

Residential Sales Initial Training

Team Member Name: _____

CHK 3000 Residential Sales: Day 1 Initial Field Training & Skill Verification Checklists

Description

This checklist ensures that all essential onboarding activities are completed on **Day 1** of the Residential Sales Training Program. Managers will guide new hires through key introductions, digital tools, training expectations, and early engagement with Massey's mission and sales process.

Each section contains **verifiable tasks** that must be completed, with select items requiring **structured observations and required comments** to ensure accountability.

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

Manager Responsibilities

- Confirm that all required **training modules and field activities** have been completed.
- Ensure the new hire **actively participates** in role-plays, document reviews, and discussions.
- Provide **structured feedback** on observed strengths and areas requiring additional coaching.
- Validate that DSAR documentation and core sales documents have been reviewed.

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_Checklist Name
 - EX: Massey_000000_CHK3000
- Upload the file to the Massy Initial Training Paperwork Upload Portal on Armyant and submit.



Checklist Items

Section 1: Welcome & Orientation

- ☐ **Welcome to Massey & Service Center Tour**
 - Ensure the new hire is introduced to the workspace, including break areas, storage, and emergency exits.
 - Review workspace cleanliness and shared resource expectations.
- ☐ **Meet the Team & Workspace Assignment**
 - Introduce the new hire to key team members, including the OM, Service Manager(s), and present Team Members.
 - Ensure workspace is assigned and expectations for organization are clear.
- ☐ **Complete Any Remaining Paperwork** 
 - Verify that all HR, payroll, and onboarding forms are completed and submitted.
 - Confirm accuracy of documentation.
 -  **Mandatory Comment Alert:** If paperwork was missing or required follow-up, document what was incomplete, if all is complete enter "complete" in the comment.

Date: _____ **Time:** _____

Section 2: Digital Tools & Training Overview

- ☐ **Navigating Massey's Digital Tools**
 - Ensure the new hire can log into Workday, LMS, and email.
 - Verify completion of mandatory LMS courses:
 - IT Network Policy
 - Licensing Requirements
 - HR Compliance Courses
 - Day 1 New Hire Survey (to be completed in 1-3 days)
- ☐ **Introduction to Training Program and Materials**
 - Provide an overview of Phase 1 training objectives, structure, and learning methods.
 - Explain how role-play and field training are integrated.
 - Clarify assessment and participation expectations.

Section 3: Sales & Operational Foundations

☐ **Why We Do What We Do & How**

- Discuss Massey's mission and how its core services provide value.
- Introduce the 8-Step Sales Process and its role in customer engagement.

☐ **Observe Manager's Daily Check-In with Team**

- New hire observes how daily priorities are set and tracked.
- Emphasize the importance of structured check-ins for success.

Section 4: End of Day 1

☐ **Day 1 Wrap-Up & Reflection** ●

- Summarize key takeaways from Day 1 with the trainee.
- Clarify any outstanding questions or areas needing follow-up.
- Provide expectations for Day 2.
-  **Mandatory Comment:** Identify one specific strength the new hire demonstrated today and one area where they may need additional support or follow-up.

Date: _____ **Time:** _____

Week 1 Initial Field Training & Skill Verification Checklists

Description

This checklist ensures that all Week 1 training activities are completed for the new Sales Inspector. Managers will oversee training module completion, ride-alongs, and early customer engagement skills while ensuring the trainee is actively participating in role-plays and documentation reviews.

Each section contains **verifiable tasks** that must be completed, with select items requiring **structured observations and required comments** to ensure accountability.

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.

