

# Reports to Run Your Business

Angela Corrado, Executive Assistant



# Estimate Summary Report

Branch: All Branches Selected

## Program

Select Customers With Program/Job:

- All Programs
- ANT - Ant Control
- BWC - Bed Weed Control
- CG - Crabgrass Booster
- CV - Consultation Visit
- DOL - Dolomitic Limestone
- FA - Core Aeration
- FAC - Full Annual Maintenance

Navigation buttons: >>, >, <, <<

- ### Selected Programs
- LE - Lawn Care Program

Service Year: 2026

Employees: 17 of 17 Employees Selected

Search By: Estimate Requested Date

This year

## Customer

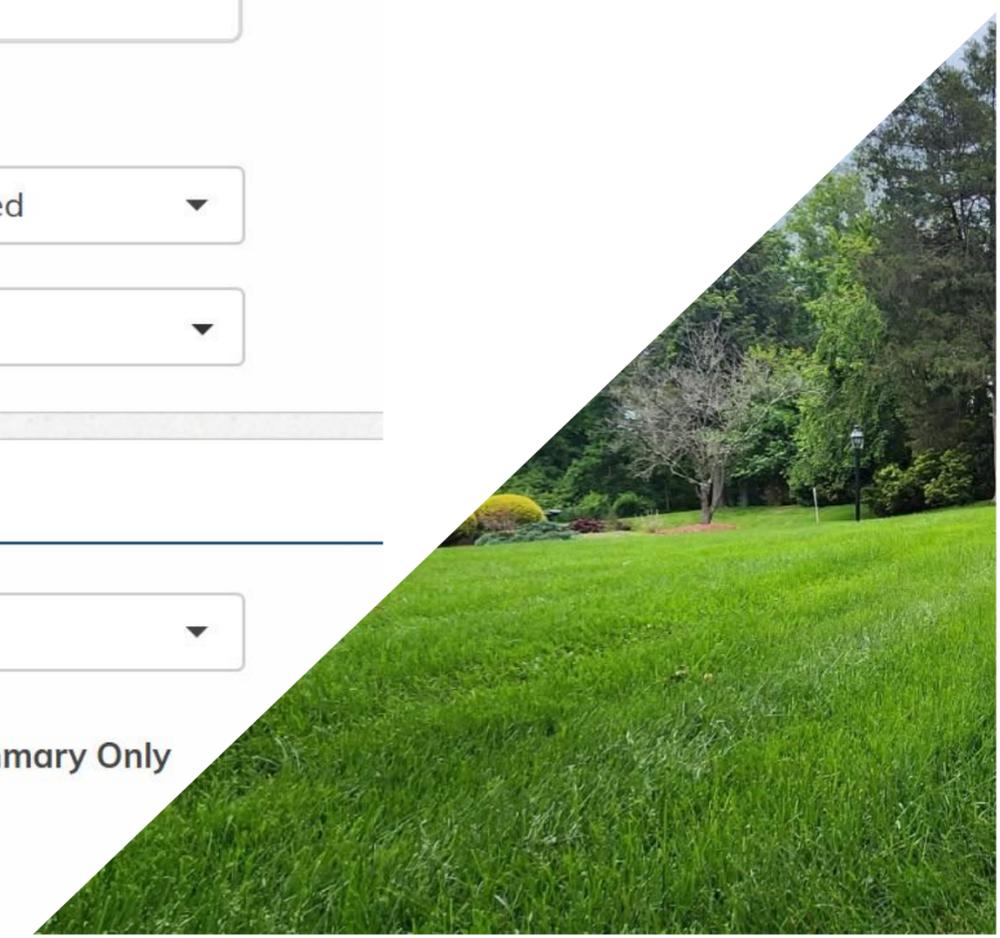
Zip Codes: 376 of 376 Zip Codes Selected

Source: 36 of 36 Sources Selected

Customer Type: Both

Customer Details  Summary Only

Main Group By: Source Code



# Estimate Summary Report

Source	Total Leads	Incomplete Leads	Completed Leads	Rejects	Program Sales	Cancel Programs	Net Sales	Disposal %	Closing %			
Called in	6	1	0	1	4	\$1,394.00	0	\$0.00	4	\$1,394.00	80.00%	66.67%
Direct Mail	339	0	20	116	203	\$97,154.50	2	\$1,265.00	201	\$95,889.50	63.64%	59.88%
Email Blast	2	0	0	0	2	\$822.00	0	\$0.00	2	\$822.00	100.00%	100.00%
Emailed in	3	0	0	2	1	\$1,050.00	0	\$0.00	1	\$1,050.00	33.33%	33.33%
Employee Account	1	0	0	0	1	\$312.00	0	\$0.00	1	\$312.00	100.00%	100.00%
Existing Customer	2	0	0	0	2	\$925.00	0	\$0.00	2	\$925.00	100.00%	100.00%
Facebook	43	0	10	16	17	\$7,513.75	0	\$0.00	17	\$7,513.75	51.52%	39.53%
Fall Campaign	8	0	0	0	8	\$3,432.45	0	\$0.00	8	\$3,432.45	100.00%	100.00%
Google Ad	120	0	13	48	59	\$33,125.80	0	\$0.00	59	\$33,125.80	55.14%	49.17%
GreenCare for Troops	1	0	0	1	0	\$0.00	0	\$0.00	0	\$0.00	0.00%	0.00%
Home Advisor	49	0	3	20	26	\$10,743.50	0	\$0.00	26	\$10,743.50	56.52%	53.06%
In-house	3	0	0	1	2	\$678.00	0	\$0.00	2	\$678.00	66.67%	66.67%
Internet Search	289	0	48	118	123	\$67,117.20	2	\$1,219.00	121	\$65,898.20	51.04%	42.56%
Landscaper	46	0	8	8	30	\$20,759.95	0	\$0.00	30	\$20,759.95	78.95%	65.22%
MARK ONLY	1	0	0	0	1	\$348.30	0	\$0.00	1	\$348.30	100.00%	100.00%
Nextdoor	2	0	0	1	1	\$507.50	0	\$0.00	1	\$507.50	50.00%	50.00%
Previous Cancellation	319	0	3	22	294	\$131,221.68	5	\$1,739.00	289	\$129,482.68	93.04%	92.16%
Priced Mailer	1	0	0	0	1	\$348.30	0	\$0.00	1	\$348.30	100.00%	100.00%
Referral	327	0	24	58	245	\$113,823.15	0	\$0.00	245	\$113,823.15	80.86%	74.92%
Reject	177	0	2	39	136	\$65,153.70	1	\$510.00	135	\$64,643.70	77.71%	76.84%
Saw Posting Sign	18	0	7	2	9	\$3,154.00	0	\$0.00	9	\$3,154.00	81.82%	50.00%
Saw Truck	43	0	3	11	29	\$13,712.75	0	\$0.00	29	\$13,712.75	72.50%	67.44%
Text	2	0	1	0	1	\$345.00	0	\$0.00	1	\$345.00	100.00%	50.00%
Yelp	4	0	0	2	2	\$1,235.00	0	\$0.00	2	\$1,235.00	50.00%	50.00%
<b>Grand Total</b>	<b>1806</b>	<b>1</b>	<b>142</b>	<b>466</b>	<b>1197</b>	<b>\$574,877.53</b>	<b>10</b>	<b>\$4,733.00</b>	<b>1187</b>	<b>\$570,144.53</b>	<b>71.81%</b>	<b>66.28%</b>

# Estimate Summary Report

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What are we looking for?

