

Administrative CSS Initial Training

Team Member Name: _____

CHK 2003 CSS Initial Training Verification Checklists

Description

This checklist ensures that all essential administrative training activities for Residential Services Office Managers are completed. It covers core responsibilities in accounts payable, accounts receivable, deposits, payroll, phones, posting production, sales leads, and termite/bait processes. Managers will guide new Office Managers through the required tasks, policies, and system functions to ensure accuracy, compliance, and consistency across the service center.

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

- Confirm the Office Manager demonstrates each process in **real conditions** (ServicePRO, phone scheduling, deposit scans, DOR balancing, etc.).
- Validate accuracy of **posting, reconciliation, and reporting tasks** by comparing against source documents (e.g., DOR, Deposit Log, Lead Log, Sales Recap).
- Ensure compliance with policies and procedures (e.g., PP-701 for collections, Renewal Processing Calendar for termite/bait).
- Observe both technical accuracy and professional communication (customer empathy, phone procedures, manager notifications).
- When a process includes required documentation (e.g., AP packet, deposit scan, cancellation package), confirm it is properly prepared and submitted.

Trainer Responsibilities

- Provide **direct supervision** or assign a qualified trainer and confirm all objectives were met.
- Validate that the Team Member can:
 - Follow proper collections procedures (letters, calls, reporting).

- Process cancellations according to policy with required documentation and approvals.
- Accurately post and reconcile deposits in ServicePRO.
- Manage phones, schedule requests and leads, and log activity correctly.
- Post production in the correct sequence and maintain accurate logs.
- Process termite renewals and new construction guarantees according to the monthly calendar.
- 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_CHK2003
- 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.
- 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

- Issues a receipt for all received cash.
- Posts all payments to customers' accounts.
- Uses ServicePRO to reconcile and post payments.
- Demonstrates 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.

- Reports the deposit via the “Report Deposit” Intranet app.

Date: _____ **Time:** _____

Section 5: 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.

Date: _____ **Time:** _____

Section 6: 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 7: 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.

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 ●

Areas for Improvement ●

Coaching & Next Steps ●

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