Checklist Items

Section 1: Role-Playing & Sales Practice

- ☐ **Day 2: Role-Play: Steps 1-4 of the 8-Step Sales Process**
 - Conduct role-play exercises to practice early customer interactions.
 - Focus on steps 1-4 of the sales process.
 - **Tip:** Use the Sales Initial Training Manual, Chapter 7, to walk through the basic structure of each step.
 - **Optional:** If needed, reference Guided Role-Play 1.4.2 and its script to prepare yourself before facilitating.
- ☐ **Day 3: Role-Play: Steps 5-6 of the 8-Step Sales Process**
 - Guide the trainee through handling customer concerns and objections through role-playing.
 - Focus on steps 5-6 of the sales process.
 - **Tip:** Reference the Sales Initial Training Manual to explain each step's purpose and flow.
 - **Optional:** Review Guided Role-Play 1.4.2 to support your setup or coaching approach if needed.
- ☐ **Day 4: Role-Play: Steps 7-8 of the 8-Step Sales Process**
 - Ensure the trainee practices closing the sale and requesting referrals by role-playing
 - Focus on steps 7-8 of the sales process.
 - **Tip:** The Sales Manual outlines how to transition into closing and referral language.

- **Optional:** You can refer to Guided Role-Play 1.4.2 for tone and flow cues.

☐ **Day 5: Full Role-Play: Steps 1-8 using a pest or mosquito sales scenario**

- Assess overall fluency and confidence in executing the **full** sales process and introducing a Massey Service into the equation.
 - **Tip:** Encourage step-by-step recall using Chapter 7 of the Sales Manual as a review tool.
 - **Optional:** Use the structure from Guided Role-Play 1.4.2 as a model for coaching and pacing.
-  **Mandatory Comment:** Describe an area where the trainee showed strong sales technique and an area that still needs improvement, and the steps you will take to support their development.

Date: _____ **Time:** _____

Section 2: Service Training, Ride-Alongs, & Sales Tasks

☐ **Ride-Along with a Pest Technician**

- Ensure the trainee participates in a service visit with a Pest Technician.
- Encourage engagement by asking questions about service procedures and customer interactions.

Date: _____ **Time:** _____

☐ **Mosquito Treatment with a Service Manager**

- Ensure the trainee participates in a service visit for a Mosquito treatment process.
- Ensure the trainee understands treatment methods and safety protocols.
- Encourage engagement by asking questions about service procedures and customer interactions.

Date: _____ **Time:** _____

☐ **Lawn Aeration & pH Test with a Service Manager**

- Demonstrate lawn aeration procedures and pH testing.
- Ensure the trainee understands the importance of these services for customer value.

Date: _____ **Time:** _____

☐ **Ride-Along with a Lawn Specialist (if applicable)**

- Observe lawn treatment applications and customer interactions.
- Discuss key service insights with the trainee.
- Explain how role-play and field training are integrated.
- Clarify assessment and participation expectations.

Date: _____ **Time:** _____

Section 3: Training Guide Modules Completion

☐ **Complete Module 1: Onboarding, Policy & Procedures, Communication**

Fundamentals ●

- Ensure the trainee understands Massey's professional standards, daily expectations, and operational procedures.
- Confirm completion of DSAR training and discuss its role in daily operations.
-  **Mandatory Comment:** Explain how the trainee demonstrated an understanding of Massey's professional expectations and how they are incorporating the DSAR into their daily workflow. Include any support you will provide to reinforce these standards.

Date: _____ **Time:** _____

☐ **Complete Module 2: Customer Engagement, Building Trust, Gathering & Recording Information, Answering Questions** ●

- Confirm the trainee has practiced active listening, engagement strategies, and structured questioning.
- Discuss their ability to recognize customer cues and adjust communication style.
-  **Mandatory Comment:** Share an example of when the trainee effectively applied a trust-building or engagement technique during training. Identify one area for improvement and describe how you will help them strengthen this skill.

Date: _____ **Time:** _____

☐ **Complete Module 3: The Genesis, The Call, The 8-Step Sales Process – Step 1: The Introduction** ●

- Ensure the trainee understands Massey’s prospecting strategies, the 4+1 program, and the 8-Step Sales Process.
- Confirm participation in role-playing exercises for the Introduction and customer engagement.
-  **Mandatory Comment:** Provide insight into the trainee’s ability to structure and deliver their sales introduction during role-play. Highlight strengths, note any needed adjustments, and explain how you will support their continued development in this area.

