it handy for reference.
- During the Ride-Along:
 - Guide the trainee through passive observation, ensuring they:
 - ▶ Take notes on how solutions are presented and how customers respond.
 - If the customer is present, introduce the trainee to the customer and obtain permission for their participation.
 - ▶ If the customer does not grant permission, ensure the trainee steps back and observes.
 - Transition to guided participation, having the trainee practice presenting parts of the solution while the trainer steps in if needed.
 - ▶ Provide real-time coaching as the trainee begins defining problems and presenting solutions.
 - ▶ Correct and guide adjustments in real-time, ensuring alignment with Steps 3 and 4 of the 8-Step Sales Process.
 - ▶ Offer reinforcement and encouragement to build confidence and clarity in communication.
- Activity Wrap-Up: Post Ride-Along

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation & Coaching:** Assess clarity, confidence, and effectiveness in solution presentation.
- **Trainee Self-Reflection:** Identifying strengths and areas for improvement.
- **Post-Ride Trainer Debrief:** Reviewing observations.



QUICK TIPS

- ★ **Guide, Don't Take Over.** Let trainees find their own words. Provide prompts instead of taking over if they struggle.
- ★ **Reinforce problem definition.** Customers need to understand the issue before they care about the solution.
- ★ **Build confidence!** Acknowledge when trainees successfully transition from problem definition to solutions.

TRAINER MATERIALS

- Materials relating to defining problems and presenting solutions.

ACTIVITY WRAP-UP

- Conduct a structured debrief after each customer interaction, using reflection prompts:
 - What they learned about customer engagement and solution presentation.
 - Two service-specific takeaways from the visit.
 - Areas for improvement in future interactions.
- Trainer Feedback & Next Steps:
 - Provide constructive coaching on the performance in the field.
 - If the trainer is not the GM, provide a brief follow-up report on trainee progress.

CONDUCTING THE RIDE-ALONG

Purpose: This guide provides step-by-step instructions for conducting a successful ride-along, ensuring the trainee observes, participates, and receives structured coaching while maintaining professionalism and customer trust.

Preparing for the Ride-Along

- **Introduce the Ride-Along:** Before heading into the field, explain to the trainee what they will be observing, practicing, and expected to do.
- **Set Clear Expectations:**
 - ▶ The ride-along is designed to reinforce problem definition, solution framing, and customer engagement techniques.
 - ▶ The trainee will observe first, then gradually participate in measuring, graphing, and engaging customers
- **Confirm Training Readiness:**
 - ▶ Ensure the trainee has completed previous inspection & graphing exercises.
 - ▶ Direct the trainee to the Ride-Along Observation Worksheet (Workbook, pgs. 88-90).

Customer Introductions & Permission

- **It is critical to obtain the customer's permission before including the trainee in any conversation.**
- **Example Customer Introduction:**
 - ▶ *Good morning, Mr. Bell! It's good to see you. Before we begin, I'd like to introduce my trainee, John Doe. He's been learning about presenting solutions today, and I'd like to give him some real-world experience. Would you be comfortable with him observing and maybe participating in our conversation?*
- **Important Notes:**
 - ▶ If the customer is not comfortable with the trainee participating or being on their property, the trainee must step back and observe from a distance or wait in the vehicle if asked.
 - ▶ If the customer allows participation, the trainee should let the trainer lead first and follow their cues.
 - ▶ If entering a customer's home, never assume permission—always ask!

General Trainer Actions

- Encourage the trainee to focus on engagement cues, customer reactions, and transition techniques.
- Provide live coaching as needed, prompting the trainee to reinforce customer concerns through problem definition.
- Correct and guide adjustments in real-time, ensuring alignment with Steps 3 and 4 of the 8-Step Sales Process.
- Offer reinforcement and encouragement to build confidence and clarity in communication.

Key Coaching Focus Areas

- How well does the trainee connect inspection findings to the recommended service?

- Is the trainee framing solutions in a way that aligns with customer priorities?
- Does the trainee respond effectively to customer concerns?
- How does the trainee transition toward the close (scheduling the service)?

The Ride-Along: Observational Phase (Passive Learning)

- The trainee should shadow the trainer, focusing on:
 - ▶ How the trainer frames solutions after defining the problem.
 - ▶ How solutions are tailored to customer-specific concerns.
 - ▶ Customer engagement cues and reactions.
 - ▶ How objections are acknowledged and addressed.

The Ride-Along: Guided Practice Phase (Active Learning)

- Gradually Increase Responsibility:
 - ▶ Start by having the trainee assist in reinforcing problem definition.
 - ▶ Have them present one aspect of the solution while the trainer provides live feedback.
 - ▶ Move into having the trainee lead the full solution presentation with trainer support.
- Live Coaching & Correction:
 - ▶ Step in when necessary to refocus the conversation on problem definition and solution framing.
 - ▶ Encourage the trainee to refine their communication and engagement techniques.
 - ▶ Reinforce best practices for clear, confident presentation delivery

The Ride-Along: Post-Visit Debriefs

- Conduct a structured debrief *after each customer interaction*, using reflection prompts:
 - ▶ *What engagement cues did the customer display?*
 - ▶ *How effective was the solution presentation?*
 - ▶ *What aspects of the presentation went well? What could be improved?*
 - ▶ *How did the trainee adjust their approach based on customer feedback?*
- Ensure the trainee documents at least two service-specific takeaways per customer interaction.

MODULE 6

Why Massey?

Proving Our Value & Presenting Features & Benefits

GOAL

To equip Sales Inspectors with the ability to effectively communicate Massey's value proposition by differentiating services, reinforcing trust, and presenting features and benefits in a way that aligns with customer concerns. **This module reinforces Steps 5 & 6** of the 8-Step Sales Process to ensure that trainees can confidently position Massey as the best choice.

OBJECTIVES

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

1. Clearly articulate Massey's unique value propositions, including service guarantees, environmentally responsible practices, and proven effectiveness.
2. Differentiate Massey's services from competitors by highlighting key advantages in Pest Prevention, Termite Protection, and Lawn Care.
3. Present features and benefits effectively, ensuring customers see how Massey's services solve their specific problems.
4. Respond to common customer concerns and objections in a way that builds trust and reinforces service value.

MODULE BREAKDOWN

Module 6 consists of three structured blocks with activities designed to ensure that Sales Inspectors can clearly qualify Massey's value and present service benefits in a way that resonates with customers.

The estimated time for Module 6 completion is approximately 2-3 hours + variable ride-along time + assessment, but timing may vary based on individual needs.

- **Block 1: Building Confidence in Massey's Value & Differentiators** - Focus: Teaching Sales Inspectors how to reinforce Massey's credibility, reliability, and superior service offerings when positioning Massey against competitors.
- **Block 2: Presenting the Solution & Guiding the Decision** - Focus: Helping Sales Inspectors connect features and benefits to customer concerns to build trust and drive confident purchasing decisions.
- **Block 3: Verification Assessment** - Focus: Demonstrating abilities in presenting Massey's value, adapting to scenarios, and driving next steps through simulated customer interactions.

MODULE TIPS

- **Help trainees connect features to customer priorities.** Customers don't buy technical details; they buy solutions. Ensure trainees understand how to present benefits clearly.
- **Emphasize trust-building.** A key differentiator of Massey is credibility and service guarantees. Trainees must learn how to reinforce trust naturally.
- **Encourage confidence, not defensiveness.** Customers will have concerns. Make sure trainees respond professionally, without over-explaining or appearing defensive.
- **Prepare trainees for real-world conversations.** The final assessment simulates customer interactions, so ensure they are comfortable adapting to different customer personalities.



CONFIDENCE IN PRESENTATION = CUSTOMER TRUST. SALES INSPECTORS MUST EFFECTIVELY COMMUNICATE MASSEY'S VALUE TO REINFORCE TRUST AND DRIVE DECISIONS.

Block 1: Building Confidence in Massey's Value & Differentiators

Model Confident, Value-Driven Communication

The way you present Massey's differentiators sets the tone: deliver explanations with clarity and certainty so trainees understand how to do the same.

GOAL

To equip Sales Inspectors with the ability to confidently communicate Massey's unique value proposition, reinforcing credibility and trust while positioning Massey as the superior choice for customers. This block ensures they can complete **Step 5 – Qualify Massey Services** of the 8-Step Sales Process by effectively integrating Massey's differentiators into customer conversations.

OBJECTIVES

By the end of Block 1, trainees will be able to:

1. Clearly articulate Massey's differentiators and unique selling points.
2. Integrate Massey's value into customer conversations naturally and effectively.
3. Address common customer concerns using company qualifiers to reinforce trust and service credibility.

AGENDA

Block 1 should take approximately 45 minutes to 1 hour to complete, depending on discussion depth and extent of the scenario-based interactions.

If possible, activities should be completed in the order listed below to ensure a logical progression of learning.

- **6.1.1: Why Massey? Positioning Our Value**
- **6.1.2: Optional Advanced Practice – Qualify Like There's No Tomorrow!**

REMINDERS

- **Teach Trainees to Lead the Conversation.** A well-positioned value statement should proactively guide the customer toward trust—help trainees avoid only responding to concerns after they arise.
- **Encourage Storytelling.** Real-world examples and testimonials make Massey's differentiators more relatable—help trainees frame their responses with customer success stories.
- **Keep the focus on Massey's strengths.** Avoid direct competitor comparisons. Let Massey's value stand on its own.
- **Guide trainees toward confidence.** Encourage natural conversation flow instead of scripted responses.
- **Challenge trainees progressively.** Start with structured practice, then remove supports to test recall and adaptability.



TRUST IS EARNED BEFORE OBJECTIONS BEGIN. THE BEST WAY TO OVERCOME OBJECTIONS IS TO MINIMIZE THEM FROM HAPPENING—HELP TRAINEES POSITION MASSEY'S VALUE IN A WAY THAT BUILDS CONFIDENCE BEFORE CONCERNS ARISE.

WHY MASSEY? POSITIONING OUR VALUE

GOAL

To equip Sales Inspectors 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.

OBJECTIVES

By the end of this activity, trainees 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

A well-positioned company builds trust before objections arise. This activity helps trainees refine their ability to communicate Massey's value proposition clearly and confidently. Through guided discussion and hands-on practice, trainees will learn how to integrate Massey's unique differentiators into real customer conversations by addressing common concerns with structured responses.

DETAILS

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

NOTES

WHY MASSEY? POSITIONING OUR VALUE

TRAINER'S ACTIONS & CHECKLIST

- Gather Massey Service Qualifiers Documents
- Review the Learner Workbook Activity "Why Massey? Positioning Our Value" on pgs. 92-95.
- Use the Trainer Guide on the Following Pages:
 - Trainer-Led Discussion: *Why should a customer choose Massey over another provider?*
 - Workbook Activity: *Why Massey? Positioning Our Value* on pgs. 92-95
 - Practice Applying Massey's Value in Customer Conversation
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Assess trainee clarity, confidence, and structure in positioning Massey's value.
- **Trainee Self-Reflection:** Identify strengths and areas for improvement.



QUICK TIPS

- ★ **Remind trainees to keep responses conversational** rather than reciting qualifiers word-for-word.
- ★ **Ensure trainees use real customer examples** when explaining Massey's differentiators to make responses relatable.
- ★ **Reinforce that trainees should focus on Massey's strengths** rather than comparing directly to or attacking competitors. Keep it classy.

TRAINER MATERIALS

- Sales Manual - Chapter 7
- Report & Graphical Analysis.

ACTIVITY WRAP-UP

- Trainer Review & Discussion:
 - Provide final feedback on clarity, urgency, and simplicity in how the trainee explains Massey's differentiators.
 - Reinforce which qualifiers were used most effectively and which need further refinement.
 - Recap key takeaways: "A well-positioned company builds trust before objections arise."
- Trainee Self-Reflection Discussion:
 - Use questions or prompts like this to help the trainee think about the activity and their abilities:
 - ▶ *What Massey differentiator stood out most to you?*
 - ▶ *Which qualifier do you feel least confident explaining? Why?*
 - ▶ *How did structuring your response around value (instead of comparison) change the conversation?*
 - ▶ *How does positioning Massey's value **before** a customer raises concerns help the sales process?*

WHY MASSEY? POSITIONING OUR VALUE

Purpose: This activity helps trainees develop the ability to confidently position Massey's value in customer conversations. Through structured discussion, guided workbook activities, and hands-on practice, trainees will refine their ability to integrate Massey's differentiators in ways that naturally build trust and address common customer concerns.

Trainer Instructions: Qualifying Massey Services

Before the Activity

- Review the Learner Workbook Activity "Why Massey? Positioning Our Value" on pgs. 92-95.
- Be ready with real-world examples and testimonials to support the discussion.

Step 1: Trainer-Guided Discussion

- Open with the question: "Why should a customer choose Massey over another provider?"
- Introduce Massey's Unique Value Qualifiers (e.g., largest privately held provider, EPA recognition, service guarantees, 700,000+ happy customers).
 - ▶ If the trainee has already been exposed to them, use this as an opportunity to review and explore more in depth.
- Discuss how these qualifiers build trust and influence decisions.

Step 2: Workbook Activity: Why Massey? Positioning Our Value" starting on pg. 93

- Work with the trainee to complete Part 1 of the workbook activity.
- Have the trainee complete Part 2, then review and discuss their answers providing feedback on their successes and where improvement may be needed.

Step 3: Practicing Applying Massey's Value in Customer Conversations

- Trainees practice explaining Massey's advantages with the trainer, receiving real-time coaching and feedback.
- Trainer challenges trainees with real-world customer objections, comments, or comparisons (e.g., "But XYZ Pest Control is cheaper").
- Provide coaching and adjustments to refine responses.
- **Suggestions for Implementation:**
 - ▶ Start with a few examples and allow the trainee to use the Sales Manual or the back of the Inspection Report & Graphical Analysis.
 - ▶ Then move on to a few examples where they don't have access to the aforementioned documents.

