

SECTION: CORPORATE

SUBJECT: Policy Definitions

**PP No.:** C-0**Section:** Corporate**Subject:** Policy Definitions**Approved By:** Tony Massey**Effective Date:** December 10, 2025**Last Reviewed Date:** December 10, 2025**Policy Owner:** Senior Director of Learning & Development**Definitions**

For the purposes of our policies and procedures, unless the context clearly indicates otherwise, the term:

- 1) “Creative lead” means any lead originated by an inspector/account manager via cold calling, cloverleafing/doorhangers, or referrals. The consumer contacting Massey Services as a result of creative activity must reference the inspector/account manager by name in order for it to be considered a creative lead.
  - a. Example: A consumer comes home to find a doorhanger on their door and calls Massey Services. If they reference the inspector/account manager’s name on the doorhanger, the lead will be marked as creative. Otherwise, it is an office lead.
- 2) “New Construction lead” means a lead received by the service center from the New Construction Division for the purpose of explaining our termite protection guarantee and selling Pest Prevention, GreenUP, or other services.
- 3) “Marketing (office and web) lead” means a phone call, internet request, or walk in from a prospective customer requesting information or a free inspection for any of Massey’s services.
- 4) “Reinstatement” means a sale that is restarting a cancelled program within a specific timeframe from the program cancellation date. The timeframes are:
  - a. Termite & Bait programs- within two years of the cancellation date.
    - i. Example:
      1. A bait program cancelled on 1/1/2021 and sold on 2/1/2022 (thirteen months) is a reinstate.
      2. A bait program cancelled on 1/1/2021 and sold on 2/1/2023 (twenty-five months) is not a reinstate; it is a new sale.
    - b. All other recurring services (e.g. pest, lawn, or irrigation)- within two full accounting months of the cancellation date.
      - i. Example:
        1. A pest program cancelled on 1/1/25 and sold on 3/15/25 is a reinstate. The two full accounting months are February and March.
        2. A pest program cancelled on 1/1/25 and sold on 4/15/25 is not a reinstate. The two full accounting months are February and March.
  - 5) “Sale” means a fully executed service agreement, which must include:
    - a. All required signatures: customer, inspector/account manager, and general manager.
    - b. Method of payment for at least the initial service.
  - 6) “Service lead” means any lead generated by a service technician/specialist during a service visit or generated by an administrative team member.

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- a. Example:
  - i. A service technician/specialist performing a lawn service cross sells a customer pest or termite service.
  - ii. A service technician/specialist brings the contact information of a potential customer interested in our services back to the service center.
  - iii. A customer service specialist calls off the alpha list and sets an appointment.
- 7) "Upsell" means a sale which changes the scope of an existing agreement by adding services.
  - a. Example: The addition of tree and shrub services to a lawn service is an upsell to landscape service.
  - b. Adding a service area or areas to an existing service agreement, such as adding the backyard to a front-only lawn service, does not qualify as an upsell.

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