Date: _____ **Time:** _____

Section 4: End-of Week-Review

☐ **Weekly Summary of Trainee Progress** ●

-  **Mandatory Comment:** Provide a summary of the trainee’s progress this week. Highlight one strength they consistently demonstrated, identify one area they should focus on improving in Week 2, and describe the specific actions you will take to support their development.

Date: _____ **Time:** _____

Week 2 Initial Field Training & Skill Verification Checklists

Description

This checklist ensures that all essential training activities for **Week 2 of the Residential Sales Training Program** are completed. Managers will oversee **service-specific training, field applications, and structured sales practice**, ensuring that trainees build on their **inspection, problem definition, and solution presentation skills**.

Each section contains **verifiable tasks** that must be completed, with select items requiring **structured observations and required comments** to ensure accountability.

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

Checklist items requiring a documentation attachment 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.

Checklist Items

Section 1: Role-Playing & Sales Practice

☐ Day 1: Steps 1-8

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee's focus area:
 - Pest – Roaches & Ants
 - Lawn – Basic Lawn Scenario
 - Termite – Basic Termite Scenario

☐ Day 2: Steps 1-8

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee's focus area:
 - Pest – Mosquito
 - Lawn – Tree & Shrub
 - Termite – Basic Termite Scenario

☐ Day 3: Steps 1-8

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee's focus area:
 - Pest – Mice, Rats, & Other Rodents
 - Lawn – Attic Upgrade

- Termite – Termite with Fume

☐ **Day 4: Steps 1-8**

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee's focus area:
 - Pest – Mosquito
 - Lawn – Attic Upgrade Scenario w/Overcoming Trial Closing & Asking for Referrals
 - Termite – Trainer's Choice

☐ **Day 4: Working with Technicians & Specialists**

- Ensure the trainee role-plays collaborating with technicians and specialists within a sales conversation.

☐ **Day 5: Securing Leads Over the Phone**

- Ensure the trainee practices role-playing phone-based lead generation and follow-ups.

☐ **Day 5: Steps 1-8** ●

- Ensure the trainee practices the full sales process using the selected service focus for the week:
 - Pest – Trainer's Choice
 - Lawn – Irrigation Scenario or Trainer's Choice if irrigation is not a provided service
 - Termite – Trainer's Choice
-  **Mandatory Comment:** Identify one sales strength the trainee demonstrated and one area for improvement in their role-play execution.

Date: _____ Time: _____

Section 2: Service Training, Ride-Alongs, & Sales Tasks

☐ **Ride-Alongs: Required Based on Weekly Service Focus** ●

- Complete all ride-alongs related to the service focus selected for this week. Try to stick to the service focus as much as possible. If a ride-along is completed outside of the service focus week, it still applies—just ensure it is documented below. All required ride-alongs must be completed by the end of training, regardless of when they are scheduled.

- **Ride-Alongs by Service Focus:**
 - **Pest:**
 - **Pest Prevention Initial** – Observe full service; assist with documentation, walkthrough, and explaining findings to customer.
 - **Mosquito Service** – Observe treatment zones and product usage; reinforce safety messaging and answer customer questions.
 - **Lawn: (If these services are not provided at your service center, indicate that in your comment.)**
 - **Irrigation Technician Ride-Along** – Observe zone inspection and controller check; ask questions about service recommendations.
 - **Landscape Initial** – Assist with property walk-through, note service concerns, and listen to service manager explanation.
 - **Termite:**
 - **Termite Monitoring Technician** – ½ day: Observe bait/check routine; note how customer education is handled on-site.
 - **Termite Technician** – Observe liquid treatment or repair protocol; assist in communication and safety prep where possible.
-  **Mandatory Comment:** List each required ride-along completed for this service focus. Include:
 - Ride-along name
 - Date completed
 - Name of team member who led it
 - Summary of the trainee’s participation and learning

☐ **Service Manager & New Inspector: Required Field Services**

- The trainee must complete **all required field services** that correspond to this week’s service focus. Try to stick to the service focus as much as possible. If a field service is completed **outside of the service focus week**, it still applies—just ensure it is documented below. All required field services

must be completed by the end of training, even if completed early or out of sequence.