- Where are the leads coming from?
- Incomplete leads.
- Estimates that need to decide on services (status 2).
- Closing rate.
- Are the campaigns we are doing worth it?
  - Allows us to allocate resources & funds to the highest performing sources/campaigns.
  - This can be determined based on:
    - Closing rate
    - Cost per sale vs. spend per sale

This report is run by individual branch as well as combined to see data for the whole company.

Mark looks at the sales reps individually as well to ensure they are staying on top of open leads. This is reviewed at the same time every week.



# Weekly Productivity by

## Date

Branch: All Branches Selected

Programs/Jobs: All Programs

- ANT - Ant Control
- BWC - Bed Weed Control
- CV - Consultation Visit
- IGR - Insect Growth Regulator
- MLI - Manager Lawn Inspection
- MT - Mosquito and Tick Program
- MTG - Tick & Mosquito

Selected Programs

- CG - Crabgrass Booster
- DOL - Dolomitic Limestone
- FA - Core Aeration
- FAO - Fall Aeration & Over Seedi...
- FG - Fungicide Application
- GC - Grub Curative
- GPD - Grub Prevention

Service Calls to Exclude from Production Totals: None

Service Years: 2026

Customer Type: Both

Group By: Date

Combine Company / Branch: Combine Company / Branch

Technicians: 17 of 17 Employees Selected

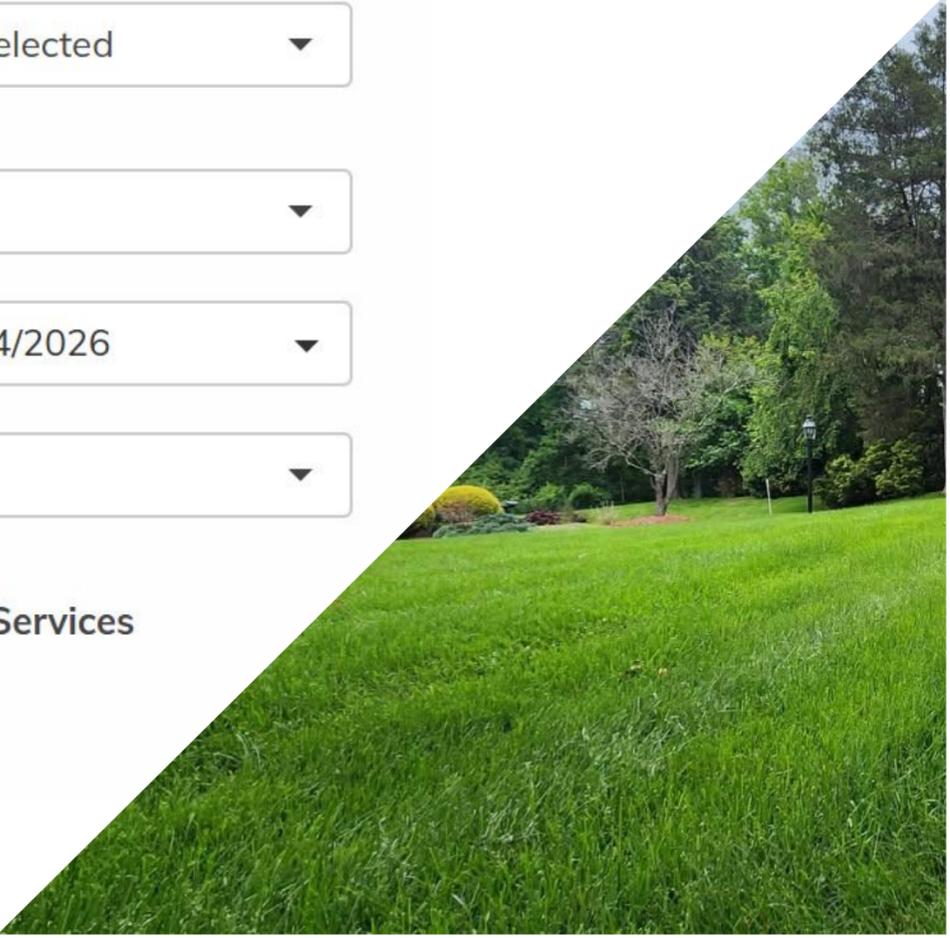
Count Leads: Count Both Leads

Sold Date: 11/01/2025-01/24/2026

Sub Group By: Ignore

Include Reversed Services

Summary Only



# Weekly Productivity by

Date

Date	Program Visits	Program Price	Special Visits	Special Price	Total Visits	Total Price	Serv. Calls	Leads	Completed Leads	Program Sales	Cancelled Programs	Special Sales	Net Sales			
11/2/2024 - 11/2/2024	111	9,031.40	3	188.10	114	9,219.50	0	0	0	0.0	0.00	5.0	2,218.50	0.0	0.00	-2,218.50
11/3/2024 - 11/9/2024	742	58,597.38	23	1,366.60	765	59,963.98	0	120	109	5.0	1,388.30	82.0	30,156.45	14.0	318.05	-28,450.10
11/10/2024 - 11/16/2024	720	57,267.93	11	834.35	731	58,102.28	0	72	67	0.0	0.00	153.0	64,081.05	1.0	0.00	-64,081.05
11/17/2024 - 11/23/2024	548	46,912.67	6	467.35	554	47,380.02	0	69	66	1.0	566.10	104.0	39,047.00	10.0	360.50	-38,120.40
11/24/2024 - 11/30/2024	426	35,783.04	7	86.85	433	35,869.89	0	52	43	0.0	0.00	102.0	48,864.82	0.0	0.00	-48,864.82
12/1/2024 - 12/7/2024	242	21,901.95	5	0.00	247	21,901.95	0	59	49	0.0	0.00	152.0	69,872.65	6.0	0.00	-69,872.65
3/23/2025 - 3/29/2025	730	56,778.10	90	5,579.25	820	62,357.35	0	1115	1057	145.0	71,365.55	31.0	14,832.30	442.0	20,960.75	77,494.00
3/30/2025 - 4/5/2025	777	66,392.90	135	9,119.50	912	75,512.40	0	801	756	117.0	52,715.65	35.0	15,325.70	351.0	13,391.23	50,781.18
4/6/2025 - 4/12/2025	663	57,191.00	136	7,578.80	799	64,769.80	0	837	787	145.0	62,600.15	27.0	10,364.69	460.0	23,108.25	75,343.71
4/13/2025 - 4/19/2025	628	61,482.05	152	10,862.75	780	72,344.80	0	722	685	108.0	51,302.15	20.0	6,095.20	394.0	22,143.55	67,350.50
4/20/2025 - 4/26/2025	627	66,854.00	317	7,473.25	944	74,327.25	0	768	718	123.0	52,440.80	17.0	7,461.45	388.0	20,568.90	65,548.25
4/27/2025 - 5/3/2025	676	54,900.78	674	15,323.05	1,350	70,223.83	0	609	567	94.0	40,796.60	12.0	5,271.45	320.0	16,475.53	52,000.68
Grand Total	7,796	657,678.76	1,763	70,848.00	9,559	728,526.76	0	8249	7440	1389.0	630,024.38	1225.0	519,566.51	4113.0	192,496.52	302,954.39

# Weekly Productivity by

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This week over week snapshot allows us to look at key information to measure the business:

**Date**

- Production stops
- Value of stops
- Optional \$
- Service Calls
- # of leads that came in & that were completed
- # in \$ for sales & cancels
- Optional sales
- Net sales

With this information, we can assess:

- Did the business grow or shrink?
- Are we consistent in productivity?
  - If not, why?