QUALIFY LIKE THERE'S NO TOMORROW!

Purpose: This advanced practice session provides an additional challenge for trainees who have completed the core 6.1.1 activity. It reinforces their ability to naturally integrate Massey's differentiators into conversations by removing scripted supports and increasing difficulty levels. Trainees will practice handling unexpected customer reactions while maintaining clarity and confidence.

TRAINER'S ACTIONS & CHECKLIST

- Ensure the trainee has completed Activity 6.1.1 and demonstrated confidence in Massey's differentiators.
- Select 3-5 advanced role-play scenarios from the examples on the next page (or create custom ones based on real field experiences).
- Remove supporting materials (Sales Manual, Workbook, etc.) to challenge the trainee's recall and delivery.
- Gradually increase scenario difficulty, adjusting the complexity of customer responses.

DETAILS

- **ESTIMATED TIME:** 20-30 Minutes
- **DELIVERY MODE:** Trainer-Guided Challenge Scenarios + Real-Time Coaching
- **FACILITATOR:** General Manager or Designated Individual

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Evaluate confidence, clarity, and ability to handle unexpected responses.
- **Trainee Self-Assessment:** Identify areas where more practice is needed.
- **Real-Time Coaching:** Adjust explanations as necessary to refine responses.

ACTIVITY WRAP-UP

- Trainer Review & Discussion:
 - Provide real-time feedback on clarity, adaptability, and confidence.
 - Reinforce which responses were most effective and where improvements can be made.
- Trainee Self-Reflection Discussion:
 - What response felt the most natural to you? Why?*
 - Which scenario challenged you the most? How can you improve?*
 - How can you make your value positioning even stronger in real customer interactions?*

Round 1: The Neighbor's Advice

- The trainee must respond to a customer who says:
 - ▶ *My neighbor swears by another company—why shouldn't I go with them?*
- Trainer challenges the trainee to position Massey's value without mentioning competitors directly.
- **Focus:** Building trust in Massey through strong, independent qualifiers.

Round 2: The "I Do My Own Pest Control" Prospect

- Trainer plays a customer who says:
 - ▶ *I've been spraying my own yard for years—why do I need Massey?*
- The trainee must reinforce the long-term benefits of professional services and Massey's prevention approach
- **Focus:** Demonstrating Massey's unique expertise and proactive service model.

Round 3: The "I Don't Have a Pest Problem" Customer

- Trainer plays a skeptical homeowner who says
 - ▶ *It just a few roaches and ants—why should I spend money on this? I don't see the problem.*
- The trainee must position Massey's value by explaining preventative maintenance and risk reduction.
- **Focus:** Explaining the unseen benefits of pest prevention.

Bonus Round: The Pressure Test

- Trainer rapid-fires customer objections or questions, and the trainee must respond in real time with brief, confident answers.
 - ▶ Example rapid-fire questions:
 - *What's so special about Massey's pest services? A pest company is a pest company.*
 - *Why should I pay more for your service?*
 - *Isn't all lawn care basically the same?*
 - *I've never had pest problems before. Why start service now?*
 - *Can't I just buy something at the hardware store and do it myself?*
 - *What happens if I'm not happy with the results?*
 - *Does Massey require a long-term contract?*
 - *What makes Massey different from my last provider?*
 - ▶ You can, of course, use your own questions or comments.
- **Focus:** Speed, accuracy, and natural delivery.

Block 2: Presenting the Solution & Guiding the Decision

Help Trainees Master the Feature-to-Benefit Transition

The way a trainee connects service features to real customer benefits can make or break a sale. Reinforce the importance of framing benefits around customer priorities rather than just listing features.

GOAL

To equip Sales Inspectors with the ability to confidently present Massey's services in a way that connects features and benefits directly to customer concerns. This block reinforces **Step 6 – Features & Benefits** of the 8-Step Sales Process by ensuring trainees can clearly communicate service value and overcome customer hesitation.

OBJECTIVES

By the end of Block 2, trainees will be able to:

1. Differentiate between features and benefits to create customer-focused explanations.
2. Adapt explanations based on customer priorities (e.g., safety, cost-effectiveness, convenience)
3. Present Massey's service offerings persuasively while maintaining professionalism.
4. Handle customer questions and objections confidently, reinforcing service value.

AGENDA

Block 2 should take approximately 1-1.5 hours, plus assessment time.

If possible, activities should be completed in the order listed below to ensure a logical progression of learning.

- **6.2.1:** Presenting Features & Benefits Effectively
- **6.2.2:** Guided Role-Play: Selling Solutions with Value

REMINDERS

- **Emphasize customer relevance.** Features are important, but benefits make the sale. Trainees should always connect service details to customer concerns.
- **Encourage clarity over complexity.** Overloading a customer with details can backfire. Make sure trainees can simplify explanations without losing credibility.
- **Guide trainees toward confident communication.** A strong delivery inspires trust. Help trainees refine tone, pace, and non-verbal cues.



FEATURES ARE NICE—BUT BENEFITS SELL! CUSTOMERS DON'T BUY SERVICES; THEY BUY SOLUTIONS TO THEIR CONCERNS. ENSURE TRAINEES FOCUS ON HOW MASSEY'S OFFERINGS IMPROVE THE CUSTOMER'S SITUATION, NOT JUST WHAT THEY INCLUDE.

PRESENTING FEATURES & BENEFITS EFFECTIVELY

GOAL

To ensure Sales Inspectors 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.

OBJECTIVES

By the end of this activity, trainees 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 activity provides trainees with a structured framework for presenting Massey's services effectively. Through guided discussion and a hands-on Feature-to-Benefit Mapping Exercise, trainees will develop the ability to explain services in a way that resonates with customers and reinforces trust.

DETAILS

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

NOTES

PRESENTING FEATURES & BENEFITS EFFECTIVELY

TRAINER'S ACTIONS & CHECKLIST

- Review the Learner Workbook Activity "Feature-to-Benefit Mapping Exercise" on pgs. 96-98.
- Gather any documents or materials relating to features and benefits.
- Use the Trainer Guide on the Following Pages:
 - Trainer-Led Discussion: *Why Features & Benefits Matter*
 - Workbook Activity: "Feature-to-Benefit Mapping Exercise" on pgs. 97-98
 - Practicing with Features: Scenario-Based Customer Conversations
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Assess trainee clarity, confidence, and structure in positioning Massey's value.
- **Trainee Self-Reflection:** Identify strengths and areas for improvement.



QUICK TIPS

- ★ **Teach trainees to focus** on what the customer gains from each service, rather than listing features without context.
- ★ **Reinforce that customers buy solutions, not services**—help trainees position Massey's offerings as problem solvers.
- ★ **Use real-world examples** to make benefits more relatable and engaging.
- ★ **Remind trainees to be accurate and realistic when explaining benefits**—overpromising can damage trust and lead to unmet expectations.

TRAINER MATERIALS

- Sales Manual - Chapter 7
- Service Brochures

ACTIVITY WRAP-UP

- Trainer Review & Discussion:
 - Provide real-time feedback on clarity, adaptability, and confidence.
 - Reinforce which responses were most effective and where improvements can be made.
- Trainee Self-Reflection Discussion:
 - Use questions or prompts like this to help the trainee think about the activity and their abilities:
 - ▶ *What was the most natural feature-benefit explanation for you? Why?*
 - ▶ *Which feature-benefit pair do you find most challenging to explain?*
 - ▶ *How does framing features around customer concerns make your conversation more persuasive?*

WHY FEATURES & BENEFITS MATTER

Purpose: This activity helps trainees develop the ability to confidently position Massey's value in customer conversations. Through structured discussion, guided workbook activities, and hands-on practice, trainees will refine their ability to integrate Massey's differentiators in ways that naturally build trust and address common customer concerns.

Trainer Instructions: Features & Benefits

Before the Activity

- Review the Learner Workbook "Feature-to-Benefit Mapping Exercise" on pgs. 96-98.
- Review common customer priorities (health, safety, property value, convenience) and how Massey's services align with them.

Step 1: Trainer-Guided Discussion

- Ask the question: *Why do customers care about benefits, not just features?*
- Use this discussion to help define:
 - ▶ **Feature:** A factual aspect of the service (e.g., "We apply a slow-release granular treatment").
 - ▶ **Value-Added Feature:** A feature that adds additional customer value beyond the standard (e.g., "Our service includes an annual irrigation inspection").
 - ▶ **Benefit:** The direct impact for the customer (e.g., "This ensures healthier grass with fewer treatments").
 - ▶ **Note:** If the trainee has already been exposed to them, use this as an opportunity to review and explore more in depth.
- Review the importance of positioning:
 - ▶ Providing features & benefits differentiates Massey from companies that only list services.
 - ▶ Helps establish trust and shows Massey's expertise and commitment to service excellence.
- Discuss how accuracy realistic expectations matter and how overpromising can have poor results.
- Explore Weak vs. Strong Feature-Benefit Responses
 - ▶ Ask the trainee to explain how the strong response benefits them as a Sales Inspector and, ultimately, Massey Services.

Weak Response	Strong Response
We apply a pest treatment around your home.	Our service creates a protective barrier around your home, preventing pests before they enter—so you don't have to worry about infestations.
We perform an annual lawn aeration.	Our aeration process helps your lawn absorb more nutrients and water, leading to thicker, healthier grass that naturally resists weeds.
We inspect your home for termites.	Our thorough termite inspection identifies hidden threats before they cause costly damage—protecting your investment.

Step 2: Workbook Activity: "Feature-to-Benefit Mapping" starting on pg.97

- Work with the trainee to complete Part 1 of the workbook activity.
- Have the trainee complete Part 2, then review and discuss their answers providing feedback on their successes and where improvement may be needed.

Step 3: Practicing with Features: Scenario-Based Customer Conversations

- Trainees practice explaining Massey's features & benefits with the trainer, receiving real-time coaching and feedback.
- Trainer challenges trainees with real-world customer objections, comments, or comparisons (e.g., *What do I need aeration for? My lawn looks fine.*).
- Provide coaching and adjustments to refine responses.
- **Suggestions for Implementation:**
 - ▶ Start with the trainer modeling a feature to benefit explanation using a real Massey service.
 - ▶ Start the trainee with a few example customer statements and allow the trainee to use the Sales Manual or other Features and Benefits documents.
 - ▶ Then move on to a few examples where the trainee doesn't have access to the aforementioned documents.

Example Scenarios for Practice

Customer Statement	Expected Feature-to-Benefit Response Type
I just want to get rid of bugs in my laundry room, why do I need an entire preventative treatment?	Explain how Massey's service prevents infestations before they start, reducing the need for reactive treatments.
What makes your termite protection better than others?	Position Massey's termite guarantee and advanced treatment methods as a proactive, long-term solution.
I've had pest control before and <i>still</i> saw bugs—how is Massey any different?	Highlight Massey's approach to eliminating conditions, avenues, and sources rather than just spraying pesticides.
Other companies offer pest control too—why should I choose you?	Reinforce Massey's expertise, customer satisfaction guarantee, and environmentally responsible practices.

GUIDED ROLE-PLAY: SELLING SOLUTIONS WITH VALUE

GOAL

To ensure Sales Inspectors 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 trainees transition from simply listing services to positioning them as solutions.

OBJECTIVES

By the end of this activity, trainees 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 guided role-play experience where trainees will refine their ability to present Massey's services using a feature-to-benefit approach. Instead of simply listing features, trainees will practice positioning services in a way that connects to customer priorities, reinforcing the value and long-term benefits of Massey's offerings.

 This session follows a guided role-play format, helping trainees refine their approach in different customer scenarios.

DETAILS

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

NOTES

GUIDED ROLE-PLAY: SELLING SOLUTIONS WITH VALUE

TRAINER'S ACTIONS & CHECKLIST

- Set Up Role-Play Activity
- Deliver the Role-Play Using the Trainer Activity Guide
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Assess trainee clarity, confidence, and structure in positioning Massey's value through Features and Benefits.
- **Trainee Self-Reflection:** Identify strengths and areas for improvement.
- **AI Speech Analysis (Siro):** Evaluate speech pacing, clarity, and engagement (if available)

ACTIVITY WRAP-UP

- Trainer Review & Discussion:
 - Provide real-time feedback on clarity, adaptability, and confidence.
 - Reinforce which responses were most effective and where improvements can be made.
- Trainee Self-Reflection Discussion:
 - Use questions or prompts like this to help the trainee think about the activity and their abilities:
 - ▶ *What was the most natural feature-benefit explanation for you? Why?*
 - ▶ *Which feature-benefit pair do you find most challenging to explain?*
 - ▶ *How does framing features around customer concerns make your conversation more persuasive?*



QUICK TIPS

- ★ **Encourage adaptability.** Customers respond differently; help trainees adjust their approach to fit each conversation naturally.
- ★ **Emphasize confidence.** A hesitant presentation weakens credibility; remind trainees to speak with conviction.
- ★ **Model smooth transitions.** Guide trainees to connect features to benefits without sounding scripted.
- ★ **Keep it concise.** Over-explaining can overwhelm customers. Teach trainees to be clear and direct in their explanations.

TRAINER MATERIALS

- Sales Manual - Chapter 7
- Siro

This activity requires the completion of two role-play rounds. Round 1 is required. For the second round, choose either Round 2 or 3 based on the trainee's performance and areas for improvement, or complete all three rounds. You may repeat any round for additional practice.

Please use your professional judgment to determine which second round, or if all three rounds, will provide the most valuable learning experience.



DEPLOYMENT GUIDE

Purpose: This activity helps trainees develop the ability to confidently position Massey's value in customer conversations. Through a guided simulation, the trainee will have to apply their knowledge and adapt to changing customer mindsets.

