CHK 3010 Residential Sales Week 2 Skill Verification & Evaluation Assessment Results Upload Guide - Graph It Like You Mean It!

This guide will help you upload the task which verifies the completion and documentation of the **Graphing & Inspection Skills Evaluation** for the Residential Sales Training Program. **Do not upload this guide as proof of completion.**

This summative skills evaluation confirms the trainee's ability to independently complete a structured property inspection, create an accurate graph, and communicate findings clearly and professionally.

Evaluator Instructions

Manager Responsibilities

- Confirm that the assessment was completed by an approved evaluator.
- Ensure the completed **rubric and assessment form** are uploaded as documentation.
    - Provide structured feedback in the comment fields based on proctor input.

How to Complete This Task

- Print this list to reference if you wish.
- Scan the required items to a .pdf format.
- Name the file in the following format: Last Name_EmployeeID_Course Number_Evaluation Week
    - EX: Massey_000000_CHK3010_Week2
- Upload the file to the Massy Initial Training Paperwork Upload Portal on Armyant and submit.

4.3.1 Proctor Guide: Graph It Like You Mean It

CONDUCTING THE ASSESSMENT

Purpose: This skills assessment evaluates the new Sales Inspector's ability to conduct a full inspection, accurately measure and document property details, and create a professional graph following Massey's standards.

Pre-Assessment: Trainer Responsibilities

- Select a suitable property for the assessment (Service Center, training site, or customer location).
- Provide necessary tools and forms to the trainee.
- Review assessment expectations with the trainee beforehand if you won't be present.

ACTIVITY TIPS

- **Stay Objective!** The assessment is about verifying competency, not coaching.
- **Let the Trainee Lead!** Do not intervene unless safety or major errors occur.

Trainee Assessment Criteria (Independent Performance)

1. Conduct a structured property inspection using Massey's process.
2. Accurately measure and document property layouts for graphing.
3. Create and present a complete graph aligned with Massey's standards.
4. Confidently explain findings and justify solutions to the proctor.
5. Properly use all required tools.

Proctor Evaluation Responsibilities

1. Evaluate trainee performance using the provided Rubric.
2. **Circle the performance category and briefly explain the rating - do NOT leave comments blank!**
3. Complete the Results form.

Passing Criteria

The trainee must score "Meets Expectations" or higher in <u>all five categories</u> to pass.

To pass this assessment, the trainee must score "**Meets Expectations**" or higher in all five categories.

- If **one** category is marked "**Needs Improvement**", the trainee may receive immediate coaching and attempt a retest of **that particular element** right away.
- If **two or more** categories are marked "**Needs Improvement**", the trainee must r**epeat the full assessment after additional training.**

Retest Allowances:

- **First Retest**: May be conducted immediately following targeted feedback and correction from the trainer.
- **Second Retest**: Allowed only after re-teaching and additional practice. Trainer must confirm the trainee is ready to proceed.
- **Third failure**: The trainee's progress and training plan must be reviewed by a Regional Manager or Sales Director. Any further retests require their approval and oversight.

4.3.1 Proctor Guide: Graph It Like You Mean It

Post-Assessment: Proctor Debrief & Sign-Off

- Review the trainee's inspection process and graphing accuracy and, provide feedback.
- Complete and submit the assessment form to the General Manager. The GM will upload the assessment form to Massey University.

CHK 3010 Residential Sales Week 3 Skill Verification & Evaluation Assessment Results Upload Guide - Qualifying Massey's Benefits & Features

This guide will help you upload the task which verifies the completion and documentation of the **Skills Evaluation: Qualifying Massey's Benefits & Features** which takes place in **Week 3**. This summative evaluation confirms the trainee's ability to confidently present Massey's services, handle objections, and transition customer conversations toward a professional close using a structured scenario-based assessment. **Do not upload this guide as proof of completion.**

Evaluator Instructions

Manager Responsibilities

- Confirm that the assessment was completed by an approved evaluator.
- Ensure the completed **rubrics and assessment form** are uploaded as documentation.
    - Provide structured feedback in the comment fields based on proctor input.

