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COVER STORY

State of the Industry

Contractors continue to report strong growth trends, but some uncooperative

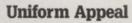
weather, a lack of labor and increasing regulations present challenges.



FEATURES

Have We Created a Monster?

The definitions, interpretations and philosophies behind Integrated Pest Management have made the process



The Scoop on Spring Supply



Nursery market insiders offer their expert forecasts for next year's plant availability.

Nothing to be Afraid Of



Crossing the Line

Landscape companies are working double duty, adding interiorscape services to tap into an expanding market and boost revenues.

SPECIAL REPORT:

State of the Irrigation Industry

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Editor's Focus

"Creativity is thinking up new things. Innovation is doing new things."

- Theodore Levitt

C-Valuating The Future

This is really starting to get a little boring, isn't it? This issue includes our fourth annual State of the Industry Report, and while the strong economy creates happy lawn and landscape contractors across the country, it also leads to some pretty repetitive interviews.

We conducted dozens of interviews for this year's report, and, to a degree, they could be summed up in one sentence: "Business is great - I could grow faster if I could get the people."

Considerable potential for change and innovation continues to develop on the horizon, however, which could have tremendous impact on the industry. The overwhelming Internet development was obviously THE story of the late 1990s, and we're all waiting to see where these URLs will take our economy.

Technology continues to gravitate toward the lawn and landscape industry as well with at least a dozen companies having launched initiatives to wire up the buying and selling of landscape products, supplies and equipment.

The potential of e-commerce within this industry is one of the biggest unknowns as we look toward the future. But while e-commerce grabs the headlines, don't overlook the rest of the Internet's potential for your business. A Web site offers visitors so much more information than a Yellow Pages ad ever can and e-mail makes communication instantaneous.

As an information provider, we're interested in the Internet's potential from an educational perspective. To that end, we're partnering with RohMid and Golf Course News to produce the industry's first web-based seminar with noted entomologists Dave Shetlar of The Ohio State University and Daniel Potter from the University of Kentucky.

> On Nov. 13, these researchers will each make 30-minute, live presentations on www.grubfree.com and will be available to answer questions from industry professionals such as yourself. Honestly, we're not sure how everything will turn out, and that includes this program as well as the future. But we do know one thing - today's technology offers opportunities unlike anything else we've had at our disposal in the past. And despite business being as good as it has ever been for us, we know that we must continue to stretch ourselves, try new ideas and even take some risks if we want to stay ahead of the game. That way next year at this time we'll be able to once again report, "If only we could find more people..."

Wouldn't that be nice?

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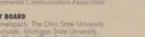
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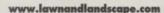
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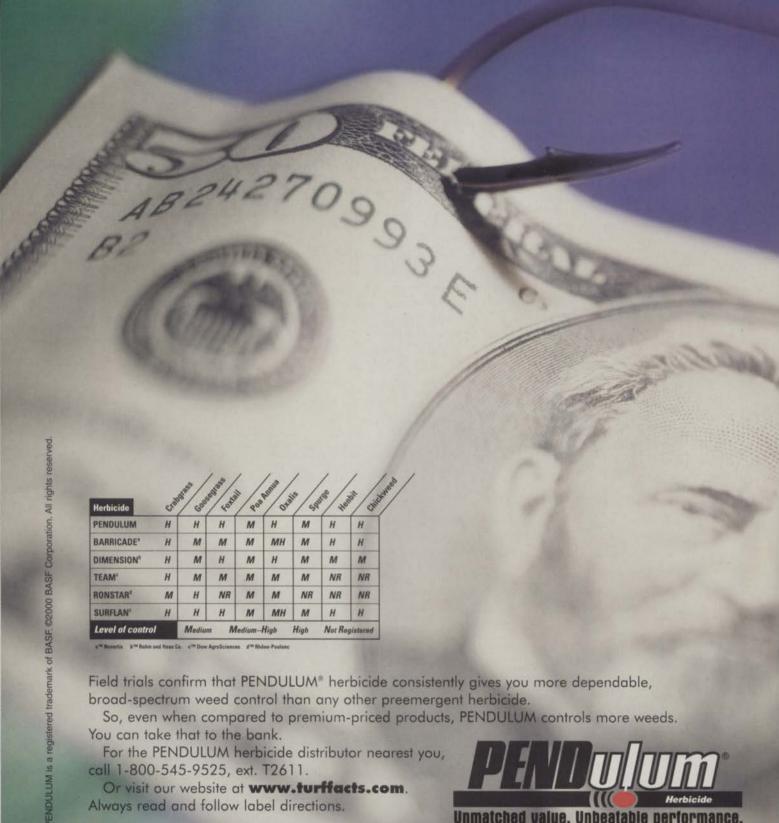
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REGIONAL NEWS

N.Y. Lawn Care Industry Set To Battle Notification Law

ALBANY, N.Y. – Lawn and tree care companies in New York may soon face increased operating costs, changes in business practices and loss of customers due to the state's new Neighbor Notification Law for pesticide use.

The new law, effective March 1, 2001, features two separate provisions that could negatively affect the state's lawn and tree care businesses. The first provision will require companies that commercially apply pesticides to give at least a 48-hour written notification to neighboring properties within 150 feet of any spray site. The second provision of the law requires schools and day care facilities to provide parents and staff with a written notice before pesticides are applied on school grounds.

The success of New York's lawn and tree care companies lobbying to protect their industry will determine the extent of the law. The New York battle could set a precedent for other states considering similar legislation.

New York State placed adoption of the residential and commercial application portion of the notification bill into the hands of its 67 local county governments. This means lawn and tree care companies and

(continued on page 42)

For ages, people have been improving the aesthetics of their home or business environments, but how long have lawn and landscape contractors been in the business of providing this service to residential and commercial clients?

| GREEN YEARS | | |
|----------------------|---------------------------|--|
| YEARS IN BUSINESS | PERCENT OF CONTRACTORS | |
| 2 years or less | 4.3 | |
| 3 or 4 years | 9.4 | |
| 5-9 years | 16.9 | |
| 10-14 years | 20.7 | |
| 15-19 years | 14.6 | |
| 20-29 years | 20.0 | |
| 30-49 years | 9.2 | |
| 50 or more years | 4.9 | |

Research USA

The average landscape contractor has been in business for 17.7 years – 20.7 percent of contractors between 10 to 14 years and 20 percent of contractors between 20 to 29 years, according to a *Lawn & Landscape* Reader Survey.

1/1/27

Approximately 16.9 percent of contractors said they have been in business for five to nine years, and 14.6 percent of contractors said they've been running their companies for 15 to 19 years.

Less than 5 percent of contractors have been in business for 50 or more years and even less -4.3 percent – are new to the industry and have been in business for less than two years.

INDUSTRY NEWS

TruGreen Interior Plant Care Division Sold to Rentokil

DOWNERS GROVE, Ill. – TruGreen turned over its interior plantscaping services to Rentokil for \$44 million in a definitive sale agreement pending antitrust clearance.

According to a release from TruGreen's parent company, ServiceMaster, the sale represents its continued focus on growth

> and investment in its core businesses, including lawn care and landscaping (TruGreen ChemLawn and TruGreen LandCare brand names).

Commenting on Rentokil's acquisition, Jeff
Mariola, president, Rentokil Tropical Services, said, "Besides strengthening our position in the bolt-on
markets, the acquisition provides the strategic
benefits of taking us into 15 new cities, which offer
additional future opportunities for our people, organic growth and other bolt-on acquisitions."

TruGreen will retain some interior plantcare manaagers to support its lawn care and landscape operations. According to the company, all other TruGreen employees will be offered employment by Rentokil, which had 1999 revenue of \$42 million and operates branches in 24 U.S. cities. The sale is not expected to alter ServiceMaster's operating results



Jeff Mariola, president, Rentokil Tropical Services

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(continued from page 8)

ACQUISITIONS

Brickman Group Expands To West Coast

LANGHORNE, Pa. - The Brickman Group, one of the largest companies in the landscape industry, acquired two companies serving the greater San Diego, Calif., market. The companies, Brookwood Landscape and Wrisley Landscape, have been merged into one \$30million branch known as Brookwood Landscape, a Brickman Group Co. This acquisition provides The Brickman Group with its first presence on the West Coast

The Brickman Group pursued the California acquisitions because of Brookwood's and Wrisley's strong past performance, established management teams and reputation for quality and high client renewal rates, according to a company press release.

Three of the five former owners will manage the operation from San Diego. They will

People

Ingersoll-Rand Co. appointed Peter Hong to vice president and treasurer

Smallwood Design Group/Smallwood Landscape appointed Jud Griggs to vice president of operations.

Hal White joined Ferris Industries as vice president of marketing following the company's purchase by Simplicity Manufacturing

Neil Feola was appointed as chief operating officer, a new position, at OmniQuip Textron. The company also promoted Larry Skaff to group controller.

Scott Rushe and Jennifer Zelley were appointed territory managers for Barenbrug

Dalen Products named Carleton Chidester to director of key accounts

Randy Oberlander joined the Growth Products staff as a technical sales representative.

Simplot Turf and Horticulture named Chris Claypool as senior vice president of marketing in the Jacklin Seed business unit.

Irritrol Systems hired Keith Shepersky as category manager for the stand-alone controller product line.





White (top), Griggs (bottom)

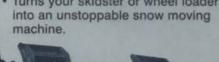
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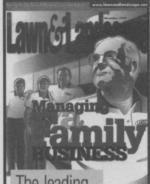
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- □ 3.0thers (please describe)
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work with Brickman Group Executive Vice President John King who will monitor operations and coordinate the transitions.

These acquisitions give The Brickman Group its first presence in California and are expected to lead to additional company growth in the state.

Brookwood Landscape started in 1972 as a small, family-owned landscape construction and maintenance business in San Diego. Today the firm has become a significant force in the Southern California landscape industry. Its business encompasses residential and commercial projects in both public and private sectors.

Founded in 1977 by Ralph Wrisley, Wrisley Landscape was a landscape contracting company operating primarily in San Diego. In 1990, two of the company's senior managers acquired the company from Ralph Wrisley. Originally a landscape construction business, the company added mainte-

nance operations a few years following this transaction. Seeking to accelerate landscape maintenance growth, Wrisley Landscape acquired Camino Real Landscape in February of 1998.

ON THE NET

LESCO Talks About Internet Plans

CLEVELAND, Ohio — As more lawn and landscape industry suppliers explore the potential of serving contractors' via the Internet, many eyes are carefully watching LESCO, who holds a powerful position in the industry because of the significant national coverage its 234 service center locations provide.

To date, the company's Internet efforts haven't produced any tangible results. However, LESCO's corporate restructuring ear-

(continued on page 16)

Association

Bill Speelman, a 36-year employee of The Toro Co., was honored by the **American Society of Irrigation Consultants** with the presentation of the Roy Williams Award. The award is the society's highest honor presented in recognition of substantial contributions to the irrigation industry.

The American Society of Landscape Architects provides solutions to urban design problems with its just-published issue of the Landscape Architecture Technical Information Series, which highlights methods to improve the survival of city trees. The publication is available for free to ASLA members at www.asla.org. Nonmembers may purchase the book for \$49.95 by calling 202/216-2362.

The **California Landscape Contractors Association** granted Bill Locklin, originator of the Nightscaping 12-volt outdoor lighting system, the Meridian Award for substantial beautification of the environment. The Meridian Award is a top honor presented to landscape professionals by the Orange County/Long Beach Chapter of the CLCA as part of its 41st annual Beautification Awards.

The **Ohio Lawn Care Association** is sponsoring an internship program organized to place horticulture and turf management students in member companies, offering them an opportunity to experience lawn care and maintenance first hand. The program's objective is to create excitement for the industry in schools and provide a source of educated job candidates who can return to the companies where they interned for professional careers.

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THE REST

(continued from page 13)

lier this year created an E-Business Division, headed by Wayne Murawski, a six-year veteran of the company. Murawski still has not announced his specific plans, although he has revealed the company's intention to leverage the value of its service centers. "Companies that have bricks and mortar – that have assets and people in place when they enter the dot-com world – are better equipped," he pointed out.

Murawski also pointed to a three-fold mission for a LESCO e-business Web site: Partner with established sales divisions to improve customer service; provide new web-based information and service products to prospective and existing customers; and allow LESCO to reach remote locations the company currently doesn't serve. In addition to direct sales, order status, e-mail and material safety data sheets, Murawski predicts that the site will offer chat rooms, online workshops and access to insurance and temporary labor help.

Although a specific timeline for these

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OCT. 14 Certified Landscape Technician Exterior Exam (retest only), Milton, Ont. Contact: 905/875-1805.

OCT. 14-15 California Landscape Contractors Association Certified Landscape Technician Test, Sacramento, Calif. Contact: 800/448-2522.

OCT. 14-15 "Creating Sustainable Landscapes" Seminar, Bar Harbor, Maine. Contact: 207/581-4092.

OCT. 18-19 California Association of Nurserymen Western Nursery & Garden Expo, Las Vegas, Nev. Contact: 800/748-6214.

OCT. 20 Massachusetts Pesticide Exam, Waltham, Mass. Contact: 617/626-1786.

OCT. 23-24 Managing Snow and Ice Control Operations, Madison, Wis. Contact: 800/462-0876.

OCT. 23-25 Landscape Design Short Course For Residential Properties: Planting Design, Hudson, Ohio. Contact: 440/717-0002.

OCT. 23-27 Hawaii MIDPAC Horticultural Trade Show & Conference, Hilo, Hawaii. Contact: 808/969-20088.

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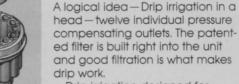
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OCT. 26 Southeast Texas Grounds Maintenance Conference, Conroe, Texas. Contact: 936/539-7822.

OCT. 27-31 American Society of Landscape Architects Annual Meeting and Expo, St. Louis, Mo. Contact: 202/898-2444.

OCT. 30-31 Managing Snow and Ice Control Operations, Allentown, Pa. Contact: 800/462-0876.

OCT. 30-31 Illinois Arborist Association's Seminar/Trade Show, St. Charles, Ill. Contact: 877/617-8887.

NOV. 1 Certified Landscape Technician Exterior Exam (written test only), Eugene, Ore. Contact: 503/253-9091.

NOV. 1-3 Eastern Regional Nurserymen's Association Fall Expo, Atlantic City, N.J. Contact: 301/990-8350.

NOV. 3 Seminar on Diseases of Ornamentals, North Falmouth, Mass. Contact: 413/545-0895.

NOV. 4-7 Green Industry Conference & Expo, Indianapolis, Ind. Contact: 800/395-2522.

NOV. 9-11 National Arborist Association's TCI Expo, Charlotte, N.C. Contact: 800/733-2622

NOV. 12-14 Irrigation Association Show, Phoenix, Ariz. Contact: 800/458-3466.

NOV. 14-16 National Irrigation Symposium, Phoenix, Ariz. Contact: 800/458-3466

NOV. 14-16 Turf and Grounds Exposition, Syracuse, N.Y. Contact: 800/873-8873.

NOV. 14-16 Virginia Turf and Landscape Conference and Trade Show, Virginia Beach, Va. Contact: 540/942-8873.

web offerings wasn't available, the company would like to start updating its Web site within six months.

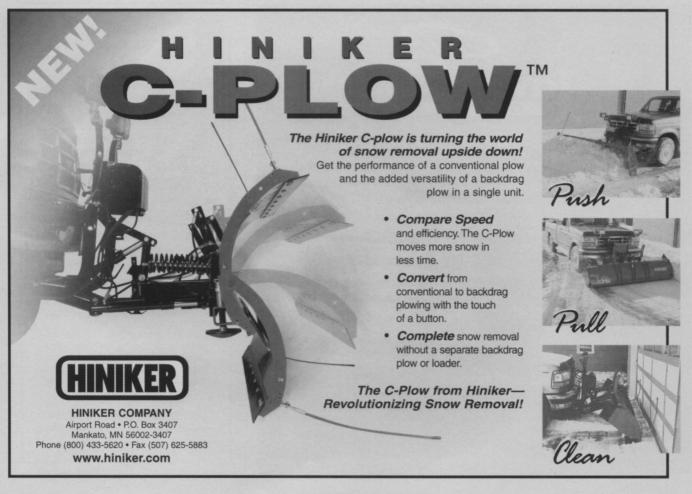
INDUSTRY NEWS

House Tables Bill Intended to Slow Down EPA

WASHINGTON – The U.S. House of Representatives Agriculture Committee postponed a scheduled bill mark-up that would slow the Environmental Protection Agency's (EPA) pesticide review under the 1996 Food Quality Protection Act (FQPA).

A spokesman for the House agriculture panel said the mark-up, which was backed by pesticide manufacturers, was postponed due to scheduling conflicts and would be rescheduled. But lobbyists said chances of setting a new date are slim, with Congress facing a heavy workload until it adjourns in early October before the November election.

The bill, sponsored by Richard Pombo, R-



Calif., and co-sponsored by more than 200 supporters, would allow pesticide manufacturers more time to produce information about the safety of their products.

Under FQPA, EPA must review approximately 9,000 pesticides to determine whether they pose a health risk for children. Critics say the agency has moved too quickly to phase out some of the most popular and widely-used pesticides, and based its claims on computer models that don't include realworld data. The FQPA already banned many uses of chlorpyrifos (Dursban) this year.

Environmental groups have pushed to block the bill, contending that the legislation was an industry tactic to delay EPA from banning pesticides that could affect children's developing nervous systems.

Industry support for the bill has waned in recent weeks, favoring a reintroduction of

the bill at the beginning of Congress in January. With House elections a few weeks away, one lobbyist said some members didn't want to wade into the political issue of children's health vs. pesticide manufacturers.

The bill is also before the U.S. House Commerce Committee, which is considering holding a hearing on the EPA's implementation of the FQPA. That panel is not expected to mark-up the bill.

In related news, the Professional Lawn Care Association of America (PLCAA), Atlanta, Ga., addressed the impact of product loss in light of EPA's recent decision to limit the use of Dursban in its latest ProPoll.

According to the survey, 55 percent of respondent said the eventual loss of Dursban will negatively affect their businesses, citing reasons such as the lack of other, as-effective insecticides and the low cost of Dursban vs. other products. Seventy-six percent of lawn care technicians said they have not experienced customer questions or complaints as a result of the negative publicity surrounding the Dursban story.



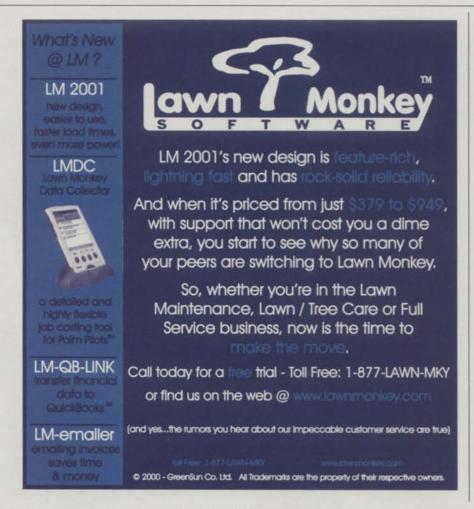
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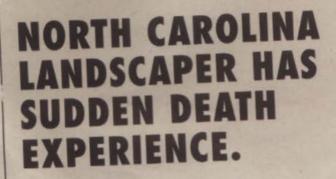
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CICIS TO THE EDITOR

To the Editor:

As a design/build landscape contractor, I love your technical articles and equipment photos. As human resources director for a large landscape maintenance contractor, I've noticed that some of Lawn & Landscape's most valuable contributions to the industry have been related to how we care for our employees. Cynthia Greenleaf's Minding Your Business department titled "A Winning Workplace" (Lawn & Landscape, June 2000, page 39) is a terrific example.

Although recent experience leads me to challenge whether there's a big difference between the recruiting challenges at large and small businesses, recruiting is about using your existing resources effectively. I strongly agree that we often overlook our most effective recruiting strategy: retention.

I wonder what our retention efforts would look like if we gave our people some of the same attention we give to our customers' plants. For example, in the landscape there's a clear distinction between "thrive" and "survive." Field experience teaches us to spot the difference at a glance. We continually strive for healthier,

more attractive plants by asking "What more could we be doing?" And we know that no two plants are alike – even similar plants behave differently depending on the microclimate in which they live. Through our sensitivity to seasons and scheduling, we ask, "When is the ideal time for each intervention?"

What would retention look like if we approached caring for our people with the same rigor we bring to plant care? I'm pretty sure the results would take a great deal of pressure off of our recruiting challenges.

Roger Wyer
People and Organizational Development Solutions
Tucson, Arizona

If you would like to express your opinion in a Letter to the Editor, please send your letter along with your name, title, company name and location to Letter to the Editor, Lawn & Landscape, 4012 Bridge Ave., Cleveland, Ohio 44113. Or send your letter via e-mail to nwisniewski@lawnandlandscape.com.

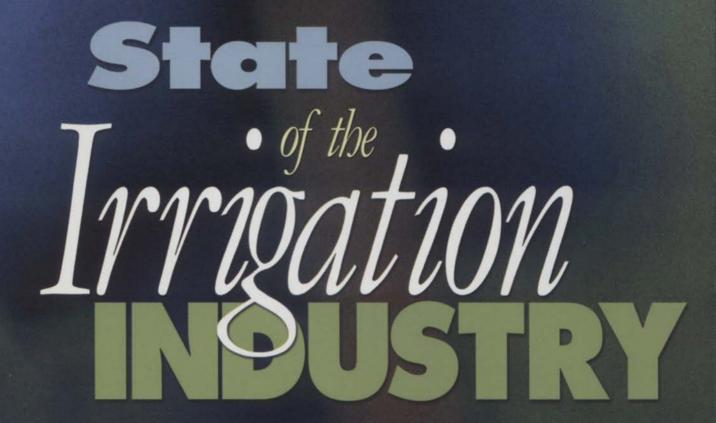




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DISTRIBUTION DIVIDES

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DEALING WITH SLOPE IRRIGATION



Buyers' Guide

This list of turf irrigation manufacturers and their contact information is a key tool for contractors who need to stock up on irrigation products. 118

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by Cynthia Greenleaf

The Golden Age Of Selection of the Control of the C

from across the country agree:
now is a great time to be in the irrigation industry.