Getting Started & What To Do

General Notes:

- Before this role-play activity, you should have an outline of how you want the scenario to play out, or you can write a brief script.
- You should allot about 10 minutes for each role-play.
- Adjust time as needed based on trainee performance.
- Each scenario is progressive, increasing in complexity or introducing a new variable.
- Trainer acts as the customer and provides feedback after each round.

Why This Works:

- Ensures progressive development rather than overwhelming trainees.
- Allows trainers to focus on key engagement skills in each iteration.
- Focuses on key engagement techniques before adding complexity
- Helps trainees adapt to different customer responses instead of relying on a script

During the Activity:

- Facilitate three structured practice rounds, following the scenario guidelines.
- Track trainee performance using the provided rubrics to target specific skills and abilities.
- Offer real-time coaching after each round.
- Encourage self-reflection before moving to the next round.
- Record AI Speech Analysis (Siro) results where applicable.

After Each Role-Play:

- Provide feedback on the focus items using the rubrics and thinking about:
 - ▶ What went well?
 - ▶ What could be improved?
 - ▶ How did their performance change after adjustments?
- Encourage self-reflection.
- Provide feedback on observations and any AI insights (if applicable).

Deploying the Role-Play

Step 1: Explain the Activity

- Review the trainee's completion of Activity 6.2.1 (Presenting Features & Benefits Effectively) if it is completed.
- Discuss key takeaways about transitioning from features to benefits.
- Inform the trainee that adjustments will be made after each role-play to challenge adaptability.
- Provide them with role-play objectives before beginning.

Step 2: Warm-Up & Scenario Prep

- Review key takeaways from the Feature-to-Benefit Mapping Exercise in Activity 6.2.1, emphasizing how to transition from technical details to customer-driven benefits
- Explain the first customer scenario and review expectations.
- Encourage the trainee to focus on tone, pacing, and engagement cues.

Step 3: Role-Play Scenarios & Adjustments

- **Instructions for the Trainee:**
 - ▶ Follow the assigned scenario and make sure you are engaging with the "customer."
 - ▶ Pay attention to engagement cues and adjust your delivery accordingly.
 - ▶ Use Massey's Features & Benefits framework from Activity 6.2.1 or other instruction.
 - Ensure recommendations align with customer concerns and priorities.
 - Don't overpromise.
 - Qualify Massey Services where appropriate.
 - ▶ Listen to trainer feedback on strengths and areas for improvement.
- **Trainer Actions:**
 - ▶ Act as the customer in each role-play scenario, keeping to the assigned scenario details.
 - ▶ Provide live feedback on:
 - Tone, pacing, and engagement level to ensure clear and confident delivery.
 - Clarity and confidence in the service recommendation to establish credibility.
 - Handling customer concerns professionally and ensuring benefits are clearly linked to customer priorities.
 - ▶ Observe how the trainee adjusts their approach based on customer responses and scenario changes.

6.2.2 TRAINER ACTIVITY GUIDE

ROUND 1 – THE "DIY EXPERT" CUSTOMER: DEMONSTRATING PROFESSIONAL VALUE

Customer Mindset: I've always handle all my own pest/lawn/termite issues. Why do I need Massey?

Trainer Role: Observe and assess how well the trainee positions professional expertise over DIY methods.

Rubrics Used:

- Engagement & Connection
- Value-Based Communication
- Verbal Communication

Focus Areas:

- Explaining why professional treatments last longer and provide better coverage.
- Reinforcing hidden risks of self-treatment (e.g., misapplication, short-term fixes).
- Using real-world examples (e.g., customers who tried DIY and still needed Massey).

Trainer Observations:

- Does the trainee position Massey's expertise without belittling the customer?
- Do they use examples or facts to reinforce Massey's superior approach?
- Is the customer left feeling confident in Massey's ability?

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: <ul style="list-style-type: none"> • 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. 	

6.2.2 TRAINER ACTIVITY GUIDE

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.
	<p>Uses clear, structured language to qualify Massey's value and connect features to customer benefits.</p> <p>Examples:</p> <ul style="list-style-type: none"> • 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. 	

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.
	<p>Speaks clearly and confidently at an appropriate pace. Examples:</p> <ul style="list-style-type: none"> • Uses a steady, natural pace for clarity. • Adjusts tone based on customer engagement. • Provides explanations without overwhelming the customer. 	

6.2.2 TRAINER ACTIVITY GUIDE

ROUND 2 – THE "TECHNOLOGY SKEPTIC" CUSTOMER: SIMPLIFYING MASSEY'S APPROACH

Customer Mindset: Why do I need an 'inspection graph' or 'advanced formula'? I just want a normal service.

Trainer Role: Observe and assess how well the trainee simplifies Massey's scientific approach without overwhelming the customer.

Rubrics Used:

- Engagement & Connection
- Qualifying Massey & Framing Benefits
- Supporting Claims with Evidence

Focus Areas:

- Explaining why Massey's tools improve service accuracy and long-term effectiveness.
- Demonstrating how Massey's tools provide better results while maintaining customer convenience.
- Framing Massey's tools in a way that reassures customers and builds trust in their necessity.

Trainer Observations:

- Does the trainee explain Massey's tools in a simple and reassuring way?
- Do they help customers feel comfortable with Massey's tools while reinforcing their value?
- Are they able to build trust by confidently presenting Massey's tools as essential for superior service? impact on the customer's property?

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: <ul style="list-style-type: none"> • 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. 	

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.
	<p>Uses the inspection graph, Fast Fact Sheets, and proposal materials to justify findings. Examples:</p> <ul style="list-style-type: none"> • 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. 	

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.
	<p>Uses clear, structured language to qualify Massey's value and connect features to customer benefits. Examples:</p> <ul style="list-style-type: none"> • 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. 	

ROUND 3 – THE “ONE-TIME FIX” CUSTOMER: SELLING LONG-TERM PREVENTION

Customer Mindset: I just want a one-time treatment. Why do I need a long-term plan?

Trainer Role: Observe and assess how well the trainee sells the value of ongoing prevention over one-time solutions.

Rubrics Used:

- Strategic Questioning
- Qualifying Massey & Framing Benefits
- Responding to Objections & Handling Rejection

Focus Areas:

- Reinforcing that prevention is cheaper, easier, and more effective than reacting to issues.
- Positioning Massey’s service guarantees as a reason to stay protected long-term.
- Framing the decision as a smart investment rather than an unnecessary expense.

Trainer Observations:

- Does the trainee build urgency appropriately?
- Are they able to explain prevention clearly and persuasively?
- Do they transition to closing naturally?

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: <ul style="list-style-type: none"> • 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. 	

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.
	<p>Uses clear, structured language to qualify Massey's value and connect features to customer benefits.</p> <p>Examples:</p> <ul style="list-style-type: none"> 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. 	

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.
	<p>Addresses objections professionally, reframes concerns with confidence, and provides clear solutions.</p> <p>Examples:</p> <ul style="list-style-type: none"> 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. 	

Block 3: Skill Verification & Evaluation Assessment

Conduct a Pre-Assessment Review:

Before the proctored assessment, conduct a focused review session with the trainee, explicitly covering the assessment format, scenarios, evaluation criteria, and any specific areas where the trainee needs reinforcement.

GOAL

To provide Sales Inspectors 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 trainees can confidently communicate service advantages, reinforce trust, and transition smoothly into recommendations in live customer interactions.

OBJECTIVES

By the end of Block 3, trainees will be able to:

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

AGENDA

Block 3 serves as an important assessment checkpoint to ensure trainees apply all previously learned sales presentation skills independently. The evaluation is proctored, and trainees must effectively present Massey's services, adapt to customer scenarios, and confidently transition to the next steps in the sales process. The assessment will be conducted at a designated testing site or via video conference to accurately gauge the trainee's ability to perform independently under simulated real-world conditions.

- **6.3.1: Assessment: Independent Inspection & Graphing Exercise**

REMINDERS

- **Sales Skills are Key: Trainees must see effective communication, objection handling, and a confident presentation as critical for building trust and closing sales.**
- **Professionalism is Essential:** Reinforce clear, structured communication and a professional demeanor to ensure consistency across all trainees.
- **Focus on the Customer:** Emphasize adapting to customer needs, addressing concerns, and driving the conversation toward a positive outcome.



SET THE TRAINEE UP FOR SUCCESS! ENSURE THEY UNDERSTAND EXPECTATIONS IN ADVANCE.

EVALUATION: QUALIFYING MASSEY'S BENEFITS & FEATURES

GOAL

To provide Sales Inspectors 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 trainees can confidently communicate service advantages, reinforce trust, and transition smoothly into recommendations in live customer interactions.

DETAILS

- **ESTIMATED TIME:** Variable
- **DELIVERY MODE:** Skill Evaluation
- **FACILITATOR:** Assigned Proctor

OBJECTIVES

By the end of this activity, trainees will 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 trainee's ability to confidently present Massey's value in structured, scenario-based customer interactions. The evaluation will be conducted as a simulated assessment, where the proctor plays the role of the customer to ensure consistency and fairness across all evaluations. If a live customer interaction is appropriate and available, this can be used as an alternative assessment method.

The assessment follows a structured verification process containing the following elements:

1. **Scenario-Based Conversation:** The proctor (evaluator) acts as the customer, providing a controlled environment for assessment.
2. **Independent Presentation:** The trainee fully presents Massey's services, reinforcing features & benefits.
3. **Evaluation & Feedback:** The evaluator provides structured feedback based on assessment criteria.



A THIRD-PARTY PROCTOR (SUCH AS ANOTHER GM, SALES MANAGER, OR REGIONAL MANAGER) IS PREFERRED FOR THIS SKILLS ASSESSMENT, BUT NOT REQUIRED. IF A THIRD-PARTY PROCTOR IS NOT READILY AVAILABLE, THE TRAINER MAY PROCTOR THE ASSESSMENT. EXPECTATIONS SHOULD BE COMMUNICATED IN ADVANCE.

EVALUATION: QUALIFYING MASSEY'S BENEFITS & FEATURES

TRAINER'S ACTIONS & CHECKLIST

- Before the Assessment:
 - Confirm whether the assessment will take place at:
 - ▶ A designated testing site (service center or Teams) where a proctor will provide the assessment and play the role of the customer.
 - ▶ A live customer interaction (if available and appropriate) where the proctor observes and assesses the trainee.
 - Ensure the proctor has the Assessment Guide and understands the evaluation criteria.
 - Do any last minute review of key Massey differentiators and service benefits with the trainee in preparation.
- During the Assessment:
 - The trainer should not be present during the assessment if they are not proctoring it.
- Post Assessment:
 - **Proctor Debrief:** The proctor reviews the trainee's ability to present Massey's services, handle objections, and transition smoothly in conversations with the trainee and the trainer
 - Feedback & Next Steps:
 - ▶ If the trainee passes, they are cleared for fully independent sales conversations.
 - ▶ If improvement is needed, assign targeted coaching and a retest.
 - ▶ If the trainee does not meet expectations in multiple categories, they must complete additional training before reassessment.
 - Documentation & Reporting:
 - ▶ The proctor submits the completed assessment form to the General Manager/Trainer for uploading.
 - ▶ The assessment results must be logged and submitted to Massey University for training records by the General Manager/Trainer.



QUICK TIPS

- ★ **Set the Trainee Up for Success!** Ensure they understand expectations in advance.
- ★ **Let the Proctor Lead!** The proctor evaluates performance—trainers should not intervene if they are present and not the proctor.
- ★ **Encourage Professionalism!** The trainee must be able to explain findings clearly and confidently.
- ★ **Review the Results!** Trainer should review assessment outcomes with the trainee and you and discuss areas for improvement.

TRAINER MATERIALS

- Assessment Guide

FEEDBACK, VERIFYING, & ASSESSING

- **Proctor Observations & Feedback:** Reinforce key behaviors based on structured evaluation.

PROCTOR GUIDE: QUALIFYING MASSEY'S BENEFITS & FEATURES

CONDUCTING THE ASSESSMENT

Purpose: This skills assessment evaluates the Sales Inspector's ability to confidently present Massey's services, handle objections, and transition conversations effectively.

Pre-Assessment: Trainer Responsibilities

- Identify an appropriate location for the assessment (Service Center property, designated training site, or customer location).
- Ensure the trainee has any necessary tools and forms.
- Review expectations with the trainee beforehand if you won't be present.

Pre-Assessment: Proctor Responsibilities

- Confirm the assessment format (in-person at a designated service center or remote via Teams).
- Ensure you understand the expectations and structure of the assessment.
- Review the Assessment Guide and evaluation criteria in advance.
- Have the necessary scenario list and Assessment Rubrics ready for evaluation.

Role of the Proctor

- The proctor is responsible for leading the interaction as the customer and evaluating the trainee's ability to adapt, explain services, and manage objections.
- The proctor should stay in character throughout the assessment and avoid coaching during the interaction.
- Feedback should be given only after the assessment is complete, unless the trainee shows distress or major failure, in which case the proctor may step out of character briefly to address the situation professionally.

During the Assessment: Deploying and 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.

ALERT!

- ★ These scenarios are **not scripted**. The trainee must respond naturally and adaptively.
- ★ We recommend using the **weekly service theme** (Pest, Lawn, or Termite) to keep the interaction relevant. This also helps reinforce that week's fieldwork and coursework focus.

PROCTOR GUIDE: QUALIFYING MASSEY'S BENEFITS & FEATURES

- Transition the conversation smoothly.
- Handle rejection professionally.
- The trainee must adapt their approach to the scenario while demonstrating confidence and clarity.

Proctor Evaluation Responsibilities

1. Evaluate trainee performance using the provided Rubric.
2. Circle the performance category and briefly explain the rating. DO NOT leave comments blank!
3. Complete the Results form.

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.

These customers are unsure about the need for Massey's services and require strong reassurance. Select one option.

OPTION 1: THE "I HAVEN'T HAD ISSUES" CUSTOMER

Customer: "I don't really have a problem right now. Why should I sign up for something I don't need?"

