PROCTOR GUIDE: ASSESSMENT FORM: RUBRIC & COMMENTS

Category	Needs Improvement	Meets Expectations	Exceeds Expectations	Proctor Notes
Inspection Process	Skipped steps, inconsistent or incomplete approach. Missed major areas. Did not follow Massey's inside-out method.	Conducted a thorough inspection using Massey's systematic approach. Followed inside-out, clockwise process.	Demonstrated a confident, structured approach. Recognized subtle signs and adjusted techniques accordingly.	
Measurement Accuracy	Major errors in measurements, incorrect documentation, or skipped key areas.	Measurements were recorded accurately, with minimal errors. Adjustments made for unique property features.	Exceptional precision, with well-documented adjustments for irregular layouts or obstructions.	
Graph Clarity & Accuracy	Graph missing key property elements, poor labeling, lacks readability. Disorganized layout	Graph includes all required structures, entry points, problem areas, and treatment zones. Properly labeled and proportional.	Graph is highly detailed, professional, and customer-friendly. Layout is clear and enhances the sales conversation.	
Findings Explanation & Customer Communication	Struggled to articulate findings clearly or provide logical recommendations.	Findings were explained confidently and clearly, with logical recommendations. Used simple, effective language.	Findings were presented persuasively, adapting explanations to customer understanding. Strong confidence and clarity.	
Tool Usage & Documentation	Used tools incorrectly or inconsistently. Failed to document findings properly.	Used all required tools appropriately. Recorded findings clearly and professionally.	Efficient, proper use of tools with a well-structured documentation process. Minimal wasted motion.	

142 4.3.1 ASSESSMENT FORM: RESULTS

Trainee Information

- Trainee Name: _____
- Proctor Name: _____
- Assessment Date: _____ Assessment Location: _____
- Assessment Attempt: ☐ 1 ☐ 2 ☐ 3

Proctor Observations & Comments:

General Observations:

Strengths Displayed:

Areas for Improvement:

4.3.1   ASSESSMENT FORM: RESULTS

Evaluation Rating & Next Steps:

Next Steps (if failed second retest or needing improvement)

Read the directions in the box on the next page and select the category, then follow the directions to upload these results.

Evaluation Component	Pass	Retest	Final Attempt – Additional Training Required
Inspection & Graph	☐	☐	☐
Notes			

- If this is the **first or second attempt,** "Needs Improvement" indicates the trainee may retest after coaching from the trainer.
- If this is the **third attempt,** any "Fail" indicates the trainee has not demonstrated readiness after multiple opportunities.
  - ▸ **No further retests should be scheduled** without approval from a Regional Manager or Sales Director.
  - ▸ A training audit may be initiated to determine next steps or reassignment.

Proctor Signature: _____

Trainee Signature: _____

Trainer Signature: _____

Date: _____

This assessment form and the rubric must fully filled out, and uploaded to Massey University in SAL 3010: Skill Verification & Evaluation Assessment - Graph It Like You Mean It!

CAT. 1   RUBRIC: SKEPTICAL/HESITANT CUSTOMERS

Category	Needs Improvement	Meets Expectations	Exceeds Expectations	Proctor Notes
Building Trust & Engagement	Trainee struggles to engage the customer, fails to address skepticism, or over-explains without connecting to customer concerns.	Trainee maintains engagement and addresses skepticism with clear, benefit-driven responses. Builds moderate trust.	Trainee confidently engages the customer, naturally addressing concerns and reinforcing Massey's credibility. Establishes strong trust.	
Explaining Massey's Value	Trainee provides unclear or overly technical explanations. Fails to connect features to benefits.	Trainee explains Massey's value clearly, connecting features to benefits in a way the customer understands.	Trainee presents Massey's differentiators persuasively, adapting explanations based on customer reactions.	
Handling Skepticism Professionally	Struggles to reframe objections or reinforce service importance. May become defensive or uncertain.	Acknowledges concerns and provides logical, structured responses. Remains professional.	Skillfully reframes skepticism, using examples, testimonials, or facts to reinforce service need.	
Guiding the Conversation	Trainee struggles to steer the discussion, allowing the customer to dominate or derail it.	Trainee keeps the conversation focused, guiding the customer toward service understanding.	Trainee proactively leads the conversation, addressing concerns before they arise.	
Closing the Interaction	Trainee ends the conversation abruptly or without a clear next step.	Trainee transitions smoothly to a closing statement or scheduled follow-up.	Trainee confidently closes, ensuring the customer leaves with a strong impression of Massey's value.	