Business has never been better. Thanks to a healthy economy, steady consumer spending and generally agreeable weather conditions, irrigation contractors are seeing good times that show no sign of slowing down any time soon.

Don Blackwell is just one of many irrigation contractors throughout the country enjoying an outstanding year. "Business has never been better as far as the amount of work we've been doing and the price we can get for our work," noted Blackwell, president, Advanced Irrigation, Auburn, Wash.

Blackwell's business, which concentrates on high-end residential properties, is thriving – even though he's landing a lower percentage of bids than he did in previous years. "If I went out and did 10 bids, I may have gotten three," he said. "Now I may only get one or two, but I bid higher."

Like many contractors, Blackwell is fetching a good price for his work because people have more disposable income these days, thanks to a booming economy. "The product and market will sustain a higher price," he explained, adding that his metro Seattle market is saturated with affluent technology workers who don't want to spend their leisure time tending to yard work. "So many people now are realizing that time is the most valuable thing we have," Blackwell said. "I like to say that we're in the time business."

Increasingly, people don't want to be "handcuffed to their landscapes," having to

address tiresome tasks such as daily watering, which, of course, bodes well for the irrigation industry, he added.

MORE SUCCESS STORIES. Business this year has also been lucrative for Cascade Irrigation Systems, McCordsville, Ind., a company specializing in residential work. According to President Gregory Baugh, the company experienced yet another record year this past year.

Cascade Irrigation Systems has expanded the last several years, growing about 10 to 20 percent annually. And this consistent growth has been just a conservative effort for the company, which has always strived to rein in expansion and "not just grow for growth's sake," Baugh explained. "We want to be controlled with our growth."

While the prediction of a Midwest drought helped drive sales, a large portion of the company's recent success is due to the changing perception of irrigation, Baugh noted. Once viewed as a luxury item, irrigation now is increasingly considered a necessity by homeowners, he said.

Matt Dearing, owner, Distinctive Landscape, Vancouver, Wash., whose irrigation maintenance-only business has doubled every year for the past several years, agreed with this theory. Because of irrigation's increasing convenience and affordability, "more and more people are getting systems put in," he pointed out. "Ten years ago, it was only doctors and lawyers."

"The industry is maturing," added Christopher Pine, former owner, Pinescape and current northeast district manager, Rain Bird, Pocasset, Mass.

"Consumers are becoming more aware of irrigation," he said. "As economic and environmental conditions have allowed for more investment in outdoor landscaped areas in particular, the reality is that efficient irrigation is critical for protection of that investment. Consumers, in turn, are making wiser choices when deciding on a contractor."

In Texas, an ongoing drought has helped boost irrigation sales, which are at an all-time high, according to Gary Prince, owner, Blume Lawn Sprinkler Systems, Hewitt, Texas. "The last two to three years have been pretty much a drought situation, which helps business, of course," he said, adding that increased water restrictions accompanying the drought haven't placed a significant burden on his company.

As in many sprawling metro areas, an expanding population in central Texas is also bolstering Prince's business, as is the sweltering summer heat's effect on these homeowners new to the region. "Once they

realize what summers are like, they're quick to put in an irrigation system," Prince observed.

The reverse phenomenon is true for Badgerland Irrigation, Middleton, Wis. "Due to the transient nature of business professionals, we are seeing an influx of people from warmer regions into our cooler climate," noted Curt Winter, the company's owner. "These consumers are accustomed to the convenience and benefits derived from an irrigation system."

Similar to the Southwest, dry weather conditions have been a boon for the irrigation industry in the Southeast, according to James Sampsel, regional coordinator of irrigation services, TruGreen LandCare, Orlando, Fla. So far this year, Florida is significantly below its average annual rainfall, facing extremely

dry conditions, he reported. Not surprisingly, "business is very good," Sampsel said.

New England is perhaps the exception to the industry's widespread success this year. "This year has been undoubtedly slower than the last few years," Pine noted. "The wet weather has affected consumers' desire for irrigation and the contractors' ability to install the systems they have sold. We have had an excessive amount and frequency of rainfall coupled with lower than normal temperatures. Last year was a stellar year because of the opposite weather pattern, however, so the differences really are quite pronounced. Personally, I turned my system off during the third week of July and have not run one cycle since."

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preconceived notions."

- Curt Winter

Pine also observed that in areas where upscale residential development continues, irrigation remains strong, however, since most new homes are now built with irrigation systems included. "In some areas, the commercial markets have remained strong as well," he said. "Without a doubt, though, irrigation maintenance is way off from last year because of the weather."

INDUSTRY DEVELOPMENTS. The dynamic irrigation market shows no shortage of trends. With water an increasingly strained resource, expanded regulations governing its use are on the rise in many parts of the U.S. On the East Coast, for example, water

for irrigation will be increasingly difficult to get, especially in New Jersey and Massachusetts, according to Brian Vinchesi, design engineer, Irrigation Consulting, Pepperell, Mass. He added that irrigation system efficiency is a growing concern and measures such as mandated system audits to ensure efficiency are on the rise.

Prince also sees more regulations on the horizon, especially regarding backflow prevention devices. Within the next few years in Texas, he anticipates a mandate to switch from a double check valve to a high hazard variety, which should increase his company's costs by about 5 to 10 percent, he said.

In addition, Florida, as with many other

states facing water shortages and booming population growth, will likely see increased reclaimed water use, according to Sampsel.

Thanks to lower pricing and improved ease of operation, heightened reliance on computerization is yet another trend surfacing across the industry.

Technology, such as irrigation scheduling systems and weather stations, is trickling down from more sophisticated setups into simpler applications such as small commercial and residential properties. Using technology to increase system precision is consistent with the trend of holding users more accountable for water usage, Sampsel pointed out.

The issue of water conservation is here to stay, Pine agreed. "As professionals, we need

"More and more people are getting irrigation systems put in. Ten years ago, it was only doctors and lawyers." - Matt Dearing

to realize the importance of conserving water because of the public's misconceptions about our intentions," he said. "Unfortunately, too many times it is assumed that landscape irrigation is wasteful and should simply be banned or severely restricted without considering alternatives or weighing the benefits. There is the potential at any time for varying restrictions to be placed on our industry that can have a great deal of impact on our future."

As water conservation becomes increasingly critical, contractors must take it upon themselves to act as industry ambassadors and educate the public, Winter advised.

"It is incumbent on irrigation professionals to learn as much as they can and educate the public about efficient water use of a properly designed system," he urged. "Without that focus, and as water conservation becomes a larger issue, and it will, irrigation contractors run the risk of having their systems classified as wasteful or as an unnecessary luxury. It makes more sense to get the word out now than to fight the uphill battle of preconceived notions."

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other industry trends. As part of water conservation efforts, drip irrigation is one segment of the industry that's expanding, according to contractors. Baugh, for one, has noticed increased drip use on residential properties. "As cities put these (water) restrictions on, people are realizing the value of low-volume watering devices," he said, adding that in his business, drip irrigation use has grown about 100 percent over the past three years.

Blackwell has experienced a similar situation with his residential clients, many of whom are installing drip in their yards because they "want to do the right thing and not waste water," he said.

From his vantage point on the East Coast, however, Vinchesi said he doubts drip will ever become overwhelmingly popular with homeowners, because it is simply too high maintenance compared to conventional irrigation systems, he said.

In terms of other trends, Vinchesi noted that commercial irrigation projects are growing in size. "We're seeing more projects at the \$1 million level while before they were generally less than half a million," he said, adding that this trend is largely due to a lack of labor.

On larger sites in particular, property managers facing a labor shortage "don't want to have to go around and hand water every plant," Vinchesi pointed out.

From construction contractors to tree care professionals, seemingly "everybody is getting into the irrigation business," Blackwell observed of another industry development, adding that he's now competing with just about every kind of company for irrigation jobs. "Increasingly, there's a lower and lower percentage of people who do just irrigation."

Many of these fly-by-night irrigation contractors hurt the industry with their low bids because they "lower the common denominator," Blackwell said. "Bids are measured off of the lowest guy, no matter how slimy he is." Often, the job comes down to the fact that "you were \$5,000 and Billy Bob Irrigation was only \$2,500," he said.

These "low ballers" probably help the industry in the long run however, by inadvertently drumming up increased business for their more professional counterparts, Blackwell concluded. "Inevitably, these guys come and go," he said. In the meantime, "they help us grow our service industry." Pine supported this assessment. "I feel that years like this, as much as nobody wants to hear this, are good for the industry because it helps to shake out a few contractors who really aren't good for the industry," he explained. "It gives the good contractors a chance to slow the pace of constant growth and regroup."

THE ONGOING CHALLENGE. Finding qualified employees is one of the most serious dilemmas the irrigation industry faces today. "Labor is our biggest problem," Blackwell observed, adding that many high school and college age workers simply aren't aware of the various job opportunities the irrigation industry offers.



Sampsel agreed. "I don't think the average graduate knows what irrigation is all about," he said. "We have a definite need for individuals interested in this field who want to make a career of it."

More often, contractors are resorting to creative measures to attract and retain workers. For one, Vinchesi sees a heightened use of foreign labor, especially workers from Central and South America, he said.

Constant networking is also essential, according to Baugh, who noted that he found his two full-time employees through his church. "You just have to go through a lot of people to find someone who cares about their job," he said.

A BRIGHT FUTURE. The industry's good times should continue if the predictions of many contractors from across the country ring true. Sampsel, for example, envisions consistent expansion for his company in the next few years. "I see nothing but exponential

"The industry is maturing. Consumers are becoming more aware of irrigation. As economic and environmental conditions have allowed for more investment in outdoor landscaped areas in particular, the reality is that efficient irrigation is critical for protection of that investment."

— Christopher Pine

growth," he said, observing that the residential irrigation repair segment of TruGreen LandCare will likely continue to be a consistent profit center.

Raising prices periodically fits into this scenario as well, Sampsel added. "You have to generate a profit. That's what's necessary. You can't stay in business and not make a profit."

Baugh agreed with this approach. "There's always room to increase pricing," he said, adding that he has never reached the "upper limit" of what he could charge, though it doesn't matter with most of his customers, he said. "Most people don't really care what I charge, just so I do a quality job."

Advanced Irrigation intends to raise its prices on the service side of its business next year since customers are always willing to pay more for expertise in this area, according to Blackwell. He said he has a positive feeling that "the next few years will be just as good for business as this past year has."





Insights from the Irrigation Association

The last three years have been terrific for the landscape/golf irrigation industry with many companies growing 15 to 20 percent a year. The strong economy, dynamic weather conditions, acceptance of installed automatic irrigation as a normal part of home ownership, and the drive to conserve water have all contributed to the industry's expansion. Technically, the industry has created ways to do more with less water by developing such innovations as more accurate low-flow nozzles and controllers that take the guesswork out of watering.

The irrigation field, which has always been entrepreneurial in nature, is now experiencing the mergers and acquisitions common in other industries. This is particularly true in the distribution and landscape construction sectors. There are seven irrigation distribution companies, for example, that are now multi-regional in coverage with one that is almost national in terms of store locations.

The future looks bright for landscape irrigation as technical creativity and recycled water use further stimulate an already favorable situation.

- Tom Kimmel, executive director, Irrigation Association

Winter echoed this outlook. "There are many reasons to be optimistic about the growth of the irrigation industry," he observed. "Despite periodic fluctuations, new construction continues to be strong. Today's consumers want to enhance the value of their property and relieve demands on their precious free time. By staying in tune with our customer's current and future needs we can ensure our own long term prosperity."

The author is Associate Editor of Lawn & Landscape magazine.

Want more information?

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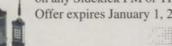
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by Kristen Hampshire

Some irrigation distributors are realigning their company focus and modifying business practices to cater to the evolving industry.

The irrigation distribution channel is narrowing, leaving a tighter margin for wholesale distributors in the market. While all industry segments - manufacturers, distributors and contractors drive the flow of the supply chain, a burgeoning pressure for efficiency, price adjustments, economies of scale and valueadded services leaves companies the choice to change with the tide or get swept away in the consolidation current.

Ironically, growth is condensing irrigation distribution, with national and regional wholesale conglomerates acquiring local distributorships and small operations realigning their service focus to preserve their industry presence. Distributors are in a position to change and grow or stagnate and sell.

Not one sector of the distribution network is immune from the changes a maturing industry initiates, and no single player in the spectrum will thrive without a strategy to adapt to industry developments. "There have been pretty radical changes and they are actually happening in a very compressed time frame," stressed Rick Fields, director of sales and marketing, Wilkins - a division of Zurn Industries, Paso Robles, Calif.

PUSHING THE CURRENT. The time is right for distributors considering growth. A healthy economy and maturing industry combined with increasing customer demand for landscape services is driving change and spearheading consolidation efforts in the irrigation distribution chain.

"A lot of money is available now," noted Rex Dixon, vice president of marketing, Weathermatic, Dallas, Texas. "Many of the distributors are opportunistic and taking advantage of the fact that there is capital available, they are looking for new markets and they are seeing the irrigation market. You put that all together and you get consolidation."

Similar to electrical and plumbing trades, the irrigation industry is aging and following the natural progression of a "maturing industry," noted Dirk Lenie, marketing manager, Irrigation Division, The Toro Co., Riverside Calif. Merging distributors results in increased economy of scale, which can disperse administrative costs and skim business expenses to buffer a company's bottom line, he explained.

"Contractors and distributors are looking for more means of income," Lenie explained. "If you can leverage more sales over the same asset schedule, you'll be more profitable. Take cost out of the chain, which benefits everyone, and there is more pressure on margins coming down because of more competition based on price."

Consolidation benefits distributors pass on to contractors include a wider availability of tools, common administration, networking advantages and access to multiple markets. Also, manufacturers who work with larger distributors might offer incentives for high-volume purchases. For manufacturers and contractors alike, the benefit of a changing industry is the multitude of options.

"Customers ultimately have more choices - choices in price and value, and the product offering that is available to them," observed Brodie Bruner, vice president of sales, Weathermatic. "For distribution, now more than ever, distributors have to decide who they are. They have to understand their business model."

Distribution business owners and industry veterans with irrigation experience and financial and technological assets to propel their companies to a more profitable level are positioning themselves to climb the business ladder, Fields added.





Change in irrigation distribution might determine how contractors obtain their supplies. Photo: Hunter Industries

tremendous amount of business knowledge behind them," he explained. "Because there's a good availability of capital, the people that are visionaries can drive this growth agenda. The money is there and they have the business background to succeed."

Jeff Carowitz, vice president of marketing, Hunter Industries, San Marcos, Calif., suggested that a desire to exit the industry is sparking many consolidation efforts. He painted a picture of three seasoned irrigation executives, where two of them are ready to retire and the third is ready to grow. Here, consolidation represents a type of retirement plan.

In addition, business operation costs have increased and companies must consider profitearning options to soak up added expenses, noted Mark Agnew, CEO, United Green Mark, Novato, Calif. "The size of the investment has gone up in terms of breadth and depth and the customers' expectations of sell rates," he said.

"We're on the front of more 'B to B' business being done in some way, shape or form aided by computers, and the cost of that is going to be more difficult to absorb for smaller wholesalers."

And for wholesalers to remain competitive, they must strive to meet a growing customer and contractor demand for one-stop shopping – the need to find parts, service, and information from a single source. More distributors are offering value-added services

by targeting a larger market through expansion, or focusing on a tighter market by firming relationships with local contractors. crunching the market. Gradually, consolidation is restructuring irrigation distribution, and wholesalers who will survive industry acquisitions are those who view changes as opportunities instead of setbacks, Carowitz noted. Large companies that highlight efficiency and small companies that niche-market and build personal relationships with their contractors will flourish.

"The loser is the company that doesn't change, becomes complacent and takes the customer for granted," Carowitz described. "There's a niche for the ones that redefine their business and decide to really focus on relationships with their customers. But they can't simply sit back and say, 'I'm going to sit here and do nothing, and I'm going to expect things to happen the way they did before.' Change is there and we all have to adjust."

Some distributors adapt by packing more than products in their warehouses. Like customers, contractors also place high priority on convenience and value ancillary products distributors offer, such as hardware, water features or lighting components. Outstanding customer attention and supplemental services, including seminars, design training and troubleshooting techniques, are ingredients for a competitive distributor, remarked Brian Day, marketing manager, Century Rain Aid, Madison Heights, Mich.

"There are many things that a contractor needs to do to be successful," he commented.

"There have been

changes and they

are happening in a

very compressed

time frame."

- Rick Fields

pretty radical

"Distributors can provide those functions to relieve that burden from the contractor so he can do what he gets paid to do, which is to sell and install irrigation systems. What we need to do is provide them with a myriad of different services and capabilities to help them be more successful at their jobs."

Large companies in a position to acquire small

wholesalers concentrate on the advantages of being more than a one-man operation, which includes the support of several regional of-

fices in a business where environmental conditions determine profitability and national chains boast a geographic edge, Day noted.

"Geographic diversification helps in terms of finding ways to literally weather the storm," he said. "Businesses in the green industry are driven by positive economic factors combined with positive weather.

"If you're selling top-end furniture and you have a great economy, rain doesn't matter because people still want a new couch," he related. "With rain, people will buy a Jacuzzi and get the sprinkler system next year."

Large distributors who have clout with manufacturers also can serve as a sounding board for contractors' ideas, concerns and input on products, Day added. "We can help provide the contractor with a voice going back to manufacturers. We can forward problems we hear about and see from our contractors and communicate product suggestions. We provide an information loop back to manufacturers from the contractor."

In the meantime, smaller companies must fine tune relationships with their client base to solidify their position within the distribution channel, Agnew advised. United Green Mark encompasses a five-state region and Agnew has been involved in 15 recent acquisitions, all of which produced successful operations and did not "squeeze out" small wholesalers. He

"The changes in irrigation distribution are so critical for all of us - manufacturers, distributors and contractors - in our positioning in the market. If you are not an expert in it, you're very vulnerable right now."-Brodie Bruner

said his company competes with smaller distributors who will continue to be strong market players as long as they maintain proactive business practices.

"The industry now is sort of like the Westward Expansion when land was available from the Homestead Act," Fields compared. "It was a frenzy and people moved west to stake out a piece. We're seeing the same in consolidation, with West Coast companies moving east and

Irrigation Industry Structural Changes

Structural changes in the irrigation industry prompt issues distributors must address to maintain a competitive and successful position in the supply chain. According to a 1998 study conducted by the Farnsworth Group for Weathermatic, Dallas, Texas, all members of the distribution channel - manufacturers, distributors and contractors - must reassess their company views and the markets they serve. Distributors should:

- Determine what they want to be smaller niche players or large, full-service
- · Identify changes in operating and expense structures to create a new "profit formula" for the company.
- Identify specific target segments and focus on meeting the segments' needs.
- · Choose channel partners whose goals and programs best match their strategic direction in the industry.

Midwest companies moving west.

"The little guy has to expand his service and parts capability, and has a better chance of surviving because they are also a target for acquisitions, because smaller companies can be very nimble and move fast to meet the changing needs of their customers," he con-

> tinued. "The middle guy has the opportunity to diversify - to provide more products and expand selling opportunity to get into nearby market niches."

And the middle guy should move quickly. A 1998 study conducted by The Farnsworth Group, Indianapolis, Ind., for Weathermatic suggested that mid-size players will be caught in the "economic and operational middle," with lower wholesale volume levels than niche- and full-line vol-

ume players. The report advised irrigation distributors to set a target market, structure a "profit formula," focus on meeting market needs and form partnerships in the industry channel with manufacturers and contractors with similar strategic goals.

MAKING MASS IMPACT. Irrigation distribution is not a two-tiered division of small and large wholesalers. Though the spectrum of company size and focus shows extremes, another player threatens some distributors. Mass merchandisers - home centers like Home Depot and Lowe's - are also seeking growth, and their strategy targets professional irrigation contractors, Bruner explained.

"The greatest impact that the mass merchandisers have had is the awareness that they have created in the consumer market awareness for irrigation in general," he noted. "The awareness of irrigation systems is a positive thing. However, the awareness is not purely for irrigation, but also of pricing associated with the products and brands that are sold through these mass merchandisers."

Price-shopping customers question contractors who cannot match retail prices, however, which are generally 30 to 50 percent less than list prices. Ninety percent of contractors mark up their products to cover labor charges, which leaves customers weary of the discrepancy when shopping the irrigation aisle at a home center, Bruner explained.

"Contractors are afraid people will say, 'You are not a doctor or a lawyer, you are a sprinkler repair guy," he said, describing why contractors pad product prices. "They are using the inflated profit cost to remove the objection that might be created by a true labor cost."

Contractors must sell expertise to compete with home centers.

Besides price constriction, distributors feel claustrophobic in a market with home centers because mass merchandisers offer extended hours, credit lines and free overnight direct delivery - all perks to attract professionals, Dixon added. "Mass merchandisers' growth depends on reaching out beyond the do-it-yourself market. They have a focus to compete directly with wholesale distributors today, and to reach out to the contractor."

Mass merchandisers are achieving their goal in some respects, with some industry professionals predicting increased sales in coming years. The Farnsworth study calculates a 20 percent growth in the residential doit-yourself market in the next few years compared to a 4 percent increase in the traditional irrigation distribution market. This figure results in a distribution chain composed of 30 percent do-it-yourself and 70 percent combined residential, commercial, municipal and golf installations, leaving a shrinking gap between the popularity of these segments.