- **Challenge:** The trainee must position Massey's services as a preventative investment rather than a reactive fix.
- **Proctor Notes:** See if the trainee avoids fear-based selling and instead reinforces the value of proactive protection.

OPTION 2: THE "MY SERVICE WORKS JUST FINE" CUSTOMER

Customer: "I've already got a company, and they seem to do the job just fine. Why switch?"

- **Challenge:** The trainee must differentiate Massey's services without bashing competitors.
- **Proctor Notes:** See if the trainee effectively qualifies Massey's advantages and service differentiators.

OPTION 3: THE "SKEPTICAL OF THE SCIENCE" CUSTOMER

Customer: "This all sounds nice, but do I really need an inspection graph and all this stuff? Pest control is just spraying chemicals and sprinkling dust, right?"

- **Challenge:** The trainee must simplify the importance of Massey's methodology without overwhelming the customer.
- **Proctor Notes:** Look for clear, benefit-driven explanations rather than overly technical details.

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.	

PRICE-CONSCIOUS OR CONFRONTATIONAL CUSTOMERS

These customers either focus on cost or push the trainee to prove the service's value. Select one option.

OPTION 1: THE "I CAN'T AFFORD THAT" CUSTOMER

Customer: "This all sounds great, but I just don't have the money right now."

- **Challenge:** The trainee must position Massey's service as a long-term investment rather than an immediate expense.
- **Proctor Notes:** See if the trainee frames the conversation around value, cost savings, and guarantees. protection.

OPTION 2: THE "MAKE ME WANT IT" CUSTOMER

Customer: "Alright, convince me. Why should I spend my money on this, and on you?"

- **Challenge:** The trainee must take control of the conversation without becoming defensive.
- **Proctor Notes:** Look for confidence and structured selling points rather than excessive persuasion.

OPTION 3: THE "DISCOUNT DEMANDER" CUSTOMER

Customer: "I like it, but I need a discount. Can you knock something off the price?"

- **Challenge:** The trainee must reinforce Massey's value and pricing structure without immediately caving to discounts.
- **Proctor Notes:** See if the trainee handles pricing concerns professionally while emphasizing long-term benefits.

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.	

CAT. 3 CONTROLLED FAILURE

These customers **will not buy**, and the trainee must demonstrate professionalism while handling rejection. Select one option.

OPTION 1: THE DISTRACTED CUSTOMER

Customer: "Yeah, yeah, just leave me a brochure or something. I'm busy right now."
(While dealing with screaming kids, talking/playing on the phone, etc.)

- **Challenge:** The trainee must recognize when to push forward or step back professionally.
- **Proctor Notes:** Watch for graceful disengagement and clear next steps, even if that step is leaving.

OPTION 2: THE HOSTILE CUSTOMER

Customer: "I'm not interested! You people always try to sell me something I don't need! What do you want now?!"

- **Challenge:** The trainee must remain calm, professional, and composed.
- **Proctor Notes:** See if the trainee keeps their composure and ends on a professional note and doesn't give into mirroring the hostile customer's attitude or demeanor.

OPTION 3: THE "I'M STICKING WITH MY COMPANY" CUSTOMER

Customer: "I've been with Mr. Pest for 15 years, and I'm not changing now."

- **Challenge:** The trainee must handle loyalty objections and leave a positive lasting impression.
- **Proctor Notes:** Evaluate whether the trainee respects the customer's loyalty while planting a potential future opportunity.

CAT. 3 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.	

Trainee Information

- Trainee Name: _____
- Proctor Name: _____
- Assessment Date: _____ Assessment Location: _____
- Assessment Attempt: 1 2 3

Scenarios Used

The proctor should indicate which scenarios were selected for the assessment.

1. Skeptical/Hesitant Customer: Option #: _____
2. Price-Conscious or Confrontational Customer: Option #: _____
3. Controlled Failure Scenario, Option # _____

Proctor Observations & Comments:

General Observations:

Strengths Displayed:

Areas for Improvement:

Final Evaluation & Next Steps:

Evaluation Component	Pass	Retest	Final Attempt – Additional Training Required
Category 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Category 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Category 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes			
<ul style="list-style-type: none"> • If this is the first or second attempt, “Needs Improvement” indicates the trainee may retest after coaching from the trainer. • If this is the third attempt, any “Fail” indicates the trainee has not demonstrated readiness after multiple opportunities. <ul style="list-style-type: none"> ▶ No further retests should be scheduled without approval from a Regional Manager or Sales Director. ▶ A training audit may be initiated to determine next steps or reassignment. 			

Next Steps (if failed second retest or needing improvement)

Proctor Signature: _____

Trainee Signature: _____

Trainer Signature: _____

Date: _____

MODULE 7

Sealing the Deal:

Closing the Sale & Generating Referrals

GOAL

To equip Sales Inspectors with the ability to confidently close sales and secure referrals by reinforcing customer trust, finalizing agreements, and ensuring accurate documentation. This module reinforces **Step 7 – Closing the Sale** and **Step 8 – Asking for Referrals** of the 8-Step Sales Process, ensuring trainees can secure customer commitment and expand opportunities through referrals.

OBJECTIVES

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

1. Recognize customer buying signals and apply effective closing techniques to secure agreements confidently.
2. Transition from closing the sale into asking for referrals naturally without appearing pushy.
3. Handle customer objections or hesitations professionally, reinforcing the value of Massey's services.
4. Complete and submit the required sales packet documentation accurately, ensuring compliance and smooth processing.

MODULE BREAKDOWN

Module 7 consists of two structured blocks with activities designed to help Sales Inspectors utilize closing techniques, handling hesitations, securing referrals, and completing the necessary documentation.

The estimated time for Module 7 completion is approximately 3 hours but timing may vary based on individual needs, discussion depth, and role-play options.

- **Block 1: Closing with Confidence** - Focus: Learning and refining closing techniques, identifying buying signals, and addressing last-minute hesitations without losing customer trust.
- **Block 2: Securing Referrals & Documentation Accuracy** - Focus: Leveraging satisfied customers for referrals while ensuring all sales paperwork is completed and submitted correctly to avoid delays.

MODULE TIPS

- **Encourage confident, natural closing.** Ensure trainees don't rush the close but instead guide the customer smoothly toward agreement.
- **Reinforce the importance of referrals.** Satisfied customers are the best source of new leads. Help trainees make referral requests feel like a natural continuation of the conversation.
- **Accuracy in documentation is critical.** Mistakes in sales paperwork cause delays and extra work. Help trainees develop the habit of double-checking their submissions.
- **Adapt to customer personality types.** Not all customers will be eager to commit immediately. Help trainees adjust their approach based on customer hesitations or objections.



A CONFIDENT CLOSE & REFERRAL REQUEST = CONTINUED BUSINESS GROWTH. SALES INSPECTORS WHO CLOSE EFFECTIVELY AND ASK FOR REFERRALS NATURALLY WILL DRIVE LONG-TERM SALES SUCCESS.

Block 1: Closing with Confidence

Model Confident Closing Conversations

Trainees will naturally mirror the trainer's approach. Demonstrate calm, assured, and structured closing techniques—this will help them adopt the right tone and presence in real sales interactions.

GOAL

To equip Sales Inspectors with the ability to confidently transition from presenting services to securing a customer commitment. This block reinforces **Step 7 – Closing** of the 8-Step Sales Process by ensuring trainees can recognize buying signals, apply structured closing techniques, and handle last-minute hesitations effectively.

OBJECTIVES

By the end of Block 1, trainees will be able to:

1. Recognize and respond to buying signals in customer interactions.
2. Apply structured closing techniques to guide customers toward a confident "yes."
3. Overcome last-minute hesitations without creating pressure or uncertainty.
4. Transition from presenting service details to securing the sale smoothly.

AGENDA

Block 1 should take approximately 1 hour and 45 minutes to complete, depending on discussion depth and extent of the scenario-based interactions.

If possible, activities should be completed in the order listed below to ensure a logical progression of learning.

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

REMINDERS

- **Closing should feel natural.** Guide trainees to transition into closing when buying signals appear. Help them avoid abrupt or awkward transitions.
- **Encourage adaptability.** Not every customer responds the same way. Help trainees practice adjusting their approach.
- **Confidence drives commitment.** Hesitation in the close can create hesitation in the customer. Make sure you reinforce the importance of certainty and clarity to the trainee.
- **Teach strategic closing techniques.** Ensure trainees understand when to use different closing methods based on customer responses.



CLOSING IS THE NATURAL CONCLUSION TO A STRONG SALES CONVERSATION! WHEN DONE CORRECTLY, CLOSING DOESN'T FEEL FORCED—IT FEELS LIKE THE NEXT LOGICAL STEP FOR THE CUSTOMER.

TRAINER'S ACTIONS & CHECKLIST

- Review the closing techniques covered in the Sales Manual.
- Use the Trainer Guide on the Following Pages:
 - Trainer-Led Discussion: Understanding Closing Techniques
 - Scenario-Based Customer Conversations
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Assess how well trainees transition from presenting services to securing a commitment.
- **Trainee Self-Reflection:** Identify strengths and areas for improvement.



QUICK TIPS

- ★ **Listen for Buying Signals.** Help trainees recognize when a customer is ready to commit and when to transition into closing.
- ★ **Encourage Confidence.** The more certain the trainee is, the easier the decision feels for the customer.
- ★ **Avoid High-Pressure Tactics.** Focus on guiding the customer to a decision rather than forcing it.
- ★ **Make Closing a Conversation, Not a Script.** Ensure trainees adapt their approach to different customer reactions.
- ★ **Prepare for Objections.** Teach trainees how to handle last-minute hesitations without losing momentum.

TRAINER MATERIALS

- Sales Manual - Chapter 7

ACTIVITY WRAP-UP

- Trainer Review & Discussion:
 - Provide real-time feedback on confidence, clarity, and transition skills.
 - Reinforce which closing techniques were most effective.
- Trainee Self-Reflection Discussion:
 - What closing technique felt the most natural to you? Why?
 - Which customer scenario was the hardest to close?

SAYING YES! WORKING THE CLOSE

Purpose: This activity helps trainees develop the ability to confidently closing the sale. Through structured discussion and guided customer scenarios, trainees will refine their approach to recognizing buying signals, applying effective closing techniques, and handling customer concerns without pressure.

Trainer Instructions: Closing the Sale

Step 1: Trainer-Guided Discussion: Understanding Closing Techniques

- Trainer-Led Discussion: What makes a strong close?
- Introduce Structured Closing Techniques (see the Sales Manual for expanded details):
 - ▶ Alternative Close
 - ▶ Assumptive Close
 - ▶ Cost of Ownership Close
 - ▶ 1-2-3 Close
 - ▶ Think About It Close
 - ▶ Trial Close
 - ▶ Valuable Customer Close
- Discussion Prompt: When is the right time to close a sale? (Buying Signals)

Step 2: Scenario-Based Customer Conversations – Applying Closing Techniques

Trainees will explore different closing scenarios through guided discussions rather than guided role-play. This will reinforce their ability to recognize buying signals and determine the best closing approach.

- Instructions:
 - ▶ Present each scenario to the trainee.
 - ▶ Work with the trainee to determine the best closing approach based on the customer's behavior.
 - ▶ Ask the trainee to explain their reasoning behind the chosen closing technique.
 - There is a guided notes template in their Learner Workbook which they can use to help structure their thoughts if that is helpful to them.
 - ▶ Provide feedback and corrections where necessary to refine their approach.

Scenarios

Each scenario starts after the inspector has presented buying plan options (Visa, MasterCard, Discover, Cash) and any promotional opportunities (e.g., Preferred Customer Discount, Pass-It-On Program). The customer's response follows, and the trainee must determine the best way to close the sale.

The trainer and trainee will discuss at least three of the following scenarios. More can be completed if time allows. For each scenario, the trainer will ask: "How can we close this sale?" The trainee should think through their options and explain how they would implement their chosen closing technique.

- **Scenario 1: The Hesitant Customer** – The customer is interested but hesitant to commit. The trainee must decide how to address their hesitation and confidently close the sale.
- **Scenario 2: The Price-Conscious Customer** – The customer is hesitant due to cost concerns. The trainee must determine how to emphasize long-term value while keeping the conversation focused on benefits rather than price.
- **Scenario 3: The Indecisive Customer** – The customer is not hesitant due to objections but struggles to make a decision. The trainee must determine how to guide them to a confident choice without overwhelming them.
- **Scenario 4: The 'Maybe Not Today' Customer** – The customer expresses some interest but isn't sure they need the service right now. The trainee must decide how to create urgency without using high-pressure tactics.
- **Scenario 5: The Disinterested Customer** – The customer is only half-engaged, showing little enthusiasm or urgency. The trainee must determine how to spark their interest and guide them toward a decision.

GUIDED ROLE-PLAY: GETTING A "YES" & CLOSING THE SALE

TRAINER'S ACTIONS & CHECKLIST

- Set Up Role-Play Activity
- Deliver the Role-Play Using the Trainer Activity Guide
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Assess how well trainees transition from presenting services to securing a commitment.
- **Trainee Self-Reflection:** Identify strengths and areas for improvement.
- **AI Speech Analysis (Siro):** Evaluate speech pacing, clarity, and engagement (if available)



QUICK TIPS

- ★ **Encourage Adaptability.** Each customer reacts differently—trainees should adjust their closing style accordingly.
- ★ **Push for Confidence.** Hesitation weakens trust—guide trainees to close with certainty.
- ★ **Ensure Smooth Transitions.** Closing should feel like a natural progression, not a sudden shift.
- ★ **Handle Hesitations Gracefully.** Trainees should learn to address concerns while keeping the sale moving forward.