CAT. 2 — RUBRIC: PRICE-CONSCIOUS OR CONFRONTATIONAL CUSTOMERS

Category	Needs Improvement	Meets Expectations	Exceeds Expectations	Proctor Notes
Confidence & Professionalism	Trainee appears hesitant, defensive, or struggles to control the conversation.	Trainee remains composed, guiding the conversation confidently while respecting the customer's concerns.	Trainee takes full control of the conversation, confidently handling objections while maintaining professionalism.	
Framing Value Over Cost	Focuses too much on price without reinforcing long-term value. May struggle to justify Massey's pricing.	Frames pricing as an investment, emphasizing benefits over cost without overselling.	Persuasively communicates Massey's value, reinforcing long-term benefits and using real-world comparisons.	
Handling Pushback & Challenging Customers	Struggles to redirect the conversation when challenged. May become defensive or overly aggressive.	Navigates objections professionally, maintaining control of the conversation while reinforcing Massey's advantages.	Seamlessly manages objections, using rapport, storytelling, and confidence to turn skepticism into interest.	
Managing Customer Expectations	Overpromises or provides unclear service expectations.	Clearly communicates what Massey's service includes and does not include.	Effectively sets expectations while reinforcing long-term benefits.	
Adapting to Customer Reactions	Struggles to pivot responses based on customer cues.	Adjusts approach based on customer reactions, maintaining composure.	Reads the customer effectively, adapting in real time to maintain engagement.	

Category	Needs Improvement	Meets Expectations	Exceeds Expectations	Proctor Notes
Maintaining Professionalism Under Pressure	Trainee becomes flustered, defensive, or disengages unprofessionally.	Remains professional and composed, even when the customer is unreceptive.	Handles rejection with confidence, leaving a positive impression and keeping the door open for future engagement.	
Recognizing When to Disengage	Pushes too hard or disengages too soon, missing opportunities to reinforce Massey's presence.	Knows when to disengage professionally, ensuring Massey is still seen positively.	Ends the conversation on a strong note, planting a future opportunity for re-engagement.	
Leaving a Lasting Impression	Customer is left frustrated or uninterested due to poor interaction management.	Customer leaves the interaction with a neutral impression of Massey.	Customer, despite rejecting service, respects the trainee's professionalism and Massey's brand.	
Active Listening & Response	Fails to acknowledge customer concerns, repeating scripted responses.	Listens actively and responds thoughtfully to customer objections.	Uses active listening to engage the customer and tailor responses effectively.	
Professional Demeanor & Confidence	Appears uncertain or unprepared, impacting customer trust.	Maintains professionalism and confidence, even when facing rejection.	Displays high confidence, keeping the interaction respectful and engaging despite customer pushback.	

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.

6.3.1 ASSESSMENT FORM: RESULTS

Trainee Information

- Trainee Name: _____
- Proctor Name: _____
- Assessment Date: _____ Assessment Location: _____
- Assessment Attempt: ☐ 1 ☐ 2 ☐ 3

Scenarios Used

The proctor should indicate which scenarios were selected for the assessment.

1. Skeptical/Hesitant Customer: Option #: _____
2. Price-Conscious or Confrontational Customer: Option #: _____
3. Controlled Failure Scenario, Option #_____

Proctor Observations & Comments:

General Observations:

Strengths Displayed:

Areas for Improvement:

6.3.1   ASSESSMENT FORM: RESULTS

Final Evaluation & Next Steps:

Evaluation Component	Pass	Retest	Final Attempt – Additional Training Required
Category 1	☐	☐	☐
Category 2	☐	☐	☐
Category 3	☐	☐	☐
Notes			

- If this is the **first or second attempt,** "Needs Improvement" indicates the trainee may retest after coaching from the trainer.
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  - ▸ **No further retests should be scheduled** without approval from a Regional Manager or Sales Director.
  - ▸ A training audit may be initiated to determine next steps or reassignment.

Next Steps (if failed second retest or needing improvement)

Proctor Signature: _____

Trainee Signature: _____

Trainer Signature: _____

Date: _____

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9.1.2 RUBRIC 1: PROPOSAL SIMULATION

