

Growing From the Field: THE TECHNICIAN'S CHECKLIST TO SELLING MORE

For pest control customers, a technician's arrival represents a solution to a problem. They see you as both a trusted expert and the face of the company you represent. With an inside look and a unique pest perspective, you're perfectly positioned to make recommendations and suggestions that can better safeguard their property and their peace of mind.

Use this checklist to ensure you're always prepared to go beyond delivering quality service by looking for opportunities to recommend other beneficial options to customers and even close the sale on the spot.



PRE-SERVICE

REVIEW CUSTOMER HISTORY

- ☐ What services are they currently signed on for?
- ☐ Have they declined past offers?
- ☐ Have they been noted as a future opportunity?
- ☐ Note potential upsells based on their service history.



DURING SERVICE

GATHER INFORMATION

- ☐ When speaking with the customer, ask open-ended questions; let them voice any concerns.
 - ☐ Have you noticed any other issues around the house or yard?
 - ☐ Any signs or suggestions of possible pests you'd like me to take a look at?

CAPTURE CONDITIONS

- ☐ Take note of any issues, as well as things that may cause problems later.
 - ☐ For example, is there standing water where mosquitoes could reproduce? Are there uncovered openings in the siding or along the chimney?
- ☐ Record any notable conditions in the mobile app.
 - ☐ Include a photo whenever possible.

DOCUMENT EVIDENCE

- ☐ If pests are already present, be sure to note and document evidence such as droppings or nesting materials in the same way.

TURN ISSUES INTO SOLUTIONS

- ☐ Identify the services you recommend to address any identified pests or issues.
- ☐ Use Sales Center to review service packages and pricing; track the sales opportunity here, as well.



POST-SERVICE

COMPLETE SERVICE DOCUMENTATION

- ☐ Complete service order and documentation, as you would for any service visit.
- ☐ Take payment via mobile app.
- ☐ Send any follow-up reports or documents.
- ☐ Request an online review from a satisfied customer.

CREATE QUOTE

- ☐ Use Forms to generate a quote for the recommended services.
- ☐ Include pricing via Sales Center.
- ☐ Review evidence and documentation with the customer along with your recommendation.
 - ☐ Be sure to take time to answer any questions!
- ☐ Request the close with a signature and payment info.
 - ☐ Don't push — let the documentation do its work.
- ☐ Close out the opportunity or mark it down as a future lead.

By staying alert and aware on the job and taking the time to not only ask customers questions but really listen to their answers, you can boost business with more effective upsells in the field and turn more of your time into billable hours.

To learn more about how PestPac can help you empower your technicians to close more sales in the field and BOOST YOUR BUSINESS, [\[Link\]](#)