This is also used for year over year planning.



# Customer Growth Analysis

Branch: All Branches Selected

Combine Company / Branch: Separate Report by Company / Branch

## Programs & Special Jobs

Programs/Jobs:

All Programs

- ANT - Ant Control
- BWC - Bed Weed Control
- CG - Crabgrass Booster
- CV - Consultation Visit
- DOL - Dolomitic Limestone
- FA - Core Aeration
- FAC - Full Aeration
- SC - Soil Care

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Selected Programs

- LE - Lawn Care Program
- MT - Mosquito and Tick Program

Route: 15 of 15 Routes Selected

Sold By: 17 of 17 Employees Selected

Source Code: 36 of 36 Sources Selected

Zip Codes: 376 of 376 Zip Codes Selected

Service Year: 2026

Programs: Both Full & Partial

Date Based On:  Sold Date  Confirm Date

11/01/2025-01/24/2026

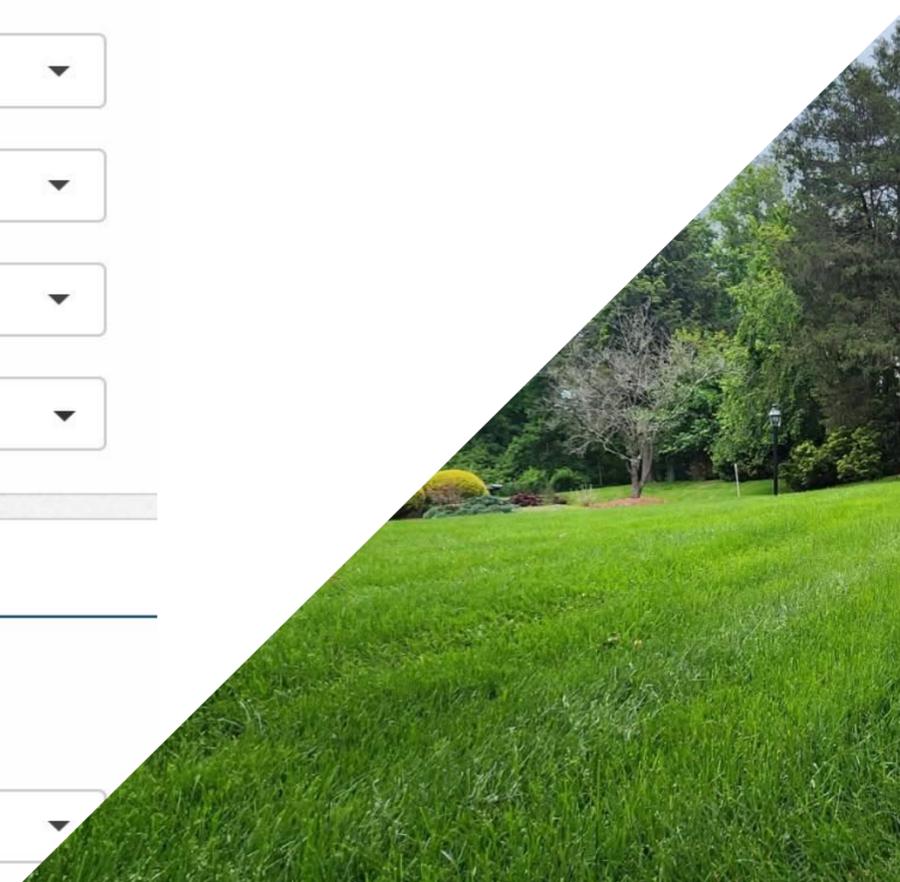
## Customer

Customer Type: Both

Summary Only

Main Group By: Program

Sub Group By: Ignore



# Customer Growth Analysis

Program	Old Customer Count		Cancel Count		Cancel \$		% Cancel		New Customers		Current Customer Count	% Growth	Net Customer Growth
	Old	New	Old	New	Old	New	Old	New	Count	Price			
<b>Program - LE - Lawn Care Program</b>	1,460		246	3	111,971.25	1,717.50	16.85%	0.69%	434	198,328.55	1,645	12.67%	185
<b>Program - MT - Mosquito and Tick Program</b>	281		45	1	30,805.55	883.40	16.01%	2.63%	38	25,620.75	273	-2.85%	-8
<b>Grand Total</b>	<b>1,741</b>		<b>291</b>	<b>4</b>	<b>142,776.80</b>	<b>2,600.90</b>	<b>16.71%</b>	<b>0.85%</b>	<b>472</b>	<b>223,949.30</b>	<b>1,918</b>	<b>10.17%</b>	<b>177</b>

Program	Old Customer Count		Cancel Count		Cancel \$		% Cancel		New Customers		Current Customer Count	% Growth	Net Customer Growth
	Old	New	Old	New	Old	New	Old	New	Count	Price			
<b>Program - LE - Lawn Care Program</b>	2,177		463	7	225,273.61	3,015.50	21.27%	0.91%	773	383,895.08	2,480	13.92%	303
<b>Program - MT - Mosquito and Tick Program</b>	445		102	0	74,485.40	0.00	22.92%	0.00%	59	42,077.20	402	-9.66%	-43
<b>Grand Total</b>	<b>2,622</b>		<b>565</b>	<b>7</b>	<b>299,759.01</b>	<b>3,015.50</b>	<b>21.55%</b>	<b>0.84%</b>	<b>832</b>	<b>425,972.28</b>	<b>2,882</b>	<b>9.92%</b>	<b>260</b>