Category	Needs Improvement	Meets Expectations	Exceeds Expectations	Proctor Notes
Sales Process Execution	Misses or jumbles key steps across proposals; lacks logical flow or consistency.	Follows a clear, structured flow for each proposal with appropriate transitions.	Delivers each proposal with strong structure and adjusts flow based on customer reactions or proposal needs.	
Proposal Delivery	Lacks clarity, confidence, or persuasive framing; explanation is incomplete or overly scripted.	Communicates the value of each service clearly and confidently with appropriate tone and structure.	Delivers polished, customer-focused proposals with strong engagement, adapting to each service type.	
Use of Sales Materials	Fails to reference or integrate key elements from inspection reports, graphs, or customer notes.	References inspection details, graphs, and relevant documentation to support the proposal.	Seamlessly integrates all materials into the sales conversation to build value and trust.	
Customer Engagement & Objection Handling	Appears disengaged or reactive; struggles to address objections or misreads cues.	Listens attentively, responds to objections professionally, and adjusts delivery as needed.	Actively engages the "customer," responds with empathy, and reframes objections to move the sale forward.	
Closing & Next Steps	Does not attempt to close or fails to define clear next steps.	Clearly asks for the sale and outlines logical next steps with the customer.	Uses tailored closing techniques across services, confirms agreement, and reinforces customer confidence.	
Sales Packet Accuracy & Completeness	One or more packets are incomplete, contain errors, or lack required forms.	Packets are complete with accurate documentation and minimal errors.	All packets are professionally prepared, well-organized, and ready for processing.	
Professionalism & Demeanor	Appearance, tone, or behavior is inconsistent or unprofessional; lacks confidence.	Maintains professional tone, clear communication, and confident presence throughout.	Consistently exhibits polish, presence, and professionalism across all proposals.	

Prospecting – Choose One Question or Write Your Own	NI	ME	EE
Describe the '4+1 Program' and explain how it's used to generate new leads. What are the key steps you would take when cold calling at the time of an inspection, and what materials would you use?	☐	☐	☐
Explain the Reinstatement Program. What steps would you take to contact a discontinued customer, and what key questions would you ask to try and bring them back?	☐	☐	☐
Describe at least three methods for generating appointments for termite inspections. Which method do you think is most effective and why?	☐	☐	☐
	☐	☐	☐
Notes			

Introductions – Choose One Question or Write Your Own	NI	ME	EE
Walk me through the steps of a proper introduction when meeting a customer for a pest control service call. What are some key questions you would ask to understand the customer's needs?	☐	☐	☐
You arrive at a customer's home for a lawn care service call. How would you introduce yourself and begin the interaction, and what information are you trying to gather from the customer?	☐	☐	☐
Explain the importance of the introduction step in the sales process. What are some things to avoid to make a good first impression?	☐	☐	☐
	☐	☐	☐
Notes			

Inspections – Choose One Question or Write Your Own	NI	ME	EE
Describe the general inspection process, including where you typically begin and what key exterior areas you inspect. Why is it important to offer comprehensive solutions?	☐	☐	☐
How do you approach a landscape inspection, and what are some of the key things you look for when assessing a lawn? How do you initiate a conversation with a homeowner about potential lawn issues?	☐	☐	☐
Explain the importance of graphing during an inspection. What are some key things to include in your graphing and what should it be used for?	☐	☐	☐
	☐	☐	☐
Notes			

Closing – Choose One Question or Write Your Own	NI	ME	EE
Describe the 'Alternative Close' and the 'Assumptive Close'. Give an example of how you would use each.	☐	☐	☐
Explain the 'Cost of Ownership Close' and the '1-2-3 Close'. When might you use these, and what do you hope to achieve with each?	☐	☐	☐
What are some of the payment and promotional options you can offer a customer? How do you determine which closing techniques and options are most appropriate for a given customer?	☐	☐	☐
	☐	☐	☐
Notes			

Referrals – Choose One Question or Write Your Own	NI	ME	EE
Describe the 'Pass-It-On' program. When should you introduce this to a customer, and what steps do you take to ensure you get referrals?	☐	☐	☐
What is the follow-up process for referrals? What do you do if a customer provides a referral, and what do you do if they don't?	☐	☐	☐
Why are referrals important in the sales process? How do referrals contribute to building long-term customer relationships and business growth?	☐	☐	☐
	☐	☐	☐
Notes			

9.1.2   Assessment Form: Results

Trainee Information

- Trainee Name: _____

- Proctor Name: _____

- Assessment Date: _____ Assessment Location: _____

- Assessment Attempt: ☐ 1 ☐ 2 ☐ 3

Proctor Observations & Comments:

General Observations:

Strengths Displayed:

Areas for Improvement:

9.1.2 ASSESSMENT FORM: RESULTS

Final Evaluation & Next Steps:

Next Steps (if failed second retest or needing improvement)

Evaluation Component	Pass	Retest	Final Attempt – Additional Training Required
Proposal Simulation	☐	☐	☐
Oral Exam	☐	☐	☐
Notes			
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Proctor Signature: _____

Trainee Signature: _____

Trainer Signature: _____

Date: _____

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