

Landscape Lighting Initial Training

Team Member Name: _____

CHK 2007 Landscape Lighting Initial Field Training Checklists

Description

This checklist verifies that a new Landscape Lighting Team Member completes the required training under direct supervision. It includes design principles, installation and maintenance procedures, and a final section specific to the Team Member's assigned role (Sales or Service).

The manager will indicate the trainee's track in the **Route Selection** section below and complete the appropriate items in the corresponding section.

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.

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

Route Selection

- Sales Track
- Service Track

Observation Guidelines

- Conduct all observations in the field or service center setting as outlined in the checklist.
- Ensure the Team Member has the required tools, PPE, and product knowledge before beginning.
- Observe for safety, accuracy, technique, and professionalism.
- Require the Team Member to explain design decisions and installation steps, not just perform the tasks.

Manager Responsibilities

- Provide **direct supervision** or assign a qualified trainer and confirm that all objectives were met.
- Validate that the Team Member can:



- Apply landscape lighting design principles correctly.
- Safely and effectively perform installation and maintenance tasks.
- Demonstrate track-specific skills: wiring (Service) or sales process (Sales).
- Provide **structured, specific feedback** on performance.
- Record observations in the **Manager Notes** section, including strengths, improvement needs, and coaching provided.

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_CHK2007
- Upload the file to the Massy Initial Training Paperwork Upload Portal on Armyant and submit.

Checklist Items

Section 1: Design

Forming and Selling the Design

- Uses proper lighting language when speaking to the customer (e.g., “Generate a visual direction through your lighting design.”)
- Engages the customer with questions prior to designing (e.g., “What parts of your outdoor space do you enjoy most?”)
- Follows the steps of the design process:
 - Walk around the property
 - Take note of grade changes
 - Look for texture
 - Find areas with entertainment value (kitchen, gathering areas, etc.)
 - Seek out garden art
 - Utilize containers
- Calculates the number of transfers needed based on the total number of volts
- Demonstrates appropriate use of beam angles and color choices

Date: _____ **Time:** _____

Lighting Techniques

- Demonstrates or can explain proper use of **basic techniques**: Uplighting, Downlighting, Path lighting, Shadowing, Wall-washing, Grazing
- Demonstrates or can explain proper use of **advanced techniques**: Cross lighting, Silhouette, Mirror lighting

Date: _____ **Time:** _____

Zoning and Dimming

- Explains the Luxor Trilogy to the customer in a way they can understand
- Explains the difference between the different controllers

Date: _____ **Time:** _____

Section 2: Installation & Maintenance

Installation According to Protocol

- Lists proper tools needed for installation
- Creates a graph marking controller location, lighting fixtures, fixture type, and wire run
- Runs the wire
- Pinpoints fixture locations
- Installs fixtures
- Sets fixtures
- Sets controller
- Conducts walkthrough with customer

Maintenance According to Protocol

- Lists tools needed for maintenance service
- Calls the customer before the service
- Takes proper tools to perform the service
- Follows arrival procedures
- Reviews lighting controller settings and records them on Service Report
- Performs voltage output check on controller according to protocol
- Performs voltage check at receptacle according to protocol

- Walks the property and checks every fixture in operation and the wire path
- Marks all fixtures or wire/wire connectors that need attention
- Performs warranted and included maintenance repairs
- Completes the Service Report
- Talks to the customer and has them sign the Service Report prior to leaving

Date: _____ **Time:** _____

Section 3A: Sales (Sales Track Only)

Demo Kit Deployment

- Ability to set up a demo kit
- Maintains communication with customer during demo kit deployment
- Disassembles demo kit

Graphing

- Creates accurate graph drawings with all necessary measurements

Pricing

- Explains fillable rate card
- Explains different packages offered by Massey
- Accurately uses fillable rate card

Date: _____ **Time:** _____

Section 3B: Wiring (Service Track Only)

Connections and Fixtures

- Installs waterproof connector correctly
- Calculates correct number of fixtures for each run
- Demonstrates proper wire splicing

Diagramming and Running Wire

- Identifies shortest distance between controller and fixture
- Calculates correct number of wire runs
- Analyzes and identifies if conduit is needed

- Identifies correct wire gauge needed for the job
 - 12 gauge up to 150'
 - 10 gauge above 150'
- Calculates all wire runs to be less than 250'
- Demonstrates ability to use Spoke/Hub or Daisy Chain method correctly
- Demonstrates proper burial depth

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