How to Complete This Task

- Print this list to reference if you wish.
- Scan the required items to a .pdf format.
- Name the file in the following format: Last Name_EmployeeID_Course Number_Evaluation Week
    - EX: Massey_000000_CHK3010_Week3
- Upload the file to the Massy Initial Training Paperwork Upload Portal on Armyant and submit.

Required Items

Included in this section are images of the required pages along with their page numbers in the Trainer Resource Guide. **You must print these pages from the Trainer Resource Guide and complete them.**

As a reminder, this evaluation assessment has three (3) rounds of roleplay and, therefore, three (3) rubrics.

1. **Evaluation Rubric Forms:**
    a. **Page 200 – Rubric 1**
    b. **Page 202 – Rubric 2**

CONDUCTING THE ASSESSMENT

Purpose: This skills assessment evaluates the Sales Inspector's ability to confidently present Massey's services, handle objections, and transition conversations effectively.

Pre-Assessment: Trainer Responsibilities

- Identify an appropriate location for the assessment (Service Center property, designated training site, or customer location).
- Ensure the trainee has any necessary tools and forms:
- Review expectations with the trainee beforehand if you won't be present.

Pre-Assessment: Proctor Responsibilities

- Confirm the assessment format (in-person at a designated service center or remote via Teams).
- Ensure you understand the expectations and structure of the assessment.
- Review the Assessment Guide and evaluation criteria in advance.
- Have the necessary scenario list and Assessment Rubrics ready for evaluation.

Role of the Proctor

- The proctor is responsible for leading the interaction as the customer and evaluating the trainee's ability to adapt, explain services, and manage objections.
- The proctor should stay in character throughout the assessment and avoid coaching during the interaction.
  - Feedback should be given only after the assessment is complete, unless the trainee shows distress or major failure, in which case the proctor may step out of character briefly to address the situation professionally.

During the Assessment: Deploying and Assessing the Scenarios

- The proctor selects one scenario from each category at random to assess the trainee, each from a different category:
  - Skeptical/Hesitant Customer – Evaluates the trainee's ability to establish trust, handle objections, and reinforce Massey's value.
  - Price-Conscious or Confrontational Customer – Assesses how well the trainee reframes pricing concerns and manages pushback.
  - Controlled Failure Scenario – Ensures the trainee can maintain professionalism and composure when handling rejection.
- The proctor will use the Assessment Rubric provided in each category to score performance fairly and objectively by evaluating trainee's ability to:
  - Present Massey's services confidently.
  - Address customer concerns without escalating tension.
  - Transition the conversation smoothly.
  - Handle rejection professionally.

6.2.3 Proctor Guide: Qualifying Massey's Benefits & Features

- The trainee must adapt their approach to the scenario while demonstrating confidence and clarity.
- The trainer should not be present during the assessment.

Proctor Evaluation Responsibilities

1. Evaluate trainee performance using the provided Rubric.
2. **Circle the performance category and briefly explain the rating.**
3. Complete the Results form.

Passing Criteria

The trainee must score "Meets Expectations" or higher in at least 11 out of 15 total rubric categories across all three scenarios.

- No more than 2 "Needs Improvement" scores per scenario rubric.
- If a trainee receives 3 or more "Needs Improvement" scores in any one scenario rubric, that scenario is considered failed.
- If a trainee fails two or more scenarios, a full retest is required after additional training.
- If a trainee fails only one scenario, targeted coaching and a partial retest may be assigned at the trainer's and proctors agrees discretion.

Retest Guidelines:

Retest Allowances:

- **First Retest**: May be conducted immediately following targeted feedback and correction from the trainer.
- **Second Retest**: Allowed only after re-teaching and additional practice. Trainer must confirm the trainee is ready to proceed.
- **Third failure**: The trainee's progress and training plan must be reviewed by a Regional Manager or Sales Director. Any further retests require their approval and oversight.

Post-Assessment: Proctor Debrief & Sign-Off

- Review the trainee's inspection process and graphing accuracy.
- Provide feedback on strengths and areas for improvement.
- Complete and submit the assessment form to the General Manager. The GM will upload the assessment form to Massey University.