The breadth of products home centers offer appeals to one-stop shoppers, but often a home center's dedicated sprinkler aisle is as seasonal as a Christmsas decoration department. Agnew said that his company typically stocks six times the amount of irrigation supplies that a home center carries. Despite convenient hours and financial resources, mass merchandisers are not a practical supply source, as they target aesthetic do-it-yourself projects, he added. Irrigation, on the other hand, is a functional improvement.

"I am in a mass merchandiser once a week, and although they have done a couple of acquisitions, the footprint of their stores is going the other direction," Agnew observed. "The bigger stores have expanded their wall coverings, cabinets and floor offerings. They have become more design-oriented and the nuts and bolts are actually shrinking in the stores."

Contractors and distributors can differentiate themselves from mass merchandisers by offering product brands not available in home centers. This way, consumers will not question price and quality discrepancies. "Mass merchandisers might have 20 or 100 sprinklers, but they don't have 1,000," added Wayne Miller, president, Century Rain Aid. "Irrigation isn't a huge industry, and for most retailers, the mantra is 'Sales per square foot,' and there are other products that would be more appealing."

PRICING THE PRODUCTS. The importance of choice in today's irrigation distribution avenue reaches beyond business decisions and marketing strategies. End-users can pour over product price tags, turn to home centers for a "deal," price-shop among contractors and settle with the least expensive offer.

Consumers who play the price game are

not necessarily purchasing value. Consolidations have created more homogeneous irrigation product costs across regions, but contractors and distributors face a promotional decision when attracting customers. Companies who advertise just on price draw bargain hunters.

Agnew noted that the combination of consolidation and consumer cost awareness de-

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creases regional price discrepancies. Also, the growing demand for irrigation services increases the volume of materials production which drives down prices for consumers, he said.

"You have to ask yourself, 'Do I have the volume to truly be a broker, or am I a valueadded distributor who gets the price he can at his cost base and adds valuable services that the contractor is willing to pay money for?"" Bruner pointed out.

Distributors must earn savings to pass on price cuts to their customers. Larger distributors' high-volume purchases allow them the opportunity to bargain for lower prices and thereby provide them with a competitive advantage, noted Stuart Nyren, director of marketing, United Pipe and Supply, Tacoma, Wash. To gain similar purchasing power, some small wholesalers are forming buying groups, but the impact of these alliances remains unknown, he added.

"If I was a manufacturer, I would be very concerned because pretty soon I'm going to

The Impact of Distributor Consolidation

The 1998 Farnsworth Group study conducted for Weathermatic, Dallas, Texas, on competitive changes affecting the irrigation industry predicted:

- The distributor segment of the irrigation industry will experience the greatest degree of "dislocation" of any industry segment.
- The erosion of market share and accelerating price pressures will mandate most distributors to specialize or consolidate.
- The large regional and national players and retail marketing trends will have a significant impact on industry change.

have three big, hungry gorillas at the table with me," Nyren said, visualizing future manufacturer-distributor negotiations as some distributors grow significantly.

Manufacturers' role in the distribution channel piques the interest of many industry players, Bruner noted. They, too, have choices. (continued on page 18)





by Todd Mohr

Here are 10 tips for setting up an effective irrigation system on a slope.

In order to maintain proper pressure and even water distribution, irrigating on a slope requires a range of careful considerations.

Photo:
Rain Bird



Dealing

SLOPE IRRIGATION

Meeting plant requirements and managing irrigation systems can be a difficult task under normal circumstances. When slope plantings are involved, applying water efficiently and effectively can be extremely challenging. Too little water and plants won't grow – too much water and you've got other problems.

Several tactics can be utilized to help you deal with these ups and downs. The following are 10 design and product application tips for effective slope irrigation.

- 1. To reduce runoff, select an irrigation timer that controls water applications. Choose an irrigation timer with at least four start times per program. Determine how long a station can be on before runoff occurs. Then divide the run time necessary to meet the plant water requirements by this factor. If necessary, use each start time and reduce runoff that results from running valve stations too long. Even better, use an advanced controller with a feature that allows for intermittent applications so applied water has time to filter into the soil. This will allow the total irrigation run time to be split into usable cycles, and the application of water divided into intervals that the soil will easily accept.
- **2.** Use master valves and flow sensing equipment as an insurance policy. Using a master valve is important when irrigating slopes.

Strategically locate the master valve to reduce the length of constantly pressurized mainline around the slope and before the zone valves. A normally closed master valve will supply a mainline with water only when a cycle is initiated from the controller. This equipment will reduce the time that a damaged sprinkler, broken pipe or defective valve will have to wash away the landscape.

Flow sensing equipment can detect excessively high flows when a problem occurs. If calibrated properly, the flow sensing equipment will work in conjunction with the master valve to shut the system down and eliminate significant damage during an excess flow condition.

- **3.** Use reverse-flow valves to reduce problems associated with a worn diaphragm. The inner workings of a reverse flow valve will prevent water from continuously flowing if the diaphragm is torn. In other words, a reverse flow valve is effective because it will fail in the "off" position. A valve without a reverse flow feature can fail in the open position, run continuously and erode the slope until it is repaired.
- **4.** Use pressure compensating/regulating devices to get the best sprinkler coverage. When used in accordance with the manufacturer's specifications, pressure-regulating modules can

be installed on valves to adjust the operating pressure of sprinkler heads downstream.

Sprinkler nozzles that provide optimum pressure distribute water as efficiently and uniformly as possible. Sprinkler nozzles operating at pressures significantly above or below the optimum pressure usually perform poorly and, as a result, plant material suffers.

Built-in pressure compensating or regulating devices provide the best option since the optimum operating pressure is delivered directly to each sprinkler head. This will eliminate misting caused by high pressures, reduce water drift due to wind, and give the water droplets the best chance of getting to where they are designed to go.

5. Adjust the distance between lateral lines to compensate for the slope. On a 2:1 slope, for example, a properly adjusted sprinkler will throw about 80 percent of its radius above the head and 120 percent of its radius below the head. This concept is difficult for many people to understand because on the site plan of an irrigation project, slopes appear to cover less ground than they actually do, and the

effect of the slope cannot be accurately depicted.

Therefore, sprinklers can be spaced consistently along the lateral, but the distance between bottom and middle laterals should be reduced and moved up toward the top of the slope to obtain head-tohead coverage and compensate for the true effects of the slope.

6. Space lateral lines across the slope other problems. rather than with the slope. When installing the lateral lines, make sure they follow the contours of the slope. If lateral lines are incorrectly installed from the top to the bottom of a slope, the pressure differential resulting from the elevation change could create severely uneven pressure at each of the various sprinkler nozzles, causing irregular water distribution.

Additionally, the higher pressures at the bottom of the slope could shorten the longevity of the pipes and sprinklers.

- 7. Limit sprinkler heads on a valve zone to decrease potential damage. As you add more sprinkler heads to a zone, the size of the delivery system components and infrastructure will increase. In this case, a more elaborate system also means that more water will be available to cause damage in the event that a component in a system breaks. Consequently, large zones are not recommended unless other safeguards are included to circumvent potential problems.
- 8. Limit sprinkler heads on a valve zone to increase performance. Tailor the irrigation system to meet the specific water requirements of the slope areas. Separate zones to apply water to slope sections with considerably different plant material, as well as different exposures such as sun, wind, rain and other climatic influences.

If you mix zones together, it will be difficult to keep plant material healthy because one side of the slope will get too much or too little water.

9. Place part-circle sprinklers on separate zones or use matched precipitation rate nozzle packages. Uniform water distribution is critical for effective slope irrigation. To achieve this, separate part-circle sprinklers from full-circle

When slope plant-

ing are involved,

too little water

and plants won't

grow, too much

and you've got

sprinklers, and then adjust the station run times. An easier method is to use nozzle sets that are specifically designed to create consistent precipitation rates, despite the various arcs and radii.

Using matched precipitation rate nozzles on the same valve system reduces the chance that your system will put down too

much water with some heads and not enough from others. This will help diminish the potential for severe soil erosion.

10. Install sprinklers with check valves to contain erosion. When used properly, a check valve will contain unpressurized water in the lateral lines after the zone valve has completed its watering cycle (if the valve is located at a higher elevation). Without a check valve, the elevation difference from a valve above to the sprinklers below could generate enough internal pressure to force water out of the sprinkler.

A check valve will prevent water that remains in the pipe from draining out of the sprinklers after the valve has shut off, thus reducing the chance of erosion of the landscape areas on or around the slope. Look for sprinklers that have built-in check valves. This eliminates the need to install separate check valve under each sprinkler.

An added benefit... Because many slopes are planted with ground cover instead of turf, consider installing 6- or 12-inch, pop-up sprinklers rather than riser-mounted sprinklers. Not only will the pop-ups improve the visual impact of the site, they aren't as visible, and may cut down on vandalism.

Effective slope irrigation is a mixture of thorough up-front planning, proper installation, and a solid maintenance technique. If all three are done properly, many emotional, financial and physical problems can be avoided, and healthy, aesthetically pleasing slope planting will result.

The author is area specifications manager, Rain Bird, Glendora, Calif.

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| Abacus Controls, Inc. | P.O. Box 223 | Tyngsboro | MA | 01879 | 978-649-8828 | |
| Ames Company | 1485 Tanforan Avenue | Woodland | CA | 95776 | 530-666-2493 | |
| Ametek - Plymouth Products Div. | P.O. Box 1047 | Sheboygan | WI | 53082 | 920-451-9343 | |
| Amiad Filtration Systems | P.O. Box 5547 | Oxnard | CA | 93031 | 805-988-3323 | |
| Applied Biochemist/Aquashade | 6120 W. Douglas Avenue | Milwaukee | WI | 53218 | 414-464-8450 | |
| Bermad Control Valves | 4070 Leaverton Court | Anaheim | CA | 92807 | 714-666-1100 | |
| Bio-Green | 6216 South Sandhill Road | Las Vegas | NV | 89120 | 702-433-4331 | |
| Bowsmith | 131 Second Sreet/P.O. Box 428 | Exeter | CA | 93211 | 559-592-9485 | |
| BPDI | 15840 N.32nd Sreet Suite 4 | Phoenix | AZ | 85032 | 602-788-5411 | |
| Buckner by Storm | 4381 N. Brawley Avenue | Fresno | CA | 93722 | 559-275-0500 | |
| Champion Irrigation | 1460 Naud Street | Los Angeles | CA | 90012 | 213-221-2108 | |
| CMB Industries | P.O. Box 8070 | Fresno | CA | 93727 | 559-252-0791 | |
| Conbraco Industries, Inc. | P.O. Box 247 | Mathews | NC | 28106 | 704-847-9191 | |
| Cycle Stop Valves | 10221 CR 6900 | Lubbock | TX | 79407 | 806-885-4445 | |
| Data Industrial | 11 Industrial Drive | Mattapoisett | MA | 02739 | 508-758-6390 | |
| Dawn Industries | 4410 North Washington Street | Denver | CO | 80216 | 303-296-4041 | |
| Dayni Controls | 18414 Eddy Street | Northridge | CA | 91325 | 818-349-8367 | |
| DIG | 1210 Activity Drive | Vista | CA | 92083 | 760-727-0914 | |
| Drip In Irrigation | 2836 N. Larkin Avenue | Fresno | CA | 93727 | 559-674-5000 | |
| Ecologic, Inc. | 9305-C Burge Avenue | Richmond | VA | 23237 | 804-261-3337 | |
| Fertigator | 8404 East Ponderosa | Parker | CO | 80138 | 314-821-5858 | |
| | 1600 Falmouth Road | Centerville | MA | 02632 | 800-356-9935 | |
| Flo-Well/Water Management Systems Flowtronex PSI | | Dallas | TX | 75220 | | |
| Hendrickson Brothers. | 10717 Harry Heines Blvd. 2931 Lester Avenue | Corona | CA | 91719 | 214-357-1320 | |
| Hunter Industries | 1940 Diamond Street | San Marcos | | 92069 | 909-737-6822 760-744-5240 | |
| | | | CA | | 909-688-9221 | |
| Irritrol | 5825 Jazman Street | Riverside | CA | 92504 | | |
| L R Nelson Corp | One Sprinkler Lane | Peoria | IL. | 61615 | 309-692-2200 | |
| Lasco Swing Joints | 540 Lasco Street | Brownsville | TN | 38012 | 901-772-3180 | |
| Marsan Turf & Irrigation | 519 Terrace Drive | San Dimas | CA | 91773 | 909-592-2041 | |
| Maxijet, Inc. | P.O. Box 1849 | Dundee | FL | 33838 | 813-439-3667 | |
| NDS | 851 N. Harvard Avenue | Lindsay | CA | 93247 | 800-726-1994 | |
| Nelson Irrigation Corp | Rt. 4 Box 169/Airport Road | Walla Walla | WA | 99362 | 509-525-7660 | |
| Netafim Irrigation | 5470 E Home Avenue | Fresno | CA | 93727 | 559-453-6800 | |
| Oetiker, Inc. | 3305 Wilson St. / PO Box 217 | Marlette | MI | 48453 | 517-635-3621 | |
| Olson | 10910 Wheatlands Avenue | Santee | CA | 92071 | 619-562-3100 | |
| Orbit Irrigation Products | P.O. Box 328 | Bountiful | UT | 84011 | 801-299-5555 | |
| Pappas Products, Inc. | 23 Rose Farm Lane | Woburn, | MA | 01801 | 800-924-9519 | |
| Progressive Electronics | 325 S. El Dorado | Mesa | AZ | 85202 | 480-966-2931 | |
| Rain Bird | 4261 S. Country Club Road | Tucson | AZ | 85714 | 520-741-6100 | |
| Rain Master | 1825 Surveyor Ave. #103 | Simi Valley | CA | 93063 | 805-527-4498 | |
| Remote Control Technology | 18342 Redmond Way | Redmond | WA | 98052 | 425-885-6362 | |
| Superior Controls Co. | 24950 Kearny Ave | Valencia | CA | 91355 | 661-257-3533 | |
| The Toro Company | 5825 Jasmine Street | Riverside | CA | 92504 | 909-785-3600 | |
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| United Elchem | 11535 Reeder Road | Dallas | TX | 75229 | 972-241-6601 | |
| VIT Products | 920 S. Andreasem Drive, #106 | Escondido | CA | 92029 | 760-480-6702 | |
| Watts Regulator | 815 Chestnut Street | North Andover | MA | 01845 | 978-688-1811 | |
| Weather-Matic | 3301 W. Kingsley Road | Garland | TX | 75041 | 214-278-6131 | |
| Weather-Tec | 5645 E. Clinton | Fresno | CA | 93727 | 209-456-2156 | |
| Wilkins - A Division of Zurn Industries | 1747 Commerce Way | Paso Robles | CA | 93446 | 805-238-7100 | |

State of the IRRIGATION INDUSTRY

(continued from page 14)

"They are in a position where they are choosing which channels they will sell through," he said. "Rather than wholesale distribution being the only choice, the choice is how to get products to end users. The fact that they have an option is also driving some of these industry changes."

distributors are brick and mortar, will future industry competitors be what Bruner calls "brick and click?" Internet developments play an undefined and unpredictable role in the irrigation industry's changing structure, but still are a prevalent factor in the technological progression distributors face to stay on the edge. However, most contractors recognize the Internet's convenient function as an information source.

"The Internet can be accessed 24 hours a day, seven days a week for specification sheets and product information," Bruner added. "It

also creates open lines of communication among distributors, manufacturers and consumers."

Already, distributors are launching Web sites so contractors can conveniently place orders, check their account status and browse product catalogues. "We are using the Internet to expand our capabilities in working through our distribution channels," Fields noted. "Internet is basically an evolution of the distributor's purchasing function—from phone orders to fax orders to Internet."

Some are curious as to whether or not the Internet will mimic and replace the distributor's role in the supply cycle. E-commerce is thriving for some industries, but online shopping is new for the irrigation industry, and "brick and click" transactions remain to be seen. Most distributors are skeptical as to whether or not e-commerce will overpower traditional sales methods.

"To assume there's a wave coming that's going to squash us is panic business," Agnew commented. "A lot of the products we sell don't lend themselves to the Internet. You can't deliver pipe through UPS – it's too heavy, too big and too bulky. "

The capability of distributors to sell their products over the Internet will create another avenue where customers can price-shop and manufacturers possibly can sell directly to end-users, however. "E-commerce can be a threat and a potential competitor to wholesale distribution," Bruner recognized. "At the same time, the traditional wholesaler, with established locations and relationships with contractors, is best suited to take advantage of the benefits of the Internet."

SHAPING OPPORTUNITY. In a tightening industry, staying strong means incorporating innovation, smart business sense, sharp marketing strategies and solid distributor-contractor relationships. "There is as much opportunity for the third generation of irrigation distributors as there was for the first generation," Agnew predicted for companies willing to adapt to the industry's changing tides.

Consolidation compacts the distribution channel, but at the same time, these acquisitions prompt other companies to investigate more efficient business methods while fine tuning customer service. While acquisitions may leave less room for "mom and pop" operations, but there remains ample space for all three segments of the market to compete in the distribution chain, Carowitz noted.

"As the population ages, I think people are going to be less inclined for do-it-yourself activities and we'll see a rise of professional contractors in the future, once again," he said. "The distributor and manufacturer that supports contractors will be successful and contractors will remain alive and well."

Irrigation distributors who plan on seeing their company through the "third generation" will be aware of the many choices available to manufacturers, distributors, contractors and end-users and must follow the industry's direction while remaining innovative.

"The changes in irrigation distribution are so critical for all of us – manufacturers, distributors and contractors – in our positioning in the market," Bruner stressed. "If you are not an expert in distribution trends, you're very vulnerable right now."

The author is Assistant Editor of Lawn & Landscape magazine.

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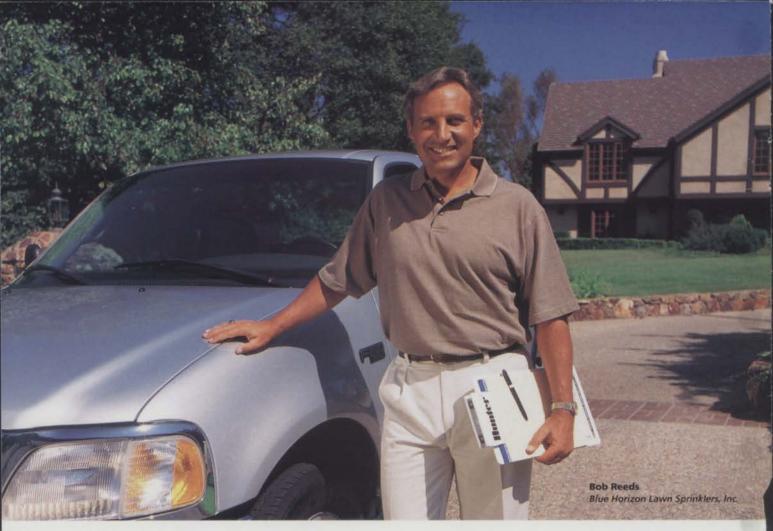
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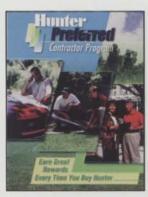
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The update is currently in progress and will be available soon. Stay tuned to the Web site for more details.

Weekly Features

Plant Of The Month - Author Barbara Ellis focuses on nicotianas, commonly known as flowering tobaccos.

Novartis TechNotes - Find weekly tips, soil temperatures from around the U.S., bug activity maps, growing degree days and more.

GreenSearch PeopleSmarts -

GreenSearch explores how businesses change as they evolve and how managing a business and measuring a company's success go hand-in-hand.

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Find these features at www.lawnandlandscape.com/ weeklyindex.asp.

Exclusive Online Features For October:

Trade show season is in full swing. Contractors can look forward to the Green Industry Exposition (Indianapolis, Ind., Nov. 4-7) and the International Irrigation Show (Phoenix, Ariz., Nov. 12-14). These and other industry trade shows provide many opportunities to check out new equipment, learn industry practices and network with other industry professionals.

Lawn & Landscape Online will feature previews of the shows during October providing key information and contacts providing key information and contacts. We'll also talk to several contractors and companies that exhibit at various industry trade shows and report on show seminars, events and sales and marketing opportunities.

As always, we'll also highlight an individual or company with significant industry impact in our Contractor Profile

NLINE Contents

Check these links to discover the tools available on Lawn & Landscape Online that will help you stay on top of the latest industry news and grow your business:

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Please e-mail your comments to shunsberger@lawnandlandscape.com. Lawn & Landscape Online is: Scott Hunsberger, internet editor (shunsberger@lawnandlandscape.com) and Sydney Work, web department manager (swork@gie.net). Enjoy your visit to Lawn & Landscape Online!

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Market Trends

Pesticide Notification Law (continued from page 8)

associations must fight 67 individual battles to preserve their current business practices.

According to Bob Ottley, president of N. Chili, N.Y.-based One Step Tree & Lawncare, the burden of the new law will fall on lawn care companies that will be required to supply written notification to homeowners, including door-to-door distribution of fliers or mailers. This requirement will increase business costs by 35 percent, Ottley estimated.

Because the new law targets only spray applications, granular applications will not require notification and Ottley predicts that many companies will switch from spray to granular products. "We're considering a granular weed control product," he said. "I hate to do this because the results are very poor. Also, you can't practice integrated Pest Management (IPM) because granular products require

blanket applications, which goes against IPM, and pests, weeds and diseases can't be treated immediately after they are found due to the 48-hour notification."

The law allows contractors to list two alternate dates for spraying in the event of weather-related cancellations. However, Ottley said the law does not address other factors that can alter scheduled application dates, such as equipment breakdowns or technician work absences.

Limited applications also are exempt from notification. According to the law, notification would not be required for spot treatments when the machine being used contains less than 32 ounces of product and the area treated is no more than 9 square feet.

