

# Account Manager Initial Training Guide

## Trainer's Guide: Instructions for the Manager

The **Account Manager Initial Training Program** is a six-week program that begins on the team member's first day with Massey Services. Training is personally supervised by a qualified manager and requires *daily* interaction, structured activities, and documented progress.

### Manager Responsibilities

- **Daily Interaction:** Spend time with the new team member each day to confirm that learning objectives and required activities are being met.
- **Efficient Time Management:** Ensure the team member spends their time engaged in training activities.
- **Delegation:** If you are unavailable, assign the team member to someone who understands it is their responsibility to teach, coach, and meet that day's objectives. Remember to follow up with that team member to learn how that activity went and know your next steps.
- **Progress Monitoring:** Keep training on schedule and obtain daily feedback from the team member, addressing any concerns promptly.
- **Readiness for Fieldwork:** If, at the end of six weeks, the team member is not prepared to work unsupervised, extend the program until you are confident, they can perform their responsibilities and deliver excellent customer service.
- **Documentation:** Correctly completing and submitting initial training documents like licensing applications and field training checklists *on time*.
  - Ensure all completed forms are scanned and then submitted to the **Initial Training Paperwork Upload Portal** which can be found on **Armyant (the intranet)**, the MILO homepage, or at the top any state initial training page.
  - These items are noted with  in the Training Guide to help you know when to submit them.

### Day One Requirements

- Sign the team member into **Massey University**.
- Print any required state documents for completion.
- Print **CHK 2001 Account Manager Initial Field Training Checklists**.
- Issue all assigned tools, PPE, and equipment.
- Begin field observation and classroom learning.

## Training Components

- Classroom training in Massey University at the service center or on the iPad in the field.
- Field training under direct supervision.
- Use of the **initial field training checklists** to guide daily field activities.
- Uploading of all completed state and/or regulatory ad licensing documents into Massey Initial Training Paperwork Portal when indicated.

**⚠ Follow the Program! Do not rush a new team member through training. The first few weeks set the foundation for their long-term success and service quality.**

## Initial Field Training Checklists

All **Initial Field Training Checklists** are available for download in the **Printable Resources** section of this guide. Each checklist includes directions on the front page explaining its use.

- Once all sections are finished, **scan and upload** the checklist to the **Initial Training Paperwork Upload Portal**.
- Complete each checklist section as indicated in the Training Guide schedule.
- Provide **dates, times, and comments** where required. Comments should be detailed, specific, and legible.
- Verify that all required fields are complete before progressing.
- Write clearly! Incomplete or unreadable checklists may be considered invalid.

## Lesson Schedule

- Follow the schedule provided.
- Lessons are designed to be completed over time.
  - **Do not allow more than the assigned lessons each week.**
  - Divide the weekly load into manageable daily segments.
- Completing too many lessons in one sitting reduces retention and is poor training.

**⚠ Exception:** There may be days during the training period that keeps the team member from going to the field to train. In these cases, they may complete more than a day's allotted lessons, but no more than two days' worth in one sitting.

## Training Guide: Schedule

This week-by-week guide details the required online service training courses, field training checklists, and licensing and certification documents. Use it to monitor progress and

ensure timely completion of each item. Upload completed files as scheduled. Click here for a printable version.

### Day 1

- LIC 3000 Licensing Application Authorization
- LIC 3003 State Licensing Applications: Account Manager 
  - What do you submit for your team member?
    - FL = Florida Licensing Packet
    - GA = Georgia Employee Registration Exam Report.
      - **Note: For Georgia only! This is submitted in the final week!**
  - All Other States = Nothing

### Week 1

- SAF 1011 Safe Driver Improvement Course Initial
- ACT 1038 Week One Field Training Assignment
- ACT 1001 Massey Culture & History
- ACT 1002 Scope of Services
- ACT 1003 Job Description, Responsibilities, & Sales Policies & Procedures
- ACT 1004 The Call
- ACT 1005 The Counselor Selling Approach
- ACT 1006 Introduction to the Massey Commercial Services Selling Process
- PPP 1001 Pest Initial
- PPP 1002 Customers Relations
- PPP 1003 MOA & Classes
- PPP 1004 Formulations
- PPP 1008 Service Policy & Procedure
- PPP 1009 Materials & Equipment
- PPP 1011 The Basics
- PPP 1012 Basic Entomology
- PPP 1013 Ant Behavior & Biology
- PPP 1014 Ants
-  CHK 2001 Account Manager Initial Field Training Checklists
  - *Checklist Section to Complete: Week 1*