○ **Field Services by Service Focus:**

▪ **Pest:**

- **Pest Prevention Initial** – Trainee performs or assists with full service; must explain the findings and proposed schedule to the customer.
- **Mosquito Service** – Trainee shadows full treatment and participates in customer prep or service explanation.

▪ **Lawn: (If Lawn is not provided at you service center, indicate that in your comment.)**

- **Landscape Initial** – Trainee assists with walk-through, identification of turf/shrub needs, and delivery of recommendations.

▪ **Termite:**

- **Liquid Termite Service** – Trainee assists with application and safety explanation; observes service setup and documentation.
- **Bait Install** – Trainee helps locate install points, reinforces purpose to customer, and confirms follow-up schedule.

○ **Mandatory Comment:**

List **each required field service** completed for this service focus. Include:

- Service name
- Date completed
- Summary of the trainee's role and performance
- Notes on any coaching provided

☐ **List the Service-Specific Sales Documents Explored**

- Ensure the trainee reviews and discusses service-specific sales documents related to the week's selected service focus: pest.
-  **Mandatory Comment:** List the specific service sales documents explored this week and describe how the trainee applied them in discussion or practice.

Date: _____ **Time:** _____

☐ **Run 5 Sales Appointments with GM** ●

- Ensure the trainee actively led or assisted in five customer sales conversations.
-  **Mandatory Comment:** Summarize the trainee's involvement in the five sales conversations, including whether they led or assisted and any notable observations.

Date: _____ **Time:** _____

☐ **Secure 1 Pass-It-On Referral** ●

- Confirm that the trainee successfully requested and documented at least one Pass-It-On Referral by indicating so in the comment.
-  **Mandatory Comment:** If the trainee secured a referral, enter "Completed" and briefly describe the referral situation. If they did not, indicate why it was not secured.
-   **They must secure a referral in Week 3 if not completed this week.**

Date: _____ **Time:** _____

☐ **Complete a Roadmap to Success** ●

- Ensure the trainee has completed a Roadmap to Success.
-  **Mandatory Comment:** Summarize the key takeaways from the trainee's

Roadmap to Success. What areas did they identify for improvement?

Date: _____ Time: _____

☐ **Field Work: ½ Day in New Construction Neighborhood (or Massey Neighborhood)**

- Verify that the trainee completed at least ½ day of field prospecting and lead generation in either a New Construction Neighborhood or Massey Neighborhood. If there is no New Construction opportunity.

Date: _____ Time: _____

☐ **Complete Service-Specific Coursework on Massey University**

- Ensure the trainee has completed any required Massey University courses related to the week's selected service focus.

Section 3: Training Guide Modules Completion

☐ **Complete Module 4 Inside, Outside, Over & Under – The Inspection & Graphing Process**

- Ensure the trainee understands how inspections build trust, how to document key findings, and how graphing reinforces sales recommendations.
- Confirm participation in live property inspections, measurement exercises, and graphing activities.
-  **Mandatory Comment & Attachment:**
 - Describe how the trainee applied the systematic inspection approach. Were they able to effectively differentiate between active and inactive conditions? Evaluate their ability to create accurate and useful property graphs.
 - Work with the trainee to select and attach one example of a graph they created to this checklist when you scan it. In your comment, **explain why this example was chosen and how it reflects their understanding of the inspection and graphing process.** Include any coaching provided and how you will support their continued development in this area.

Date: _____ **Time:** _____

☐ **Complete Module 5: Defining the Problem & Presenting the Solution** ●

- Verify that the trainee practiced framing inspection findings in customer-friendly language and transitioned from problem identification to service recommendation.
- Confirm they participated in role-plays and real-world solution presentations.
-  **Mandatory Comment:** Provide an example of how the trainee structured their Findings → Solution → Benefit explanation. Did they create urgency and maintain clarity? Where are they still struggling? Describe any feedback given and how you will help them refine this skill.