The consensus among New York lawn care companies is that their practices have

been targeted to serve as an example. "We feel this is discriminatory," said Don Potenza, president, Lushlawn, Buffalo, N.Y. "The only people who are singled out are the lawn and tree care applicators, not homeowners. This law also infringes on property owners' rights – they can't have done what they want on their property when they want it."

The New York State Lawn Care Association is taking a proactive approach to the legislation with the following plans:

- Forming a registry of New York residents who prefer advance notice of applications.
- Hiring an attorney to explore its legal options.
- Hiring staff to develop a packet of scientific data and other information to be distributed to state county legislatures detailing the industry's side of the story.
- Soliciting monetary support from lawn and tree care companies and associations.

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Breaking News

MERGERS & ACQUISITIONS

Husqvarna Acquires Bluebird International

CHARLOTTE, N.C. – Further nearing its goal of becoming a one-stop shop for the professional lawn maintenance contractor, Husqvarna has added more new products to its commercial line with the acquisition of Bluebird International, Denver, Colo. The acquisition is Husqvarna's second major acquisition in the turf care industry in the past year following its purchase last October of Yazoo Power Equipment's (Yazoo/Kees) commercial turf assets.

Husqvarna, a manufacturer of a variety of hand-held products and mowers for commercial users, will continue to market the Bluebird International brand through existing Bluebird dealers and its distributor network, and also will add the newly acquired products to its dealerships under the Husqvarna brand and signature orange color. The new product offerings will include commercial dethatchers, aerators, sod cutters, seeders, collection systems and other equipment.

This acquisition, according to Husqvarna President Dave Zerfoss, is a reflection of the changing turf care industry as more contractors use less pesticides and focus on other methods of developing lush lawns. "Most lawn maintenance companies are offering very extensive services, including plugging and dethatching," he said. "These products are coming to the forefront as viable services to be offered by commercial users so they can present more of a year-round offering."

Several years ago, Zerfoss alluded to Lawn & Landscape that Husqvarna was developing strategies to become a premier player in the lawn and landscape maintenance industry. He said it took a few years for that strategy to unfold, but through the Yazoo/Kees and Bluebird acquisitions, as well as future plans he would not elaborate on, Husqvarna should become "a recognized premium leader in commercial lawn care equipment," Zerfoss said.

"We are absolutely dedicated over the next several years to be the leader in commercial application equipment for the lawn maintenance industry," he continued. "That's been very carefully calculated as we made the purchase of Yazoo/Kees last October, Bluebird International now and other product areas to be announced over the next few months. There will be continued acquisitions to really place us in the absolute premier position of offering lawn care equipment."

Bluebird International, which generated 1999 annual sales of \$18 million, currently employs 75 people who will now become employees of Husqvarna Turf Care.

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Irrigation Notebook

BEING PREPARED:

Irrigation Essentials

Packing essential parts for irrigation work requires organization and planning, and well-stocked maintenance trucks have a jump-start over poorly planned toolboxes that some contractors rely on to service an irrigation call.

There isn't time to rummage through a messy truck to find a nozzle, and customers have little patience for technicians who spend more time playing gopher to fetch parts than installing components to fix problems, noted Thomas Farley, vice president, Farley & Son Landscaping, Rockport, Maine. Parts are compact and tools are basic, so the storage space required on irrigation vehicles is minimal. Easy access is a key consideration, he stressed.

"You get killed by a client that says you should've done it in 'x' amount of time and it took too long," he explained. "That's why the biggest key is staying organized. Our trucks are equipped with the hand tools needed to do 90 percent of the work, and we use a delivery crew."

Six employees serve on this crew—a standby operation where technicians short of key parts can call in, request the missing pieces to complete the job and have them delivered.

Sprinkler heads, filters, screens, fuses, nozzles and fittings comprise the basics Farley packs in containers to store on his trucks, stocked daily depending a job's service requirements. Referring to a work schedule that supplies the client's name and job description allows

workers to plan a truck's inventory, he noted.

General hand tools, including wrenches and pliers, accompany fundamental irrigation components on trucks, explained Jeff Johnson, operations manager, B. Johnson Turf and Irrigation, Corvallis, Ore.

"You start with the products that you typically use," he recommended, explaining how he built an inventory checklist to maximize efficiency en route. "As you do the repair itself, you start noticing that something in particular goes wrong often, so you start stocking those parts."

KEEPING IT CONTAINED. Technicians should organize containers so they aren't fumbling with miniscule parts to locate what they need, Johnson suggested, adding that he stores fittings ranging from ½ to 2 inches along with different brands of various sprinkler heads. Separating the mix is a must, he said.

"Having the right part in the right spot at the right time is essential, so good organization is needed," he said. "You should be able to walk right to the part."

An orderly system goes beyond arranging gadgets, widgets and doodads into compartments. Technicians need to stock "emergency parts" as well.

A generous inventory is important for Greg Gillespie, owner, Gillespie Landscape & Irrigation, Oxford, Miss. Based in an area without distribution centers, his company can't acquire additional parts last minute.

"Everything is done by UPS and Roadway, which is why we have to carry everything on the truck because it takes two to three days to get parts," he noted.

Stocking a truck starts with customer communication, Johnson advised. Technicians should ask their customers detailed questions and gather information, he said. Client records serve as an additional source.

"A client might not know what a part is called, but if you ask them to describe a leak, that narrows it down."

BASICS ON BOARD. Most companies hold their staff accountable for stocking maintenance trucks, requiring technicians to replace parts used during their routes at the end of the day.

However, the most indispensable tools can't be planned, organized or replaced, and must not be neglected. Knowledge and experience surpass hardware in value, Johnson noted. "Nothing can replace experience." — Kristen Hampshire

Preparing an irrigation maintenance vehicle for a service route involves planning and organization to ensure efficiency on the job.

Photo: Treasure Coast Irrigation





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<u>Equipment Notebook</u>

SUPPLY OUTLOOK:

The Aftermarket Alternative

Those who shop around for equipment parts are finding convenience and availability in an alternative supply source. Contractors and repair shop owners who look beyond original equipment manufacturers and dealers for supplies can fill inventory shelves with aftermarket parts, stocking their warehouse without stripping their budget.

End-users who need supplies in a hurry will not be left empty-handed, as the aftermarket offers a range of supplies from simple parts like filters to complex components like engines.

This supply source also sets up a system of checks and balances, in a sense. Dealers might reconsider their steep

product prices when a competitor offers the same part for 30 percent less. And price is a secondary advantage compared to supply volume, efficient delivery and parts variety the aftermarket delivers to customers, noted Jeff Golota, president, J. Thomas Distributors, Walled Lake, Mich. Product selection runs the gamut.

"I like to use the term of providing products that function the same as the original equipment manufacturer (OEM) part," he said. "We provide another outlet to purchase parts besides the OEM, which means lower pricing, product improvement and innovation."

FILLING TALL ORDERS. Generally, contractors work within a narrow window when waiting for parts, so easy access is crucial. Convenient ordering and speedy delivery are essential qualities for suppliers, and are benefits the aftermarket offers customers, Golota said.

"We publish a catalogue so the product is there right in front of the contractor," he explained. "They can call an 800 number, order through a Web site—there's timesavings issues where contractors don't have to stand in line at a dealer and waste an hour at the repair facility."

Minimal delivery turn-around time rushes products to contractors and repair shops because parts are shipped the same day they are ordered, Golota noted. A large inventory and on-site, industrial machines to produce parts allow J. Thomas Distributors to fill orders in a hurry.

Selection continues to expand as the aftermarket grows in popularity, added Mike Febbie, sales manager, Landscapers Supply, Spring Valley, N.Y. Its 220-page catalogue features more than 5,000 line items from nuts and bolts to 61-inch motors. The company watches industry trends to determine catalogue additions that might interest end-users, he said.

"We're trying to be as much as we can to the commercial user, and every year we try to expand," he explained, noting an increase in hydraulic parts available.

Constant upgrading is a supplier asset that contractors with many machines value. Joe Loyet, president, Loyet Landscape Maintenance, St. Louis, Mo., said the amount of equipment his company operates justifies why 90 percent of his replacement parts come from the aftermarket. His fleet demands supplies on a daily basis, and to fill this constant parts need, Loyet orders in quantity.

"Every day we see things go wrong, and we can't afford to have someone run around picking up parts," he added. "So the high-demand parts—belts, bearings, throttle cables—we will buy a whole bunch of."

Price and availability win Loyet's loyalty to the aftermarket. It's unusual for him to turn to local dealers for parts, and they know it, he remarked. "If we need something really hot and rare, the aftermarket will overnight it so it's here by 10 a.m."

The 30 percent savings Loyet trims from his parts budget is passed on to his customers, he said.

"We usually have the better prices because our cost structures are different from the OEM," Golota noted. "Dealers don't manufacture belts, tires or bearings—they buy all of these outside component parts anyway, especially the engines. The aftermarket doesn't go through the same distribution channel, so that's where the cost savings are—in the supply chain."

Febbie echoed these cost benefits. "You can sell the parts for a reduced price and offer top quality—in many cases the parts are identical," he noted.

Beyond quality and cost considerations, aftermarket parts are a one-stop shopping avenue, which appeals to customers, added Jon Vyn, director of equipment marketing, LESCO, Rocky River, Ohio. The nature of LESCO's outlets allows customers who purchase fertilizers and

(continued on page 52)

The aftermarket

sets up a system

of checks and

balances

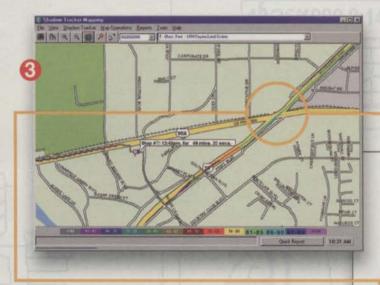


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| 6:28AM | 11:18AM | 04:50 | S-Your Company Office | 0.00 | |
| 11:19AM | 11:22AM | 00:03 | In Transit | 1.10 | |
| 11:22AM | 11:27AM | 00:05 | L-Exxon Gas Station | 0.00 | |
| 11:28AM | 11:31AM | 00:03 | No. Proceeds. | 1.10 | |
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| 4:14PM | 4:17PM | 00:03 | In Transit | 1.18 | |
| 4:1/200 | 4-10PM | 00:02 | L-Grand & Hwy 90 | TW | |
| 4:19PM | 4:36PM | 00:17 | in Transit | 15.01 | |
| 4:36PM | 6:50PM | 02:14 | E-Home, Employee U. | 0.00 | |
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Equipment Notebook

(continued from page 50)

seed to pick up parts while they are at the facility, he said. Again, convenience often dictates the aftermarket's allure.

"We are in the user's daily traffic pattern, and part of what we aim to do is provide contractors with a good value on the things that they commonly use—the consumables," he explained.

Product availability rarely presents a problem for aftermarket companies that serve an extensive geographic region, Golota added. Seventy percent of the components contractors request are filled through the aftermarket, with only 30 percent forwarded to dealers or OEMs.

PLENTY OF PARTS. The quality and variety of parts aftermarket suppliers offer continuously is improving. The aftermarket can identify common failures on OEM parts and enhance their version of the part by tweaking problem areas.

Also, contractors can locate products that support older equipment and find supplies that dealers might not carry, such as zero fault tires, which eliminate flats on machines, Golota pointed out.

"I have pretty large contractors where the buyers will call me to see if we are going to produce aftermarket parts for a piece of equipment before they even make the purchase," he noted.

Quality-driven product development also explains the aftermarket's growing popularity, Vyn commented.

"I think the market has demanded quality—aftermarket parts can't be second tier compared to the OEM parts," he said. "Aftermarket parts have really closed the gap as far as quality."

However, there are cases where the aftermarket can't serve equipment needs and contractors turn to dealers to fill parts requirements, Golota noted.

"If the item is still covered under warranty, where there are major failures on the OEM design and the customer should go back to the OEM and get the product if it is still covered under warranty," he recommended.

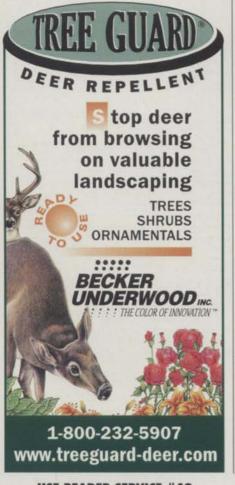
NUDGING A NICHE. Though some contractors alter buying habits after discovering savings and convenience in aftermarket parts, others are loyal to local dealerships.

"You have people in both camps," Vyn observed. "There's always going to be a place for the OEM supplier because there are some who favor this supplier and there is a warranty hook that's there."

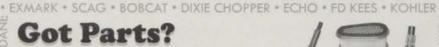
Febbie added that dealers attend to necessary repair needs. "The dealer offers one thing that we cannot do, and traditionally, that's service."

As the lawn and landscape industry flourishes, the need for equipment and parts to service contractors' fleets also will augment, Golota added. "It seems like we turn people on to the aftermarket one customer at a time," Golota mentioned.

"In terms of the market, it is growing," he added. "The industry is growing. There is so much more commercial equipment being sold, so it is a natural progression of the amount of equipment out there, and the components will follow."—Kristen Hampshire







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CONTROLLING PESTS

The Target Principle

Materials directed at controlling damage from soil-inhabiting insects must reach the primary feeding and/or activity zone (target zone) of the target insect(s) to be effective. Focusing on this objective when applying materials or employing other control strategies is to apply the Target Principle.

THE TARGET ZONE. The Target Zone for control of most soil-inhabiting insects is the first one to two inches of soil. However, in both cool- and warm-season turfs, the soil may be covered by a layer of thatch through which the control materials must pass before reaching the target zone. Thatch serves as a binding site for insecticides and a difficult barrier for some biological agents to pass through. The addition of soaps or other w4etting agents appears to have little effect on reducing the binding potential of soil or organic matter. The control material must reach the target zone in the proper concentration to have the desired affect. The degree to which this is achieved is directly related to the degree of control achievable.

Mobility is more readily achieved when thatch is thin, loose or not present. However, in long established turf sites, the constant dying of plant roots, stolons, rhizomes and crowns results in an accumulation of organic matter in the first two inches of soil (commonly 10 percent or more) which also serves as a binding site. While the organic matter content of thatch (often greater than 30 percent) and soil impede mobility, it also provides a protective filter to slow to stop more extensive mobility past the target zone.

Even when there is no thatch, through management or natural decomposition, the first two inches of soil in established turf commonly contains at least 10 percent organic matter due to the constant dying of plant parts. The binding of insecticides to this zone or thatch is a mixed blessing. While having a major influence on reducing the potential for ground water contamination, binding in this zone provides a reservoir of insecticide residues for pests such as grubs or mole crickets to contact and consume as they feed.

FEEDING HABITS. Knowing the feeding habits of soil-inhabiting insects is essential to understanding how and why control is or is not achieved. The primary means by which control agents enter the body of the target insect is through the natural openings (mouth, anus, spiracles) or ingestion. Contact with a treated surface also occurs, however, with some exceptions, is generally secondary to the impact of ingestion.

What do grubs eat? The standard answer often is, "turf roots." This is an incomplete and actually incorrect answer. A more accurate answer would be, "whatever is in front of them."

Grubs are incapable of feeding only on roots. Instead, they ingest the entire medium – roots, soil, organic matter – that occurs in their zone of habitation. Generally, this zone is the upper two inches of soil when no thatch is present and the upper one inch of soil when thatch is present. Soil inhabiting insects, such as mole crickets, consume plant and animal materials as well as soil particles. Turf inhabiting ants are general scavengers and predators, but they do not consume plant parts.

Applied control agents must reach the feeding-activity zone (the Target Zone) of a soil-inhabiting pest to achieve control. The agent is adsorbed to varying degrees and distributed at and through the soil and thatch above the target zone. The target insect ingests thatch and/or soil organic matter containing the agent, which is then absorbed by the insect as the food passes through the digestive system. Living biological agents, such as insect parasitic nematodes, must wriggle through the thatch and/or soil and reach the target zone in sufficient numbers to find and infect the target pest.

IRRIGATION - RAIN. Control materials vary widely in water solubility and capacity for adsorption to organic matter. Water, as rain or irrigation, does not completely circumvent adsorption, but it does accomplish as much movement in the target zone as possible. Generally, control materials for soil inhabiting insects should not be applied to very dry thatch or soil. Greater mobility is achieved when both thatch and soil are first moistened. In order to minimize ultraviolet (UV) degradation, hasten mobility and obtain a maximum effect, liquid materials should be irrigated in immediately after application.

Generally, granular materials should be applied when grass blades are dry so the particles bounce off the grass blades and sift deeply into the turf. While the urgency to irrigate is not as immediate as for liquid materials, it should be done as soon as possible.

With regular irrigation or rain, soil-inhabiting insects such as grubs usually remain in the target zone. However, if the surface soil dries, these insects may move deeper into the soil profile. Timely pre- and posttreatment irrigation often stimulates these insects to remain in the Target Zone.



For the next few months, Insect LD. will feature excerpts from Destructive Turf Insects, the second edition book by Harry Niemczyk and David Shetlar, entomology professors at The Ohio State University. For more information about this book, see page 131. To order a copy of this book, call Lori Skala at 800/ 456-0707.

<u>In Minor's League</u>

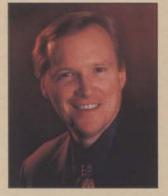
My managers constantly complain about their compensation but I can't afford to pay them more. What can I do?

As the labor market continues to tighten, this dilemma becomes more common. Employers are struggling to find creative ways to keep their employees intact.

To get to the root of the problem, you must determine whether your compensation and benefits program is comparable with what your competitors are offering. My first action would be to secure a compensation and benefits report from your state or national trade association to find out if you are in line with your peers. Secondly, you have to research what other industries that could attract your staff are paying their key managers.

My goal was to compensate managers at or slightly better than the market after factoring in their experience and education. If you provide managers with a satisfying work environment, paying them more than the industry average should be sufficient to retain them.





David Minor was founder and former president of Minor's Landscape Services, a \$12-million company in Fort Worth, Texas, that he sold to TruGreen-ChemLawn in 1998.

In addition to serving the industry as a consultant and speaker, Minor is professor and

director of The Entrepreneurship Center at The M.J. Neeley School of Business at Texas Christian University. Readers with questions they would like to ask Minor can fax them to Lawn & Landscape at 216/961-0364 or e-mail them to bwest@lawnandlandscape.com.





<u>In Minor's League</u>

You should also note, however, that extensive research indicates that compensation is not always the most important criteria in retaining employees. For example, managers who show employees appreciation on a regular basis often retain employees better than those who pay well. Providing incentives based on some type of previously agreed-upon performance criteria is another effective retention tool. This is often a means of getting your staff to a compensation level they can live with while encouraging them to improve their efforts. If the company succeeds, the managers succeed. Having a manager's "at-risk pay" to be as much as 20 percent of his or her overall compensation is not unreasonable.

If you provide your
managers with a
satisfying work
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the industry average

should be enough to

retain them.

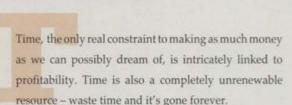
Another retention strategy to closely consider is promoting from within. There is a lot to be said about the value of promoting staff who grew up in an organization even if their resumes are not as impressive as resumes sent in from outside the company. You will always have more trouble keeping superstars with glowing resumes than loyal longterm employees. Even if you sacrifice some immediate competency by promoting from within, the net effect will still positively benefit the company because of the loyalty and effort these long-term employees will provide. Give me someone whose heart is in the right place and I will take that over brainpower any day.

Lastly, you might want to consider some type of equity sharing program. Again, research supports the fact that employees who own even a small portion of their companies are more loyal and productive. There are many equity sharing plans that can work, including stock purchase programs, bonus awards and option plans, employee stock ownership programs and phantom stock purchase plans. Clearly, retention of management is critical in today's business environment. In fact, developing strategies to keep key people may be the most important strategic decision owners can make to ensure the long-term health of their landscape businesses.



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(continued on page 58)



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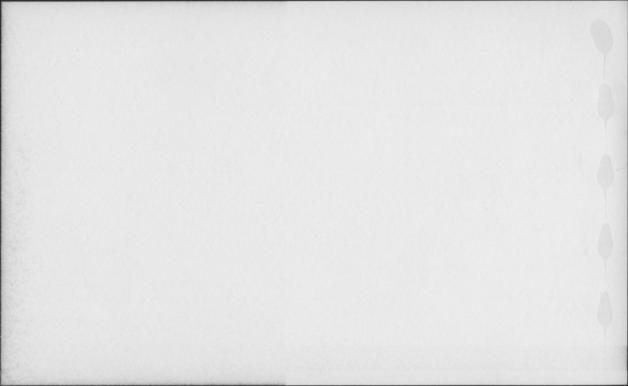
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IT'S ALL YOU NEED TO PREVENT OR CURE.

Minding Your Business

(continued from page 56)

hours of serviceable work (eight employees x 40 hours x 45 weeks = 14,400 hours per season). With only 14,400 hours available to make money, the most important piece of information you can learn is which of your clients can make you the most money. You don't want to waste any of your essential work hours in unprofitable work. Unprofitable work is equivalent to taking one-and-ahalf steps backward because you not only lose money on the job, you also lose money on time you could spend producing a profit.

Many contractors often are enticed by jobs with a bigger price tag — but don't be fooled! Higher priced jobs might be more profitable, but they also might not. You have to know your costs, your "break even" point and the amount of time you need for the job in order to make your desired profit margin.

For example: client A brings in \$100 per service and client B generates \$50 per service. A requires 5.26 hours to do the job while B requires 1.39 hours. Assuming costs are the same per hour, now estimate which job will

make more money: A is \$19.01 per hour (\$100/5.26 hours) and B is \$35.97 (\$50/1.39 hours = \$35.97 per hour). If all your jobs are like A, your gross sales will be \$273,744 ($$19.01 \times 14,400$ hours).

