# Administrative OM Initial Training

**Team Member Name:** _____

# CHK 2002 OM Initial Training Verification Checklists

## Description

This checklist verifies that a new Commercial Office Manager (CSS) can complete essential administrative responsibilities under direct supervision. It covers accounts receivable and collections, cancellations, deposits, phones and scheduling, production posting, sales leads, and termite and bait processes.

All items are **verifiable through demonstration and observation**. The **Trainer Notes** section at the end of the checklist must be completed to capture strengths, areas for improvement, and coaching provided.

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

- Conduct all observations **in the office environment**, with access to ServicePRO, call logs, and relevant policy documents.
- Ensure the Team Member has **all required system access, manuals, and forms** before beginning.
- Observe for **accuracy, professionalism, compliance with policy, and timeliness** in task completion.
- Require the Team Member to **demonstrate both the procedure and the reasoning behind each task** (e.g., why deposits must be reported daily, why empathy is critical in cancellation calls).
- Verify that all financial and customer records are **filed, posted, and documented according to Massey policy**.

### Manager Responsibilities

- Provide hands-on guidance and context for each process.
- Ensure the Office Manager understands **why** each step matters (accuracy, compliance, customer experience).
- Review and sign off only after all demonstrations and verifications are complete.
- Provide structured feedback in the Trainer Notes section.

## 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_CHK2002
- Upload the file to the Massy Initial Training Paperwork Upload Portal on Armyant and submit.

# Checklist Items

## Section 1: Phones

☐ Accurately completes the call book by filling in all required boxes.

☐ Logs all received calls into the call book.

☐ Demonstrates proper procedure to schedule a lead; uses Inspector's schedule to verify availability, confirm time with customer, and log into schedule book.

☐ Adds scheduled leads to lead log.

☐ Demonstrates proper procedure to schedule a request; uses Scheduler to verify availability, schedules at customer's convenience, enters request in ServicePRO.

☐ Blocks time in the Scheduler for a start.

☐ Navigates in ServicePRO to effectively handle billing inquiries.

☐ Can make a proper "Welcome to Massey" call (according to policy).

**Date:** _____  **Time:** _____

## Section 2: Cancellation Requests

☐ Demonstrate proper procedure if a customer initiates a cancellation.

☐ Shows empathy.

☐ Identifies the reason.

☐ Attempts to save the customer.

☐ Schedules a visit with a manager.

- ☐ Adds the cancellation event.
- ☐ Assembles the cancellation package: hard file, cancel request, service, and payment activity reports.
- ☐ Ensures a cancellation request is approved by the General Manager prior to posting in ServicePRO.
- ☐ Properly cancels program with appropriate cancellation reason.
- ☐ Demonstrates proper filing of cancelled paid accounts (alphabetical by address).

**Date:** _____ **Time:** _____

## Section 3: Posting Production

- ☐ Ensures the Technician Summary Report is complete prior to processing (signatures of tech and manager, hours, collections, mileage, M&S).
- ☐ Posts completed production in this order: Sold Events first then work orders.
- ☐ Updates completed initials on the Backlog and DOR.
- ☐ Balances the initial completions to the Backlog and DOR using the Completed Billing Production in Total by Service Group report.
- ☐ Accurately updates the production log (balance to the completed production of the Completed Billing Production in Total by Service Group).
- ☐ Files completed work (initial services in customer files, rest with tech day).

**Date:** _____ **Time:** _____

## Section 4: Deposits

- ☐ Issue a receipt for all received cash.
- ☐ Verify pending ServSuite payments have been received.
- ☐ Remove pending ServSuite payments.
- ☐ Run adding machine tapes for all non-credit card payments.
- ☐ Post all payments to customers' accounts.
- ☐ Using ServicePRO, reconcile and post payments.
- ☐ Demonstrate proper procedure for a deposit: scan by noon, confirm scanned checks balance to posted payment batch, cash and foreign checks must be to bank same day by 2pm.

☐ Report the deposit via the "Report Deposit" Intranet app.

**Date:** _____ **Time:** _____

## Section 5: Processing New Sales

☐ Accepts only accurate and complete sales packets; returns any sales packet to GM that is incomplete or inaccurate.

☐ Verify pending ServSuite payments have been received.

☐ Remove pending ServSuite payments.

☐ Add the account number to the Backlog.

**Date:** _____ **Time:** _____

## Section 6: Daily Operations Report (DOR)

☐ Understands all headers.

☐ Balance production for the day and month.

☐ Balance collections for the day and month (Deposit Log/GreenUP and Commercial Only DOR Collections).

☐ Balance sales for the day and month (Leads and Backlog).

☐ Print the Payments in Total report the following morning (All Service Centers entered in your SC; Your SC entered in Corp; Your SC entered in All Service Centers).

☐ Complete the Daily Balance Sheet for monies posted.

☐ Update the Deposit Log.

☐ Balance the Deposit Log to the daily and MTD Payment in Total reports and the daily and MTD Completed Billing Production in Total by Service Group report for renewals.