199

CAT. 1 SKEPTICAL/HESITANT CUSTOMERS

These customers are unsure about the need for Massey's services and require strong reassurance.

OPTION 1: THE "I HAVEN'T HAD ISSUES" CUSTOMER

Customer: "I don't really have a problem right now. Why should I sign up for something I don't need?"

- **Challenge:** The trainee must position Massey's services as a **preventative investment** rather than a reactive fix.
- **Proctor Notes:** See if the trainee **avoids fear-based selling** and instead **reinforces the value of proactive protection.**

OPTION 2: THE "MY SERVICE WORKS JUST FINE" CUSTOMER

Customer: "I've already got a company, and they seem to do the job just fine. Why switch?"

- **Challenge:** The trainee must differentiate Massey's services **without bashing competitors.**
- **Proctor Notes:** See if the trainee **effectively qualifies Massey's advantages and service differentiators.**

OPTION 3: THE "SKEPTICAL OF THE SCIENCE" CUSTOMER

Customer: "This all sounds nice, but do I really need an inspection graph and all this stuff? Pest control is just spraying chemicals and sprinkling dust, right?"

- **Challenge:** The trainee must simplify the **importance of Massey's methodology** without overwhelming the customer.
- **Proctor Notes:** Look for **clear, benefit-driven explanations** rather than overly technical details.

201

Cat. 2 Price-Conscious or Confrontational Customers

These customers either focus on cost or push the trainee to prove the service's value.

OPTION 1: THE "I CAN'T AFFORD THAT" CUSTOMER

Customer: "This all sounds great, but I just don't have the money right now."

- **Challenge:** The trainee must position Massey's service as a **long-term investment rather than an immediate expense.**
- **Proctor Notes:** See if the trainee **frames the conversation around value, cost savings, and guarantees. protection.**

OPTION 2: THE "MAKE ME WANT IT" CUSTOMER

Customer: "Alright, convince me. Why should I spend my money on this, and on you?"

- **Challenge:** The trainee must take control of the conversation **without becoming defensive.**
- **Proctor Notes:** Look for **confidence and structured selling points** rather than excessive persuasion.

OPTION 3: THE "DISCOUNT DEMANDER" CUSTOMER

Customer: "I like it, but I need a discount. Can you knock *something* off the price?"

- **Challenge:** The trainee must reinforce Massey's **value and pricing structure** without immediately caving to discounts.
- **Proctor Notes:** See if the trainee **handles pricing concerns professionally** while emphasizing long-term benefits.

203

Cat. 3 Controlled Failure

These customers *will not buy*, and the trainee must demonstrate professionalism while handling rejection.

OPTION 1: THE DISTRACTED CUSTOMER

Customer: "Yeah, yeah, just leave me a brochure or something. I'm busy right now."
(While dealing with screaming kids, talking/playing on the phone, etc.)

- **Challenge:** The trainee must recognize when to **push forward or step back professionally.**
- **Proctor Notes:** Watch for **graceful disengagement and clear next steps,** even if that step is leaving.

OPTION 2: THE HOSTILE CUSTOMER

Customer: "I'm not interested! You people always try to sell me something I don't need! What do you want now?!"

- **Challenge:** The trainee must remain **calm, professional, and composed.**
- **Proctor Notes:** See if the trainee **keeps their composure** and **ends on a professional note** and **doesn't give into** mirroring the hostile customer's attiute or demenor.

OPTION 3: THE "I'M STICKING WITH MY COMPANY" CUSTOMER

Customer: "I've been with Mr.Pest for 15 years, and I'm not changing now."

- **Challenge:** The trainee must handle **loyalty objections** and leave a positive lasting impression.
- **Proctor Notes:** Evaluate whether the trainee **respects the customer's loyalty** while planting a potential future opportunity.