If your business's overall costs, however, are \$372,000 annually, you'd be in the red \$98,256. Not good.

If all your jobs are like B, however, your gross sales would be \$517,968 (35.97 x 14,400 hours). A profit of \$145,968 (\$517,968 - \$372,000 = \$145,968) - or 28 percent - is not bad!

This example illustrates just how important it is to do a little simple math and not to automatically think that a bigger job is always a better job. You need to know which jobs make you the most money, and on which you are losing your shirt.

The only way to ensure you make your profit margin is through an accurate and

consistent revenue tracking system. Here are some guidelines to ensure profitability:

- · Track every dollar on every job
- Just say no to unprofitable jobs no matter how tempting they appear
- Track all travel time and make sure travel time is part of your "dollar per hour" equation
- Don't raise prices across the board after careful consideration, raise just some clients' fees

Carefully tracking revenue makes it more difficult to be unprofitable. It's a lot harder to squander time when you know you're throwing it away. Take the time to do the math and know on which jobs you're losing money and wasting time. — Dave Tucker

The author is president, Sensible Software, Ijamsville, Md.; Phone: 800/635-8485; Web site: www.clip.com

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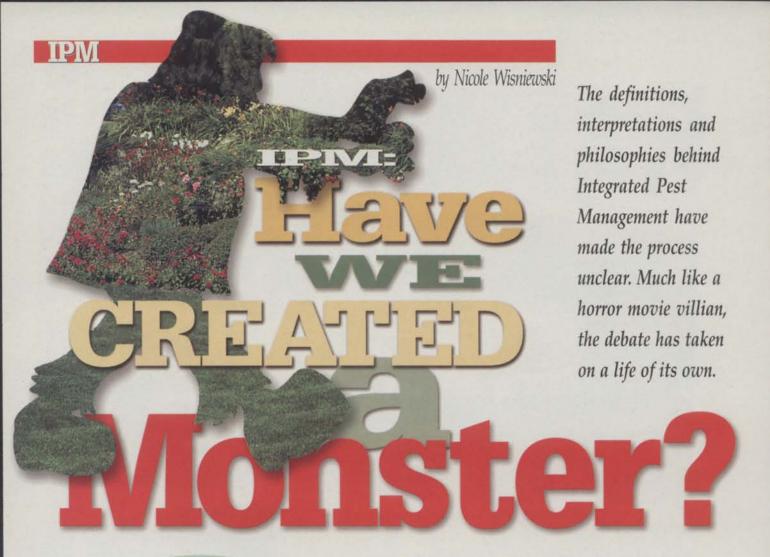


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Over the past 20 years, Integrated Pest Management (IPM) has attempted to reduce pesticide use, stop the destruction of beneficial insects, cut down on costs to contractors and clients, and benefit the environment.

However, while establishing the IPM concept, the industry has not developed a widely accepted definition of the term. Lawn care operators, educators and product manufacturers have strongly supported their own IPM definitions in one way or another while legislators and environmental activists challenged them and their use of pesticides – no matter how small.

Despite the fact that many IPM meanings exist and that many people believe IPM is a practical approach for controlling landscape pests, weeds and diseases, there is still no single definition that is universally accepted. This lack of focus, some industry members speculate, could be the reason recent legislation (see *Market Trends*, page 8) is presenting IPM as a lawn care strategy that is more impossible than possible.

RESTRUCTURING IPM. To many people, IPM means anti-pesticides or use of the least toxic pesticides because, throughout the years, classical IPM aimed to reduce pesticide use, pointed out Dave Shetlar, associate professor of landscape entomology, The Ohio State University, Columbus, Ohio.

"In fact, the measuring stick of IPM success has been whether insecticides, fungicides and herbicides were reduced," Shetlar said. "A common assumption was made: Pesticides, especially insecticides, were bad for people and the environment. This concept was developed at a time when we were using lead arsenate, fungicides containing mercury

(continued on page 62)

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(continued from page 60)

and organochlorine pesticides. These compounds were showing up in endangered birds, fish and even humans. Pests were becoming resistant, and new pests were becoming a problem because their natural enemies were being destroyed by pesticides. Obviously, faced with these problems, pest managers looked for alternatives."

The threshold concept was the first program to be implemented, Shetlar said, defining this notion as applying pesticides whether or not any bad pests, weeds or diseases were present. "In turf we relied on aesthetic thresholds where the visual damage was too great to tolerate before a pesticide was used," he said.

Next, Shetlar said the industry increased its reliance on non-chemical control tactics, such as cultural (making the environment less suitable for pests using resistant plant material, etc.) and biological controls (encouraging

beneficial parasites and insects to control pest populations).

Finally, the industry improved monitoring techniques to determine thresholds and evaluate the performance of non-chemical control tactics, Shetlar said, emphasizing that this has been a landmark development in IPM use. "In landscapes, we now recommend targeting a spray only to the plant that needs it – look before you shoot," Shetlar explained. "Spot treating lawns where grubs are at damaging levels or applying herbi-

cides where weeds are present or likely to emerge are other

likely to emerge are othe techniques."

But pesticide use isn't the only choice that can cre-

ate damage or improve an environment, remarked Barry Troutman, East Coast chief technical officer, Environmental

Care, Orlando, Fla. "To me, the use of pesticides is only one-fifth of the battle."

According to Troutman, IPM includes five key steps: growing the right plants in the right place, creating healthy soil, mowing and pruning properly, watering properly and controlling problem pests, weeds and diseases. "If you find an insect problem, the first response should not be to spray," he explained. "We examine all five areas first, and if the first four steps have been reviewed and the problem still isn't solved, then we select a pesticide to use. IPM is a thought process you apply when trying to control a problem that comes up; it is figuring out what will do the job quickly with little damage to the environment.

"Our industry does a good job creating healthy soil by encouraging aeration and soil testing," Troutman continued, "and we also do a good job controlling pests, weeds and diseases. But only contractors who work this list from beginning to end are successful."

Other contractors agreed with similar (continued on page 64)

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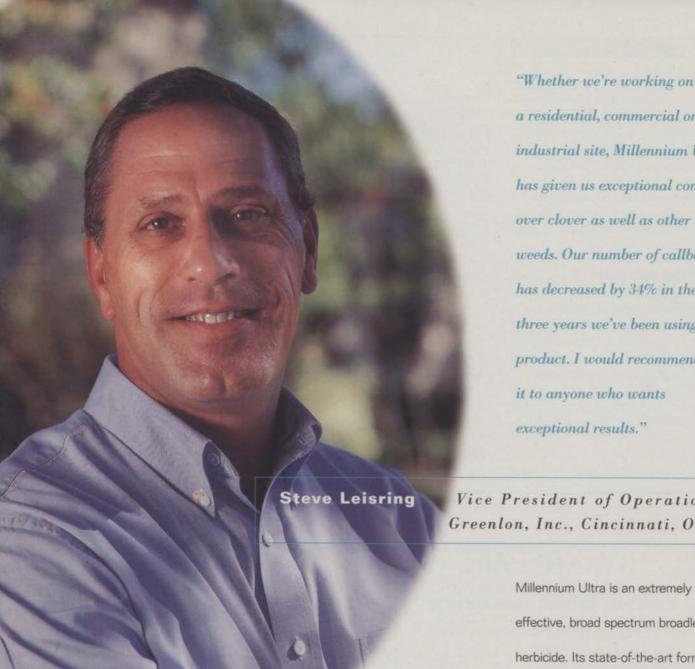
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(continued from page 62)

versions of Troutman's IPM definition, stressing that IPM is a service-oriented program.

"When you're on a client's property, you always want to take some kind of action," added Gary LaScalea, president, GroGreen, Plano, Texas. "For example, if you didn't see any insect problems, you can fertilize the beds or treat the client's azaleas with iron. IPM is looking for all cultural and nutrient type issues in the landscape."

SCOUTING FOR TROUBLE. Since a service focus drives IPM, the industry's current labor shortage stalls the program's development. The quality of worker needed to scout pests, weeds and diseases while consulting with clients also requires consistent training.

"IPM's greatest challenge is personnel," explained Steve Brady, county agent, Gwinnett County Extension Service, Lawrenceville, Ga. "Companies that don't have enough personnel don't make enough scouting visits to properly practice IPM."

"When you are working on a schedule with a certain number of employees and can only stop at a property every 45 to 60 days, you could be missing potential landscape problems," added Steve Farrington, sales representative, Dow AgroSciences, Orlando, Fla. "This means you have to rely on homeowners to scout for you in between your visits and that doesn't always work to a contractor's benefit."

IPM training helps lawn care companies produce a higher grade technician, which is crucial to proper IPM performance, commented Gary Tomlinson, director of technical services, seasonal color and arbor care groups, The Morrell Group, a division of Omni Facility Resources, Atlanta, Ga. "Since implementing an IPM approach more than 10 years ago, we've increased our training by 50 percent," Tomlinson said. "We have ongoing training with an extra one or two hours per week focused strictly on IPM. We make sure to supplement this with on-the-

job training and the use of local extension agents who provide IPM education."

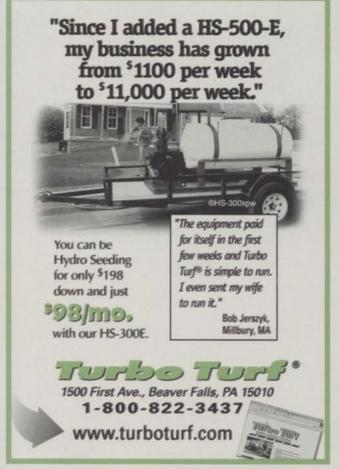
IPM can even save clients and contractors money after the first year, depending on seasonal challenges like weather. Cindy Halm, operations manager, Broccolo Tree & Lawn Care, Rochester, N.Y., quoted an overall 30 to 40 percent drop in pesticide use. These savings are not felt initially, however, due to the cost of IPM training.

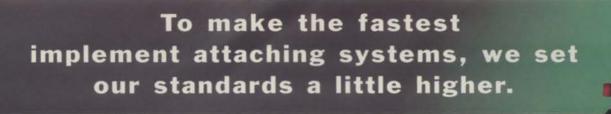
Bob Ottley, president, One Step Tree & Lawn Care, N. Chili, N.Y., said he spends \$3,000 to \$5,000 per person each year for initial IPM training and then \$1,000 per person each following year for additional training.

Training technicians, though, also bolsters a company's reputation, employee morale, retention and customer satisfaction. "Educating our employees does take a lot of time, but we get it back tenfold in customer satisfaction," Halm said. "Our technicians are well-trained and offer consultations on in-

(continued on page 66)









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(continued from page 64)

sect and disease problems, watering, pruning, mowing, etc. Our customers are buying that service and expertise."

In addition to training costs, IPM causes equipment costs to rise. Ottley said IPM liquid applications require the use of twinline hoses. "This is the equivalent of two spray hoses, which doubles your equipment

overhead," he explained. "The benefit of IPM isn't always profit. Initially, there are extra costs, but that levels out after a few years, and contractors will notice savings."

PRODUCT CHANGES. The changing nature of products introduced to the market will also drive or hinder future IPM use.

When Environmental Protection Agency (EPA) representatives announced the reexamination of chemistry classes such as organophosphates and carbamates as part of the 1996 Food Quality Protection Act (FQPA), it confirmed that new pesticides being registered will have a narrower area of control.

"Trends in pesticide development indicate that new products, while low in toxicity, will be more targeted in their pest spectrum," said Doug Spilker, turf and ornamental research manager, Bayer Corp., Kansas City, Mo. "The challenge is to maximize the strengths of each product. More specific timing recommendations for these products could reduce or delay the need for subsequent applications or rescue treatments."

"The new products provide us with more targeted options," concurred Rick Brandenburg, entomologist, North Carolina State University, Raleigh, N.C. "But now we don't have a chance to rescue plants from infestations as quickly. And the window of opportunity for controlling pests is smaller."

Many lawn care operators and pesticide manufacturers are also keenly aware of the fact that the FQPA could ultimately result in the cancellation of many pesticide products altogether or severly limit their applications, as it did with chlorpyrifos earlier this year.

"This jeopardizes urban and rural pest management efforts," according to the New York State Turfgrass Association. "Also, as valuable pesticides are lost, pest management experts won't be able to properly apply IPM, and the environment will suffer."

Despite this grim IPM forecast, Farrington said most lawn care company owners have adjusted well to the changing nature of product availability. However, using new or different products presents challenges.

"Contractors rely on certain products because they've used them for years and know they can spray a property and walk away without having to come back and deal with additional problems," Farrington explained. "There is a certain period of unreliability with the new product, which may not have as long of a residual or the same level of control as a previously used product."

Cost also becomes an issue when contractors are forced to use a different product. "Losing a product forces us to use an alternative that may not be as cost effective as the (continued on page 68)

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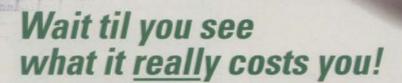
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(continued from page 66)

product we were using before," Troutman pointed out. "Switching to a product that costs \$2 per square foot instead of 43 cents per square foot is difficult."

CUSTOMER HANDICAP. If lawn care technicians, industry educators and experts, manufacturers, legislators and environmental activists follow varying interpretations of IPM, imagine what customers must think of the process. Most lawn care companies practicing IPM are familiarizing their clients with the concept on a regular basis, but getting them to understand it has been challenging.

"We've tried to educate customers on IPM, but I don't think they fully grasp the idea," Ottley said. "They seem to understand it in tree care, but in lawn care they are used to being told that April is the time to treat crabgrass and August is the time to treat grubs so they don't believe we can actually scout for these problems.

Customers who are exceptionally hard to

educate are those who have been hit hard with an insect problem not caught through the IPM approach and they don't trust it," Ottley continued. "Even clients who are afraid of pesticides and don't want you on their property often don't fully comprehend the fact that with IPM you can use

20 percent less product and ease their pesticide concerns. The idea just doesn't sink in."

Because IPM is more intense than a typical mowing service, it is harder for customers to grasp, explained Mike Linker, extension agent, North Carolina State University, Raleigh, N.C. "Because of the difficulty in understanding IPM, more hand-holding is needed," he said. "Also, since IPM can cost more, it is hard to explain to customers how another company can offer what appears to be the same service for a lower price."

Viewing the situation from a client's perspective encourages lawn care operators to understand why IPM might be intimidating. "When I pay a lawn care company to take care of my property, I want a healthy, disease-, weed- and insect-free lawn and landscape," pointed out Kyle Miller, senior technical specialist for turf and ornamentals, BASF Specialty Products, Richmond, Va.

"You can tell me you're trying to reduce

"You can tell me you're trying to reduce inputs, but in the end you have to do what it takes to satisfy me. If a problem gets out of hand, I'm going to tell you IPM is not working. Customers are paying you to take care of their landscapes with a higher level of service than they can perform themselves."

Despite the difficulties with customer communication concerning IPM, Halm said she thinks her customers understand the process. "There's a difference between practicing and marketing IPM," she said. "We market our level of service. People don't look at (continued on page 139)

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Lawn and landscape employees are models for their companies, and the uniforms they wear on the job can project a clean-cut image that identifies their trade and portrays unity and quality service. If a client's front yard is the runway for first impressions, contractors are wise to outfit their employees in professional garb.

While the "contractor catwalk" might not be a show of trend-setting technicians, workers tout advantages of company attire – comfort, camaraderie and pride. Standing out isn't necessarily the goal – uniformity is. "Perception is reality," noted Terri Myers, office manager, American Beauty Landscaping, Youngstown, Ohio. "Inevitably, everything boils down to the client and customer service, and when our company name is visible, it establishes credibility."

ACHIEVING THE LOOK. Myers admits her company's navy blue uniforms are not flashy – the logo is sized for visibility and workers pair knit shirts with either khakis or jeans. But making a fashion statement isn't the goal for American Beauty Landscaping.

"We want to establish professionalism, first off," she explained. "We tried it the other way – without uniforms – and we had a couple of instances where people wanted things under their own liberty. We tried to accept this under certain circumstances, but there was animosity between employees and there wasn't a professional character on the job site."

Some technicians arrived to work in army fatigues instead of jeans, and workers would substitute their uniforms with T-shirts when they didn't have clean attire, she said. Establish-

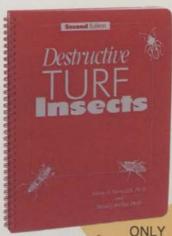
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JOE REYNOLDS,
 President, Ohio Lawn Care Association
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DTIAD

Emplovee Uniforms

(continued from page 70)

ing a code of uniformity for her workers created a clean-cut team and garnered positive feedback from customers, who appreciated easy identification of workers on their property, she added.

"The key is that employees go to a person's home," stressed Neil Lazaroth, co-owner, Clean Uniform Company, St. Louis, Mo. "They want to project an image that the company knows what it is doing - that it's professional and the employees are clean and neat and look attractive. Uniforms help that identity program."

Uniformity means choosing a color, a logo and an overall image, Lazaroth added. With various shades of green available, employees could choose different shades, resulting in a green-graded rainbow. Lazaroth recommended setting a company standard by ordering matching separates from a uniform service or catalog.

"A good baseball team is going to be wearing the same uniforms - the same color,

same logo," he compared. "Uniformity projects quality, efficiency, reliability and a winning spirit - a winning team."

Contractors shouldn't skimp on uniform essentials, he added. "If you send out a baseball team with just shirts on, you don't do the whole job. They have the same socks, shoes, pants - a whole look. At a minimum, they wear pants and shirts."

Besides achieving a cohesive look, uniforms flaunt both economic and safety benefits. Lazaroth said

studies suggest companies that provide employees with uniforms can charge more for their services, and their technicians are less prone to work-related injuries. "I think when people are in their own raggedy jeans, then there's less concern about their personal appearance and their work tends to get sloppy," he related.

Admitting that she is a "believer in first



Companies that outfit their employees in cleancut uniforms gain a customer service edge and promote a cohesive, team atmosphere for their workers. Photo: WearGuard

impressions," Karen Sikes, manager, Sunshine Spray Services, Auburndale, Fla., con-

siders uniforms a sign of caring about company details, protecting technicians from the elements and presenting a fresh image to clients. "In our business, people don't want dirty, nasty, sweaty," she said, laughing.

"We know how to put the window dressing on and give people a sense of security - a sense that our employees know what they are

(continued on page 74)





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Employee Uniforms

(continued from page 72)

doing," she continued. "If you put a company with good service and good appearance together, you will be successful."

Sikes is adamant in her theory, commenting that she would pay for uniforms out of her own pocket if necessary. She washes her two technicians' shirts herself in a separate washing machine she keeps in her garage, collecting all of the "work" laundry in a designated hamper. "My guys are too important," she remarked.

And "the guys" echo the importance of coordinating apparel, she said. "They are as bad as kids at Christmas when I get new uniforms," she related. "The younger employee of the two didn't see the value of uniforms at first, but he has since. The older of the two always said he felt like a different

person when he put the uniform on. I think it was the fact that he was a part of something successful, his name was on it and it was especially for him."

picking from the RACK. Choosing apparel to suit company needs goes beyond picking among polo shirts and pants. Contractors must consider their target market and environment before deciding on a uniform that will best serve employees. No two companies are alike – while one operation provides pesticide applications, another engages in major installations. Certain tasks require special protection, which needs to be examined before committing to professional dress, stressed Kerry Ashforth, business account manager, WearGuard, Norwell, Mass.

"Sometimes companies that apply pesticides will want protection for their employees, so they might order coveralls," she noted. "A lot of companies handle the transportation end of things where they are doing deliveries and they want drivers to look professional, yet remain cool and comfortable. They look for abrasion resistance because they wear a seatbelt and they don't want a patch of worn-out twill near the middle of their shirt."

Companies should look for uniforms that stand up to excessive washing, abrasion, stains and heavy wear. Fabric can be treated with a soil release finish to prevent stains and fading. Poly-cotton blends are popular among contractors because they do not wrinkle, can be laundered easily and retain color, Ashforth said.

After assessing the toll job requirements take on material, companies can customize their uniforms based on the client base, she noted. While landscape operations that service high-end customers seek a classier look – polo shirts vs. T-shirts – companies who do not focus on upper-crust commercial accounts might lean toward more casual attire. "Uniforms should reflect the image of their clientele," Ashforth commented.

Contractors target dress to meet customer expectations, and today they are much more style-savvy when placing orders, noted Daniela Quilter, marketing and merchandise manager for rental apparel, G & K Services, Minnetonka, Minn. "People are becoming a little more fashion conscious about

(continued on page 76)



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Employee Uniforms

(continued from page 74)

what's going on around them," she observed.
"The variety of apparel has become more important and we try to service that demand. We have been working on expanding our uniforms to offer our customers an edge."

Popular options include polo and denim shirts, relaxed-fit pants and shorts in softer fabrics, Quilter said. "Comfort is a factor for those who are wearing uniforms, and employees have responded well to these changes because we are basically giving them options."

MAKING AN IMPRESSION. Companies generally stick with a uniform style and design for quite some time, ordering replacement shirts each season. Uniform appearance is evolving, but most follow a traditional suit when ordering professional attire. Some, however, rely on attention-grabbing attire to distinguish their company from competitors. John Ross, president, John Ross, Flat Rock, N.C., said his signature teal-colored shirts are notorious eye catchers.

"When I first started, we had two guys," he explained. "We just cut grass, and we would have one yard on one side of town and one on the other. People would say they spotted us, so it made us

look like we had more people than we did."

The visibility of his company's shirts is an advertising tool, and after expanding the business from two to 26 employees Ross is reluctant to modify company dress.

"The shirts are free advertising – Yellow Pages are expensive," noted Dennis Rocheleau, executive director, Innovative Landscapes, Ltd., Lapeer, Mich. "We have referrals that have called just because we were there – the neighbors saw us."

