

Administrative Initial Training Guide: OM

Duration: 15 Days

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

Trainer's Guide: Instructions for the Manager

The **Office Manager (OM) Initial Training Program** is a 15-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*.
 - 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 **CHK 2002 OM 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 Verification 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
- ADM 1052 Petty Cash

Day 2

- ADM 1004 Basics of Navigating ServicePRO
- ADM 1005 The Scheduler
- ADM 1006 Handling Customer Calls
- ADM 1007 Mitel MiCollab
- ADM 1008 Call Scripts

Day 3

- ADM 1009 Posting & Balancing Production
- ADM 1053 P&P 107: Service Center Call Book
- ADM 1054 Emails, Answering Phones & Scheduling
- CHK 2002 OM 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 2002 OM 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
- ADM 1013 Creating New Customer Accounts & Programs
- ADM 1014 Pest Programs
- ADM 1015 GreenUp Programs
- ADM 1016 Termite & Bait Programs
- CHK 2002 OM Initial Training Verification Checklists
 - Checklist Section to Complete: Section 4 - Deposits

Day 6

- ADM 1058 Enter New Sales
- ADM 1017 Creating New Customer Accounts & Programs Assessment

- ADM 1018 DOR & Backlog Summary
- ADM 1019 Daily Operations Report
- CHK 2002 OM Initial Training Verification Checklists
 - Checklist Section to Complete: Section 5 - Processing New Sales

Day 7

- ADM 1059 Prepare DOR & Backlog
- ADM 1060 Balance DOR
- ADM 1020 Daily Operations Report Assessment
- ADM 1021 Collections
- ADM 1061 P&P 701 & 901: Pest Prevention Collection & Lawn Administration
- CHK 2002 OM Initial Training Verification Checklists
 - Checklist Section to Complete: Section 6 - Daily Operations Report (DOR)

Day 8

- ADM 1062 P&P 1103B: Lead Log Procedure
- ADM 1022 Lead Log
- ADM 1071 Print DCIRs

Day 9

- ADM 1063 Verify Leads
- ADM 1064 Balance Leads
- ADM 1065 Update Lead Log
- ADM 1066 Update Sales Recap
- ADM 1023 Lead Log Assessment
- ADM 1031 Termite & Bait Processes
- ADM 1068 Renewal & Schedule Inspection Calls
- CHK 2002 OM Initial Training Verification Checklists
 - Checklist Section to Complete: Section 7 - Sales Leads

Day 10

- ADM 1032 Termite & Bait Renewal Processes Assessment
- ADM 1024 Accounts Payable
- ADM 1067 Complete APs
- ADM 1069 Collection Calls Days 10, 11, 12, & 14

- Practice Collection Calls
- CHK 2002 OM Initial Training Verification Checklists
 - Checklist Section to Complete: Section 8 - Termite & Bait Processes

Day 11

- ADM 1025 Accounts Payable Assessment
- ADM 1026 Payroll
- ADM 1027 Human Resources
- ADM 1028 Human Resource Assessment
- Practice Collection Calls
- CHK 2002 OM Initial Training Verification Checklists
 - Checklist Section to Complete: Section 9 - Account Payable
 - Checklist Section to Complete: Section 10 - Payroll
 - Checklist Section to Complete: Section 11 - Human Resources

Day 12

- ADM 1029 Month End Process
- ADM 1030 Month End Assessment
- Practice Collection Calls
- CHK 2002 OM Initial Training Verification Checklists
 - Checklist Section to Complete: Section 12 - Month-End Processing

Day 13

- ADM 1033 Claims
- CHK 2002 OM Initial Training Verification Checklists
 - Checklist Section to Complete: Section 13 - Claims Reporting

Day 14

- Practice Collection Calls
- CHK 2002 OM Initial Training Verification Checklists 
 - Checklist Section to Complete: Section 14 - Accounts Receivable & Collections
 - Upload the completed checklist!

Day 15

- ADM 1070 Petty Cash Key and Petty Cash Reconciled

- ADM 1034 A Message to Garcia
- ADM 1035 OM Daily Schedule