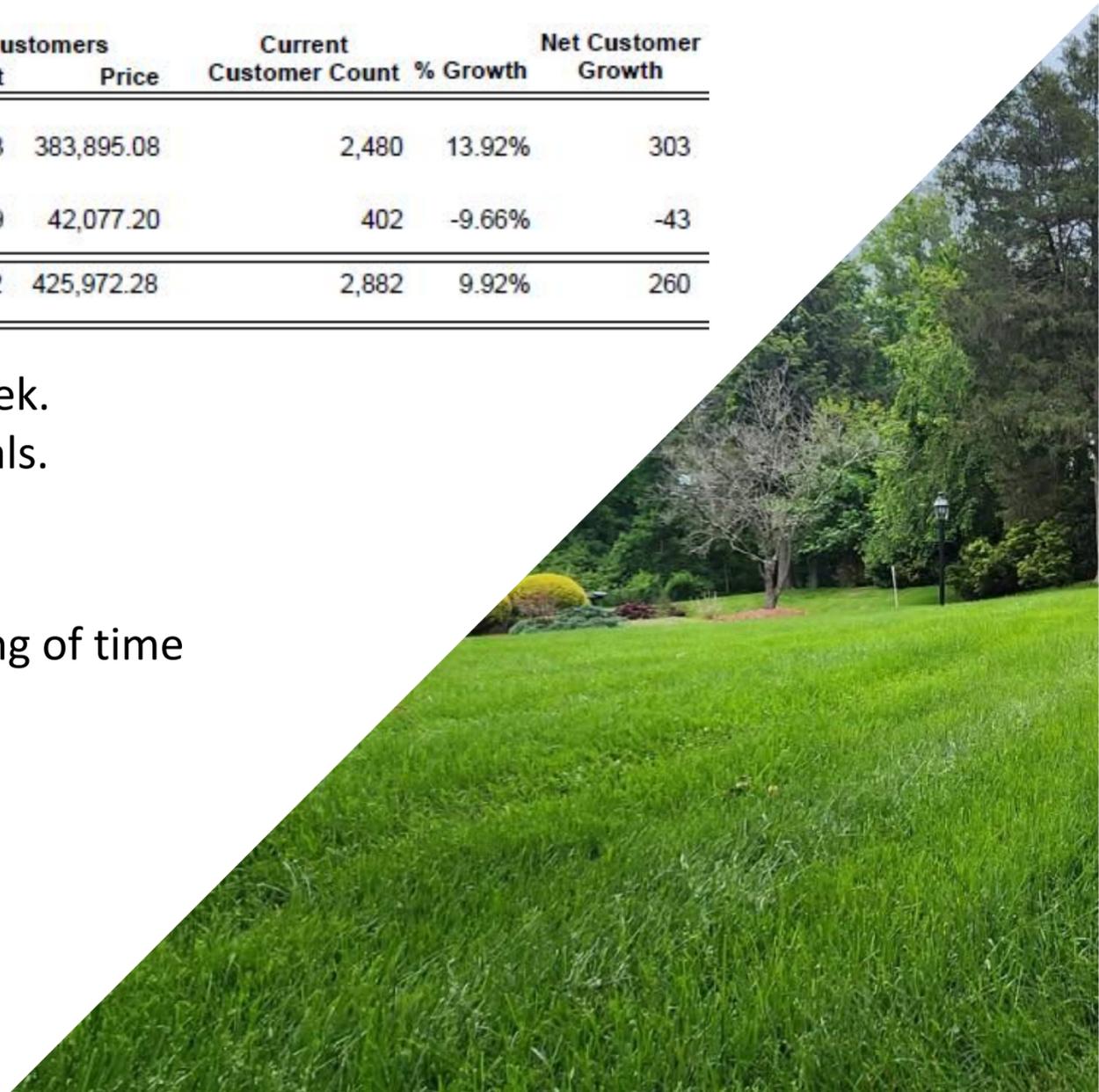
We look at the CGA from 11/1 of the previous year through Saturday of the previous week.

Why November 1<sup>st</sup>? We start our sales campaigns for the next year as well as renewals.

MT looks low because we do not focus on that until May.

We are looking at:

- Old customer count; which are the customers from 10/31 & before since the beginning of time
- Revenue by \$ old & new
- % of cancel rate
- Customer count
- Growth tracking



# Weekly Productivity by

Tech

Branch: All Branches Selected

Programs/Jobs: All Programs

Selected Programs

ANT - Ant Control  
BWC - Bed Weed Control  
CG - Crabgrass Booster  
CV - Consultation Visit  
DOL - Dolomitic Limestone  
FA - Core Aeration

