

Account Manager Initial Training

Team Member Name: _____

CHK 2001 Account Manager Initial Field Training Checklists

Description

This checklist ensures that new Commercial Account **Managers complete all initial training requirements during their first six weeks at Massey Services**. Each week builds progressively, combining service knowledge, sales practice, field training, and participation in customer-facing activities. **The General Manager must personally verify the completion** of each weekly objective and provide written comments to document observations and reinforce accountability.

All items are **verifiable through direct observation** in the field and/or service center. Selected items require **structured observations** and **mandatory comments** to document findings, decisions, or measurements.

These checklists must be completed as the team member

Checklist items with a mandatory comment are marked with this symbol: ● .

! Real-Time Verification Required

Checklists must be filled out **in real time** as the team member performs each activity. Do **not** wait until the end of training to complete or upload them.

Evaluator Instructions

Observation Guidelines

- Personally observe the Account Manager in both field and office training settings.
- Verify knowledge-based items through **recitation, explanation, or demonstration**.
- Confirm that field training assignments are completed with the appropriate Service Manager or Technician.
- For all appointments, presentations, or group participation, document specific outcomes and behaviors in the Manager Comment section.

Manager Responsibilities

- Provide hands-on coaching and context for each week's objectives.
- Ensure the Account Manager has opportunities to **observe, practice, and apply** sales and service skills.
- Use Manager Comments to provide evidence of training activities, not just confirmation of completion.
- Complete the overall Manager's Notes at the end of the six weeks to summarize observed strengths, areas for growth, and next steps.

How to Complete This Checklist

- Print this list and neatly print the name of the trainee on in the provided space above.
- Check off items *as they are demonstrated and completed*.
- Where indicated, enter **mandatory comments** following the instructions given.
 - Write neatly and legibly!
- Scan the completed checklist, along with any required attachments, to a .pdf format.
- Name the file in the following format: Last Name_EmployeeID_Course Number
 - EX: Massey_000000_CHK2001
- Upload the file to the Massey Initial Training Paperwork Upload Portal on Armyant and submit.

Checklist Items

Section 1: Week 1

- New Account Manager introduced to Service Center team members, assigned workstation, and all new hire paperwork submitted.
- Has read and understands Lesson 2 – Overview of Services Provided by Massey, and reviewed brochures for Commercial, Pest & Termite, and Landscape services.
- Has reviewed and understands the Account Manager Job Description (Policy & Procedure 216).
- Can recite the 8 Steps of a Sale verbatim.
- Has witnessed at least two (2) new sales appointments generated in the field and at least two (2) actual Sales Presentations.
- Has read and can explain the different services Massey Commercial Services provides (Lesson 7).
- Can recite Our Mission, Our Purpose, Our Values, and Our Passion.
- Mandatory Comment:** Describe how the Account Manager demonstrated understanding of Massey’s services, values, and the 8 Steps of a Sale. Note specific observations from their introductions, recitation, or participation in presentations.

Date: _____ **Time:** _____

Section 2: Week 2

- Can recite the 8 Steps of a Sale verbatim.
- Has set at least two (2) new sales appointments and participated in two (2) Sales Presentations with the General Manager.
- Has participated in Morning Check-In with GM and an experienced Account Manager each morning.
- Completed the 2nd Week Field Training Assignment with a Commercial Pest Technician (pest ID, biology, and behavior).
- Mandatory Comment:** Provide feedback on the Account Manager's ability to set and participate in sales appointments, as well as their engagement during Morning Check-Ins and field training with the Commercial Pest Technician.

Date: _____ **Time:** _____

Section 3: Week 3

- Has set at least two (2) new sales appointments and participated in two (2) Sales Presentations with the General Manager.
- Participated or attended as a guest at a leads group or trade association function.
- Has participated in Morning Check-In with GM and an experienced Account Manager each morning.
- Completed the 3rd Week Field Training Assignment with a Commercial Pest Technician (pest ID, biology, and behavior).



- Mandatory Comment:** Comment on the Account Manager’s progress in sales activity and customer presentations. Include observations from their leads group/trade association participation and pest identification training.

Date: _____ **Time:** _____

Section 4: Week 4

- Has set at least two (2) new sales appointments and participated in two (2) Sales Presentations with the General Manager.
- Has participated in Morning Check-In with GM and an experienced Account Manager each morning.
- Participated or attended as a guest at a leads group or trade association function.
- Completed the 4th Week Field Training Assignment with a Commercial Pest Technician (Food Processing & Food Distribution Protocols).
- Completed Post-Test 13 assignment: Mailing the “career announcement” letter to their Sphere of Influence.
- Mandatory Comment:** Evaluate the Account Manager’s performance in sales activity, professional networking (leads group/trade association), and field training with food industry protocols. Comment on their initiative with the “career announcement” assignment.

Date: _____ Time: _____

Section 5: Week 5

- Has set at least two (2) new sales appointments and participated in two (2) Sales Presentations with the General Manager.
- Participated or attended as a guest at a leads group or trade association function.
- Completed the 5th Week Field Training Assignment observing a Heat Remediation Service.
- Mandatory Comment:** Provide feedback on the Account Manager’s continued sales activity and networking involvement. Include observations from their exposure to Heat Remediation Service.

Date: _____ Time: _____

Section 6: Week 6

- Using Lesson 8 tools, has set appointments for the first 3 days of Week 7.
- Completed the 6th Week Field Training Assignment concentrating on Site-Specific Commercial Pest Protocols.
- Participated or attended as a guest at a leads group or trade association function.
- With GM, completed “Your Roadmap to Success,” creating a Performance & Activity Plan for Weeks 7–12.
- GM has submitted Affidavit of Account Manager Initial Training to VP of Massey Commercial Services and Director of Sales.
- Mandatory Comment:** Summarize the Account Manager’s ability to independently plan and set appointments, apply site-specific protocols, and engage in networking. Comment on their contributions during the “Roadmap to Success” planning and readiness for transition to Weeks 7–12.

Date: _____ Time: _____

Manager Notes

Use this section to record specific examples of performance observed. Include positive behaviors, areas where additional training may be required, and any coaching or feedback provided during the observation.

Strengths observed ●

Areas for Improvement ●

Coaching & Next Steps ●

Acknowledgement

By signing below, both the manager and the team member confirm that the manager directly observed the completion of the above tasks and that this checklist was completed accurately and honestly.

_____ Date: _____
Manager Signature

_____ Date: _____
Team Member Signature