TRAINER MATERIALS

- Sales Manual - Chapter 7
- Siro

ACTIVITY WRAP-UP

- Trainer Review & Discussion:
 - Provide real-time feedback on confidence, clarity, and transition skills.
 - Reinforce which closing techniques were most effective.
 - Ensure the trainee can naturally integrate referrals into closing.
- Trainee Self-Reflection Discussion:
 - Use questions or prompts like this to help the trainee think about the activity and their abilities:
 - ▶ *What closing technique felt the most natural to you? Why?*
 - ▶ *Which customer scenario was the hardest to close?*
 - ▶ *How did integrating referrals change the conversation?*

DEPLOYMENT GUIDE

Purpose: This activity helps trainees develop the ability to confidently position Massey's value in customer conversations. Through structured discussion, guided workbook activities, and hands-on practice, trainees will refine their ability to integrate Massey's differentiators in ways that naturally build trust and address common customer concerns.

Getting Started & What To Do

General Notes:

- Before this role-play activity, you should have an outline of how you want the scenario to play out, or you can write a brief script.
- You should allot about 10 minutes for each role-play.
- Adjust time as needed based on trainee performance.
- Each scenario is progressive, increasing in complexity or introducing a new variable.
- Trainer acts as the customer and provides feedback after each round.

Why This Works:

- Ensures progressive development rather than overwhelming trainees.
- Allows trainers to focus on key engagement skills in each iteration.
- Focuses on key engagement techniques before adding complexity
- Helps trainees adapt to different customer responses instead of relying on a script

During the Activity:

- Facilitate three structured practice rounds, following the scenario guidelines.
- Track trainee performance using the provided rubrics to target specific skills and abilities.
- Offer real-time coaching after each round.
- Encourage self-reflection before moving to the next round.
- Record AI Speech Analysis (Siro) results where applicable.

After Each Role-Play:

- Provide feedback on the focus items using the rubrics and thinking about:
 - ▶ What went well?
 - ▶ What could be improved?
 - ▶ How did their performance change after adjustments?
- Encourage self-reflection.
- Provide feedback on observations and any AI insights (if applicable).

Deploying the Role-Play

Step 1: Explain the Activity

- Review any closing techniques or methods you feel need reviewing.
- Inform the trainee that adjustments will be made after each role-play to challenge adaptability.
- Provide them with role-play objectives before beginning.

Step 2: Warm-Up & Scenario Prep

- Discuss key takeaways about any other training or learning relating to closing.
- Explain the first customer scenario and review expectations.
- Encourage the trainee to focus on tone, pacing, and engagement cues.

Step 3: Role-Play Scenarios & Adjustments

Each role-play scenario follows a structured sequence, ensuring the trainee practices handling a full closing conversation:

1. The trainee presents a **specific Massey service** to the customer.
 - You can tell them the one indicated in the scenario, or let them choose on their own.
2. The customer reacts with a **concern that must be qualified or addressed with features & benefits**.
3. The trainee **moves to close** using Massey's standard offer script.
4. The customer provides a **closing response**, requiring the trainee to secure the sale effectively.

Instructions for the Trainee:

- Follow the assigned scenario and ensure you engage with the "customer."
- Present the specific Massey service as outlined in the scenario.
- Address customer concerns using qualification and features & benefits before attempting to close.
- Use Massey's Sales Manual to reference any closing strategies if allowed.
- Apply an appropriate closing technique based on the customer's final response.
- Listen to trainer feedback on strengths and areas for improvement.

Trainer Actions:

- Act as the customer in each role-play scenario, maintaining the assigned scenario details.
- Observe how well the trainee follows the structured sequence:
 - ▶ Presents the service effectively.
 - ▶ Addresses customer concerns before closing.
 - ▶ Uses a structured closing approach with confidence.
- Provide live feedback on:
 - ▶ Tone, pacing, and engagement level to ensure clear and confident delivery.
 - ▶ Clarity and confidence in closing the sale.
 - ▶ Handling last-minute objections or concerns professionally.
- Observe how the trainee adjusts their approach based on customer responses and scenario changes.

ROUND 1 – THE INDECISIVE CUSTOMER

Customer Closing Reaction: "Well, I *do* like the idea, but I'm just not sure I need this today..."

Trainer Role: Observe and assess how the trainee responds to hesitation and steers the conversation to close.

Service Being Sold: Pest Prevention Program

Rubrics Used:

- Skepticism & Reframing Concerns
- Strategic Questioning
- Verbal Communication

Focus Areas:

- Reinforcing the long-term benefits of proactive pest prevention.
- Using strategic questioning to uncover the customer's hesitation.
- Qualifying Massey's industry reputation and service guarantees.
- Transitioning smoothly into closing without creating pressure.

Trainer Observations:

- Does the trainee recognize when to push forward vs. when to step back?
- Do they handle hesitation professionally without seeming pushy?
- Is their closing statement clear and compelling?
- Did they close the sale?

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.
	<p>Recognizes customer skepticism and confidently reframes concerns into opportunities. Examples:</p> <ul style="list-style-type: none"> • Acknowledges customer doubts without becoming defensive. • Uses clear, positive language to reframe hesitation into curiosity. • Provides reassurance through facts, testimonials, or service benefits. 	

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: <ul style="list-style-type: none"> • 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. 	

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: <ul style="list-style-type: none"> • Uses a steady, natural pace for clarity. • Adjusts tone based on customer engagement. • Provides explanations without overwhelming the customer. 	

ROUND 2 – THE PRICE-CONSCIOUS CUSTOMER

Customer Closing Reaction: "I *really* like what you're saying, but I just don't know if I can afford this."

Trainer Role: Observe and assess how the trainee reframes price concerns and confidently moves toward closing.

Service Being Sold: Termite Protection Plan

Rubrics Used:

- Engagement & Connection
- Supporting Claims with Evidence
- Value-Based Communication

Focus Areas:

- Reframing cost as a long-term investment rather than an immediate expense.
- Using strategic questioning to understand what specifically concerns the customer about the price.
- Applying a structured closing approach that reinforces value while maintaining engagement.
- Encouraging commitment by reinforcing urgency without making the customer feel pressured.

Trainer Observations:

- Does the trainee effectively steer the conversation toward long-term value?
- Do they justify pricing with confidence while maintaining engagement?
- Is the transition to scheduling service smooth and natural?
- Did they close the sale?

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: <ul style="list-style-type: none"> • 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. 	

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: <ul style="list-style-type: none"> • 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. 	

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: <ul style="list-style-type: none"> • 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. 	

Block 2: Securing Referrals & Documentation Accuracy

Teach Trainees to Normalize Referrals in Conversation

Referrals shouldn't feel like an extra step—they should be part of the natural flow of conversation. Encourage trainees to integrate *subtle, customer-focused referral prompts* throughout their sales interactions rather than treating them as a last-minute ask.

GOAL

To equip Sales Inspectors with the ability to secure referrals naturally while ensuring accurate sales documentation. This block reinforces **Step 8 – Asking for Referrals** and the finalization of the sales process, ensuring that Sales Inspectors complete paperwork properly and maximize future sales opportunities.

OBJECTIVES

By the end of Block 2, trainees will be able to:

1. Transition from closing the sale to requesting referrals without sounding pushy.
2. Confidently explain the Pass-It-On Program to encourage customer advocacy.
3. Identify and complete all required sales packet documentation with accuracy.
4. Follow proper submission protocols to ensure smooth processing and compliance.

AGENDA

Block 2 should take approximately 2-2.5 hours to complete, depending on discussion depth and extent of the scenario-based interactions.

If possible, activities should be completed in the order listed below to ensure a logical progression of learning.

- 7.2.1: Securing Referrals: Expanding Your Leads
- 7.2.2: Guided Role-Play: Growing Leads, Not Weeds
- 7.2.3: Completing & Submitting the Sales Packet

REMINDERS

- **Referrals should feel like a benefit to the customer.** Help trainees frame referral requests as an opportunity for customers to share something valuable with their friends.
- **Documentation accuracy prevents delays.** Reinforce the habit of double-checking all paperwork to ensure completeness before submission.
- **Encourage professional follow-ups.** Trainees should follow up on referrals in a timely, professional manner to maximize conversion rates.



REFERRALS & ACCURACY DRIVE SUCCESS. ENSURE THAT TRAINEES UNDERSTAND THAT ASKING FOR REFERRALS NATURALLY AND COMPLETING PAPERWORK CORRECTLY LEADS TO STRONGER CUSTOMER RELATIONSHIPS AND SMOOTHER OPERATIONS.

SECURING REFERRALS: EXPANDING YOUR LEADS

TRAINER'S ACTIONS & CHECKLIST

- Review the referrals information covered in the Sales Manual.
- Use the Trainer Guide on the Following Pages:
 - Trainer-Led Discussion: Asking for Referrals & Pass-It-On Program
 - Scenario-Based Customer Conversations
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Assess how well trainees transition from presenting services to securing a commitment.
- **Trainee Self-Reflection:** Identify strengths and areas for improvement.



QUICK TIPS

- ★ **Referrals should feel natural.** Encourage trainees to frame referrals as a way to help the customer's friends and neighbors, not just a request for leads.
- ★ **Confidence is key.** A hesitant or unsure request will lower the chances of success.
- ★ **Focus on the right timing.** The best moment to ask for a referral is right after the customer expresses satisfaction with the service.
- ★ **Use positive language.** Avoid making the request feel transactional—instead, position it as a way for the customer to help others benefit from Massey's services.

TRAINER MATERIALS

- Sales Manual - Chapter 7

ACTIVITY WRAP-UP

- Trainer Review & Discussion:
 - Provide real-time feedback on referral requests and trainee confidence.
 - Reinforce which referral approaches felt most natural and effective.
 - Ensure trainees understand how to recognize referral opportunities in real customer interactions.
- Trainee Self-Reflection Discussion:
 - What part of asking for referrals felt the most comfortable?
 - How did you handle a hesitant customer when requesting a referral?
 - What will you do differently to ensure your referral requests are effective?

SECURING REFERRALS: EXPANDING YOUR LEADS

Purpose: This activity helps trainees develop confidence in requesting referrals as part of the sales process. Through structured discussion and scenario-based practice, trainees will refine their ability to ask for referrals naturally, handle hesitations professionally, and reinforce customer trust in Massey's services.

Trainer Instructions

Step 1: Trainer-Guided Discussion: Asking for Referrals

- Trainer-Led Discussion: Why are referrals important to Massey's business model?
 - ▶ Introduce Best Practices for Securing Referrals:
 - Timing Matters – Ask after the customer expresses satisfaction with the service.
 - Make It About the Customer – “Do you know anyone else who could benefit from the same protection and savings?”
 - Use the Pass-It-On Program – Explain how it benefits both the customer and their referral.
 - Secure Commitment – Get permission to use their name when reaching out to referrals.
 - ▶ Discuss the importance of following up after the sale with things like a thank you card and how that can keep the door open for future interactions.

Step 2: Scenario-Based Customer Conversations – Asking for Referrals

Trainees will explore different referral scenarios through guided discussions rather than guided role-play. This will reinforce their ability to ask for referrals naturally and adjust their approach based on customer responses.

Instructions:

- Present the scenario to the trainee.
- Work with the trainee to determine the best approach for asking for a referral based on the customer's behavior.
- Ask the trainee to explain their reasoning behind their chosen approach.
- Provide feedback and corrections where necessary to refine their approach.
 - ▶ Optional: Repeat the scenario again with the trainer acting as the customer and the trainee implementing feedback from the first attempt.
 - Observe improvements in approach, confidence, and delivery. Provide final feedback to reinforce best practices.

Scenario 1: The Satisfied Customer

- **Situation:** The customer is happy with the service and gives positive feedback.
- **Trainee Goal:**
 - ▶ Thank the customer for their kind words.
 - ▶ Transition naturally into asking for a referral using the Pass-It-On program.

- ▶ Secure a commitment from the customer to provide a referral.
- **Trainer Coaching Points:**
 - ▶ Did the trainee recognize the right moment to ask?
 - ▶ Did they use positive framing (e.g., "Who else do you know that could benefit?")?
 - ▶ Did they confirm permission to use the customer's name in the follow-up call?

Scenario 2: The Hesitant Customer

- **Situation:** The customer is happy but seems unsure about referring others.
- **Trainee Goal:**
 - ▶ Address hesitation without being pushy.
 - ▶ Reinforce that referrals are about helping others who may benefit from the service.
 - ▶ Offer reassurance (e.g., "That's completely understandable! If a friend or neighbor ever mentions a pest issue, you can feel confident in recommending us because of your great experience.")
- **Trainer Coaching Points:**
 - ▶ Did the trainee recognize the right moment to ask?
 - ▶ Did they use positive framing (e.g., "Who else do you know that could benefit?")?
 - ▶ Did they confirm permission to use the customer's name in the follow-up call?

Scenario 3: The "I Don't Know Anyone" Response

- **Situation:** The customer is happy but insists they don't know anyone who needs service.
- **Trainee Goal:**
 - ▶ Reframe the request to encourage future referrals.
 - ▶ Use soft prompts like: "If you happen to hear a friend or neighbor mention they have a pest issue, would you mind passing along my name?"
 - ▶ Keep the conversation positive and open-ended.
- **Trainer Coaching Points:**
 - ▶ Did the trainee keep the door open for future referrals?
 - ▶ Did they avoid making the customer feel pressured?
 - ▶ Did they end the conversation in a friendly, professional manner?

GUIDED ROLE-PLAY: GROWING LEADS, NOT WEEDS

TRAINER'S ACTIONS & CHECKLIST

- Set Up Role-Play Activity
- Deliver the Role-Play Using the Trainer Activity Guide
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Assess trainee confidence and approach in follow-up conversations.
- **Trainee Self-Reflection:** Identify strengths and areas for improvement.
- **AI Speech Analysis (Siro):** Evaluate speech pacing, clarity, and engagement (if available)

ACTIVITY WRAP-UP

- Trainer Review & Discussion:
 - Provide real-time feedback on follow-up conversations and referral requests.
 - Reinforce which approaches felt most effective and natural.
 - Ensure trainees understand how to adapt based on customer responses.
- Trainee Self-Reflection Discussion:
 - Use questions or prompts like this to help the trainee think about the activity and their abilities:
 - ▶ *What part of the follow-up conversation felt the most natural?*
 - ▶ *How did you adjust when handling customer concerns?*
 - ▶ *What will you do differently to improve your follow-up conversations?*



QUICK TIPS

- ★ **Follow-ups should feel natural.** Reinforce that the conversation is about maintaining trust and customer satisfaction, not just about asking for referrals.
- ★ **Listen actively.** The ability to adjust based on customer feedback is key.
- ★ **Encourage confidence.** A hesitant follow-up weakens the impact of the conversation.
- ★ **Keep the conversation engaging.** Ensure the trainee keeps the dialogue open and friendly rather than transactional.