Service Calls to Exclude from Production Totals: None

Technicians: 17 of 17 Employees Selected

Service Years: 2026

Count Leads: Count Both Leads

Customer Type: Both

Sold Date

11/01/2025-01/24/2026

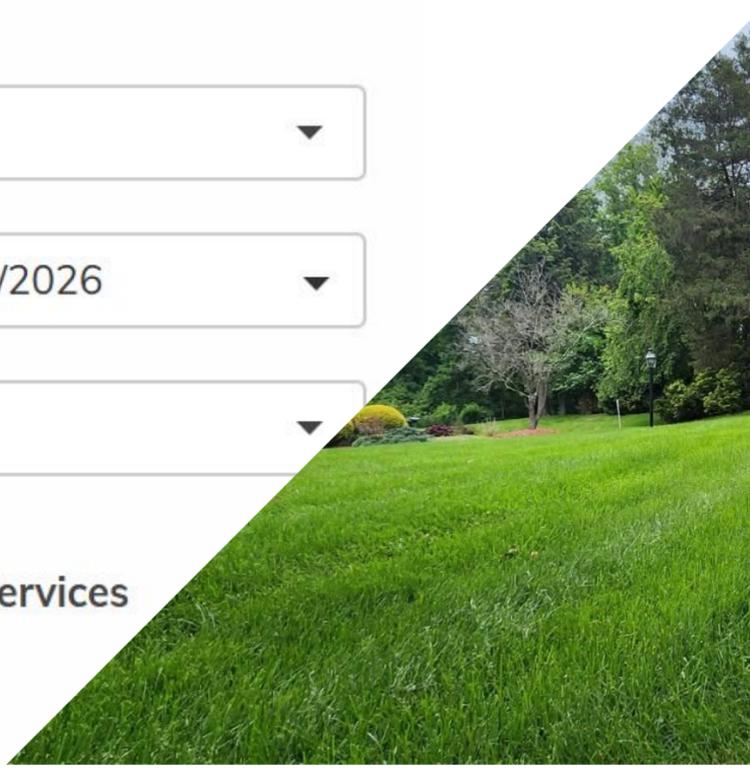
Group By: Technician

Sub Group By: Ignore

Combine Company / Branch: Combine Company / Branch

Include Reversed Services

Summary Only



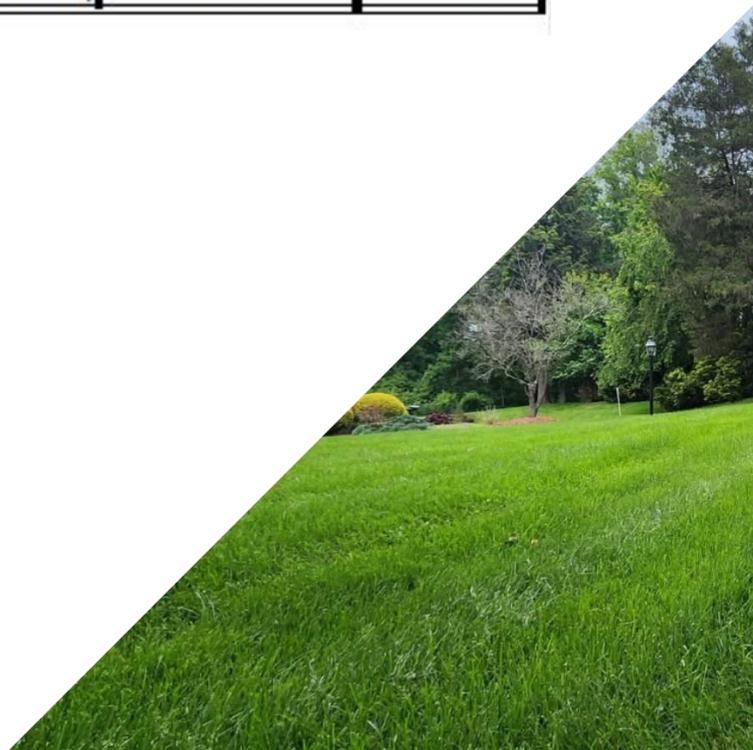
# Weekly Productivity by

Tech

Technician	Program Production Visits	Program Production Price	Special Production Visits	Special Production Price	Total Production Visits	Total Production Price	Serv. Calls	Leads	Completed Leads	Program Sales	Cancelled Programs	Special Sales	Net Sales			
V - [unclear]	0	0.00	0	0.00	0	0.00	0	0	0	0.0	0.00	1.0	728.25	0.0	0.00	-728.25
RAC - Robert Costa	619	54,834.80	40	2,175.25	659	56,810.05	0	1	1	1.0	1,061.10	0.0	0.00	1.0	45.00	1,106.10
RCC - Ryan Collette	407	33,460.00	105	2,631.45	512	36,091.45	0	277	259	66.0	31,023.30	163.0	70,601.52	145.0	3,504.85	-36,073.37
RCF - Ryland Ford	555	53,890.60	168	12,028.15	723	65,918.75	0	0	0	0.0	0.00	0.0	0.00	1.0	0.00	0.00
RD - Robert Duquette	267	35,468.69	50	1,132.45	317	36,601.14	0	4	3	0.0	0.00	1.0	156.10	6.0	767.70	611.60
REM - Rafael Muriel	0	0.00	32	3,462.00	32	3,462.00	0	0	0	0.0	0.00	0.0	0.00	0.0	0.00	0.00
SLS - Suzanne Spinelli	0	0.00	0	0.00	0	0.00	0	2696	2492	435.0	211,157.30	404.0	194,634.60	1239.0	55,231.62	71,754.32
SM - Steve Menard	457	48,107.64	49	2,150.30	506	50,257.94	0	0	0	0.0	0.00	9.0	3,468.70	0.0	0.00	-3,468.70
SRP - Shane Powers	741	46,766.96	137	2,059.10	878	48,826.06	0	2	2	1.0	370.00	1.0	133.30	2.0	90.00	326.70
Grand Total	8,736	770,419.70	1,828	72,266.84	10,564	842,686.54	0	8564	7705	1515.0	707,896.33	1453.0	669,166.04	4194.0	193,936.88	232,667.17

Snapshot of tech productivity & what is going on in "their business":

- How many cancels in the route?
- Who is producing well for technicians?
- Who is producing well for sales?



# Season Summary by Service

Branch: All Branches Selected

Service Year: 2026

Services: All Services

Navigation buttons: >>, >, <, <<

Selected Services

- AI1 - Ant control
- AI2 - Ant Control
- AI3 - Ant Control
- AI4 - Ant control
- BW1 - Bed Weed Control
- BW2 - Bed Weed Control
- BW3 - Bed Weed Control

Route: 15 of 15 Routes Selected

Day Code Range: [ ] to [ ]

Schedule Date: This year

Amount Option: Gross Amount

If Service is completed, the done date will be used. Otherwise, the schedule date will be used

Note: Next year projected revenue is Gross Amount.

Show Auto Renew: All Services

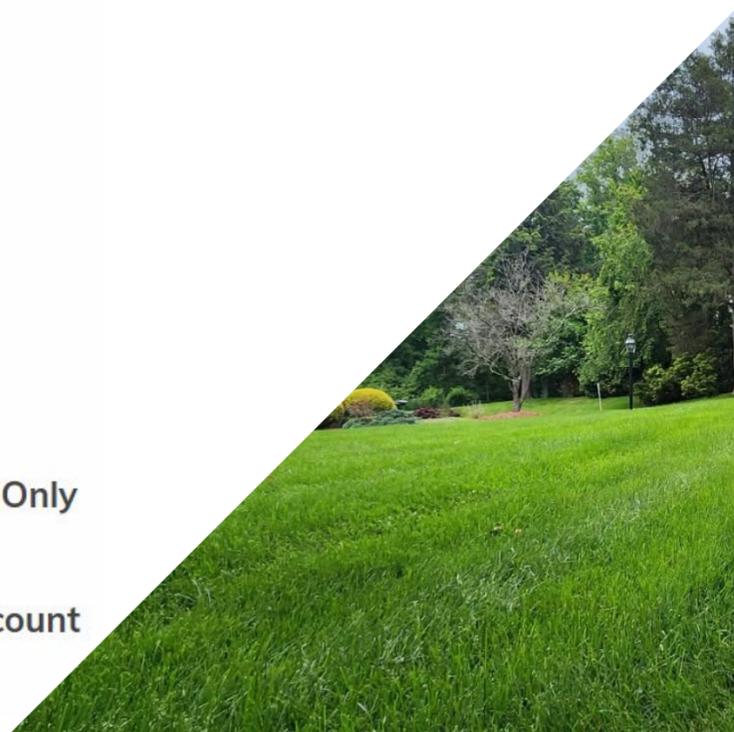
Customer Type: Both

Prepaid: All

Include Completed Services  Summary Only

Combine Company / Branch: Separate Report by Company / Branch

Include Repetitions  Subtotal by GL account



# Season Summary by Service

This gives a snapshot of everything we are doing & the total revenue for the entire company.

- We look at all services individually by branch as well as combined data for the company (shown below).
- Watching for when services should be completed at that time of year & if we are on schedule to complete them?
- Why are we scheduling the next service when we're not done this round?
- Are services getting done on time?
- Are we leaving revenue on the books?
- Allows us to track product needs for all services.

	Total Scheduled			Serviced to Date			Yet to Be Serviced		
<b>Total</b>	41851	420,004.27	3,551,780.23	7772	75,141.31	613,738.47	34032	344,371.16	2,933,707.01

< 1st section of #s gives revenue scheduled for the whole company.

	Less Customers On Hold			Less Customers on Credit Hold			Net Yet to be Serviced		
<b>Total</b>	434	3,089.00	30,921.15	93	637.80	6,291.70	33505	340,644.36	2,896,494.16

< 2nd section shows possible revenue loss due to Service Holds & Credit Holds.

	Next Year Projected Annual Revenue			Started Services too Late K Skips			All Skip Codes Except K Skipped (Service Allowance)		
<b>Total</b>	41790	419,507.87	3,546,835.23	12	94.00	808.45	35	397.80	3,526.30

< 3rd section is projected revenue based on what we have now. This is "less important" as this can change due to cancels, skips, & removal of 1-time services.

