



# Inspection Guidelines

For Residential Team

# Inspection Guidelines

## What are the Inspection Guidelines?

The Inspection Guidelines define when we should book a service directly and when an inspection should be offered or required.

They were created to ensure we send the right opportunities to Estimation, while still enabling the Inbound team to direct book whenever an inspection is not required.

## The guidelines serve two purposes:

### Service Requirement

Some services cannot be accurately assessed or quoted without an inspection.

### Sales Opportunity

Some opportunities have a better chance of conversion or greater potential when handled through Estimation, where the team can assess the client's needs and maximize the value of the opportunity.

## THE MINDSET BEHIND THE GUIDELINES

### Inspection is a Conversion Weapon

Use inspection when it gives the opportunity a stronger chance to convert or when assessment is required.

### Use The Right Route

Direct book when inspection adds no value. Use inspection when it adds value. Mandatory inspection cases must always follow the inspection route.

# Inspections Rules

|               |                                                                                                                                     |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------|
| <b>Rule 1</b> | <b>New Client – Non Standard or Potential Area</b><br>Offer both options: Direct Booking or Inspection.                             |
| <b>Rule 2</b> | <b>All Other Clients</b><br>Direct Book. If the client does not book, offer an inspection.                                          |
| <b>Rule 3</b> | <b>Mandatory Inspections</b><br>Override all other rules. If the inquiry matches a mandatory case below, inspection must be booked. |

## Mandatory Inspections

|             |                                                                                 |             |
|-------------|---------------------------------------------------------------------------------|-------------|
| <b>AC</b>   | 1) New Client, Non Standard with More than 3 AC units                           | <b>Free</b> |
| <b>DC</b>   | 1) First-time DC In Non-Standard Area<br>2) Post-Renovation / Post-Construction | <b>Free</b> |
| <b>PC</b>   | 1) Termites<br>2) Bird Control<br>3) Biogents                                   | <b>200</b>  |
| <b>MOLD</b> | 1) Mold Concerns ( Not On AC componenat)                                        | <b>200</b>  |