TRAINER MATERIALS

- Sales Manual - Chapter 7
- Siro



This activity requires the completion of two role-play rounds. Round 1 is required. For the second round, choose either Round 2 or 3 based on the trainee's performance and areas for improvement, or complete all three rounds. You may repeat any round for additional practice.

Please use your professional judgment to determine which second round, or if all three rounds, will provide the most valuable learning experience.

DEPLOYMENT GUIDE

Purpose: This activity helps trainees develop confidence in conducting structured follow-up conversations that verify customer satisfaction and lead naturally into a referral request. Through guided role-play, trainees will refine their ability to handle different customer responses, ensuring the conversation remains positive and engaging.

Getting Started & What To Do

General Notes:

- Before this role-play activity, you should have an outline of how you want the scenario to play out, or you can write a brief script.
- You should allot about 10 minutes for each role-play.
- Adjust time as needed based on trainee performance.
- Each scenario is progressive, increasing in complexity or introducing a new variable.
- Trainer acts as the customer and provides feedback after each round.

Why This Works:

- Ensures progressive development rather than overwhelming trainees.
- Allows trainers to focus on key engagement skills in each iteration.
- Focuses on key engagement techniques before adding complexity
- Helps trainees adapt to different customer responses instead of relying on a script

During the Activity:

- Facilitate three structured practice rounds, following the scenario guidelines.
- Track trainee performance using the provided rubrics to target specific skills and abilities.
- Offer real-time coaching after each round.
- Encourage self-reflection before moving to the next round.
- Record AI Speech Analysis (Siro) results where applicable.

After Each Role-Play:

- Provide feedback on the focus items using the rubrics and thinking about:
 - ▶ What went well?
 - ▶ What could be improved?
 - ▶ How did their performance change after adjustments?
- Encourage self-reflection.
- Provide feedback on observations and any AI insights (if applicable).

Deploying the Role-Play

Step 1: Explain the Activity

- Review the importance of follow-up conversations in maintaining customer relationships and generating referrals.
- Inform the trainee that adjustments will be made after each role-play to challenge adaptability.
- Provide them with role-play objectives before beginning.

Step 2: Warm-Up & Scenario Prep

- Discuss key takeaways from any other training or learning related to customer follow-up.
- Explain the first customer scenario and review expectations.
- Encourage the trainee to focus on tone, pacing, and engagement cues.

Step 3: Role-Play Scenarios & Adjustments

Each scenario follows a structured sequence, allowing trainees to practice handling different customer follow-up situations with increasing complexity. Each scenario has the following format:

1. The trainee initiates the follow-up conversation with the customer.
 - Examples:
 - ▶ *Looks like that's everything signed and ready. What other questions do you have for me?*
 - ▶ *I'm glad we were able to get this set up for you today. How are you feeling about everything?*
 - ▶ *Now that we've gone through everything, what else I can clarify for you before we wrap up?*
2. The customer provides an initial response about the sale.
3. The trainee asks for a referral.
4. The customer responds based on their referral attitude (e.g., enthusiastic, hesitant, or resistant).
5. The trainee must adjust their approach to reinforce trust and guide the conversation effectively.
6. The trainer observes and provides structured feedback based on engagement, confidence, and response handling.
7. **Optional:** The trainee repeats the scenario, implementing feedback to refine their approach.

Instructions for the Trainee:

- Follow the assigned scenario and ensure you engage with the "customer."
- Verify satisfaction by asking open-ended questions and listening attentively.
- Address any customer concerns while reinforcing service value.
- Transition smoothly into a referral request without sounding pushy.
- Listen to trainer feedback on strengths and areas for improvement.

Trainer Actions:

- Act as the customer in each role-play scenario, maintaining the assigned scenario details.
- Observe how well the trainee:
 - ▶ Engages the customer effectively.
 - ▶ Verifies satisfaction and handles concerns professionally.

- ▶ Uses a structured approach to ask for a referral.
- Provide live feedback on:
 - ▶ Tone, pacing, and engagement level to ensure clear and confident delivery.
 - ▶ Clarity and confidence in closing the sale.
 - ▶ Handling last-minute objections or concerns professionally.
- Observe how the trainee adjusts their approach based on customer responses and scenario changes.

ROUND 1 – THE ENTHUSIASTIC CUSTOMER

Customer Initial Response: "This look great! I'm looking forward to not having to deal with the rats in my shed!"

Trainee Action: Ask for referral.

Customer Referral Response: " Oh, I actually know a few people who might be interested!"

Trainer Role: Observe how the trainee reinforces satisfaction and transitions to a referral request.

Rubrics Used:

- Engagement & Connection
- Verbal Communication

Focus Areas:

- Reinforcing the customer's positive experience to build long-term trust.
- Using engaging language to naturally introduce the referral request.
- Encouraging customer advocacy without making the request feel transactional.

Trainer Observations:

- Did the trainee recognize and capitalize on the referral opportunity?
- Was the transition to the referral request natural and engaging?
- Did they encourage customer advocacy without sounding transactional?

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: <ul style="list-style-type: none"> • 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. 	

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: <ul style="list-style-type: none"> • Uses a steady, natural pace for clarity. • Adjusts tone based on customer engagement. • Provides explanations without overwhelming the customer. 	

ROUND 2 – THE "I DON'T KNOW ANY ONE" CUSTOMER

Customer Initial Response: "I'm glad we got this fumigation set up, it seems like a good service, and I need to evict these unwanted 'guests' from this place."

Trainee Action: Ask for referral.

Customer Referral Response: " I don't really know anyone off the top of my head who would be interested." (The customer looks uncomfortable and closed off.)

Trainer Role: Observe how the trainee encourages engagement and steers the conversation toward a referral.

Rubrics Used:

- Nonverbal Communication
- Strategic Questioning
- Verbal Communication

Focus Areas:

- Encouraging customer engagement by uncovering subtle satisfaction cues signals such as body language and tone.
- Reinforcing the long-term benefits of Massey's service through strategic questioning.
- Creating a natural and comfortable transition into asking for a referral.

Trainer Observations:

- Did the trainee encourage further discussion to generate engagement?
- Did they avoid a passive or rushed transition to the referral request?
- Was the conversation structured to create a positive moment for the customer?

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: <ul style="list-style-type: none"> • Uses open posture and gestures to reinforce messages. • Maintains eye contact to build trust. • Avoids closed-off or distracting body language. 	

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: <ul style="list-style-type: none"> • 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. 	

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: <ul style="list-style-type: none"> • Uses a steady, natural pace for clarity. • Adjusts tone based on customer engagement. • Provides explanations without overwhelming the customer. 	

ROUND 3 – THE CUSTOMER WITH CONCERNS

Customer Initial Response: "I appreciate your help with my trees and shrubs. Everything seems good so far and I'll be ready for the technician to come out."

Trainee Action: Ask for referral.

Customer Referral Response: "I don't usually give out names, my friends and I made a promise to each other that we wouldn't share without asking first. I really have to think about it."

Trainer Role: Observe how the trainee acknowledges the concern while maintaining a positive relationship and leading to a referral request.

Rubrics Used:

- Active Listening
- Skepticism & Reframing Concerns

Focus Areas:

- Encouraging customer engagement by uncovering subtle satisfaction cues signals such as body language and tone.
- Reinforcing the long-term benefits of Massey's service through strategic questioning.
- Creating a natural and comfortable transition into asking for a referral.

Trainer Observations:

- Did the trainee encourage further discussion to generate engagement?
- Did they avoid a passive or rushed transition to the referral request?
- Was the conversation structured to create a positive moment for the customer?

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.
	<p>Listens attentively, acknowledges concerns, and asks follow-up questions. Examples:</p> <ul style="list-style-type: none"> • 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. 	

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.
	<p>Recognizes customer skepticism and confidently reframes concerns into opportunities. Examples:</p> <ul style="list-style-type: none"> • Acknowledges customer doubts without becoming defensive. • Uses clear, positive language to reframe hesitation into curiosity. • Provides reassurance through facts, testimonials, or service benefits. 	

COMPLETING & SUBMITTING THE SALES PACKET

TRAINER'S ACTIONS & CHECKLIST

- Gather Supplies
 - The Trainer Explainer at the end of this lesson contains the list of forms for reference
- Use the Trainer Guide on the Following Pages:
 - Trainer-Led Walkthrough: Sales Packet Requirements
 - Mock Sales Packet Assembly Exercise
 - Accuracy Check & Submission Review
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Assess trainee accuracy in completing and verifying the sales packet.
- **Mock Packet Review:** Ensure all necessary documents are completed correctly.
- **Trainee Self-Reflection:** Identify strengths and areas for improvement.



QUICK TIPS

- ★ **Accuracy matters.** Ensure trainees understand that incomplete or incorrect paperwork leads to delays.
- ★ **Organization is key.** Help trainees develop a habit of verifying documents before submission.
- ★ **Check for legibility.** Ensure handwriting is clear and digital entries are error-free.
- ★ **Submission deadlines matter.** Reinforce the importance of submitting documents on time to avoid processing issues.

TRAINER MATERIALS

- Completed Sales Packet Example
- Blank Sales Forms for Hands-On Practice

ACTIVITY WRAP-UP

- Trainer Review & Discussion:
 - Provide real-time feedback on packet completion accuracy.
 - Reinforce the importance of thorough documentation.
 - Ensure trainees understand submission requirements and deadlines.
- Trainee Self-Reflection Discussion:
 - What was the most challenging part of assembling the sales packet?
 - How will you ensure accuracy before submission in real sales situations?
 - What steps will you take to stay organized with paperwork?

COMPLETING & SUBMITTING THE SALES PACKET

Purpose: This activity provides a structured approach to ensuring trainees understand the essential components of a complete sales packet. By reviewing examples and completing a mock packet, trainees will develop the habit of accurate documentation and timely submission.

Step 1: Trainer-Guided Walkthrough – Sales Packet Requirements

- Trainer-Led Discussion: What documents are required in a complete sales packet?
- Review Core Documents for All Services:
 - ▶ MS-131: Start Sheet
 - ▶ Agreement (Service-Specific)
 - ▶ Rate Card (Service-Specific)
 - ▶ MS-051: Inspection Graph
 - ▶ MS-050: Graphical Analysis
 - ▶ Referral Call Back Sheet
 - ▶ MS-135: Thank You Card
- Review Service-Specific Documents:
 - ▶ Lawn: Soil pH Test Form, Uncontrollable Weed Alert, Irrigation Maintenance Forms
 - ▶ Pest: Prep Checklists for Bed Bugs, Roaches, Fleas/Ticks
 - ▶ Termite: Consumer Notice Form, Fumigation Prep List, Attic Decline Form

Step 2: Mock Sales Packet Assembly Exercise

- Trainees will complete three several sales packet using example customer details.
 - ▶ Trainer provides a case study scenario for each Massey Service their Service Center provides
 - ▶ Example customer details for the case:
 - Required services.
 - Any unique conditions (e.g., attic decline, irrigation agreement, referral information, etc.).
 - Trainees assemble the full sales packet.
- Trainer reviews and checks for errors.

Step 3: Accuracy Check & Submission Review

- Trainer Reviews Common Errors:
 - ▶ Missing forms
 - ▶ Missing signatures or incomplete fields.
 - ▶ Incorrect rate card or agreement selection.
 - ▶ Handwriting legibility or digital entry mistakes.

- Trainees Conduct a Final Accuracy Check on Their Mock Packet.
- Trainer Reinforces Proper Submission Process:
 - ▶ Who to submit the completed packet to.
 - ▶ Submission deadlines and protocol.
 - ▶ Follow-up requirements if corrections are needed.

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
- Fumigation Service Affidavit
 - Fumigation preparation List for Vikane
 - MS-142: Attic Decline
 - Completion Certificate for Fume

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)

MODULE 8

Time Is Money: Time & Territory Management Crash Course

GOAL

To equip Sales Inspectors with the skills needed to prioritize tasks, optimize routes, and establish productive work habits that maximize their time and efficiency in the field. This module reinforces previous prioritization and scheduling training while introducing new strategies for territory management, time-blocking, and work-life balance.

OBJECTIVES

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

1. Reinforce and apply prioritization techniques for scheduling appointments, follow-ups, and lead generation.
2. Optimize daily routes to minimize travel time and maximize customer engagement.
3. Balance fieldwork, administrative tasks, and follow-ups efficiently to maintain daily productivity.
4. Develop consistent and sustainable work habits that support long-term success and prevent burnout.
5. Identify common time-wasting behaviors and implement strategies to mitigate them.

MODULE BREAKDOWN

Module 8 consists of three structured activities designed to ensure that Sales Inspectors can effectively structure their day, optimize their routes, and maintain productivity without burnout.

The estimated time for Module 8 completion is approximately 55 minutes to 1 hour, but timing may vary based on discussion depth and individual needs.

- **8.1.1: Plan. Prioritize. Perform: Scheduling & Time Management - Focus:** Teaching Sales Inspectors how to structure their day efficiently by balancing customer interactions, lead generation, and administrative responsibilities.
- **8.1.2: Route Planning: Callbacks & Leadwork Efficiency - Focus:** Helping Sales Inspectors minimize wasted time by structuring callbacks and leadwork around scheduled appointments, using mapping tools to improve efficiency.
- **8.1.3: Work Smart, Live Well, Make It Count - Focus:** Identifying common time traps and developing sustainable work habits to maintain productivity and prevent burnout.