Number of Active Customers 4435

Note: Total scheduled includes services completed and later cancelled



# Call Tracker

## Week Ending January 31, 2026

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Totals
	26-Jan	27-Jan	28-Jan	29-Jan	30-Jan	31-Jan	-
Incoming Calls	3	23	13	31	21	-	91
Outgoing Calls	78	84	88	127	49	-	426
VM's	0	0	0	4	2	-	6
LE Sales	3	7	5	10	12	-	37
Total LE Cancels	0	2	1	6	3	-	12

## Incoming Calls per Rep

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Weeks Total
	26-Jan	27-Jan	28-Jan	29-Jan	30-Jan	31-Jan	-
Mark/Angela	0	0	0	0	0	-	0
Brittany	Closed	2	0	5	1	-	8
Fatima	Closed	2	2	6	3	-	13
Kate	Closed	4	1	7	3	-	15
Nikki	1	9	4	3	10	-	27
Suzanne	2	6	6	10	4	-	28
Thaddeus	2	5	1	6	4	-	18
<b>Daily Total</b>	<b>3</b>	<b>23</b>	<b>13</b>	<b>31</b>	<b>21</b>	<b>0</b>	<b>91</b>

## Outgoing Calls per Rep

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Weeks Total
	26-Jan	27-Jan	28-Jan	29-Jan	30-Jan	31-Jan	-
Mark/Angela	0	1	2	0	0	-	3
Brittany	Closed	2	1	2	0	-	5
Fatima	Closed	41	2	3	0	-	46
Kate	Closed	0	2	0	2	-	4
Nikki	27	18	21	66	29	-	161
Suzanne	51	22	62	56	18	-	209
Thaddeus	52	63	80	78	66	-	339
<b>Daily Total</b>	<b>78</b>	<b>84</b>	<b>88</b>	<b>127</b>	<b>49</b>	<b>0</b>	<b>426</b>

## Number of emails dispersed from C.S. & Sales Inbox

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Week Total
	26-Jan	27-Jan	28-Jan	29-Jan	30-Jan	31-Jan	-
Mark/Angela	1	0	1	0	0	-	2
Brittany	Closed	4	0	0	0	-	4
Fatima	Closed	0	0	0	0	-	0
Kate	Closed	0	0	0	0	-	0
Nikki	3	2	3	0	0	-	8
Suzanne	4	3	2	0	0	-	9
Thaddeus	1	0	2	1	1	-	5
<b>Daily Total</b>	<b>8</b>	<b>9</b>	<b>6</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>23</b>

## Number of texts

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Week Total
	26-Jan	27-Jan	28-Jan	29-Jan	30-Jan	31-Jan	-
Mark/Angela	4	49	35	0	2	-	90
Brittany	Closed	0	0	10	0	-	10
Fatima	Closed	0	0	7	1	-	8
Kate	Closed	0	1	7	1	-	9
Nikki	18	40	29	21	15	-	123
Suzanne	0	29	10	3	2	-	44
Thaddeus	5	4	4	1	6	-	20
<b>Daily Total</b>	<b>22</b>	<b>118</b>	<b>75</b>	<b>48</b>	<b>21</b>	<b>0</b>	<b>284</b>

API User (export from SA) 1,902 1,499 105 3,506

## Total incoming calls, outgoing calls, & emails for the day/week

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Week Total
	26-Jan	27-Jan	28-Jan	29-Jan	30-Jan	31-Jan	-
Mark/Angela	5	50	38	0	2	-	95
Brittany	Closed	8	1	17	1	-	27
Fatima	Closed	43	4	16	4	-	67
Kate	Closed	4	4	14	6	-	28
Nikki	49	69	57	90	54	-	319
Suzanne	57	60	80	69	24	-	290
Thaddeus	60	72	87	86	77	-	382
<b>Daily Total For the Team</b>	<b>111</b>	<b>234</b>	<b>184</b>	<b>206</b>	<b>91</b>	<b>0</b>	<b>826</b>

# Sales Goal Tracker – 3-Year

## Season Summary by Round/Cycle

Branch: MissionGreen CT

Service Year: 2026

Programs: All Programs  
IAR - Insect Growth Regulator  
K01 - Potassium  
K02 - Potassium  
L1 - Spring Limestone  
L2 - Limestone  
L3 - Limestone  
MLI - Manager Lawn Inspection

Navigation buttons: >>, >, <, <<

Selected Programs  
LE - Lawn Care Program

Route: 15 of 15 Routes Selected

Day Code Range: [ ] to [ ]

Amount Option: Gross Amount

Note: Next year projected revenue is Gross Amount.

Show Auto Renew: All Services

Customer Type: Both

Prepaid: All

Summary Only

Combine Company / Branch: Combine Company / Branch

Subtotal by GL account

# Sales Goal Tracker – 3-Year

TOTALS		2026															
Week Ending	LE	MT	BWC	CG	FAO	FG	GPR	K	LS	NS	PCC	PH	SI2	ST	STR	WT	
Remaining	\$528,510	\$52,727	\$2,621	\$12,000	\$252,942	\$67,103	\$79,227	\$37,212	\$92,432	\$16,120	\$9,700	\$26,312	\$2,603	\$38,935	\$0	\$15,275	
GOAL	\$ 2,525,673	\$ 643,913	\$ 18,000	\$ 12,000	\$ 674,000	\$ 132,000	\$438,600	\$ 51,000	\$ 183,500	\$ 68,800	\$ 9,700	\$ 30,600	\$ 3,000	\$ 40,150	\$ -	\$ 22,049	\$4,852,985
% of goal	79%	92%	85%	0%	62%	49%	82%	27%	50%	77%	0%	14%	13%	3%	#DIV/0!	31%	
January	\$ 1,997,163	\$ 591,186	\$ 15,379	\$ -	\$ 421,058	\$ 64,897	\$359,373	\$ 13,788	\$ 91,068	\$ 52,680	\$ -	\$ 4,288	\$ 397	\$ 1,215	\$ -	\$ 6,774	
February	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
March	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
April	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
May	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
June	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
July	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
August	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
September	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
October	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
November	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
December	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total	\$ 1,997,163	\$ 591,186	\$ 15,379	\$ -	\$ 421,058	\$ 64,897	\$359,373	\$ 13,788	\$ 91,068	\$ 52,680	\$ -	\$ 4,288	\$ 397	\$ 1,215	\$ -	\$ 6,774	\$1,030,916
																	Difference: \$3,822,069