Such employee recognition is an asset not only for promotional purposes, but also for safety reasons. Ashforth cited a situation where a customer misidentified a cable company that didn't previously outfit their employees. While the technician was installing

"Uniformity projects quality, efficiency, reliability and a

winning spirit - a winning

team."- Neil Lazaroth

cable, the homeowner pulled a shotgun on the worker, she said. "This incident made the cable company rethink their position on identity apparel. That was the impetus to going to a uniform program."

Dennis Minelli, operations manager, Twombly Nursery, Monroe, Conn., added that providing uniforms that feature his company's logo allows customers to understand his mission and purpose. "If a customer looks out their window and sees a rock 'n roll T-shirt and a pair of broken-down jeans, they might say, 'What are you doing here,'" he described. "I think clients like to see some sort of continuity so when they see six guys in their yard, they know they belong there."

(continued on page 97)



Lawnerlandscape

State of the William Report

Contractors continue to report strong growth trends, but some uncooperative weather, a lack of labor and increasing regulations present challenges.

By Bob West



Life in the lawn and landscape industry is very good these days. In fact, you could make a pretty strong argument that there has never been a better time to be in the business of installing and maintaining landscapes for residential and commercial customers.

Sure, there are challenges making contractors' lives more difficult: the national unemployment rate remains so low that the only people unemployed today are in that situation because they've elected not to work, and environmental lobbying efforts in Washington, D.C., and state capitals around the country seem to be gaining steam.

Still, the industry continues moving forward, growing all the time. A survey conducted on behalf of *Lawn & Landscape* found that nearly two-thirds of the industry –64.5 percent, to be exact – expect revenue to grow this year, and this growth will occur at an average of 15 percent. These numbers represent a slight slowdown from last year's survey when approximately 72 percent of respondents called for growth, but more companies are expecting this to end up as a year with little to no growth

State of the

BY THE Numbers

PERCENT OF TOTAL REVENUE

| Avg. 1999 Revenue | Avg. 1999 Revenue | Years in busi- ness | Avg. full- time employ. | Avg. season- al/part time employ. | Phys. lawn maint. | Chem. lawn care | Chem. tree/ orna- mental care | Phys. tree/ orna- mental maint. | Design Install. | Irriga- | Snow removal | Other |
|-------------------------|-------------------------|---------------------------|----------------------------------|---|-------------------------|-----------------------|---|---|--------------------|---------|-----------------|-------|
| Less than \$10 | 00,000 (36 | ,000 c | ompani | es) | | | | | | | | |
| \$52,400 | \$47,200 | 8.5 | 1.2 | 1.3 | 52% | 9% | 1% | 11% | 20% | 0% | 2% | 1% |
| \$100,000-\$ | 500,000 (3 | 6,000 | compa | nies) | | | | | | | | |
| \$220,300 | \$193,300 | 16.8 | 3.0 | 2.4 | 31% | 9% | 3% | 8% | 28% | 11% | 4% | 6% |
| \$500,001-\$ | 1 million (8 | ,100 c | ompani | es) | | | | | | | | |
| \$672,500 | \$536,300 | 20.6 | 9.2 | 7.3 | 28% | 10% | 3% | 8% | 30% | 6% | 3% | 11% |
| More than \$1 | million (9, | 900 co | mpanie | s) | | | | | | | | |
| \$2,068,700 | \$1,869,200 | 25.4 | 29.7 | 13.5 | 19% | 16% | 4% | 6% | 33% | 10% | 1% | 9% |

Credit:

Lawn &

survey

Landscape

-24 percent of respondents – compared to about 20.7 percent last year. By contrast, only 11.5 percent of industry companies expect to generate less revenue this year than they did last year, compared to 10 percent last year.

The fact that the industry's growth seems to be slowing is an issue that bears further examination. While some contractors have reported pockets of market softening, this is generally attributed to 2000 being a general election year, which often results in increased caution among some people. At the same time, the tribulations of the stock markets and gradual increases in interest rates have reined in the rocketing economy in general, and all segments of the economy are certain to feel the impact.

Taking a more microeconomic view, however, there are other factors that would indicate that if there is any slow-down in the market's growth it may not be indicative of

decreasing demand for professional landscape services. The most obvious challenge impacting contractors' growth is, of course, the labor market. A 4 percent unemployment rate means the labor pool necessary for a business to hire employees and drive growth evaporated years ago.

In addition, this year Lawn & Landscape's annual research included more in-depth examination of the number of businesses within this industry, which is a challenge to figure out because of the industry's fragmented nature. Our analysis, based on a number of sources, found that the professional business units serving this industry in the year 2000 can be

| Less than \$100,000 | \$16,900 |
|-----------------------|----------|
| \$100,000-\$500,000 | \$24,200 |
| \$500,001-\$1 million | \$40,700 |
| More than \$1 million | \$50,000 |

estimated at approximately 90,000 legitimate companies offering some mix of lawn care and landscape services. It should be noted, however, that this number does not take into consideration the number of individuals offering lawn and landscape services themselves without forming a legitimate business. This represents a significant increase in the competition present in the industry. Perhaps this is one downside to the general public's heightened awareness of this industry – more individuals are aware of the tremendous potential for developing their own lawn care or landscape organization.

The weather also presented its annual series of challenges throughout the 2000 season, although these conditions were different than the climatic concerns the industry grappled with in 1999. Whereas last year brought drought conditions to most of the country east of the Rocky Mountains, 2000 brought above-average rainfall to much of the Midwest and New England. The South and Southeast, however, continued to endure drought conditions throughout spring and well into summer.

But as this year draws to a close, conversation with contractors from all sectors of the industry are positive about the success contractors enjoyed this season and their prospects for the future.

"There seems to be a lot more money being spent this year on landscape projects than there was last year, and last year was a good year," observed Tim Kilgallon, president, CSI Landscaping, Scarsdale, N.Y. "The installation jobs are getting bigger, and people don't want to have to wait."

"We're having a record year," noted Joe Sander, sales manager, Fredericks Landscaping, Cincinnati, Ohio. "The economy is the big push with commercial buildings going up and residential projects just seem to be getting bigger and bigger. We're working hard to make sure we temper our growth and do this the right way."

"Our market is strong all the way across," agreed John DeBell, president, Clippers, Chantilly, Va. "We're seeing a lot of building, and the housing market is out of sight with a lot of apartments going in as well."

"We can grow as fast as we want now, and we retained 84 percent of our customers from last year," said Tom Walczyk, president, Emerald Earth, Middleton, Conn.

THE Companies

| Companies | 90,000 |
|------------------------------|-----------|
| Employees | 1,035,000 |
| Average years in business | 15.1 |
| Average year-round employees | 7.0 |
| | |

Average revenue per employee ... \$59,200

"We've consistently grown close to 30 percent every year for the last five years," related Maria Threadgill, operations manager, James River Grounds Management, Richmond, Va.

Hispanic HELP

THE GOOD NEWS is that the United States economy continues to steam forward to all-time highs. The bad news is that most industries are reaping the benefits of these good times, which means everyone is employing as many people as possible. As a result, unemployment continues to hover around 4 percent nationally and the people who do work in the lawn and landscape industry are doing so for higher wages.

As a result, many companies have turned their eyes south,

beyond the U.S. borders, to Central and South America for potential employees. According to a recent Lawn & Landscape industry survey, better than 54 percent of the magazine's readers currently employ at least one Hispanic employee. And, not surprisingly, the use of this immigrant la-





bor force becomes more likely as companies increase in size – almost 95 percent of the survey respondents generating in excess of \$1 million in revenue employ at least one Hispanic.

What was surprising, however, is that the percentage of a company's total workforce that is comprised of Hispanics is almost identical for companies above and below the \$1 million mark. Slightly more than 48 percent of the employees working for respondents doing less than \$1 million who

employ immigrant labor are Hispanic, while 47.2 percent of the employees at companies greater than \$1 million who employ immigrant labor are Hispanic.

One note of interest was the number of smaller companies reporting that, although they employ at least one Hispanic, less than 10 percent of their overall workforce is Hispanic. This was true for 34.4 percent of the respondents, which would indicate that many companies are just beginning to experiment with the idea of a multi-cultural workforce. Based on the fact that none of the responding companies of similar size reported that Hispanics comprise between 11 percent and 30 percent of their workforce, it would seem likely that once companies hire their first Hispanic employees they are likely to hire many more or not employ any at all.

Credit: Lawn & Landscape survey

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Housing STARTS

New housing starts are good for a number of industries, lawn and land-scape included. In fact, many industry analysts have observed that the fortunes of this industry can often be found to follow about nine months behind the housing industry since the landscape trade is often among the last to show up on a new property.

The growth period of the mid- and late 1990s that the landscape industry

has enjoyed can be attributed at least in part to the increased amount of new home construction in this same period. Climbing interest rates, however, have tempered housing construction to some degree. Unless the third and fourth quarters of this year deliver some stronger numbers than are expected, this year will mark the first year since 1995 that new home construction dipped significantly from the preceding year.



* 2000 data is forecasted based on results from January 2000 through August 2000

"To tell you the truth, if you're not doing well right now in this industry then you've got a problem," noted George Gaumer, vice president, commercial grounds maintenance, Davey Tree, Kent, Ohio. **MARKET DRIVERS.** What is driving the good times for the landscape industry? The economy, the aging baby-boomer population, a workplace environment demanding more time of employees and more double-

income families, and maturation among landscape professionals have all contributed to the industry's growth.

"The right customers, the ones we try to get ourselves in front of, recognize good landscapes and they want quality," remarked Gaumer. "Those people are the top one-third of the population, and they represent a very vibrant market."

"Fifteen years ago, I couldn't tell you what a home equity loan was, but now they're used so commonly as people reward themselves," commented Marty Grunder, president, Grunder Landscaping, Miamisburg, Ohio. "This has put us in a situation to say what work we will and won't do, and we're telling people 'No' more than ever before. We're especially turning people away who we've never done anything for before or people who invite us and five other companies to bid on a job."

"We generally try to overbook for the summer months to get us through any slow times, but that wasn't a problem this year," enthused Brent Flory, president, Freedom Lawns, Delphi, Ind. "We even wanted to control our growth this year because it's happening so fast, but there were just too many

Methodology

THE STATISTICS IN this year's State of the Industry Report are derived from two surveys – one conducted by Lawn & Landscape's research department and another conducted by an independent research firm on behalf of Lawn & Landscape. We sent a survey to a total of 1,500 lawn and landscape firms randomly selected from our reader database and 1,500 firms randomly selected from an outside list of lawn and landscape firms. This approach was taken to better analyze the entire industry, and the return rates for the surveys were 23 percent and 25 percent, respectively.

This year, survey data were analyzed by distinct revenue ranges that reflect the diversity of industry participants. This differs from our past approach of presenting broad market averages. We feel this analysis of a broader sampling of participants by revenue range presents a more complete and meaningful picture of professional lawn and landscape activity. These revenue categories – less than \$100,000 in annual sales, \$100,000-\$500,000, \$500,000-\$1 million, more than \$1 million – were selected because our analysis shows that they mark key points in the typical lawn and landscape company's growth.

good opportunities out there to pass on."

Some companies are using this flourishing market as an opportunity to prepare themselves for the future. "In the next 12 months we want to move our maintenance from where it is now, about 6 percent of our revenue, into the 40 percent range," said Kerry Rotolo, president, Jack's Landscaping, Slidell, La. "We're consciously going after that work because we have to replace the revenue we see going away when the construction spending slows down."

"We're working hard to prepare for the future," seconded Kilgallon. "We've paid down most of our debt and we're making large capital purchases now, so even if we don't have the same, large installation dollars coming through a few years from now we'll still have good equipment."

For lawn care companies, weather has been the name of the game. "We see the power of rain," commented Joe Reynolds, lawn care service manager, Black Diamond Lawn Service, Toledo, Ohio. "Going into this year all the forecasters talked about was a drought for the Midwest, but we've been as far from that as possible. The rain has created a host of other problems with delays in getting to customers and increased fungus, but I'll take that any day over a drought. We look like heroes when it rains."

"This year we've been inundated with rain in New England, so we've got weeds coming up everywhere and red thread on 75 percent of the lawns," Walczyk observed.

"What a difference a year makes," agreed John Buechner, director of technical services, Lawn Doctor, Marlboro, N.J., adding that the complete impact of this year's rain won't be fully understood until sometime next year. "This year we'll probably do less seeding business because everyone's lawns are green and they may not buy seeding even if the lawn is thin. But there's also a greater chance this year and next year of weed, disease and insect pressure. For example, the crabgrass germination period may have been extended this year because of the wet, cool weather, and if the crabgrass goes to maturity and

Growing AGAIN

DESPITE THE LABOR SHORTAGE that has limited so many lawn and landscape companies' ability to take on as much new work as they would like, a Lawn & Landscape survey of industry companies found that most firms continue increasing their annual sales.

Almost two-thirds of the survey respondents indicated their 2000 sales would represent an increase over their 1999 sales. These companies who said their businesses would grow this year also noted that, on average, they will grow by 15 percent. While these numbers continue to be impressive, the 24 percent of respondents who reported that 2000 revenue will be comparable to 1999 revenue is up significantly from last year's 20.7 percent who reported that they didn't grow from 1998 to 1999.

The number of contractors reporting possible decreases in revenue from last year to this year is up slightly from 10 percent to slightly more than 11 percent this year. On average, these companies expect revenue to drop 15 percent this year.

| | 2000 | 1999 | 1998 | 1997 |
|-----------|-------|------|------|------|
| Increase | 64.6% | 70 | 72 | 66 |
| Decrease | 11.5% | 10 | 3 | 9 |
| No change | 24.0% | 20 | 25 | 25 |

Source: Research USA

seeds beyond July 4, which is when most preemergent barriers wear out, then we'll see more crabgrass next year."

GOING INTO LABOR. Contractors can't talk for long about their businesses without lamenting the labor situation in some way, shape or form. For many companies, simply finding people to put in the field behind a mower or to push a spreader is a challenge. Other companies struggle to identify individuals qualified to function as a foreman or supervisor, a position that is perhaps as critical as any other to profitability on a job-by-job basis.

Gaumer explained that entry-level labor has been more readily available to Davey Tree this year for some reason, but the foreman and supervisor positions drive growth in the field, and those employees have been almost impossible to locate. "The skill positions – crew leaders, licensed pesticide applicators and foremen – are becoming increasingly difficult to fill," he said. "Good companies are growing these days so we could really stand to have some more promotable people enter the job market."

"Our biggest challenge this year has been the same as last year – we can't find the middle managers to run the crews," noted

Threadgill. "The H2B program takes care of our regular labor issues, but then we're lucky to get one out of 100 of those employees who will get his or her driver's license. And finding spray technicians is pretty much impossible right now."

The H2B program has become a popular solution to the field labor shortage for many companies, and this has accelerated the evolution of the landscape workforce into a multicultural ensemble of workers from North America, Central America and South America. Companies that participate in the program receive temporary work visas through the federal government and then work with an H2B company to locate His-

panic individuals to come to the United States and fill those available positions.

"We have 85 H2B employees right now, and the only problem is that this is putting a Band Aid on a big problem," Threadgill explained. "I get nervous because we get more dependent on the program each year, and there are people in Washington, D.C., who want to eliminate or scale back the program."

"We have about five to eight Hispanic employees, which is less than other companies, but we'll probably need to look for more immigrant labor as we grow," added Sander.

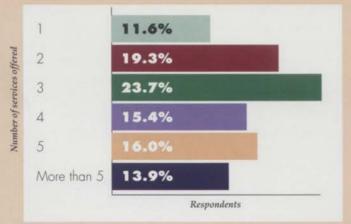
"The biggest issue for us is labor, and what makes it even more difficult for us is that we have to have people with a valid driver's license," explained Buechner. "Landscape companies don't deal with this problem for all of their crew members."

The tremendous competition for available labor has necessitated another change for lawn care companies, especially those located in northern climates that traditionally lay employees off in the winter. "This is the time to get creative," explained Reynolds. "One of the knocks on this industry used to be that you would get laid off each winter, but that doesn't happen any more."

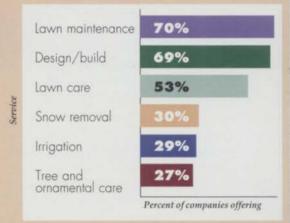
"Some of the smaller companies have decided that they have to come up with some way to keep labor employed through the winter or they have to take less profit to keep

Services GALORE

THERE ARE TWO contrasting schools of thought regarding what it means to be a service company. The first holds that consumers – residential and commercial – are interested in consolidating service providers, and a successful lawn or landscape company needs to offer multiple services to grow and satisfy its customers. The alternative is the idea of "doing one thing and doing it well" that many companies choose to subscribe to. The rationale here is that by offering too many services a company will lose site of its core business and waste resources doing work that it isn't qualified to perform.



Source: Lawn & Landscape survey



Source: Lawn & Landscape survey

Convincing arguments can be made for both positions, and truly successful companies can serve as illustrations of the benefits of both approaches. As time goes on, however, the lure of increased sales and the need to satisfy customer demands seem to draw more and more companies into the full-service realm.

A Lawn & Landscape survey found that 13.9 percent of industry companies offer more than five services to their customers, while 11.6 percent offer just one service. (See left box).

Physical lawn care – mowing, trimming, edging, etc. – is obviously the most popular service for companies to offer. But as the trend toward full-service continues, services such as irrigation and tree and shrub care continue to catch up to the pack in terms of how commonly they are offered. (See box above).

AS THEY Grow

OF PARTICULAR INTEREST is the evolution of the typical lawn and landscape company. Not surprisingly, Lawn & Landscape's research reinforces the popularity of some add-on services, such as irrigation and tree and shrub care. What is a surprise, however, is the percentage of companies generating more than \$1 million in annual rev-

enue who offer physical lawn maintenance service (53 percent) compared to the companies generating less than \$100,000 in sales offering that service (80 percent).

However, an examination of research about the percentage of revenue different-sized companies derive from different services indicates that companies with more than \$1 million in annual sales rely much more heavily on design/build/installation and irrigation work for revenue than do smaller companies. On average, these two services provide 43 percent of revenue for companies in excess of \$1 million in annual sales compared to 24 percent of revenue for companies generating less than \$100,000.

Less than \$100,000:

| Physical Lawn | Chemical Lawn | Chemical Tree | Physical Tree | Design & Installation |
|---------------|---------------|---------------|---------------|-----------------------|
| 80% | 54% | 15% | 60% | 58% |
| Irrigation | Interior | Snow Removal | | Other |
| 13% | 3% | 22% | | 3% |

\$100,000 to \$499,000:

| Physical Lawn 68% | Chemical Lawn 54% | Chemical Tree 29% | Physical Tree 54% | Design & Installation 73% |
|-------------------|-------------------|----------------------|----------------------|---------------------------|
| Irrigation 37% | Interior 3% | Snow Removal | | Other |

\$500,000 to \$999,000:

| Physical Lawn | Chemical Lawn | Chemical Tree | Physical Tree | Design & Installation |
|---------------|---------------|---------------|---------------|-----------------------|
| 71% | 54% | 39% | 61% | 82% |
| Irrigation | Interior | Snow Removal | | Other |
| 29% | 4% | 39% | | 25% |

More than \$1 million:

| Physical Lawn 53% | Chemical Lawn 50% | Chemical Tree 39% | Physical Tree 45% | Design & Installation 79% |
|-------------------|-------------------|----------------------|----------------------|------------------------------|
| Irrigation | Interior | Snow Removal | | Other |
| 50% | 11% | 26% | | 21% |

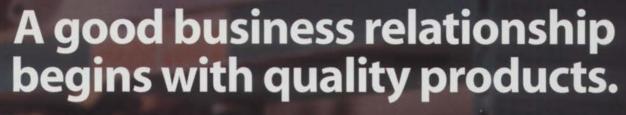
Source: Lawn & Landscape survey

them because there is no guarantee that people who are laid off in the winter will come back in the spring," added Buechner.

"You automatically know that whoever shows up to work for you is potential trouble because if they're out of work now then they don't want to work," recognized Brent Flory, president, Freedom Lawns, Delphi, Ind. "Then figuring out how to retain people I do hire through the winter when we only get about 24 inches of snow may be the biggest problem I have right now."

Other companies are convinced there are solutions to the labor situation if you take the right attitude. "Part of the problem for a lot of companies is that they keep saying, 'I can't

find help," remarked Grunder, adding that he looks for unconventional solutions. "Sure, the help wanted sign goes out in front of our office every morning, but we've also got firefighters working for us with odd hours, we run wacky ads in the newspaper and we focus on the intangibles – having cookouts, sending thank-you notes and so on."







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tions and technical input are yours for the asking. Whether it's agronomic program development, soil testing or locating a hard-to-find item, LESCO can help. And with on-site service technicians at most locations, equipment service and repair are also part of the package.

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a just-in-time program and an express ordering system.

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Application Equipment



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urf Maintenance Equipment



Products



Turfgrass



Products



Combination

Revenue SOURCES

AT THE END OF THE DAY, the dollars have to be there for a company to succeed. Despite its increasingly full-service nature, this industry continues to be built around lawn maintenance work - mowing, trimming, edging, etc. According to Lawn & Landscape's industry survey, approximately 39 percent of the industry's total revenue are

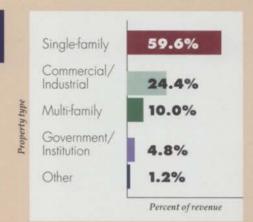
Irrigation

Tree and

Other

generated through maintenance work. (See box below).

