PP No.: 1114
Section: Office Administration
Subject: Multi-Family Prospecting and Sales
Approved By: Tony Massey
Effective Date: June 1, 2014
Last Reviewed Date: August 25, 2026
Policy Owner: Division Vice President of Multi-Family

The multiple property and portfolio packaging of multi-family communities require coordination between our service center sales teams and our multi-family division.

Effective coordination and communication:

- Ensures consistent pricing and appropriate protocol selection across multiple properties managed by a single property management company or owner;
- Strengthens existing relationships at the property, regional, or corporate level of property management companies or asset managers and owners; and
- Ensures that we present ourselves as the best choice to provide services to the multi-family communities with scalable pricing and communication.

To accomplish effective coordination and communication, the following is required:

All multi-family leads go through the Multi-Family division.

This would include any accounts that may be worked in partnership with the Multi-Family division and a service center sales inspector.

Before Calling on a Multi-Family Community

Before calling on a multi-family community, the team member will contact our multi-family division to determine what, if any, current activity exists with that property or portfolio and/or what relevant information is available to increase the success of the team member's efforts.

Upon calling our multi-family division, the team member will be provided with the following:

- This community is already being solicited directly.
    - In this case, the team member should not call on the property.
- This community is already being solicited through its property management company or owner.
    - In this case, the team member may be asked to call on the property manager to establish a secondary, positive relationship.
    - If the Team Member is asked to call on the property manager to establish a secondary, positive relationship, the components of the call would include:
        - Introducing yourself and the company;

  - Sharing that we are working through their property management company to provide solutions to their needs;
  - Determining what specific problems this particular community is having and describing how our multi-family protocols can eliminate them and prevent them from happening in the future; and
  - Qualifying the company, expressing excitement at the prospect of servicing them in the future, and restating that we are working through their management company to provide them excellent customer service. Under no circumstances is a proposal or speculative pricing to be given to the property manager.
- This community is not being solicited directly or through its property management company or owner.
  - In this case, any relevant information available will be provided to the team member to increase the likelihood for success. The team member is then able to call on the community partnering with multi-family, using best practices to establish a relationship and secure the opportunity to make a proposal and presentation.

Before Making a Proposal or Presentation to a Multi-Family Community

Before any proposal or presentation to a multi-family community, the team member is to contact the multi-family division and cover the proposal with either the Multi-Family general manager or a director of sales. The Multi-Family general manager or a director of sales must sign off on the proposal before it is allowed to be presented.

This communication and pre-approval process ensures:
1. Proper selection of the authorized protocols;
2. Appropriate frequency of on-site service based upon the number of units;
3. Rate card pricing consistency based upon portfolio size, including charges for one-time services, additional site work not included in the regular service price; and
4. Conveying and reinforcing all advantages of Massey Services, for example, planning meetings, *Service Log book,* etc.

After the Sale

After the sale is presented to the multi-family community, a planning meeting is to be scheduled by the team member, and is to include the property manager, the maintenance supervisor, the team member, and the receiving service center's general manager or service manager. At the planning meeting, all aspects of service provided will be covered. Planning meetings are required and will include utilizing the Multi-Family Planning Meeting Template, as well as:

1. Scope of service and covered insects
2. Frequency of services
3. Day/time of service
4. Pre-notification requirements and responsibilities
5. Confirmation of key preparation by the community as well as oversight conditions
6. Service log use and contact information
7. Bed bug and infestation pricing and processes including non-emergency additional visits.
8. Invoicing, billing, and payment procedure