CHK 3010 Residential Sales Week 4 Final Evaluation Results Guide Results Upload Guide - Proposal Simulation & Oral Exam

Description

This guide will help you upload the task which verifies the completion and documentation of the **Final Evaluation** for the Residential Sales Training Program. This capstone skills evaluation measures the trainee's ability to independently deliver a complete sales proposal using real customer materials and respond to structured oral exam questions. **Do not upload this guide as proof of completion.**

This final evaluation is proctored by the regional manager! Trainers may not be present. The proctor leads all portions of the evaluation, scores the simulation and oral exam using standardized rubrics, and provides feedback.

Evaluator Instructions

Manager Responsibilities

- Confirm that the assessment was completed by the regional manager.
- Ensure the completed **rubrics and assessment form** are uploaded as documentation.
    - Provide structured feedback in the comment fields based on proctor input.

How to Complete This Task

- Print this list to reference if you wish.
- Scan the required items to a .pdf format.
- Name the file in the following format: Last Name_EmployeeID_Course Number_Evaluation Week
    - EX: Massey_000000_CHK3010_Week4
- Upload the file to the Massy Initial Training Paperwork Upload Portal on Armyant and submit.

Required Items

Included in this section are images of the required pages along with their page numbers in the Trainer Resource Guide. This is for reference only; you must print these pages from the Trainer Resource Guide and complete them.

1. **Sales Proposal Simulation Rubric Form: Page 262**
2. **Oral Exam Rubric Forms: Pages 264-266**
3. **Evaluation Results Form: Pages 267-268**

9.1.2 Final Evaluation

GOAL

To assess the trainee's ability to independently conduct a complete sales proposal, including presenting a solution, addressing customer concerns, closing the sale, and completing all related documentation, using real customer materials in a simulated customer interaction.

DETAILS

- ESTIMATED TIME: Variable
- DELIVERY MODE: Assessment
- FACILITATOR: Regional Manager and/or Sales Director

OBJECTIVES

By the end of this activity, the trainee and trainer will:

- Analyze inspection findings and customer context to support real proposals.
- Clearly define the problem and present service-specific solutions using Massey's offerings.
- Engage professionally with a simulated customer, including handling objections.
- Close each proposal confidently and transition into clear next steps.
- Complete all required sales documentation accurately and thoroughly.
- Respond to oral questions covering key sales process concepts not observed during the simulation.

ACTIVITY OVERVIEW

This final evaluation is a simulation-based assessment designed to measure the trainee's ability to present and defend real-world service proposals. The trainer will help the trainer select and submit 3 actual sales packets—each representing a different service—that the trainee completed during training.

During the simulation, the trainee will present each proposal to the evaluator, who will act as the customer. The evaluator can introduce questions, objections, or disengaged behavior to assess the trainee's ability to explain services clearly, handle concerns professionally, and close each sale. The assessment concludes with a structured oral exam to evaluate additional sales knowledge not observed during the proposals.

This capstone evaluation confirms the trainee's readiness to operate independently in the field and ensures their documentation, delivery, and decision-making meet Massey's standards.

Phase	Time (Min.)	Purpose
1. Live Proposal Simulation	~60	The trainee presents all 3 services from their submitted packets to the proctor, who acts as the customer. The proctor introduces questions and objections to assess the trainee's communication, objection handling, and closing skills for each proposal.
2. Oral Exam	15-20	Respond to a series of structured questions covering topics not directly observed during the proposal (e.g., prospecting, introductions, securing referrals).
3. Debrief	30	Proctor will provide structured feedback to the trainee and trainer on their performance in the simulated proposal presentation and oral exam and any next steps which need to be taken.

9.1.2 Final Evaluation

TRAINER'S ACTIONS & CHECKLIST

Before the Assessment

- [ ] Confirm whether the assessment will take place at:
  - At a **designated testing site** (e.g., service center) with a live proctor.
  - Via a **remote Teams meeting** with the proctor conducting the evaluation virtually.
- [ ] Confirm the d**ate, time, and platform/location** with both the trainee and the proctor.
- [ ] Ensure the **proctor has received the trainee's selected evaluation submissions no later than 3 business days prior to the evaluation date.**
- [ ] Ensure the proctor has access to the proposal rubric and oral exam question pool.
- [ ] Conduct any final coaching to address lingering concerns in proposal delivery or documentation.