Date: _____ **Time:** _____

☐ **Prepare for Skills Evaluation: Graphing & Inspection** ●

- Confirm that the trainee practiced inspections, reviewed graphing expectations, and understands the structure of the evaluation.
- Ensure the trainee had opportunities to complete sample inspections or graphing exercises independently.
-  **Mandatory Comment:** Describe how the trainee demonstrated readiness for the evaluation. Include any observed strengths and what coaching or practice was provided.

Date: _____ **Time:** _____

- ☐ **Graphing & Inspection Skills Evaluation is Scheduled** ●
- Confirm the date/time and location of the proctored evaluation.
 - Ensure the evaluator has seen the rubric and form if the trainer is not the evaluator.
 -  **Mandatory Comment:** Enter the scheduled date/time of the Graphing & Inspection Evaluation.
- _____

Section 4: End-of Week-Review

- ☐ **Weekly Summary of Trainee Progress** ●
-  **Mandatory Comment:** Summarize the trainee's development this week. Highlight one strength they consistently demonstrated, identify one area they should focus on improving in Week 3, and describe the specific actions you will take to support their continued growth.
- _____
- _____
- _____
- _____
- _____

Date: _____ **Time:** _____

Week 3 Initial Field Training & Skill Verification Checklists

Description

This checklist ensures that all essential training activities for **Week 3 of the Residential Sales Training Program** are completed. Managers will oversee **service-specific training, field applications, and structured sales practice**, ensuring that trainees continue refining their **communication, presentation, and closing skills**.

Each section contains **verifiable tasks** that must be completed, with select items requiring **structured observations and required comments** to ensure accountability.

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

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Checklist Items

Section 1: Role-Playing & Sales Practice

☐ Day 1: Steps 1–8

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee's focus area:
 1. Pest – Roaches & Ants
 2. Lawn – Basic Lawn Scenario
 3. Termite – Basic Termite Scenario

☐ Day 1: Knocking on the Door

- Ensure the trainee practices customer approach and greeting techniques when initiating contact at the door.

☐ Day 2: Steps 1–8

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee's focus area:
 1. Pest – Mosquito
 2. Lawn – Tree & Shrub
 3. Termite – Basic Termite Scenario

☐ Day 2: Delivering New Construction Guarantees

- Ensure the trainee practices presenting and explaining New Construction Guarantees as part of a customer visit.

☐ **Day 3: Steps 1–8**

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee’s focus area:
 1. Pest – Mice, Rats, & Other Rodents
 2. Lawn – Attic Upgrade
 3. Termite – Termite with Fume

☐ **Day 4: Steps 1–8**

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee’s focus area:
 1. Pest – Mosquito
 2. Lawn – Attic Upgrade Scenario w/Overcoming Trial Closing & Asking for Referrals
 3. Termite – Trainer’s Choice

☐ **Day 5: Steps 1–8** ●

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee’s focus area:
 1. Pest – Trainer’s Choice
 2. Lawn – Irrigation Scenario or Trainer's Choice if irrigation is not a provided service
 3. Termite – Trainer’s Choice
-  **Mandatory Comment:** Describe one area where the trainee has shown strong progress across this week’s role-plays, and one area where continued improvement is needed in their execution of the full sales process. Include the specific steps you will take to support their development in the coming week.

Date: _____ **Time:** _____

Section 2: Service Training, Ride-Alongs, & Sales Tasks

☐ **Ride-Alongs: Required Based on Weekly Service Focus** ●

- Complete all ride-alongs related to the service focus selected for this week. Try to stick to the service focus as much as possible. If a ride-along is completed outside of the service focus week, it still applies—just ensure it is

documented below. All required ride-alongs must be completed by the end of training, regardless of when they are scheduled.