Just as no one should be surprised that lawn maintenance is the No. 1 service in terms of revenue generated, there is equally little shock to see that single-family residences are the properties that provide the most revenue. What is encouraging to note, how-



Source: Research USA

38.9% Lawn maintenance Design/build 26.0% 10.9% Lawn care 8.5% ornamental care 3.9% Snow removal 6.7% Percent of industry revenue it provides

Source: Research USA

ever, is that much of the untapped market potential that isn't currently being service by professional contractors is singlefamily residential work. As many contractors continue to grow their operations, they tend to focus more on the larger volume per property offered by commercial accounts. This often leaves single-family residential properties to smaller and mid-size contractors, which means tremendous growth opportunity remains for this part of the industry as well. (See box above).

WAGING BATTLE. Supply and demand economics are clearly at play when it comes to wages for lawn and landscape employees as well as other service industries. Data from the U.S. Department of Labor indicates that the average employment cost for private businesses in service industries climbed nearly 2 percent in the first six months of this year.

Lawn & Landscape research found that wages have jumped by nearly 50 cents an hour in the last 12 months for entry-level mower operators and foreman, while entrylevel spray technicians are earning 25 cents more an hour than they were last year.

Part of what frustrates many contractors is that they recognize that their employees deserve higher pay, but justifying raises isn't that simple. "The labor rates are going up, and rightfully so," recognized Kilgallon. "They work hard, they're loyal and they get the job done right."

"I'm raising wages as much as I can, but I'm competing with local Caterpillar and Subaru plants that bring in Hispanic employees at \$10 an hour, and they can do that because they can manage 10 to 12 people with one foreman," noted Flory. "If I bring in three or four Hispanics, I need to teach

them to work independently of immediate supervision."

"We're paying more, but this isn't a catastrophic situation," related Gaumer. "You'll know real quickly if you don't keep up with the current wages because you won't hire any new people."

The fact that employees have realized their advantageous position doesn't help contractors either. "We have to pay more and we have to pay more faster than we used to," commented Kerry Rotolo, president, Jack's Landscaping, Slidell, La. "We're offering a higher starting wage than we ever have and reviews have to take place sooner, like every 45 days now, because by then the employees have already got another offer to go from \$8.50 an hour with us to \$9 an hour with someone else."

POSITIVE PRICING. While the labor shortage continues to top all surveys asking about the biggest limitation on companies' ability to grow, an equally annoying thorn in the side of many businesses, particularly those that are established in the industry, is lowball pricing by inexperienced or unprofessional companies.

Many of the companies interviewed for this report noted they have to raise their prices next year, whether they're comfortable doing so or not. "We're looking to get a 4 percent increase next year just to cover our increased fuel and labor costs, and we're hoping to keep our other costs in line next year," related Flory. "Fortunately, our overhead per man-hour is a little bit lower than we budgeted for this year because we've produced more labor hours than we expected so far,

and that has helped us keep prices down."

An additional concern for Flory is being overly aggressive pricing a long-term contract. "I don't want to be too greedy taking advantage of the strong market because I'm concerned that bidding too high on a long-

While some contractors have reported pockets of market softening, this is generally attributed to 2000 being a general election year, which often results in increased caution among some people.

term maintenance contract can create problems with the customer down the road if the market changes and prices drop," he said.

"Our wages are up about 20 percent over the last 18 months, and that goes all the way down to office staff," remarked Brian Ham,

Expensing ISSUES

ANY LAWN OR landscape contractor who has built a successful and profitable company and will tell you that this business is all about labor, especially if you're interested in profits. Previous Lawn & Landscape surveys have shown labor to represent anywhere from 30 to 40 percent of a

company's annual expenditures, depending on the type of business. But there are certainly plenty of other areas where companies can and do spend their money: (See box below).

The logical question then is exactly what did all of these dollars buy for these companies. Well, here's a look

| Product Category | Percent who bought in 1999 | Average |
|----------------------|----------------------------|-------------------------------------|
| 1999 expenditures | | |
| Pesticides | 70% | \$13,033 |
| Power equipment | 94% | \$17,364 |
| Nursery stock | 75% | \$48,551 |
| Irrigation equipment | 31% | \$24,147 |
| Landscape materials | 78% | \$19,596 |
| Building | 46% Source: | \$13,960 Lawn & Landscape Survey |

| Walk-behind mowers | 2.6 |
|--------------------|---------------|
| Riding mowers | 1.6 |
| Trimmers | 3.5 |
| Blowers | 3.5 |
| Edgers | 1.6 |
| Pruners | 3.4 |
| Chain saws | 2.6 |
| Aerators | 0.7 |
| Vehicles | 2.6 |
| Snow plows | 1.1 |
| Sprayers | 2.5 |
| Spreaders | 2.1 |
| Spray trucks | 0.4 |
| Average numl | per of pieces |

Source: Lawn & Landscape survey

at what the average respondent to this survey has in the shop when it comes to equipment: (See box above).

president, Santa Rita Landscaping, Tucson, Ariz. "We're trying to pass that increase along to customers, and the market has absorbed some of it, but wages are eating into everyone's margins. I'm also concerned that raising prices may become more difficult because everyone has a budget, such as a builder for a house. The builder may elect to buy a little less landscape instead of boosting the budget."

The jump in fuel prices must also be accounted for when companies evaluate their pricing for next year. "We were 50 percent over budget for fuel expense in July alone," lamented DeBell. "So new contracts and renewals will include at least a 3 percent or 4 percent increase, although that won't entirely cover the higher fuel and labor costs."

Instead, DeBell looks to enhancement work for current customers to bridge the gap. "We should be able to price that work a little higher and thereby increase our overall margins a little bit since there isn't much of a bidding challenge on the enhancement work," he noted.

"We're seeing more players who we haven't heard of show up at bid meetings for commercial projects because they're trying to get their feet wet with some decent-sized projects, and that's kind of scary," noted Sander. "We're trying to raise our prices, but landscape installation work pricing is being driven down because of these new companies trying to go after this work. Commercial work is time- and labor-intensive work, so there's no reason for the pricing to be pushed down, but that's the effect of low bids. So we don't bid on those projects and we focus on being more selective in our job choices."

Rotolo remarked that Jack's Landscaping steers clear of these low-balling challenges on installation jobs. "We do a significant amount of negotiated work, but even though we see some bid prices going up we don't want to compete with those companies that are just cash flowing work," he explained. "They can't stay in business that way, but when two companies leave the industry four more seem to come in and butcher the pric-

ing for awhile."

Walczyk is careful about boosting prices because of the impact he believes this has on customers' expectations. "We haven'traised prices for the last two years, and if we do raise prices for next year

the increase will probably only be about 2 percent," he remarked, adding that profitability in a route-based business is derived from density more so than pricing. "If you have an increase, you have to make a lot of promises about why you're different than the competition, and then you have to de-

While the weather also presented

its annual series of challenges

throughout the 2000 season, these

were different than the climatic

concerns the industry grappled

with in 1999.

liver on that."

Tom Oyler, president, U.S. Lawns, Orlando, Fla., seconded Walczyk's point and added that the customers' perceived correlation between higher prices and better service creates a greater problem for the more established companies than it does for start-up outfits. "A lot of the big companies are seeing

Wage WOES

HOW SIGNIFICANT of an impact is the labor shortage having on this industry? Obviously, the dearth of employees limits the amount of business lawn and landscape contractors can take on. In fact, contractors surveyed by Lawn & Landscape said that on average they would hire four more full-time field personnel tomorrow if they had an unlimited labor pool to choose from. Compounding this problem is the fact that the lack of quality manpower is also forcing companies to pay more for the people they can get. And companies are watching wages (and benefits, in many cases as well) climb so substantially that they aren't even debating raising prices next year.

Many companies have reported that the residential and commercial markets seem to have developed greater tolerance for price increases in the last two to three years, but one of the most common complaints from contractors is that prices are too low and companies are afraid to ask for annual increases. Perhaps this problem will dissipate as contractors face the reality that if they want to hire and retain employees they have to pay them more than minimum wage. Here are the average hourly wages for three key categories:

| | 2000 | 1999 | Increase of: |
|------------------------------|---------|---------|--------------|
| Entry-level mower operator | \$7.80 | \$7.28 | 7.1% |
| Entry-level spray technician | \$8.97 | \$8.77 | 2.3% |
| Foreman | \$12.25 | \$11.54 | 6.2% |

Source: Research USA

their profitability decline these days and they can't figure out why," he commented. "The problem is that they keep raising the bar in terms of service and quality, but they can't get the customer to pay for this because they haven't raised the customers' willingness to pay. We have to educate customers on the value of our work.

"Customers are getting a heck of a value today compared to eight or 10 years ago," Oyler continued. "The price of sod, for example, hasn't stayed flat, but we're charging the same today as we did eight years ago to install it."

While some companies will always elect to compete on the basis of price because that's easier than improving their level of service, smaller companies may also find that some customers will have lower expectations of them because of their size. This can enable these companies to keep customers' expectations and willingness to pay for quality work hand-in-hand as the level of service and price both increase.

The alternative, according to Oyler, is to cut or control your costs, but he counseled that this is a difficult strategy to use successfully. "If you raise the customers' expectations without raising the price, then you have to manage your costs better to make any money in this business," he explained. "Controlling costs is a real challenge, however, because of all the variables we deal with, such as weather, climbing labor rates and small power equipment."

Part of the pricing equation is targeting the right customers. "We're focusing on folks who have already tried the low ballers and appreciate what we can do," noted Kilgallon, whose business is 75 percent residential. "People are looking for a higher level of service these days, and they want to know that once they call you problems will be taken care of properly."

"I absolutely believe you have to pick the customers you want, people who pay on time, accept a competitive price and will then enable you to grow your profitability," DeBell agreed.

GETTING Political

TUESDAY, NOV. 7, is Election Day this year, and that night America will go to bed having elected either George W. Bush or Al Gore as the next president of the United States. All other political ideologies aside, the thought of Gore being given the most powerful position in the country from which to act upon his environmental stances is enough to keep many lawn care professionals awake at night.

Compounding matters is Gore's running mate, Sen. Joseph Lieberman (D-Conn.). Industry veterans may remember Lieberman for his efforts spearheading the infamous "Lawn Care Hearings" in Congress more than a decade ago. These hearings represented a critical point for the industry as environmentalists worked to destroy the very essence of the industry by declaring contractors poisoners of nature. This election could significantly impact the industry.

"My optimism for the future is tied to the next man in the White House," observed Joe Reynolds, lawn care service manager, Black Diamond Lawn Service, Toldeo, Ohio. "I want someone who is friendly to our industry to win that race because I think the election could have a big impact on us all."

"I still remember Lieberman for his role in those hearings," related John Buechner, director of technical services, Lawn Doctor, Marlboro, N.J.

That's not to mention the potential impact of the election on the longest continued growth stretch in the history of the U.S. economy. "The future all depends on the economy, and that will depend on the election," according to George Gaumer, vice president, commercial grounds maintenance, Davey Tree, Kent, Ohio. "Demand for our services always follows the economy to a degree with construction dollars tied more closely to the economy than maintenance dollars.

"If the economy slows down or there's a recession that results in layoffs, the middle portion of our customer base would be affected, while the high-end residential customer base isn't as closely connected to the unemployment rates," he continued.

FUTURE FORECASTING. The big question on so many lawn and landscape contractors' minds these days isn't whether or not the industry can continue to grow – clearly, there are thousands of acres of turf and landscape that aren't being maintained by professionals, and new landscapes will continue

to be installed daily. Instead, contractors wonder just how long the industry can continue to grow as rapidly as it has over the last five years.

Will the economy come off its record run and force homeowners and commercial clients to curtail their landscape spending? Will

A Regulatory RUCKUS

LAWN & LANDSCAPE'S 1999 State of the Industry Report contained a section entitled, "FQPA Threat Looms," in reference to the controversial Food Quality Protection Act (FQPA) of 1996 that mandated an extensive and, some would say, critical review by the U.S. Environmental Protection Agency (EPA) of some 9,000 previously registered pesticides. Much of the criticism surrounding FQPA centered on the lack of scientific data and the "Risk Cup" concept the EPA was empowered to use in its re-evaluations.

To date, the biggest victim of FQPA has been chlorpyrifos, the active ingredient in the popular insecticide Dursban from Dow AgroSciences, Indianapolis, Ind. On June 8, EPA Administrator Carol Browner announced that lawn care registration for Dursban would essentially be cancelled at the end of this year.

"We steadfastly believe in the safety of chlorpyrifos," noted Tim Maniscalo, manager of government and public affairs for the pesticide supplier. "However, federal laws governing pesticides changed dramatically with the passing of FQPA. In its ongoing implementation of FQPA, the EPA has demonstrated that it intends to apply standards far more restrictive than those historically established by the environmental community and accepted by the EPA and other regulatory bodies around the world."

Lawn care companies around the country have been impacted by the decision as they've been forced to seek out a suitable replacement product, and most have found that other products offer reduced effectiveness at a higher price. This is a trend that is likely to continue as heightened EPA restrictions force pesticide manufacturers to produce products that address a narrower spectrum of pests.

"We could be looking at using a number of less effective products in the future because of FQPA," explained John Buechner, director of technical services, Lawn Doctor, Marlboro, N.J. "Dursban took a hit because of the amount of it that was used. Other organophosphates remain available to us because the EPA doesn't see that much use of them, but it could

still decide that the risk cup is overflowing at some point.

"This is definitely driving our product costs up," he continued. "There isn't a tremendous increase, but 3 or 4 percent more here and there really has an impact."

Joe Reynolds, lawn care service manager for Black Diamond Lawn Service, Toledo, Ohio, noted that anyone making pesticide applications should have been preparing for these changes. "Shame on you if you weren't ready for the impact of FQPA," he asserted, adding that he is confident in the industry's ability to react. "I've seen a lot of good tools be taken away over the years, and we wondered what the industry was going to do when that happened. It turns out that we're doing a better job now."

At the same time, the lawn care industry finds itself watching a new battle emerge with the passage of a state law in New York requiring lawn care companies provide 48-hour pre-notification to any abutting neighbors to a property on which they are going to apply pesticides. The law is written so that each individual county must decide whether or not to pass it for their area, so the extent of the law's damage is yet to be determined. However, that doesn't change the fact that lawn care operators across the country see this as a harbinger of problems to come as future states develop similar laws.

Landscape maintenance and irrigation professionals have encountered their own legislative roadblocks along the path to success. Various states across the country are the scene for battles over about the fate of gasoline-powered, hand-held and backpack blowers. California has spawned many of these battles, and different West Coast states have even banned use of these staple tools. However, municipalities have found enforcement of these laws to be a real challenge, so the debate continues.

And while droughts have traditionally benefited the irrigation industry, the sparse rainfall that fell across the Sun Belt earlier this summer led many communities to enact water use restrictions that created challenges for numerous irrigation contractors.

Supply and demand economics are

clearly at play when it comes to

wages for lawn and landscape

employees as well as other service

industries.

the industry reach a point where the labor shortage is so severe that growth is limited to a company's ability to do more with the employees it already has? Could wages continue to climb faster than contractors are able to raise their prices?

Any of these changes would negatively impact the industry, but there's no reason to expect any of them to occur any time soon. In a Lawn & Landscape reader survey, respondents were asked to rank their degree of optimism as they look to the future on a scale of 1 to 7, with 1 being the most optimistic. The average response was a 2.4. And there were relatively few contractors who were pessimistic about the future. In fact, only 13.3 percent of respondents indicated they were more pessimistic than optimistic, while 44.5 percent of respondents noted they were as optimistic as they could be.

Another good sign for the future is that smaller companies are even more optimistic about the future than their larger counterparts. The average optimism rating for companies generating less than \$1 million in annual revenue was 2.3, compared to a 2.8 rating from respondents generating more than \$1 million in annual sales. This would also seem to indicate that many of the concerns some companies had about competing against large, national landscape firms who were growing through consolidation have dissipated to some degree.

But the key factor behind many contractors' expectations for the future is that overwhelming opportunities for growth clearly exist. Although there hasn't been a conclusive study published that verifies the amount of uncaptured market still available in the lawn and landscape industry, no would would describe the market opportunities as exhausted.

This leaves contractors faced with the

making the strategic decision of how they can best compete in an increasingly competitive marketplace.

"Companies are gong to have to be full-service in the

future, so long as they can do so without expanding beyond their capabilities," predicted Gaumer. "I see companies who take the grass is always greener approach and try to offer everything, but you can shoot yourself in the foot. More companies get in trouble by going beyond their core capabilities than get in trouble by focusing on their core."

Sander also called for more full-service firms when he said he expects to see more companies expand into irrigation because irrigation contractors are too busy with their own work to take on much subcontracted work. Threadgill said the future will feature more outsourcing from larger operations such as hospitals and the evolution of some landscape companies into outdoor maintenance companies that also handle parking lot curbs, sign painting and other exterior functions.

Still, Gaumer sees clients continuing to demand more services from contractors in the future, particularly the much-sought-after commercial clients. "I think we'll see more partnering with companies realizing they have to draw the line somewhere and can't expand into every service," he went on, "especially when they identify something outside of their sphere of competency, be it tree care, lawn care applications, patio construction."

Grunder said despite the good times he has adopted the philosophy of Andy Grove, the man credited for much of the success for the computer chip giant Intel—"Only the paranoid survive," related Grunder. "In reality, everything isn't rosy, so you have to be looking behind you all the time. Take advantage of this period to streamline operations, get systems installed and save money while you're making it."

The author is Editor of Lawn & Landscape magazine.



On the next two pages, Lawn & Landscape presents its fourth annual Top 100 list, a compilation of the 100 largest companies in the green industry based on 1999 year-end revenue.

The Top 100 earned a total of \$4,337,402,315 in 1999, an average of \$43,374,023.

These companies enjoyed an average growth of 18.79 percent in 1999 and expect an average growth of 13.31 percent in 2000.

California and Illinois are both home to the most Top 100 companies – 14 businesses are headquartered in each state.

Companies on this list were asked via survey to provide the pertinent information. If you would like to be added to a future Top 100 list or know of a company that should be included, please call Nicole
Wisniewski at 800/456-707 or e-mail her at nwisniewski@lawnandlandscape.com



20 State of

| | COMPANY | CITY | STATE | 1999 REVENUES | PERCENT CHANGE FROM 1998 | EXPECTED PERCENT CHANGE IN 2000 |
|----|--|----------------------|--------|------------------|--------------------------------|---------------------------------------|
| 1 | TruGreen-ChemLawn | Memphis | Tenn. | \$900,000,000 | 10 | N/A |
| 2 | TruGreen LandCare | Memphis | Tenn. | \$700,000,000 | N/A | N/A |
| 3 | Environmental Industries Inc. | Calabasas | Calif. | \$458,845,000 | 12 | 15 |
| 4 | The Davey Tree Expert Co. | Kent | Ohio | \$308,000,000 | -2 | 2 |
| 5 | The Brickman Group | Long Grove | 111. | \$190,000,000 | 25 | 25 |
| 6 | The F.A. Bartlett Tree Expert Co. | Stamford | Conn. | \$114,000,000 | 9.4 | 9 |
| 7 | Rentokil Environmental Services | Riverwoods | 111. | \$71,000,000 | N/A | N/A |
| 8 | Randall & Blake Inc. | Littleton | Colo. | \$68,681,000 | 21 | 15 |
| 9 | Lawn Doctor | Holmdel | N.J. | \$56,300,000 | 13.2 | 10 |
| 10 | OneSource Landscape & Golf Services | Tampa | Fla. | \$55,000,000 | 45 | 18 |
| 11 | The Weed Man/ | | | | | |
| | Turf Management Systems Inc. | Mississauga, Ontario | | \$55,000,000 | 10 | 10 |
| 12 | Gothic Landscape Inc. | Valencia | Calif. | \$52,200,000 | N/A | 15 |
| 13 | TruGreen Interior Plantcare * | Memphis | Tenn. | \$44,000,000 | N/A | N/A |
| 14 | | | | Color Barrier | | |
| | Landscape Group | S. Plainfield | NJ. | \$34,473,434 | 16 | 20 |
| | Save On Enterprises Inc. | Venice | Fla. | \$33,000,000 | 38 | 15 |
| 16 | The Bruce Co. of Wisconsin Inc. | Middleton & Racine | Wis. | \$31,000,000 | 17 | 9 |
| 17 | | San Antonio | Texas | \$30,000,000 | 50 | 30 |
| | American Landscape Cos. | Canoga Park | Calif. | \$30,000,000 | 22 | 12 to 15 |
| | Oak Leaf Landscape Inc. | Anaheim | Calif. | \$30,000,000 | 30 | 20 |
| | The Care of Trees | Wheeling | III. | \$29,753,000 | 9.7 | 10 |
| 21 | Greenspace Services Ltd. | Toronto | Canada | \$29,100,000 | 12 | 8 |
| | Duke-Weeks Landscape Services | Norcross | Ga. | \$27,500,000 | 77 | 20 |
| 23 | The Groundskeeper | Tucson | Ariz. | \$25,000,000 | 10 | 15 |
| | Acres Group | Wauconda | III. | \$23,000,000 | 18 | 15 |
| 25 | | Mount Laurel | N.J. | \$22,500,000 | 10 | 10 |
| | Leisure Lawn | Dayton | Ohio | \$22,000,000 | N/A | N/A |
| | Scott Byron & Co.Landscape Architects | Lake Bluff | 111. | \$21,000,000 | 25 | 15 to 20 |
| | Vila & Son Landscaping Corp. | Miami | Fla. | \$20,820,000 | 46 | 15 |
| | Landscape Concepts Inc. | Grayslake | 111. | \$20,500,000 | 32 | 31 |
| | Chapel Valley Landscape Co. | Woodbine | Md. | \$20,000,000 | 25 | 2 |
| | Scotts Lawn Service | Marysville | Ohio | \$20,000,000 | 90 | 60 |
| | Jensen Corp./Jensen Landscape | Cupertino | Calif. | \$19,500,000 | 25 | 25 |
| | Brookwood Landscape Inc. | San Diego | Calif. | \$19,200,000 | 27 | 20 |
| | Teufel Nursery Inc. | Portland | Ore. | \$19,000,000 | 9.5 | 10 |
| | Lucas Tree Expert Co. | Portland | Maine | \$18,500,000 | -7.5 | 5 |
| | Cagwin & Dorward | Novato | Calif. | \$18,153,206 | 11.7 | 10 |
| | Mariani Landscape | Lake Bluff | 111. | \$18,037,000 | 4 | 10 |
| | Nanak's Landscaping | Longwood | Fla. | \$18,000,000 | 20 | 20 |
| | Urban Farmer Inc. | Thornton | Colo. | \$16,200,000 | 11 | 7 |
| 40 | The state of the s | Orange County | Calif. | \$16,000,000 | 14 | 10 |
| 41 | Underwood Brothers Inc. | T [D] | 1. | 415 750 704 | 3.3 | |
| 10 | dba AAA Landscape | Tucson and Phoenix | Ariz. | \$15,752,734 | 11 | 5 |
| 42 | A SECURE OF THE PROPERTY OF TH | San Jose | Calif. | \$15,600,000 | 50 | N/A |
| 43 | | Sussex | Wis. | \$14,878,000 | 2 | 5 |
| 44 | | Miami | Flo. | \$14,500,000 | 4 | 2 |
| 45 | | Apopka | Fla. | \$14,300,000 | 6 | |
| 46 | | Anaheim | Calif. | \$14,000,000 | 30 | 60 |
| 47 | | San Diego | Calif. | \$14,000,000 | N/A | N/A |
| 48 | The state of the s | Smyrna | Ga. | \$13,807,000 | 14 | 17 |
| 49 | The Highridge Corp. | Issaquah | Wash. | \$13,800,000 | 23 | 23 |