TOTALS		2025														
Week Ending	LE*	MT	CG	GPR	LS	FAO	WT	NS	ST	POT	BWC	FG	PH	STR		
Remaining	\$25,147	\$14,110	-\$8,039	\$11,248	\$23,788	\$23,490	\$8,871	\$20,429	-\$6,871	\$601	-\$1,668	-\$17,337	-\$5,311	-\$6,010		
GOAL	\$ 2,080,858	\$ 624,045	\$ 9,477	\$399,986	\$ 187,000	\$ 625,072	\$ 26,628	\$ 80,326	\$ 26,559	\$ 46,213	\$ 14,136	\$ 74,353	\$ 19,974	\$ -	\$1,509,724	
% of goal	99%	98%	185%	97%	87%	96%	67%	75%	126%	99%	112%	123%	127%	#DIV/0!		
January	-	-	\$ -	\$322,200	\$ 89,855	\$ 373,415	\$ 18,679	\$ 58,999	\$ 2,875	\$ 9,298	\$ 11,331	\$ 36,359	\$ 3,307	-		
February	-	-	\$ -	\$ (381)	\$ 118	\$ (9,468)	\$ -	\$ (415)	\$ 450	\$ 111	\$ -	\$ (451)	\$ 52	-		
March	-	-	\$ -	\$ 3,883	\$ 3,723	\$ (18,561)	\$ (1,147)	\$ (3,127)	\$ 9,360	\$ 3,140	\$ 607	\$ (1,721)	\$ 1,543	-		
April	-	-	\$ 651	\$ 18,444	\$ 18,721	\$ 22,645	\$ (367)	\$ (291)	\$ 12,240	\$ 9,600	\$ 729	\$ 58	\$ 4,952	-		
May	-	-	\$ 7,178	\$ 31,492	\$ 17,665	\$ 7,764	\$ 372	\$ (463)	\$ 3,555	\$ 10,941	\$ 1,525	\$ 5,763	\$ 6,029	-		
June	\$ 2,048,540	\$ 606,447	\$ 2,142	\$ 6,174	\$ 12,774	\$ 4,246	\$ (235)	\$ 1,116	\$ 495	\$ 4,492	\$ 426	\$ 18,723	\$ 3,860	-		
July	\$ 4,228	\$ 3,725	\$ 1,884	\$ 5,583	\$ 9,045	\$ 19,965	\$ 125	\$ 2,785	\$ 1,575	\$ 3,298	\$ 1,100	\$ 31,513	\$ 2,492	-		
August	\$ 4,856	\$ 874	\$ 5,580	\$ 290	\$ 3,813	\$ 103,587	\$ 222	\$ 1,294	\$ 1,305	\$ 1,464	\$ 88	\$ 1,283	\$ 1,088	\$ 3,361		
September	\$ 3,163	\$ 1,037	\$ 82	\$ 387	\$ 4,811	\$ 84,276	\$ (76)	\$ -	\$ 1,215	\$ 1,794	\$ -	\$ 164	\$ 941	\$ 2,060		
October	\$ (2,949)	\$ (2,406)	\$ -	\$ 445	\$ 2,804	\$ 14,059	\$ 182	\$ -	\$ 315	\$ 1,363	\$ -	\$ -	\$ 935	\$ 589		
November	\$ (1,858)	\$ (2,627)	\$ -	\$ 221	\$ (117)	\$ (344)	\$ -	\$ -	\$ 45	\$ 111	\$ -	\$ -	\$ 85	\$ -		
December	\$ (269)	\$ 2,884	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		
Total	\$ 2,055,711	\$ 609,935	\$ 17,516	\$388,738	\$ 163,212	\$ 601,582	\$ 17,757	\$ 59,898	\$ 33,430	\$ 45,612	\$ 15,804	\$ 91,690	\$ 25,285	\$ 6,010	\$1,466,532	
															Difference: \$43,192	

# Sales Goal Tracker – 3-Year

Total LE Sales	2026						2025								
Week Ending	New Sales #			Week Ending	New Sales \$			Week Ending	New Sales #			Week Ending	New Sales \$		
	Goal	Actual	% Goal		Goal	Actual	% Goal		Goal	Actual	% Goal		Goal	Actual	% Goal
1/3/2026	72	72	100%	1/4/2025	\$35,064	\$42,327	121%	1/4/2025	114	114	100%	1/4/2025	\$58,668	\$63,752	109%
1/10/2026	9	9	100%	1/11/2025	\$4,383	\$5,902	135%	1/11/2025	14	14	100%	1/11/2025	\$7,218	\$6,431	89%
1/17/2026	5	5	100%	1/18/2025	\$2,435	\$1,740	71%	1/18/2025	7	7	100%	1/18/2025	\$3,659	\$3,621	99%
1/24/2026	14	13	93%	1/25/2025	\$6,818	\$5,529	81%	1/25/2025	11	11	100%	1/25/2025	\$5,607	\$6,334	113%
1/31/2026	26	36	138%	2/1/2025	\$12,662	\$17,082	135%	2/1/2025	22	22	100%	2/1/2025	\$11,614	\$10,633	92%
2/7/2026	28	0	0%	2/8/2025	\$13,636	\$0	0%	2/8/2025	17	17	100%	2/8/2025	\$8,779	\$6,914	79%
2/14/2026	30	0	0%	2/15/2025	\$14,610	\$0	0%	2/15/2025	28	38	136%	2/15/2025	\$14,636	\$16,243	111%
2/21/2026	37	0	0%	2/22/2025	\$18,019	\$0	0%	2/22/2025	36	21	58%	2/22/2025	\$18,582	\$8,896	48%
2/28/2026	68	0	0%	3/1/2025	\$33,116	\$0	0%	3/1/2025	56	78	139%	3/1/2025	\$29,272	\$37,762	129%
3/7/2026	82	0	0%	3/8/2025	\$39,934	\$0	0%	3/8/2025	66	61	92%	3/8/2025	\$34,592	\$34,518	100%
3/14/2026	117	0	0%	3/15/2025	\$56,979	\$0	0%	3/15/2025	75	78	104%	3/15/2025	\$39,125	\$37,142	95%
3/21/2026	133	0	0%	3/22/2025	\$64,771	\$0	0%	3/22/2025	93	93	100%	3/22/2025	\$48,241	\$39,935	83%
3/28/2026	150	0	0%	3/29/2025	\$73,050	\$0	0%	3/29/2025	101	134	133%	3/29/2025	\$52,437	\$68,706	131%
4/4/2026	152	0	0%	4/5/2025	\$74,024	\$0	0%	4/5/2025	100	107	107%	4/5/2025	\$52,100	\$49,908	96%
4/11/2026	155	0	0%	4/12/2025	\$75,485	\$0	0%	4/12/2025	118	119	101%	4/12/2025	\$61,266	\$54,119	88%
4/18/2026	150	0	0%	4/19/2025	\$73,050	\$0	0%	4/19/2025	112	100	89%	4/19/2025	\$58,544	\$48,268	82%
4/25/2026	137	0	0%	4/26/2025	\$66,719	\$0	0%	4/26/2025	105	105	100%	4/26/2025	\$54,935	\$47,328	86%
5/2/2026	114	0	0%	5/3/2025	\$55,518	\$0	0%	5/3/2025	95	86	91%	5/3/2025	\$49,565	\$37,274	75%
5/9/2026	67	0	0%	5/10/2025	\$32,629	\$0	0%	5/10/2025	79	42	53%	5/10/2025	\$41,473	\$16,297	39%
5/16/2026	45	0	0%	5/17/2025	\$21,915	\$0	0%	5/17/2025	48	32	67%	5/17/2025	\$25,226	\$10,169	40%
5/23/2026	27	0	0%	5/24/2025	\$13,149	\$0	0%	5/24/2025	42	13	31%	5/24/2025	\$21,954	\$3,967	18%
Total	1618	135	8%	Total	\$787,966	\$72,579	9%	Total	1339	1292	96%	Total	\$697,493	\$608,215	87%
YTD	100	135	35	YTD	\$48,700	\$72,579	\$23,879	YTD	146	146	0	YTD	\$75,152	\$80,138	\$4,986
Goal	1618			Goal	\$800,572			Goal	908			Goal			