During the Assessment

- [ ] The **trainer should not be present** during the assessment.
- [ ] The **proctor will lead** the evaluation and administer the oral exam portion.

Post Assessment

- [ ] **Proctor Debrief**: The proctor provides feedback on the trainee's performance to the trainer.
- [ ] T**rainer Follow-Up**: Take next steps based on the trainee's results.

Documentation & Reporting

- [ ] The proctor submits the **completed rubric and trainee materials** to the General Manager or Trainer.
- [ ] The **General Manager/Trainer logs the results** and sends the documentation to Massey University for training records.

QUICK TIPS

- ✶ **Set the Trainee Up for Success!** Ensure they understand expectations in advance.
- ✶ **Let the Proctor Lead!** Let the Proctor Lead: The trainer should not intervene once the assessment begins.
- ✶ **Encourage Realism:** The trainee should treat this simulation like a real customer appointment.
- ✶ **Review the Results!** After the proctor submits feedback, discuss outcomes and growth opportunities with the trainee.

TRAINER MATERIALS

- Assessment Guide

9.1.2 Proctor Guide: Final Evaluation

CONDUCTING THE ASSESSMENT

Purpose: This final evaluation is a simulation-based assessment designed to measure the trainee's ability to conduct a complete and professional sales proposal. The trainee will present multiple real-world proposals selected from their sales experience with Massey. These proposals will be delivered to the evaluator, who will act as the customer. The simulation will evaluate the trainee's ability to define problems, present service-specific solutions, handle objections, and close the sale.

The assessment also includes an oral exam portion to confirm the trainee's understanding of other key sales concepts.

Pre-Assessment: Trainer Responsibilities

- Confirm the assessment date, time, and whether it will be conducted in-person or virtually.
- Email the trainee's 3 completed sales packets to the proctor no later than 3 business days prior to the evaluation.
- Review expectations with the trainee and ensure they are prepared to present each proposal professionally.
- Provide any final coaching on proposal transitions, objection handling, and documentation accuracy.

Pre-Assessment: Proctor Responsibilities

- Review the submitted sales packets and prepare:
  - Notes on any questions or concerns about each proposal.
  - Points where you plan to introduce objections, push-back, or customer behavior (e.g., hesitant, disinterested, distracted, etc.)
- Review the Proposal Simulation Rubric and Oral Exam questions in advance.

Need some help or ideas? Check out page 261 for some suggestions.

Role of the Proctor

- Act as the customer throughout the proposal simulation.
- Remain in character and introduce any objections or questions during each proposal.
- Do not coach or provide feedback until the full simulation and oral exam are complete.
- Administer the Oral Exam after the final proposal has been delivered.
- Score both components using the appropriate rubrics.

Proctor Evaluation Responsibilities

1. Evaluate trainee performance using the provided Rubric.
2. **Circle the performance category and briefly explain the rating. DO NOT leave comments blank!**
3. Complete the Results form.

9.1.2 Proctor Guide: Final Evaluation

Proposal Simulation: Passing Criteria

- The trainee must score Meets Expectations or higher ***in all*** primary rubric categories.
- One "Needs Improvement" may be allowed with targeted coaching.
- Two or more "Needs Improvement" ratings require a full simulation retest.

Proposal Simulation: Retest Guidelines:

- 1st Retest: Allowed after trainer-led coaching and corrective practice.
- 2nd Retest: Only with trainer sign-off. A new set of proposals must be used.
- 3rd Attempt: Requires Regional Manager or Sales Director approval and evidence of additional training.

Oral Exam: Passing Criteria

- The trainee must score Meets Expectations or higher in 4 of 5 categories.
- One "Needs Improvement" triggers a targeted retest for that category.

Oral Exam: Retest Guidelines:

- 1st Retest: Allowed after targeted coaching with a new question.
- 2nd Retest: Requires trainer sign-off. Use a different question.
- 3rd Attempt: Requires Regional Manager or Sales Director approval and documented retraining.