- **Ride-Alongs by Service Focus:**
 - **Pest:**
 - **Pest Prevention Initial** – Observe full service; assist with documentation, walkthrough, and explaining findings to customer.
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 - **Irrigation Technician Ride-Along** – Observe zone inspection and controller check; ask questions about service recommendations.
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 - **Termite:**
 - **Termite Monitoring Technician – ½ day:** Observe bait/check routine; note how customer education is handled on-site.
 - **Termite Technician** – Observe liquid treatment or repair protocol; assist in communication and safety prep where possible.
-  **Mandatory Comment:** List each required ride-along completed for this service focus. Include:
 - Ride-along name
 - Date completed
 - Name of team member who led it
 - Summary of the trainee’s participation and learning

☐ **Service Manager & New Inspector: Required Field Services**

- The trainee must complete **all required field services** that correspond to this week’s service focus. Try to stick to the service focus as much as possible. If a field service is completed **outside of the service focus week**, it still applies—just ensure it is documented below. All required field services

must be completed by the end of training, even if completed early or out of sequence.

○ **Field Services by Service Focus:**

▪ **Pest:**

- **Pest Prevention Initial** – Trainee performs or assists with full service; must explain the findings and proposed schedule to the customer.
- **Mosquito Service** – Trainee shadows full treatment and participates in customer prep or service explanation.

▪ **Lawn: (If Lawn is not provided at you service center, indicate that in your comment.)**

- **Landscape Initial** – Trainee assists with walk-through, identification of turf/shrub needs, and delivery of recommendations.

▪ **Termite:**

- **Liquid Termite Service** – Trainee assists with application and safety explanation; observes service setup and documentation.
- **Bait Install** – Trainee helps locate install points, reinforces purpose to customer, and confirms follow-up schedule.

○ **Mandatory Comment:**

List **each required field service** completed for this service focus. Include:

- Service name
- Date completed
- Summary of the trainee's role and performance
- Notes on any coaching provided

☐ **List the Service-Specific Sales Documents Explored**

- Ensure the trainee reviews and discusses service-specific sales documents related to the week's selected service focus: pest.
-  **Mandatory Comment:** List the specific service sales documents explored this week and describe how the trainee applied them in discussion or practice.

☐ **Run 5 Sales Appointments with GM** ●

- Ensure the trainee actively led or assisted in five customer sales conversations.
-  **Mandatory Comment:** Summarize the trainee's involvement in the five sales conversations, including whether they led or assisted and any notable observations.

☐ **Secure 1 Pass-It-On Referral (2nd Chance!)** ●

- Confirm that the trainee successfully requested and documented at least one Pass-It-On Referral if they did not last week. (If already secured in Week 2, still comment below.)
-  **Mandatory Comment:** If the referral was secured this week or previously, enter "Completed" and briefly describe the referral. If not, explain why it was not secured.
-   **They must secure a referral in Week 4 if not completed this week.**

☐ **Complete Service-Specific Coursework on Massey University**

- Ensure the trainee has completed any required Massey University courses related to the week's selected service focus.

Section 3: Training Guide Modules Completion

☐ **Complete Module 6: Qualifying Massey Services & Features/Benefits Presentations** ●

- Ensure the trainee clearly communicated Massey's value and connected service features to customer priorities during practice scenarios.
- Confirm the trainee actively participated in role-plays and demonstrated a willingness to reflect and improve their delivery.
-  **Mandatory Comment:** Provide an observation of how the trainee presented Massey's features and benefits during role-play or field application. Highlight what was done well, what could be improved, and how you will support their continued development.

Date: _____ **Time:** _____

☐ **Complete Module 7: Closing the Sale & Asking for Referrals** ●

- Ensure the trainee demonstrated closing techniques with confidence and transitioned into the referral step using natural, customer-focused language.
- Confirm the trainee engaged fully in guided role-plays, reflected on performance, and made adjustments based on feedback.
-  **Mandatory Comment:** Share an example of how the trainee practiced closing techniques and asking for referrals. Identify which language or techniques were most effective, what coaching may still be needed, and how you will provide that support.

Date: _____ **Time:** _____

☐ **Prepare for Skills Evaluation: Qualifying Massey's Benefits & Features** ●

- Confirm that the trainee practiced presenting features and benefits using realistic customer scenarios.
- Ensure the trainee understands the structure, expectations, and rubric criteria of the evaluation.

