# Administrative Initial Training Guide: CSS

**Duration: 10 Days**

Administrative training includes all the resources and content needed to effectively manage office tasks, communication, and customer service in a commercial office.

## Trainer's Guide: Instructions for the Manager

The **Customer Service Specialist (CSS) Initial Training Program** is a 10-day program that begins on the team member's first day with Massey Services. Training is personally supervised by an **admin trainer** and focuses on structured learning, applied administrative tasks, and demonstrated proficiency in office operations.

**Trainer Responsibilities**

- **Daily Interaction:** Spend dedicated time with the new team member each day to review progress, clarify expectations, and ensure learning objectives are being met.

- **Guided Practice:** Observe the team member as they complete daily administrative tasks and provide immediate feedback and correction as needed.

- **Delegation:** If you are unavailable, designate another experienced office manager or admin trainer to assist. Follow up afterward to review progress and next steps.

- **Progress Monitoring:** Keep the team member on schedule with both online coursework and checklist activities. Address questions or performance gaps promptly.

- **Performance Observation:** Observe task accuracy, attention to detail, and adherence to company policies during live demonstrations (posting production, balancing reports, handling calls, etc.).

- **Documentation:** Correctly completing and submitting initial training documents like licensing applications and field training checklists *on time*.

    o 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.

    o 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 **CHK 2003 CSS Initial Training Verification Checklists.**
- Review the day-by-day training schedule and expectations.
- Begin online coursework and guided practice.

**Training Components**

- Administrative task demonstrations with hands-on practice.
- Observation and performance verification through checklist items.
- Completion of all required online courses in **Massey University**.

- Daily feedback and coaching from the admin trainer.

**Follow the Program! Under no circumstances should the new team member be rushed through the program. How you train the new team member in their first few weeks can have a tremendous impact on their success and the quality of service they will provide to our customers.**

### Initial Training Verification Checklists

All **Initial Training Verifcation 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 daily schedule outlined in the Training Guide.

- Lessons and activities are designed to reinforce accuracy, organization, and communication.
- Do not allow more than the assigned lessons per day.
- Encourage questions and discussion to strengthen understanding.

The Lessons are designed to be completed over a set time. **DO NOT** allow the team member to complete more than the assigned lessons each day. **Completing too many lessons in one day will greatly affect their ability to learn and retain the information.**

## Training Guide: Schedule

This day-by-day guide details the required online training courses and training checklists. Use it to monitor progress and ensure timely completion of each item. Upload completed files as scheduled.

**Day 1**

- ADM 1050 P&P 405A: A Payroll Time Clock
- ADM 1051 P&P 341: Overtime
- ADM 1002 Managing Overtime
- ADM 1003 Role & Curriculum Overview

**Day 2**

- ADM 1004 Basics of Navigating ServicePRO
- ADM 1005 The Scheduler

**Day 3**

- ADM 1053 P&P 107: Service Center Call Book
- ADM 1006 Handling Customer Calls
- ADM 1007 Mitel MiCollab
- ADM 1008 Call Scripts
- ✅ CHK 2003 CSS Initial Training Verification Checklists
  - Checklist Section to Complete: Section 1 - Phones
  - Checklist Section to Complete: Section 2 - Cancellation Requests

**Day 4**

- ADM 1055 Production Log
- ADM 1010 Posting & Balancing Production Assessment
- ADM 1011 Deposit - Posting & Balancing
- ✅ CHK 2003 CSS Initial Training Verification Checklists
  - Checklist Section to Complete: Section 3 - Posting Production

**Day 5**

- ADM 1056 Balancing the Deposit Log
- ADM 1057 Posting the Deposit
- ADM 1012 Posting & Balancing Deposit Assessment
- ✅ CHK 2003 CSS Initial Training Verification Checklists
  - Checklist Section to Complete: Section 4 - Deposits

**Day 6**

- ADM 1021 Collections
- ADM 1060 P&P 701 & 901: Pest Prevention Collection & Lawn Administration

**Day 7**

- ADM 1061 P&P 1103B: Lead Log Procedure
- ADM 1022 Lead Log
- ADM 1065 Update Lead Log
- ADM 1063 Verify Leads
- ADM 1064 Balance Leads
- ADM 1071 Print DCIRs

**Day 8**

- ADM 1023 Lead Log Assessment
- ADM 1031 Termite & Bait Processes
- ADM 1068 Renewal & Schedule Inspection Calls

- ✅ CHK 2003 CSS Initial Training Verification Checklists
    - Checklist Section to Complete: Section 5 - Sales Leads
    - Checklist Section to Complete: Section 6 - Termite & Bait Processes

**Day 9**

- ADM 1032 Termite & Bait Renewal Processes Assessment
- ADM 1034 A Message to Garcia

**Day 10**

- ADM 1069 Collection Calls Days 10, 11, 12, & 14
- Practice Collection Calls
- ✅ CHK 2003 CSS Initial Training Verification Checklists 🔺
    - Checklist Section to Complete: Section 7 - Accounts Receivable & Collections
    - Upload the completed checklist!