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Procedure Manual Excerpt : *Greg Unseth Painting and Exteriors*

(Sample from the Canvass Manager Operations Manual)

Filing and Organization – Canvass Team Leader

Greg Unseth Painting and Windows – Canvass Marketing Operations Manual

Nightly Paperwork:

Every night, a Canvass Team Leader will do the following for his team:

- Record the daily leads and ground hours on the Team Leader Ground Hours form. Before returning from the field, figure out and fill in the total ground hours for each Canvasser in the team, as well as their individual leads for the night, then add up the total leads and let your Canvass Manager know by phone.
- Mark the Dry-Erase Board. Fill in the number of leads gathered for each Canvasser on the team into the top-center of the each Canvasser's daily cell, then add up the total into the daily 'Total' cell for that team. Mark in any other designation as necessary ("Sick", "off", etc.)
- Collect and file nightly forms. Make sure each Canvasser turns in their appointment sheets, partial sheets (if any), and reverse lead sheets (if at least half-full). Make sure each Canvasser's forms include their name and date, and they have added up the total number of doors hit from that day's knocking tracker and included 'Total doors' next to their name on the appointment sheet(s).
 - o Appointment Sheets will be attached and stapled. Write 'Team 1' (or appropriate team number) if there is more than a single team on the top of the first page, and file the stapled bundle into the cabinet folder for the appropriate month.
 - o Partial sheets are filed into the Confirmer Office's main Inbox.
 - o Reverse Lead Sheets are filed into the Confirmer Office's 'Reverse Lead' Inbox.
- Record the day's results and notes in the Canvass Logbook, including the date, the Team Leader's name, the area canvassed (major cross-streets), the total leads gathered by the team that night, total doors knocked for the whole team (in the notes area), and any relevant notes about demographics, oddities, incidents, or difficulties.

Weekly Paperwork:

Every Wednesday night, in addition to normal nightly paperwork, the Team Leader will have a few additional duties to tend to for the 'end of the pay week'.

- Collect every Canvasser's 'Knocking Tracker', make sure names and dates are filled in, staple together, and file in the cabinet's 'knocking trackers' folder.
- Complete the Team Leader Ground Hours form and calculate quotas.
 - o Add up each Canvasser's nightly leads and ground hours into the 'totals' area.
 - o Write in the Canvassers' names in the 'leads per hour' section, and calculate and write in each Canvasser's leads-per-hour (Quota)—total leads divided by total ground hours. Write leads-per-hour rounded to two decimal places.
 - o Add up the entire team's total leads and total ground hours to calculate the team's 'curve'. Total leads divided by total ground hours. Do NOT calculate the curve by taking an average of each Canvasser's leads-per-hour, as this will result in an inaccurate result.
- Completed Ground Hours Forms are turned in to the Canvass Manager.
- On the Dry-Erase Board, total up each individual Canvasser's leads for the week in the 'weekly total' cells, then the team's total for the week in the Team total weekly total cell. Write in each Canvasser's leads-per-hour in the center-right area their individual weekly total's cell. If a Canvasser missed Quota (designated by the Canvass Manager), write in their leads-per-hour in RED.