**Date:** _____ **Time:** _____

## Section 7: Sales Leads

☐ Identifies the caller as a lead vs. an existing customer in need of a request.

☐ Demonstrates the ability to ask leading questions.

☐ Schedules the appointment and cross sells.

☐ Demonstrates proper procedure for updating Lead Log and notifying the inspector.

☐ Demonstrates proper procedure for updating Lead Log from the DCIR.

☐ Balances web and office leads on Call Log Reconciliation Report to the DOR.

☐ Balances Sales from the Lead Log to the Sales Recap, Backlog, and DOR.

☐ Balances Leads on the Sales Inspector Weekly Lead Percentage Report to the Sales Recap.

**Date:** _____ **Time:** _____

## Section 8: Termite & Bait Processes

☐ Follows monthly Renewal Processing Calendar: Prints reports.

☐ Follows monthly Renewal Processing Calendar: Adheres to dates and tasks.

☐ Follows monthly Renewal Processing Calendar: Processes cancellations for non-payment.

☐ Attaches New Construction guarantee and lead detail to guarantee acknowledgement form; gives to GM to be placed in 1-31 accordion file.

☐ Assigns New Construction leads to Inspectors for 60 days if wood treatment; 5 days if bait.

☐ Updates the account with the owner's contact information after successful delivery of the New Construction guarantee.

☐ Demonstrates proper procedure for calls: Scheduling the reinspection.

☐ Demonstrates proper procedure for calls: Collecting renewals.

☐ Transfers a New Homeowner.

**Date:** _____ **Time:** _____

## Section 9: Accounts Payable

☐ Maintain Pending Regular Orders (RO) and Emergency Purchase Orders (EPO) file

☐ Maintain Confirmed ROs/EPOs and packaging slips file

☐ Maintain Accounts Payables (AP) Processed files

☐ Prepare AP vouchers for every incoming invoice within 24 hours of receipt (no statements)

☐ Email the fully executed AP packet within 72 hours

☐ Complete AP Voucher Register

☐ Explain the use of a Capital Expenditure Report (CER)

☐ Explain the use of a Journal Voucher (JV)

☐ Explain the Subcontractor AP process

☐ Explain the Refund process

☐ Explain the Claim process

**Date:** _____ **Time:** _____

## Section 10: Payroll

☐ Explain pay type: Guarantee.

☐ Explain pay type: Salary.

☐ Explain pay type: Hourly.

☐ Explain pay type: Exempt vs. Non-exempt.

☐ Demonstrate proper procedure to request pre-approved overtime.

☐ Review Production and Sales Commission reports.

☐ Complete all Payroll forms and attach any required supporting documents.

☐ Demonstrates proper procedure for updating hourly technician time sheets, including adding the Service Category Breakdown.

**Date:** _____ **Time:** _____

## Section 11: Human Resources

☐ Demonstrate proper procedure for team member changes: notify HR for address, service center location, job title, termination, and after three consecutive days of missed work, etc.

☐ Maintain Absentee Calendars.

☐ Maintain three files for each team member: State, Massey training, and personnel (do not keep any medical or personal identification at the service center).

**Date:** _____ **Time:** _____

## Section 12: Month-End Processing

☐ Verify balancing DOR for the month to date.

☐ Verify balancing Backlog for the month to date.

☐ Verify balancing Deposit Log for the month to date.

☐ Verify balancing Production Log for the month to date.

☐ Verify balancing Sales Recap for the month to date.

☐ Verify balancing Lead Log for the month to date.

☐ Complete the month-end checklist.

☐ Prepare and submit a help desk ticket that Service Center is closed and balanced.

☐ Complete the Month-End package and email to Monthend@masseyservices.com.

☐ Send the Renewal Processing Calendar to Regional Manager Admin.

**Date:** _____ **Time:** _____

## Section 13: Claims Reporting

☐ Demonstrates proper claim reporting procedure for any accident or damage caused to property or person.

**Date:** _____ **Time:** _____

## Section 14: Accounts Receivable & Collections

☐ Explain collection process and responsibilities for each role (PP-701).

☐ Demonstrates proper collections procedure: Prints and mails 30- and 60-day letters every Wednesday.

☐ Demonstrates proper collections procedure: Uses QA Collection Calls report to make daily 7-day calls.

☐ Demonstrates proper collections procedure: Makes 30 and/or 60-day collection calls.

☐ Demonstrates proper collections procedure: Sends certified mail to unresponsive accounts by the 10th of each month.

☐ Create a complete Bad Debt package.

☐ Post approved Allowances and Bad Debts.

**Date:** _____ **Time:** _____

## Trainer 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** 🔴

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_____

_____

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_____

**Areas for Improvement** 🔴

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_____

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**Coaching & Next Steps** 🔴

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## Acknowledgement

By signing below, both the trainer 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: _____
Trainer Signature

_____ Date: _____
Team Member Signature