# Winter Renewal Status Tracker

2025-2026												
Week Ending:	Total Status 8:	Total Status 9:	Total Customer Count:	% to Active	\$ in Prepay	PP	Install	Auto-bill	PPT	LE Cancels Last Week:	Sent to B&R	
11/15/2025	4151	428	4579	9.35%	\$227,176	-	101	-	-	89	4	< Cancels are for 11/1-11/15
11/22/2025	3963	560	4523	12.38%	\$52,593	361	124	50	16	36	0	
11/29/2025	3856	629	4485	14.02%	\$46,671	424	125	49	26	36	0	
12/6/2025	3582	877	4459	19.67%	\$93,662	557	218	65	29	37	2	
12/13/2025	3355	1087	4442	24.47%	\$81,434	668	229	150	34	17	0	
12/20/2025	3157	1248	4405	28.33%	\$107,529	808	239	157	35	44	0	
12/27/2025	2968	1418	4386	32.33%	\$120,877	954	248	166	39	19	3	
1/3/2026	2579	1774	4353	40.75%	\$236,850	1268	277	179	39	35	2	< CT moved to it's on branch
1/10/2026	2253	2085	4338	48.06%	\$28,229	1301	546	182	43	25	0	
1/17/2026	1995	2323	4318	53.80%	\$9,259	1314	713	220	64	22	1	
1/24/2026	1900	2398	4298	55.79%	\$23,698	1357	716	249	65	33	1	
1/31/2026	1868	2460	4328	56.84%	\$18,713	1399	725	258	65	12	1	
2/7/2026	0	0	0	#DIV/0!		0	0	0	0	0	0	
2/14/2026	0	0	0	#DIV/0!		0	0	0	0	0	0	
2/21/2026	0	0	0	#DIV/0!		0	0	0	0	0	0	
2/28/2026	0	0	0	#DIV/0!		0	0	0	0	0	0	
3/7/2026	0	0	0	#DIV/0!		0	0	0	0	0	0	
3/14/2026	0	0	0	#DIV/0!		0	0	0	0	0	0	
3/21/2026	0	0	0	#DIV/0!		0	0	0	0	0	0	
3/28/2026	0	0	0	#DIV/0!		0	0	0	0	0	0	
				Total to date:	\$1,046,691	2447				405	14	
						Partial PP - 7						

# Winter Renewal Status Tracker

2024-2025							
Week Ending:	Total Status 8:	Total Status 9:	Total Customer Count:	% to Active	\$ in Prepay*	LE Cancels Last Week:	Sent to B&R
11/16/2024	3795	269	4064	6.62%	\$82,611	57	0
11/23/2024	3641	404	4045	9.99%	\$72,157	51	0
11/30/2024	3347	611	3958	15.44%	\$58,237	52	0
12/7/2024	3224	712	3936	18.09%	\$91,989	67	2
12/14/2024	3022	888	3910	22.71%	\$70,835	35	0
12/21/2024	2847	1032	3879	26.60%	\$90,132	30	2
12/28/2024	2533	1305	3838	34.00%	\$175,261	49	1
1/4/2025	2245	1557	3802	40.95%	\$148,514	47	3
1/11/2025	2023	1755	3778	46.45%	\$29,923	38	0
1/18/2025	1650	2101	3751	56.01%	\$17,921	33	1
1/25/2025	1626	2128	3754	56.69%	\$12,834	9	1
2/1/2025	1042	2700	3742	72.15%	\$9,828	23	3
2/8/2025	1039	2718	3757	72.34%	\$8,054	7	1
2/15/2025	1030	2761	3791	72.83%	\$14,509	5	1
2/22/2025	984	2813	3797	74.08%	\$19,226	11	0
3/1/2025	941	2916	3857	75.60%	\$34,076	15	0
3/8/2025	881	2999	3880	77.29%	\$34,975	35	0
3/15/2025	737	3167	3904	81.12%	\$56,772	56	0
3/22/2025	519	3387	3906	86.71%	\$63,979	88	0
3/29/2025	412	3596	4008	89.72%	\$75,237	35	0
				Total to date:	\$860,241	491	13
\$186,450	-86						

# Winter Communication Schedule

## Snail mailer:

- Send to GFM for print – 10/17 - DONE (sent on 10/20 due to GFM schedule)
- Hit homes 11/1-11/4 - DONE (2026 note: hit homes on Tuesday, not Saturday)

## Automated calls:

- Happy Holidays/7% pp expiring call by branch – 12/23 - DONE on 12/22 instead due to 2 people being off on 12/23
- 7% discount expiring call to action with connect back: 12/30 & 12/31 (low & slow) - DONE
- “You are scheduled for services” & 5% prepay expires on 3/31: 3/12
  - (subject to change pending March weather & RD1 start date)

## Text:

- “Be on the lookout”: 10/29 - DONE
- 2025 prepay accts – 11/25 - DONE
- 7% prepay expiring: 12/29 - DONE
- “57 days until spring” text - 1/22 < moving to 1/29 - DONE
- 2025 prepay, not confirmed for 2026: 2/12
- “You are scheduled for services” & 5% prepay expires on 3/31: 3/11
  - (subject to change pending March weather & RD1 start date)

## Manual calls:

- “Non-renewed” accounts without email – week of 11/17 - DONE
- 2025 PPT accounts (move to installment, auto-bill or prepay) – week of 11/24 - DONE
- 2025 installment accts to prepay or confirm install for 2026 – week of 12/1 - DONE
- 2025 auto-bill accts to prepay or confirm auto-bill for 2026 – week of 12/8 - DONE
- 2025 PP accounts that have not yet prepaid for 2026 – week of 12/15 - DONE (didn’t finish about 300 – 1 CSR off 3 days & the holiday party this week)
- All status 8 accounts – week of 1/5 (call installment accts) - DONE
- All status 8 not renewed accounts with texting – week of 1/12 (this is a change from the original plan to call them the week of 1/5) - DONE < broke up by auto-bill, PPT & PP
- Accounts without texting – week of 1/19 < rolled into all status 8 calls
- Auto-billed accounts in 2025, but have not yet confirmed 2026 – week of 1/26
  - Add on: Go through “Must Get OK on RD1” accounts to see if it is appropriate to reach out
- 2025 PPT accounts (move to installment, auto-bill or prepay) - week of 2/2
- 2025 PP accts that have not yet prepaid for 2026 – week of 2/9
  - SCHEDULE CHANGE: 2025 auto-bill accounts (renewing acct on this touch) - IN PROGRESS
- Accounts without email – week of 2/16
- 2025 auto-bill accts (renewing acct on this touch) - week of 2/23
  - SCHEDULE CHANGE – 2025 PP accts that have not yet prepaid for 2026 – week of 2/23
- “Must Get OK for RD1” - week of 3/2 (email to all following)

## Emails:

- Oct. 29th – Wed: “Be on the lookout” (to those who cannot receive texts) - DONE
- Nov. 11th & 12th – Tues/Wed (2025 we broke this up into 3 batches) - DONE 11/12-11/13 due to RI office closing on 11/11 for Veterans Day
- Dec. 2nd – Tues - from CC - DONE
- Dec. 26th – Fri - DONE
- Jan. 6th – Tues – new prepay discount - DONE
- Jan. 27th – Tues - from CC < moving to 2/12
- Feb 24th – Tues |
- March 10th – Tues

Before renewals are processed, we outline what our communication will be throughout the winter. This is used as a guideline but can be adjusted as needed at any point. The changes are tracked to use as reference the following year when we prep for the next winters communication.



# GET IN TOUCH

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**Angela Corrado**

**Executive Assistant**

**MissionGreen Services**

**EMAIL ADDRESS**

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**m**

**PHONE NUMBER**

**(603) 689-6229**



**THANK YOU**