MODULE TIPS

- **Time is a limited resource.** Help trainees understand that proper scheduling, prioritization, and strategic time management lead to greater efficiency and success.
- **Encourage adaptability.** Sales schedules change frequently—trainees should learn to adjust on the fly without losing productivity.
- **Leadwork, callbacks, and follow-ups should be strategic.** Reinforce the importance of planning lead generation and follow-ups efficiently around set appointments.
- **Work-life balance matters.** Encourage trainees to incorporate breaks and boundary-setting to maintain long-term success and avoid burnout.



MASTER YOUR TIME, MAXIMIZE YOUR SALES. EFFICIENT PLANNING, SMART ROUTING, AND BALANCED SCHEDULING LEAD TO SUCCESS WITHOUT BURNOUT.

PLAN. PRIORITIZE. PERFORM: TIME MANAGEMENT

TRAINER'S ACTIONS & CHECKLIST

- Complete the LMS Microlearning – The Eisenhower Matrix Crash Course with the trainee
- Use the Trainer Guide on the Following Pages:
 - Trainer-Led Discussion: Prioritization & Scheduling Best Practices
 - Learner Workbook Activity: Live Task Prioritization Exercise: What's On My Plate?
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Evaluate how well the trainee organizes their schedule and prioritizes tasks.
- **Trainee Self-Reflection:** Identify personal strengths and areas for improvement in time management.



QUICK TIPS

- ★ **Emphasize prioritization:** Not all tasks are equal; help trainees identify high-impact activities.
- ★ **Keep schedules realistic:** Overloading a day leads to inefficiencies and missed opportunities.
- ★ **Time-block effectively:** Teach trainees to set aside *dedicated* periods for specific tasks to improve focus.
- ★ **Encourage adaptability:** Plans will change—help trainees understand how to adjust schedules efficiently.

TRAINER MATERIALS

- Any example schedules

LMS ASSIGNMENTS

- MAN 7000 - The Eisenhower Matrix Crash Course

ACTIVITY WRAP-UP

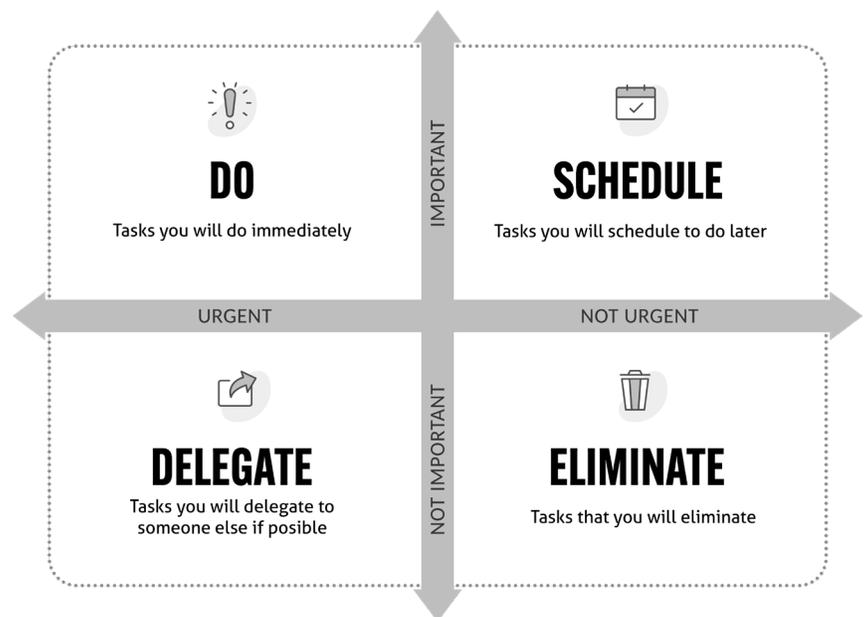
- Discuss the trainee's scheduling decisions and how they align with sales priorities.
- Reinforce time-blocking strategies and adaptability to real-world scheduling changes.
- Complete any workbook prompts and facilitate a self-reflection discussion.

LIVE TASK PRIORITIZATION EXERCISE: WHAT'S ON MY PLATE?

Purpose: This exercise helps trainees learn how to effectively structure their workday by prioritizing tasks in a way that maximizes efficiency while ensuring appointments and lead generation remain the highest priority.

Step 1: Trainer-Led Discussion – Prioritization & Scheduling Best Practices & Reviewing MAN 7000

- Make sure you emphasize: **No lead = no appointment = no sale**
- Discuss the following:
 - ▶ Key takeaways from the LMS microlearning course.
 - ▶ Why is prioritization essential for Sales Inspectors?
 - ▶ How does effective scheduling impact revenue and efficiency?
- Review common scheduling mistakes and how to avoid them.
- Use The Drill to provide a framework of how their day is expected to be filled.
- Below are the graphic from MAN 7000 and a summary of the quadrants for reference.



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

Step 2: Scenario-Based Prioritization Exercise

- Trainees have a list of tasks and appointments in their learner workbook which includes items like:
 - ▶ Setting Appointments
 - ▶ Lead Generation Tasks (calls, door hangers, 4+1 method)
 - ▶ Follow-Up Calls & Revisits (clustering to reduce inefficient travel)
 - ▶ Operational Work (paperwork, reports)
 - ▶ Personal Tasks (breaks, lunch, doctor appointment)
- Ask trainees to categorize each task into the Eisenhower Matrix in their workbook.

Step 3: Daily Scheduling Application

- Using their categorized tasks, the trainee creates a structured daily schedule.
- Discuss real-world constraints like appointment cancellations and urgent callbacks.
- Trainee time-blocks their schedule for optimal efficiency.
- Trainer reviews and provides feedback on sequencing and balance.

Step 4: Trainer-Guided Discussion & Assessment

- Review their prioritization and scheduling choices.
- Ask guiding questions like:
 - ▶ *Which tasks must be completed first, and why?*
 - ▶ *How do you adjust your schedule if an appointment cancels?*
 - ▶ *Where should you build in time for lead generation?*
 - ▶ *How do you avoid inefficiently driving back and forth across town?*
- **Trainer Review:** Observe how trainees adjust their schedules and provide feedback.
- **Workbook Reflection:** Have trainees complete the reflection prompts at the end of the exercise. The prompts are as follows:
 - ▶ Document one key takeaway from the exercise and why you chose it.
 - ▶ What adjustments can I make to my daily planning to be more effective?
- Review and discuss their answers.

ROUTE PLANNING: CALLBACKS & LEADWORK EFFICIENCY

GOAL

To help Sales Inspectors understand the impact of strategic route planning, ensuring they efficiently integrate callbacks and leadwork into their pre-set sales appointments.

OBJECTIVES

By the end of this activity, trainees 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 Sales Inspectors minimize wasted time and maximize their customer engagement opportunities. This activity introduces Sales Inspectors to effective vs. ineffective route planning by discussing real-world examples and evaluating pre-set schedules. Trainees 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.

DETAILS

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

NOTES

ROUTE PLANNING: CALLBACKS & LEADWORK EFFICIENCY

TRAINER'S ACTIONS & CHECKLIST

- Review Learner Workbook Resource: Route Planning – Good vs. Bad Examples on pg. 126-127
- Use the Trainer Guide on the Following Pages:
 - Trainer-Led Discussion: Identifying Inefficiencies
 - Learner Workbook: Route Planning – Good vs. Bad Examples
 - Discussion: Applying Best Practices
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Assess how well the trainee recognizes inefficiencies in scheduling.
- **Workbook Discussion:** Confirm understanding of good vs. bad route planning principles.
- **Trainee Self-Reflection:** Encourage trainees to consider how they will apply these lessons to their daily work.

ACTIVITY WRAP-UP

- Summarize key takeaways from the discussion.
- Discuss how trainees can integrate callbacks and leadwork into their daily routine.
- Encourage ongoing self-evaluation of route planning strategies.



QUICK TIPS

- ★ **Focus on discussion rather than exercises.** The goal is to help trainees recognize inefficiencies, not build full schedules.
- ★ **Keep it practical.** Discuss how these principles apply to their real-world workdays.

TRAINER MATERIALS

- Optional: Access to a mapping app like Google or Apple Maps

ROUTE PLANNING: CALLBACKS & LEADWORK EFFICIENCY

Purpose: This activity helps Sales Inspectors understand the importance of strategic route planning by evaluating and discussing real-world examples. Through guided discussion and workbook resources, trainees will learn how to structure callbacks and leadwork efficiently around their set sales appointments, minimizing wasted time and maximizing customer interactions.

Step 1: Trainer-Led Discussion – Recognizing Inefficiencies

- Why does poor route planning waste valuable time?
- What are common mistakes in scheduling callbacks and leadwork?
- How does efficient field planning impact overall sales performance?

Step 2: Reviewing Workbook Examples

- Review Learner Workbook Resource: Route Planning – Good vs. Bad Examples on pgs. 126-127.
- Discuss the optimized vs. inefficient schedules and highlight key differences.
- Ask trainees to identify inefficiencies in the bad example and suggest improvements.

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



Step 3: Practical Discussion – Applying Best Practices

- How should Sales Inspectors structure their day to minimize travel and maximize efficiency?
- What adjustments would they make to the inefficient schedule?
- How can they apply these principles to their own field planning?

WORK SMART, LIVE WELL, MAKE IT COUNT

TRAINER'S ACTIONS & CHECKLIST

- Review Learner Workbook Resource: Sales Productivity & Time Traps
- Use the Trainer Guide on the Following Pages:
 - Trainer-Led Discussion: Identifying Time-Wasting Behaviors
 - Discussion: Applying Best Practices
 - Need help? There's a Trainer Explainer at the end of this activity!
- Activity Wrap-Up

FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Observation:** Assess how well the trainee understands time traps and strategies to avoid them.
- **Trainee Self-Reflection:** Encourage trainees to develop sustainable work habits that promote long-term success.



QUICK TIPS

- ★ **Keep it interactive.** Engage trainees with real-world examples of time traps.
- ★ **Encourage honest reflection.** Trainees should assess their own habits.
- ★ **Provide actionable strategies.** Help them develop realistic solutions to avoid burnout.

TRAINER MATERIALS

- Any example schedules

LMS ASSIGNMENTS

- MAN 7000 - The Eisenhower Matrix Crash Course

ACTIVITY WRAP-UP

- Summarize key takeaways from the discussion.
- Discuss how trainees can integrate time management strategies into their daily routine.
- Encourage ongoing self-evaluation of productivity habits.

RECOGNIZING TIME-WASTING BEHAVIORS

Purpose: This activity helps trainees analyze their own time-wasting habits, recognize their impact on productivity, and develop effective time management strategies to improve efficiency and maintain work-life balance.

Step 1: Trainer-Led Discussion

- What are common time traps in sales that impact productivity?
- How does context switching reduce efficiency?
- How does mental fatigue impact performance and decision-making?

Step 2: Reviewing Workbook Examples

- Look at Learner Workbook Resource: Sales Productivity & Time Traps with the trainee (pg.129 of the Learner Workbook)
- Discuss the impact of time-wasting habits on sales success and personal well-being.
- Identify strategies for minimizing distractions and improving focus.

Step 3: Self-Reflection & Personal Strategy Development

- Have the trainees complete the self-reflection questions on pg. 129 of their workbook.
- Discuss findings: What are their biggest time-wasting behaviors?
- Help them develop realistic strategies for reducing inefficiencies and maintaining work-life balance.

WHY TIME MANAGEMENT MATTERS IN SALES

Time is a Sales Inspector's most valuable resource. Without structure, distractions, inefficiencies, and mental fatigue can severely impact performance. This section provides key background information to help trainers lead a meaningful discussion on time traps and effective work-life balance strategies.

Context Switching: The Myth of Multitasking & Mental Fatigue

Many people believe they are multitasking when they juggle multiple tasks at once, but in reality, their brain is rapidly switching focus between tasks—this is known as **context switching**. Studies show that frequent context switching can **reduce productivity by up to 40%**, as the brain takes time to readjust with each shift in focus, leading to mental exhaustion as chemical resources in the brain are rapidly depleted.

Answering emails while on a sales call may seem efficient, but in reality, your brain is rapidly switching between reading, typing, and listening. This overload makes it harder to actively engage with the customer while composing a clear response, leading to errors, missed details, and overall fatigue.

Examples of Time-Wasters

- ★ Spending excessive time on social media or personal calls during work hours.
- ★ Inefficient route planning leading to wasted travel time.
- ★ Poor email management, resulting in an overflowing inbox and missed communications.
- ★ Failing to prioritize tasks, leading to reactive rather than proactive work.

The Energy Cost of Thinking & Why Rest Matters

Thinking takes energy. The brain consumes a significant amount of the body's energy, **about 20%**, and like any other muscle, **it requires intentional rest to function optimally**. Sales Inspectors should build in **short, meaningful breaks** throughout the day to maintain sharpness and decision-making ability.

Examples of Effective Rest Breaks:

- ★ Taking a few minutes to step outside and enjoy fresh air.
- ★ Listening to a song with eyes closed to reset mental focus.
- ★ Walking around the block to clear the mind between appointments.
- ★ Ensuring proper hydration and food intake to sustain energy levels.

👉 Encourage trainees to schedule **intentional**, short breaks just as they would appointments. A refreshed mind leads to **better decision-making, higher productivity, and a more sustainable work routine**.

Sustainable Work Habits: Building a Foundation for Long-Term Success

Sustainable work habits are **practices and routines** that support **consistent productivity, well-being, and career longevity**. They involve **proactive strategies** to prevent burnout, manage stress, and maintain a healthy work-life integration.