## Week 2

- ACT 1039 Week Two Field Training Assignment
- ACT 1008 Creating Business Opportunities
- ACT 1009 Telephone Basics
- ACT 1010 Using the Telephone to Set Sales Appointments
- ACT 1011 Prepare Thoroughly for Every Call
- ACT 1012 Procedural & Technical Aspects of our Massey Commercial Services
- PPP 1026 Initial Treatments
- PPP 1027 Cockroaches
- PPP 1028 German Cockroaches
- PPP 1029 Expanded & Regular Services
- PPP 1030 Bees & Wasps
- PPP 1031 Spiders & Scorpions
- PPP 1032 Fleas & Ticks
- PPP 1033 Mosquitoes
- PPP 1034 Bed Bugs
- PPP 1035 Stored Product Pests
- PPP 1037 Fabric Pest
- PPP 1038 Occasional Invaders
- PPP 1039 Rodents
- PPP 1040 Flies
- ACT 1013 Using Traditional Mail & Email Effectively
- ACT 1014 Developing Your 30 Second Commercial
- ACT 1015 Using Social Media to Generate More Sales
- CHK 2001 Account Manager Initial Field Training Checklists
  - *Checklist Section to Complete: Week 2*
- NPMA GreenPro: Begin coursework

## Week 3

- ACT 1040 Week Three Field Training Assignment
- ACT 1016 Introduction to Customer Relationship Management (CRM)
- CRM 1010 Salesforce Commercial Training

- ACT 1017 Building the Relationship with Your Prospect – The Relating Process
- ACT 1018 Qualifying the Opportunity (Part One) – The Discovery Process
- ACT 1019 How to Perform a Professional Inspection
- CHK 2001 Account Manager Initial Field Training Checklists
  - *Checklist Section to Complete: Week 3*
- NPMA GreenPro: Continue coursework

#### **Week 4**

- ACT 1041 Week Four Field Training Assignment
- ACT 1020 Qualifying the Opportunity (Part Two) – Budgets & Decision Making
- ACT 1021 Advanced Questioning Techniques & Strategies
- ACT 1022 Developing a Winning Attitude
- ACT 1023 Food Processing/Distribution Service Standards
- CHK 2001 Account Manager Initial Field Training Checklists
  - *Checklist Section to Complete: Week 4*
- NPMA GreenPro: Continue coursework/Take exams

#### **Week 5**

- ACT 1042 Week Five Field Training Assignment
- ACT 1024 Presentation – The Advocating Process
- ACT 1025 Closing Strategies, Skills, & Techniques Setting Up the Close
- ACT 1026 Behavior & Technique Development
- CHK 2001 Account Manager Initial Field Training Checklists
  - *Checklist Section to Complete: Week 5*
- NPMA GreenPro: Take exams

#### **Week 6**

- ACT 1043 Week Six Field Training Assignment
- ACT 1027 Account Manager Post-Sale Responsibilities & Opportunities
- ACT 1028 Knowing Your Competition
- ACT 1029 Site Specific Commercial Pest Protocols
- ACT 1030 Your Roadmap to Success
- CHK 2001 Account Manager Initial Field Training Checklists 
  - *Checklist Section to Complete: Week 6*

- Upload the completed checklist!
- LIC 1008 NPMA GreenPro Certificate Upload 
- LIC 3103 State Training Record Verification: Account Manager 
  - What do you submit for your team member?
    - FL = FDACS 13665 Verification Record of Initial Employee Training Form
    - GA = Georgia SPCC Pre-Examination Training Form
    - TX = Texas 37084 Verifiable Training Record Checklist
    - All Other States = Nothing
- **Georgia team members only!**
  - LIC 3003 State Licensing Applications: Account Manager 
    - Georgia Employee Registration Exam Report