-  **Mandatory Comment:** Describe how the trainee demonstrated readiness for the evaluation. Include any coaching or role-play feedback provided this week and how you will continue to prepare them.

Date: _____ **Time:** _____

- ☐ **Qualifying Massey's Benefits & Features Evaluation is Scheduled** 
- Confirm the date/time and evaluator for the skills evaluation.
- Ensure that all needed forms and rubrics are available.
-  **Mandatory Comment:** Enter the scheduled date/time of the evaluation.

Section 4: End-of Week-Review

- ☐ **Weekly Summary of Trainee Progress** 
-  **Mandatory Comment:** Summarize the trainee's development this week. Highlight one strength they consistently demonstrated during customer interactions, identify one area where they should focus their efforts in Week 4, and describe the actions you will take to support their progress.

Date: _____ **Time:** _____

Week 4 Initial Field Training & Skill Verification Checklists

Description

This checklist ensures that all essential training activities for **Week 4 of the Residential Sales Training Program** are completed. Managers will oversee **final service training, territory and time management development, and preparation for the Final Evaluation.**

Each section contains **verifiable tasks** that must be completed, with select items requiring **structured observations and required comments** to ensure accountability.

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.

Checklist Items

Section 1: Role-Playing & Sales Practice

☐ Day 1: Steps 1-8

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee's focus area:
 1. Pest – Roaches & Ants
 2. Lawn – Basic Lawn Scenario
 3. Termite – Basic Termite Scenario

☐ Day 1: Cross-Selling Current Customer

- Ensure the trainee practices presenting a new service to an existing customer using a Termite-focused approach.

☐ Day 2: Steps 1-8

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee's focus area:
 1. Pest – Mosquito
 2. Lawn – Tree & Shrub
- Termite – Basic Termite Scenario

☐ Day 3: Steps 1-8

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee's focus area:

1. Pest – Mice, Rats, & Other Rodents
2. Lawn – Attic Upgrade
3. Termite – Termite with Fume

☐ **Day 4: Steps 1-8**

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee's focus area:
 1. Pest – Mosquito
 2. Lawn – Attic Upgrade Scenario w/Overcoming Trial Closing & Asking for Referrals
 3. Termite – Trainer's Choice

☐ **Day 5: Steps 1-8** ●

- Ensure the trainee practices sales processes and customer interactions using the appropriate scenario for their assigned service focus this week. Only one of the following should be used, based on the trainee's focus area:
 1. Pest – Trainer's Choice
 2. Lawn – Irrigation Scenario or Trainer's Choice if irrigation is not a provided service
 3. Termite – Trainer's Choice
-  **Mandatory Comment:** Identify one sales strength the trainee demonstrated and one area for improvement in their role-play execution.

Date: _____ **Time:** _____

Section 2: Service Training, Ride-Alongs, & Sales Tasks

☐ **Ride-Alongs: Required Based on Weekly Service Focus** ●

- Complete all ride-alongs related to the service focus selected for this week. Try to stick to the service focus as much as possible. If a ride-along is completed outside of the service focus week, it still applies—just ensure it is documented below. All required ride-alongs must be completed by the end of training, regardless of when they are scheduled.
- **Ride-Alongs by Service Focus:**
 - **Pest:**
 - **Pest Prevention Initial** – Observe full service; assist with documentation, walkthrough, and explaining findings to customer.