Post-Assessment: Proctor Debrief & Sign-Off

- Debrief with the trainee and trainer to review strengths and areas for improvement.
- Submit completed rubrics and trainee materials to the General Manager or Trainer.
- Ensure results are recorded in Massey University for training documentation.

9.1.2 Proctor Guide: Objections and Customer Behaviors Ideas

How to Use These During Evaluations

Pick one or two mild challenges per proposal. You can use the ideas below, or think of your own ***provided they are realistic***.

You're not trying to "beat up" the trainee—you're checking if they:

- Stay professional and confident
- Listen without getting defensive
- Reframe concerns and continue moving the conversation forward

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General Objections or Behaviors (Applicable to Any Service)

- Cost Concern: "It sounds expensive. I'm not sure it's worth it."
- Delay Tactic: "Let me think about it and call you later."
- Skepticism: "I've had bad experiences with companies making promises before."
- Disinterest / Low Engagement: Customer seems distracted, uninterested, or in a rush.
- Mild Defensiveness: Customer acts defensive when problems are pointed out (e.g., regarding property conditions or home maintenance).

Pest Control Specific

- Pet Safety Concern: "Last time I used a pest company, my dog got sick. I'm worried about chemicals."
- Doubts About Effectiveness: "I've tried pest control before. It didn't solve the problem."
- DIY Confidence: "I usually just spray the stuff from the hardware when I see bugs. Why would I need a service?"

Termite Specific

- No Visible Damage Doubt: "I don't see any damage—are you sure there's a problem?"
- Insurance Confusion: "Wouldn't my homeowner's insurance cover termite damage anyway?"
- Cost vs. Likelihood Skepticism: "I don't think termites are really a big risk around here."

Lawn / Landscape Specific

- Pride Sensitivity: Customer becomes defensive if it sounds like you're suggesting they aren't taking care of their lawn properly.
- Chemical Safety Concern: "I'm worried about lawn treatments with kids and pets running around."
- Immediate Result Expectation: "Will my yard look better next week? I don't want to wait months."

9.1.2 Rubric 2: Oral Evaluation

Select one question from each of the five categories: Prospecting, Introductions, Inspections, Closing, and Referrals. Evaluators may select from the provided questions or create their own, ensuring alignment with the Massey Services Sales Manual and the role. If the proctor creates their own question, they must write it into the rubric.

Evaluation Guidance

For each question, the evaluator should assess the trainee's response based on these criteria:

- **Clarity**: Is the response easily understood? Does the trainee articulate the concepts in a clear and organized manner?
- **Accuracy**: Is the information presented correct and in line with the Massey Services' expectations? Does the trainee demonstrate a solid understanding of the material?
- **Professionalism**: Does the trainee present themselves in a professional manner? Do they use appropriate language and demonstrate the expected demeanor of a Massey Services Sales Inspector?

Rating Scale:

- **NI (Needs Improvement):** The response demonstrates a significant lack of understanding or omits key information. The response may be unclear, inaccurate, or unprofessional.
- **ME (Meets Expectations):** The response is satisfactory and demonstrates a general understanding of the topic. The trainee provides accurate information with reasonable clarity and professionalism.
- **EE (Exceeds Expectations):** The response is thorough, accurate, and demonstrates a strong command of the subject matter. The trainee communicates clearly, concisely, and professionally, and may provide insightful examples or applications.

Feedback Documentation:

If the evaluator marks "Needs Improvement" (NI) for a trainee's response, they must provide written feedback in the "Notes" section. This written feedback must:

- **Clarify why the response did not meet expectations:** The feedback should specifically identify the shortcomings of the response.
- **Provide a specific suggestion on how the trainee can improve to reach "Meets Expectations":** The feedback should offer actionable advice on how the trainee can enhance their understanding or delivery.
- Example:
  - **Clarify why the response did not meet expectations:** *The trainee asked if the customer was interested but didn't use a structured closing technique to guide them toward a decision*
  - **Provide a specific suggestion on how the trainee can improve to reach "Meets Expectations":** *Coach the trainee on closing techniques like the Alternative or Assumptive Close. Have them practice different approaches using real objections they've encountered.*