Key Elements to Building Sustainable Habits:

- ✓ Setting **realistic expectations** and **boundaries** to avoid overcommitment.
- ✓ Prioritizing **self-care activities** (e.g., exercise, mindfulness) to **manage stress**.
- ✓ Establishing clear **separation** between work and personal time to prevent burnout.
- ✓ **Regularly reviewing and adjusting** work habits to ensure long-term effectiveness.

MODULE 9

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

GOAL

To verify the trainee's ability to independently conduct a complete and professional sales proposal using real-world customer information, and to confirm their readiness for unsupervised sales activity through both a live simulation and oral exam.

OBJECTIVES

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

1. Prepare and present multiple real-world service proposals.
2. Deliver each proposal clearly, confidently, and with professionalism.
3. Use sales documentation, inspection reports, and customer information to support each recommendation.
4. Address objections and engage the customer effectively across service types.
5. Close the sale and complete all associated documentation accurately.
6. Demonstrate understanding of core sales process concepts through a structured oral exam.

MODULE BREAKDOWN

Module 9 consists of two activities: a preparation session and a final evaluation. The time required for this module is variable and depends on the trainee's readiness and the scheduling of the proctored assessment.

- 9.1.1: Final Countdown: Preparing for the Final Evaluation.
- 9.1.2: Final Evaluation Assessment (Proposal Simulation + Oral Exam)

MODULE TIPS

- Use Activity 9.1.1 to walk through the final evaluation expectations, clarify the submission process, and ensure readiness.
- All sales packets must be submitted to the proctor at least 3 business days prior to the assessment.
- Trainers are not present during the evaluation. Prepare the trainee, then step back.
- Make sure submitted sales packets are complete, legible, and reflect a variety of service types.
- Use previous coaching notes and assessment results to target final preparation.
- Remember: If the trainee is on their third attempt, any further retest requires approval from a Regional Manager or Sales Director.



THIS FINAL EVALUATION IS THE CAPSTONE OF THE TRAINEE'S JOURNEY. IT CONFIRMS THEIR ABILITY TO REPRESENT MASSEY SERVICES INDEPENDENTLY, WITH PROFESSIONALISM, CONFIDENCE, AND CLARITY.

THE FINAL COUNTDOWN: GETTING READY FOR THE ASSESSMENT

TRAINER'S ACTIONS & CHECKLIST

Before the final evaluation, complete the following:

- Confirm Trainee Readiness:
 - Review past assessments (Module 4 and Module 6).
 - Discuss any challenges the trainee has encountered and reinforce key concepts as needed.
 - Ensure the trainee has observed or completed multiple full sales presentations in real-world scenarios.
 - Use the trainee has completed the Trainee Self-Check in their workbook to help verify readiness.
- Review Final Evaluation Structure & Expectations:
 - Explain the flow of the final evaluation using the information in Activity 9.1.2.
 - Emphasize that this is a realistic, skills-based test designed to measure field readiness.
 - Clarify the scoring criteria and pass/fail guidelines.
- Set the Stage for Success
 - Confirm the time, location, and logistics for the final evaluation with the proctor and trainee. Ensure the proctor is fully briefed on the evaluation structure and their role in assessing the trainee.
 - Schedule the final evaluation in a quiet, controlled environment free from distractions.
 - Encourage the trainee to treat this as a real appointment—dress professionally, stay confident, and approach it with a solution-based mindset.
 - Answer any last-minute questions, but remind the trainee that this is their moment to showcase their readiness.
- Activity Wrap-Up
 - The trainer and trainee should confirm readiness and schedule the Final Evaluation (9.1.2).
 - If additional coaching is needed, schedule targeted review sessions before the evaluation.

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.

GOAL

To assess the trainee’s 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 trainee and trainer will:

- Analyze inspection findings and customer context to support real proposals.
- Clearly define the problem and present service-specific solutions using Massey’s offerings.
- Engage professionally with a simulated customer, including handling objections.
- Close each proposal confidently and transition into clear next steps.
- Complete all required sales documentation accurately and thoroughly.
- Respond to oral questions covering key sales process concepts not observed during the simulation.

ACTIVITY OVERVIEW

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

During the simulation, the trainee will present each proposal to the evaluator, who will act as the customer. The evaluator can introduce questions, objections, or disengaged behavior to assess the trainee’s 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 trainee’s 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.

TRAINER'S ACTIONS & CHECKLIST

Before the Assessment

- Confirm whether the assessment will take place at:
 - At a **designated testing site** (e.g., service center) with a live proctor.
 - Via a **remote Teams meeting** with the proctor conducting the evaluation virtually.
- Confirm the **date, time, and platform/location** with both the trainee and the proctor.
- Ensure the **proctor has received the trainee's selected evaluation submissions no later than 3 business days prior to the evaluation date.**
- Ensure the proctor has access to the proposal rubric and oral exam question pool.
- Conduct any final coaching to address lingering concerns in proposal delivery or documentation.

During the Assessment

- The **trainer should not be present** during the assessment.
- The **proctor will lead** the evaluation and administer the oral exam portion.

Post Assessment

- Proctor Debrief:** The proctor provides feedback on the trainee's performance to the trainer.
- Trainer Follow-Up:** Take next steps based on the trainee's results.

Documentation & Reporting

- The proctor submits the **completed rubric and trainee materials** to the General Manager or Trainer.
- The **General Manager/Trainer logs the results** and sends the documentation to Massey University for training records.



QUICK TIPS

- ★ **Set the Trainee Up for Success!** Ensure they understand expectations in advance.
- ★ **Let the Proctor Lead!** Let the Proctor Lead: The trainer should not intervene once the assessment begins.
- ★ **Encourage Realism:** The trainee should treat this simulation like a real customer appointment.
- ★ **Review the Results!** After the proctor submits feedback, discuss outcomes and growth opportunities with the trainee.

TRAINER MATERIALS

- Assessment Guide

PROCTOR GUIDE: FINAL EVALUATION

CONDUCTING THE ASSESSMENT

Purpose: This final evaluation is a simulation-based assessment designed to measure the trainee’s ability to conduct a complete and professional sales proposal. The trainee will present multiple real-world proposals selected from their sales experience with Massey. These proposals will be delivered to the evaluator, who will act as the customer. The simulation will evaluate the trainee’s ability to define problems, present service-specific solutions, handle objections, and close the sale.

The assessment also includes an oral exam portion to confirm the trainee’s understanding of other key sales concepts.

Pre-Assessment: Trainer Responsibilities

- Confirm the assessment date, time, and whether it will be conducted in-person or virtually.
- Email the trainee’s 3 completed sales packets to the proctor no later than 3 business days prior to the evaluation.
- Review expectations with the trainee and ensure they are prepared to present each proposal professionally.
- Provide any final coaching on proposal transitions, objection handling, and documentation accuracy.

Pre-Assessment: Proctor Responsibilities

- Review the submitted sales packets and prepare:
 - ▶ Notes on any questions or concerns about each proposal.
 - ▶ Points where you plan to introduce objections, push-back, or customer behavior (e.g., hesitant, disinterested, distracted, etc.)
- Review the Proposal Simulation Rubric and Oral Exam questions in advance.

Need some help or ideas? Check out page 261 for some suggestions.



Role of the Proctor



- Act as the customer throughout the proposal simulation.
- Remain in character and introduce any 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.

Proctor Evaluation Responsibilities

1. Evaluate trainee performance using the provided Rubric.
2. Circle the performance category and briefly explain the rating. **DO NOT** leave comments blank!
3. Complete the Results form.

PROCTOR GUIDE: FINAL EVALUATION

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.

PROCTOR GUIDE: OBJECTIONS AND CUSTOMER BEHAVIORS IDEAS

How to Use These During Evaluations

Pick one or two mild challenges per proposal. You can use the ideas below, or think of your own *provided they are realistic*.

You're not trying to "beat up" the trainee—you're checking if they:

- Stay professional and confident
- Listen without getting defensive
- Reframe concerns and continue moving the conversation forward

General Objections or Behaviors (Applicable to Any Service)

- Cost Concern: "It sounds expensive. I'm not sure it's worth it."
- Delay Tactic: "Let me think about it and call you later."
- Skepticism: "I've had bad experiences with companies making promises before."
- Disinterest / Low Engagement: Customer seems distracted, uninterested, or in a rush.
- Mild Defensiveness: Customer acts defensive when problems are pointed out (e.g., regarding property conditions or home maintenance).

Pest Control Specific

- Pet Safety Concern: "Last time I used a pest company, my dog got sick. I'm worried about chemicals."
- Doubts About Effectiveness: "I've tried pest control before. It didn't solve the problem."
- DIY Confidence: "I usually just spray the stuff from the hardware when I see bugs. Why would I need a service?"

Termite Specific

- No Visible Damage Doubt: "I don't see any damage—are you sure there's a problem?"
- Insurance Confusion: "Wouldn't my homeowner's insurance cover termite damage anyway?"
- Cost vs. Likelihood Skepticism: "I don't think termites are really a big risk around here."

Lawn / Landscape Specific

- Pride Sensitivity: Customer becomes defensive if it sounds like you're suggesting they aren't taking care of their lawn properly.
- Chemical Safety Concern: "I'm worried about lawn treatments with kids and pets running around."
- Immediate Result Expectation: "Will my yard look better next week? I don't want to wait months."

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.	

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:
 - ▶ **Clarify why the response did not meet expectations:** *The trainee asked if the customer was interested but didn't use a structured closing technique to guide them toward a decision*
 - ▶ **Provide a specific suggestion on how the trainee can improve to reach "Meets Expectations":** *Coach the trainee on closing techniques like the Alternative or Assumptive Close. Have them practice different approaches using real objections they've encountered.*

Prospecting – Choose One Question or Write Your Own	NI	ME	EE
Describe the '4+1 Program' and explain how it's used to generate new leads. What are the key steps you would take when cold calling at the time of an inspection, and what materials would you use?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explain the Reinstatement Program. What steps would you take to contact a discontinued customer, and what key questions would you ask to try and bring them back?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Describe at least three methods for generating appointments for termite inspections. Which method do you think is most effective and why?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes			

Introductions – Choose One Question or Write Your Own	NI	ME	EE
Walk me through the steps of a proper introduction when meeting a customer for a pest control service call. What are some key questions you would ask to understand the customer's needs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
You arrive at a customer's home for a lawn care service call. How would you introduce yourself and begin the interaction, and what information are you trying to gather from the customer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explain the importance of the introduction step in the sales process. What are some things to avoid to make a good first impression?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes			

Inspections – Choose One Question or Write Your Own	NI	ME	EE
Describe the general inspection process, including where you typically begin and what key exterior areas you inspect. Why is it important to offer comprehensive solutions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How do you approach a landscape inspection, and what are some of the key things you look for when assessing a lawn? How do you initiate a conversation with a homeowner about potential lawn issues?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explain the importance of graphing during an inspection. What are some key things to include in your graphing and what should it be used for?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes			

Closing – Choose One Question or Write Your Own	NI	ME	EE
Describe the 'Alternative Close' and the 'Assumptive Close'. Give an example of how you would use each.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explain the 'Cost of Ownership Close' and the '1-2-3 Close'. When might you use these, and what do you hope to achieve with each?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What are some of the payment and promotional options you can offer a customer? How do you determine which closing techniques and options are most appropriate for a given customer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes			

Referrals – Choose One Question or Write Your Own	NI	ME	EE
Describe the 'Pass-It-On' program. When should you introduce this to a customer, and what steps do you take to ensure you get referrals?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What is the follow-up process for referrals? What do you do if a customer provides a referral, and what do you do if they don't?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Why are referrals important in the sales process? How do referrals contribute to building long-term customer relationships and business growth?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes			

Trainee Information

- Trainee Name: _____
- Proctor Name: _____
- Assessment Date: _____ Assessment Location: _____
- Assessment Attempt: 1 2 3

Proctor Observations & Comments:

General Observations:

Strengths Displayed:

Areas for Improvement:

Final Evaluation & Next Steps:

Next Steps (if failed second retest or needing improvement)

Evaluation Component	Pass	Retest	Final Attempt – Additional Training Required
Proposal Simulation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oral Exam	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes			
<ul style="list-style-type: none"> • If this is the first or second attempt, "Needs Improvement" indicates the trainee may retest after coaching from the trainer. • If this is the third attempt, any "Fail" indicates the trainee has not demonstrated readiness after multiple opportunities. <ul style="list-style-type: none"> ▶ No further retests should be scheduled without approval from a Regional Manager or Sales Director. ▶ A training audit may be initiated to determine next steps or reassignment. 			

Proctor Signature: _____

Trainee Signature: _____

Trainer Signature: _____

Date: _____

This assessment form must be submitted to the General Manager and documented in Massey University training records.

APPENDIX



**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.

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 in 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 an 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.
	<p>Listens attentively, acknowledges concerns, and asks follow-up questions. Examples:</p> <ul style="list-style-type: none"> • 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.
	<p>Uses de-escalation techniques to redirect a tense or difficult interaction. Examples:</p> <ul style="list-style-type: none"> • 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.
	<p>Remains calm, professional, and composed in challenging interactions. Examples:</p> <ul style="list-style-type: none"> • 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.
	<p>Establishes rapport and makes the interaction feel personal and engaging. Examples:</p> <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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.
	<p>Addresses objections professionally, reframes concerns with confidence, and provides clear solutions.</p> <p>Examples:</p> <ul style="list-style-type: none"> • 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.
	<p>Recognizes customer skepticism and confidently reframes concerns into opportunities. Examples:</p> <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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

Prospecting – Choose One Question or Write Your Own	NI	ME	EE
Describe the '4+1 Program' and explain how it's used to generate new leads. What are the key steps you would take when cold calling at the time of an inspection, and what materials would you use?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explain the Reinstatement Program. What steps would you take to contact a discontinued customer, and what key questions would you ask to try and bring them back?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Describe at least three methods for generating appointments for termite inspections. Which method do you think is most effective and why?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(Blank for custom question)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes			