- **Mosquito Service** – Observe treatment zones and product usage; reinforce safety messaging and answer customer questions.
- **Lawn: (If these services are not provided at your service center, indicate that in your comment.)**
 - **Irrigation Technician Ride-Along** – Observe zone inspection and controller check; ask questions about service recommendations.
 - **Landscape Initial** – Assist with property walk-through, note service concerns, and listen to service manager explanation.
- **Termite:**
 - **Termite Monitoring Technician – ½ day:** Observe bait/check routine; note how customer education is handled on-site.
 - **Termite Technician** – Observe liquid treatment or repair protocol; assist in communication and safety prep where possible.
-  **Mandatory Comment:** List each required ride-along completed for this service focus. Include:
 - Ride-along name
 - Date completed
 - Name of team member who led it
 - Summary of the trainee’s participation and learning

☐ **Service Manager & New Inspector: Required Field Services**

- The trainee must complete **all required field services** that correspond to this week’s service focus. Try to stick to the service focus as much as possible. If a field service is completed **outside of the service focus week**, it still applies—just ensure it is documented below. All required field services **must be completed by the end of training**, even if completed early or out of sequence.
- **Field Services by Service Focus:**
 - **Pest:**
 - **Pest Prevention Initial** – Trainee performs or assists with full service; must explain the findings and proposed schedule to the customer.

- **Mosquito Service** – Trainee shadows full treatment and participates in customer prep or service explanation.
- **Lawn: (If Lawn is not provided at you service center, indicate that in your comment.)**
 - **Landscape Initial** – Trainee assists with walk-through, identification of turf/shrub needs, and delivery of recommendations.
- **Termite:**
 - **Liquid Termite Service** – Trainee assists with application and safety explanation; observes service setup and documentation.
 - **Bait Install** – Trainee helps locate install points, reinforces purpose to customer, and confirms follow-up schedule.
-  **Mandatory Comment:**
List **each required field service** completed for this service focus. Include:
 - Service name
 - Date completed
 - Summary of the trainee’s role and performance
 - Notes on any coaching provided

☐ **List the Service-Specific Sales Documents Explored**

- Ensure the trainee reviews and discusses service-specific sales documents related to the week's selected service focus: pest.
-  **Mandatory Comment:** List the specific service sales documents explored this week and describe how the trainee applied them in discussion or practice.

☐ **Run 5 Sales Appointments with GM** ●

- Ensure the trainee actively led or assisted in five customer sales conversations.
-  **Mandatory Comment:** Summarize the trainee's involvement in the five sales conversations, including whether they led or assisted and any notable observations.

☐ **Secure 1 Pass-It-On Referral (Last Chance!)** ●

- Confirm that the trainee successfully requested and documented at least one Pass-It-On Referral if not completed in Week 2 or Week 3.
-  **Mandatory Comment:** If the referral was secured this week or previously, enter "Completed" and provide a brief note on the referral. If it was not secured, explain why and how it will be addressed in follow-up coaching.
-   **They must be coached on referral expectations before completing their final evaluation. This will be noted and may be addressed during their final evaluation.**

☐ **Complete Service-Specific Coursework on Massey University**

- Ensure the trainee has completed any required Massey University courses related to the week's selected service focus.

Section 3: Training Guide Modules Completion

☐ **Complete Module 8: Time & Territory Management**

- Ensure the trainee actively participated in discussions and exercises related to scheduling, time-blocking, and sustainable work habits.
- Confirm that the trainee completed the daily planning, route optimization, and time-waste reflection activities.

Date: _____ **Time:** _____

☐ **Complete Module 9: Final Evaluation Preparation** ●

- Confirm that the trainee reviewed prior feedback, practiced evaluation scenarios, and completed all workbook prep materials.
- Ensure the trainee understands the structure, expectations, and logistics of the Final Evaluation.
-  **Mandatory Comment:** Describe how the trainee demonstrated readiness for their Final Evaluation. Include any coaching provided and highlight one strength they showed during preparation.

Date: _____ **Time:** _____

☐ **Final Evaluation is Scheduled** ●

-  **Mandatory Comment:** Enter the date/time of the Final Evaluation and confirm that all three sales packets have been submitted to the evaluator (Regional Manager) as required.

Section 4: End-of Week-Review

☐ **Final Summary of Trainee Progress** ●

-  **Mandatory Comment:** Reflect on the trainee's growth over the full training program. What are their greatest strengths at this point? What areas still need improvement? Describe how you will continue to support their development beyond training.

Date: _____ **Time:** _____

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