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Acquired by The Brickman Group in 2000

he Industry

| | COMPANY | CITY | STATE | 1999 REVENUES | PERCENT CHANGE FROM 1998 | EXPECTED PERCENT CHANGE IN 2000 |
|-----|--|--------------------|---------|------------------|--------------------------------|---------------------------------------|
| 50 | Clarence Davids & Co. | Matteson | III. | \$13,000,000 | 10 | 12 |
| 51 | Keller Outdoor Inc. | Sanford | Fla. | \$13,000,000 | 2 | 17 |
| 52 | Naturalawn of America | Frederick | Md. | \$13,000,000 | 30 | 35 |
| | Terrain Systems Inc. | Phoenix | Ariz. | \$13,000,000 | 30 | 10 |
| 54 | DuBrow's Nurseries | Livingston | NJ. | \$12,500,000 | 5 | 10 |
| 55 | New Garden Landscaping & Nursery | Greensboro | N.C. | \$12,500,000 | 13.6 | 15 |
| | Western Dupage Landscaping Inc. | Naperville | 111. | \$12,500,000 | 18 | 8 |
| | McFall & Berry Landscape Mgmt. | McLean | Va. | \$12,400,000 | 31 | 8 |
| 58 | Nissho of California | Vista | Calif. | \$12,000,000 | 25 | 10 |
| | Parker Interior Plantscape | Scotch Plains | N.J. | \$12,000,000 | 0 | 5 |
| | Hermes Landscaping Inc. | Lenexa | Kan. | \$11,300,000 | 9 | 15 |
| 61 | The Greenery Inc. | Hilton Head Island | S.C. | \$11,254,000 | 28.7 | 19.6 |
| 62 | Landscape Management Inc. | Carrollton | Texas | \$11,228,891 | 11.15 | 10 |
| 63 | Clintar Groundskeeping Services | Markham, Ontario | Canada | \$11,091,000 | 29 | 9 |
| | Blumel Sunset Landscaping | Santa Clarita | Calif. | \$11,000,000 | N/A | N/A |
| | Gibbs Landscape Co. | Smyrna | Ga. | \$10,500,000 | 17 | 17 |
| | Hillenmeyer Nurseries | Lexington | Ky. | \$10,500,000 | 2 | 5 |
| | | | III. | \$10,400,000 | 18 | 5 |
| | Munie Outdoor Services Inc. | Caseyville | | | 25 | 20 |
| | ALDO 1 Landscaping & Lawn Service | Ocean | N.J. | \$10,300,000 | | |
| | Countryside Industries Inc. | Wauconda | 111. | \$10,264,222 | 24 | 12 |
| 70 | Webb Landscape Inc. | Ketchum | Idaho | \$10,126,148 | 19 | 15 |
| 71 | Pro-Grass Inc. | Wilsonville | Ore. | \$10,000,000 | 10 | 10 |
| | J.C. Erlich Co. Inc. | Reading | Pa. | \$9,800,000 | -3 | 5 |
| 73 | Dennis' Seven Dees Landscaping | Portland | Ore. | \$9,700,000 | 4 | 17 |
| 74 | The state of the s | Ft. Washington | Md. | \$9,500,000 | 25 | 35 |
| | Middleton Lawn & Pest Control | Orlando | Fla. | \$9,500,000 | 20 | 11.5 |
| | Northwestern Landscape Co. | Puyallup | Wash. | \$9,300,000 | 20 | 20 |
| | Senske Lawn & Tree Care | Kennewick | Wash. | \$9,300,000 | 10 | 10 |
| | James Martin Associates | Vernon Hills | III. | \$9,215,000 | 30 | 20 |
| | Bio Energy Landscape & Maintenance | Houston | Texas | \$9,077,535 | 91 | 10 |
| | Cedar Landscape Inc. | Sherwood | Ore. | \$9,063,145 | 4.1 | 8.5 |
| 81 | All-Phase Landscape | Lakewood | Colo. | \$9,000,000 | 28 | 20 |
| 82 | Sebert Landscaping Co. | Bartlett | 111. | \$8,771,000 | 5.5 | 5 |
| 83 | Lambert Landscape Co. | Dallas | Texas | \$8,750,000 | 0 | 0 |
| 84 | CoCal Landscape | Denver | Colo. | \$8,700,000 | 26 | 28 |
| 85 | Landscape Specialists Inc. | Lake Forest | Calif. | \$8,700,000 | -13 | 10 |
| 86 | Jack's Nursery Inc. | Slidell | La. | \$8,671,000 | 51 | 10 |
| 87 | Canon Russeau Landscape | Carleton | Mich. | \$8,600,000 | 20 | 5 to 10 |
| 88 | Yardmaster Inc. | Painesville | Ohio | \$8,500,000 | 1 | 15 |
| 89 | Fullbach Services Inc. | Louisville | Ky. | \$8,250,000 | 125 | 75 |
| 90 | Landscape Workshop Inc. | Birmingham | Ala. | \$8,200,000 | 14 | 10 |
| 91 | Decorative Plant Service | San Francisco | Calif. | \$8,110,000 | 5 | 0 |
| 92 | ILT Vignocchi Inc. | Wauconda | 111. | \$8,000,000 | 10 | 11 |
| 93 | Swingle Tree & Landscape Care | Denver | Colo. | \$8,000,000 | 8 | 12 |
| | Stiles Landscape Co. | Pompano Beach | Fla. | \$7,950,000 | 5.5 | 11 |
| | Maintain Services Inc./ | Walled Street | - Color | | OF NO. | |
| | Landscape Design & Construction | Dallas | Texas | \$7,850,000 | 5 | 20 |
| 96 | Rood Landscape Inc. | Tequesta | Fla. | \$7,750,000 | 6.8 | 6 |
| | Groundmasters Landscape Mgmt. | Cincinnati | Ohio | \$7,350,000 | 58 | 20 |
| | R. B. Stout Inc. | Akron | Ohio | \$7,300,000 | 4 | 0 |
| | Alpine Gardens | Greeley | Colo. | \$7,230,000 | 11 | 10 |
| |) Bratt Inc. | Pleasant Grove | Vt. | \$7,200,000 | 24 | 5 |
| 100 | bruit life. | Libusum Ofove | *** | 47,200,000 | 2-7 | |

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GROW WITH US"

Employee Uniforms

(continued from page 74)

Visibility surpasses security measures. Myers expands her approach to a "uniform appearance," with hygienic requirements such as discouraging earrings and requesting employees to trim long hair behind the ear. "We ask them upfront when they sign our code of conduct if they would be willing to remove facial hair, earrings, etc.," she said. "They may hesitate, but once they adopt the general policy as their own, they develop a sense of pride."

WEARING THE BENEFITS. Pride forms only part of the benefit package uniforms offer employees. Contractors who supply attire for their technicians demonstrate an interest in their workers. "Uniforms have a combination of benefits," Quilter noted. "As a company you get the advantage of having employees in impeccable uniforms, and as an employee, you don't have to think about what to wear to work," she explained.

Commitment to providing conveniences to employees results in a higher labor retention rate for company owners. And when employees feel ownership in their workplace, their attitude, self-esteem and performance improves.

In addition, providing professional attire can be economically sound for employers, Quilter added. "If you have a high turnover, you outfit your employees, then they leave and take the clothes with them and you have to repurchase apparel," she said, explaining the difference between renting and buying uniforms. "In a rental business, a new employee comes on board and then you get the uniform back from the person who left to outfit the new person."

Uniform cost is miniscule when compared to the value they bring to businesses, Lazaroth stressed. Expenses vary among companies, with some paying up to \$15,000 every year for uniforms and others ordering T-shirts in bulk from a catalog for \$7.99 each. Lazaroth estimated that a uniform service puts a \$6 dent in a contractor's pocket per employee every week. Myers offsets her uniform budget with an initial \$75 employee uniform fee, and Ross keeps a check on apparel inventory by requiring workers who leave the company to turn in their attire before they receive their last check.

Despite the costs, Rocheleau confirmed that his \$700 annual uniform expenditure is a worthwhile investment. His workers lend input when he orders new attire and are enthusiastic when the uniforms arrive, he added.

"When we handed out the shirts this year, they were really looking forward to new uniforms," he noted, describing the new sleeveless crew shirt that replaced T-strap tank tops his employees used to wear. "We had a meeting, thanked them for their contribution to the company and passed out the uniforms – they couldn't get them fast enough. It's a sharp little shirt."

Customer demand for service-related maintenance is swelling, which includes the landscape industry, Lazaroth pointed out. Companies who offer benefits to their employees and customers will thrive in the market, and uniformed technicians with a professional appearance can win accounts.

"You have to differentiate yourself as to why your service is better than someone else's," he stressed. "I give a better service, have better trained employee and portray that because they are uniformed."

The author is Assistant Editor of Lawn & Landscape magazine.



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USE READER SERVICE #68



Nursery Stock Forecast

by Cynthia Greenleaf

Nursery market insiders offer their expert forecasts on next year's plant availability.

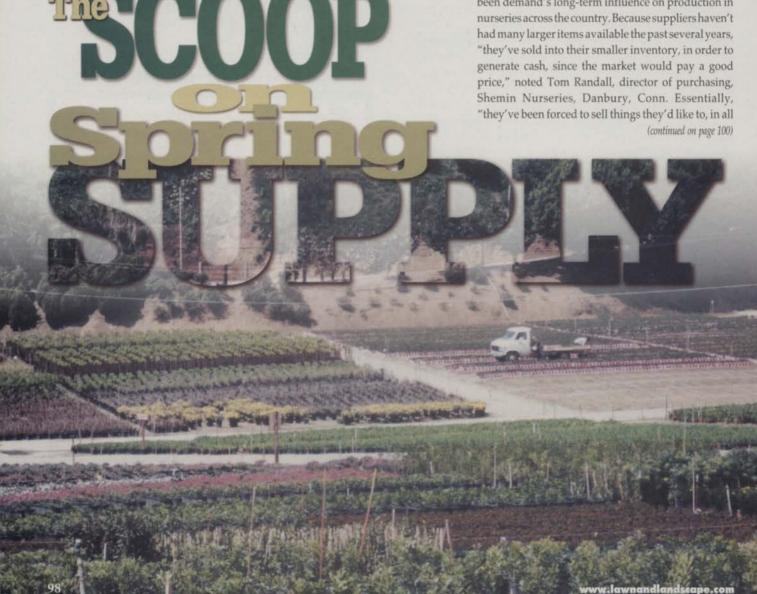
Like any dynamic industry, the nursery market has its ups and downs, which can leave contractors wondering what they're going to be able to plant once installation season rolls around. Here's the lowdown from experts across the country on next spring's supply.

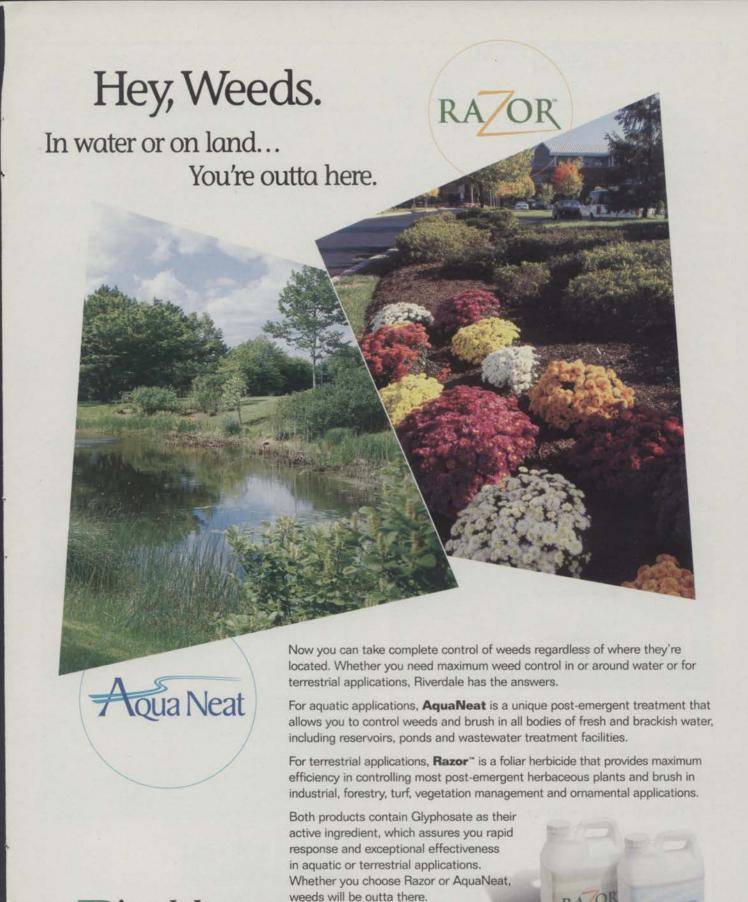
Several key factors continue to govern plant availability, according to industry insiders. For one, a strong economy coupled with a construction boom has created a heightened demand for plant material. Flush financial times have promoted record growth throughout many parts of the U.S., primarily in the form of residential and commercial construction, according to Terry Van Arsdale, nursery manager, McHutchison, Ridgefield, N.J. Because of this massive expansion, "more people are planting more (landscape) material," he said.

On the West Coast, Tony Rosso, operations manager, Julius Rosso Nursery Company, Seattle, Wash., agreed with the theory that the economy is at the root of plant availability, especially in regard to scarcer items such as large trees. "Everybody wants big stuff and has the money to pay for it," he said, adding that the multitude of new residential and commercial projects is driving a healthy demand for plant material in Pacific Northwest.

Wendy Proud, product manager, Monrovia, Azusa, Calif., reported similar findings. "The strong economy has influenced the supply of larger specimens," she said.

THE PRODUCTION FACTOR. The most significant factor impacting plant availability, however, has been demand's long-term influence on production in nurseries across the country. Because suppliers haven't had many larger items available the past several years, "they've sold into their smaller inventory, in order to generate cash, since the market would pay a good price," noted Tom Randall, director of purchasing, "they've been forced to sell things they'd like to, in all (continued on page 100)





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Nursery Stock Forecast

(continued from page 98)

honesty, hang on to in the future," he said.

"As the economy has heated up, (many nurseries have) taken inventory out of the pipeline and replacement hasn't kept up with demand," added Bill Reese, president, Greenbriar Nurseries, Ocala, Fla.

Understanding the ups and downs of the nursery market is a simple lesson in economics - it's all about supply and demand. "Our business is very much cyclical," pointed out Hugh K. Steavenson, executive vice president, Forrest Keeling Nursery, Elsberry, Mo. "All of a sudden there's a gap if you get caught behind. Then it takes a while to get caught up, and just when things are getting good, you have a surplus situation," he said.

Steavenson pointed out that a tree requires at least five years, on average, to get from its original producer to the final grower. And from there, a tree can take yet another three or four years until it hits the end market. "We go through these things all the time. (continued on page 102)

he recent scarcity of large trees has many wondering just when the situation is going to improve. While 21/2-inch caliper and larger specimens will continue to be on the short side into next spring, a fresh supply is on the horizon, according to industry experts.

Tom Randall, director of purchasing, Shemin Nurseries, Danbury, Conn., predicts that the current tree shortage will subside within the next two selling seasons. This will be due to a slight slowdown in consumer confidence, spending and in turn, plant demand, he said.

Suppliers are starting to catch up with the demand for trees, agreed Danny Summers, executive vice president, Southern Nursery Association, Marietta, Ga. "The natural summer slowdown helped us catch our breath," he said. "In 2001, growers may be catching up somewhat."

Increased nursery acreage devoted to trees is one factor that promises to ease the recent shortage. "Every nursery I've visited has expanded," Terry Van Arsdale, nursery manager, McHutchinson, Ridgefield, N.J., observed.

Hugh K. Steavenson, executive vice president, Forrest Keeling Nursery, Elsberry,

Mo., has seen the same trend. "There have been an awful lot of trees planted in the last few years."

- Cynthia Greenleaf



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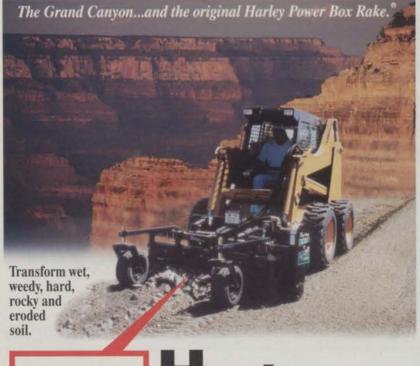


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Nursery Stock Forecast

(continued from page 100)

(Plant production) is not like a widget press: You can't just turn it on and off when you want to," he said.

Reese agreed, pointing out that there was an overabundance of trees about a decade ago. When the cycle swings back into a shortage situation, however, "it takes a while to get those (larger tree) sizes back," he said.

SPRING SUPPLY PREDICTIONS. In terms of next spring's plant availability, contractors can expect the same trends they've been seeing to continue. For one, shade and ornamental trees 21/2 to 3 inches and above will stay in demand, and in turn, in short supply. "Because of the economy being as strong as it is, people tend to specify larger plants," Randall said, adding that large evergreen trees in the 10- to 12-foot range, such as white pine, Norway spruce and Serbian spruce, will continue to be in strong demand.

In addition, red maple cultivars such as Red Sunset will keep enjoying widespread popularity and in turn, extensive shortages, according to industry experts. Widely adaptable, brilliantly colored and low maintenance, red maples are popular with good reason, according to Steavenson. "They've been hotter than a pistol for the past two or three years," he noted. "They're using them everywhere. Everybody wants them."

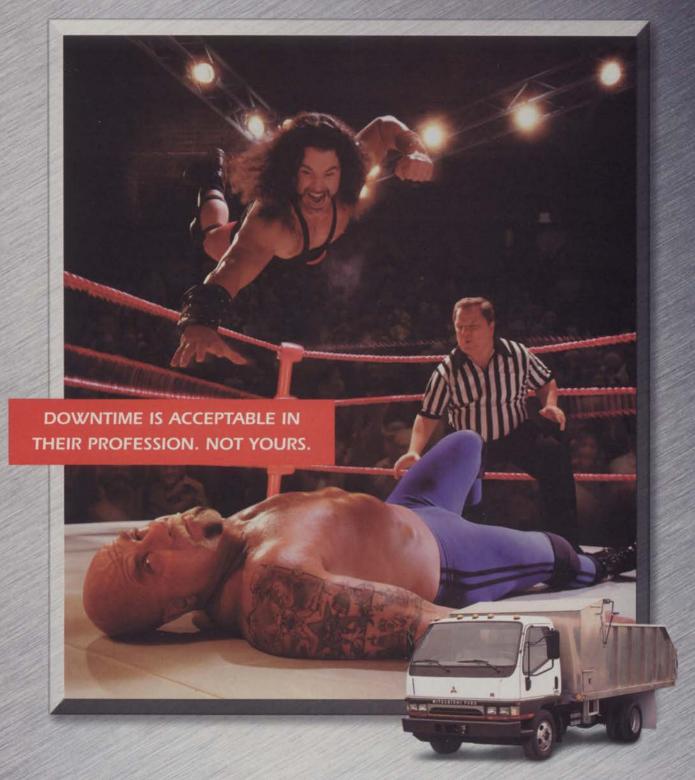
From his East Coast vantage point, Van Arsdale predicts that varieties such as Emerald Green arborvitae, as well as boxwoods and viburnums, will also be in high demand throughout the country.

The trend toward colorful landscapes will also carry on well into next year. "Contractors should expect to see a continued demand for colorful plants," Reese said. "People are looking for plants that have a multi-season appeal."

This includes increased use of perennials, which continue to catch on in yards across the country, according to Reese.

"Tropicals and brightly colored foliage will dominate the market across the country," Proud agreed. "New varieties, especially perennials, may be in short supply, however, since people have more money to spend and price is not an issue."

In spite of shortages with certain plant materials, Steavenson is confident that contractors will be able to find what they need for their spring projects. "While there are (continued on page 104)



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Nursery Stock Forecast

(continued from page 102)

isolated shortages for sure, there will be enough plants out there," he said.

PLANNING FOR PLANTS. Securing the right plant material has everything to do with planning ahead. The earlier contractors communicate their spring landscaping needs to suppliers, the better, according to nursery insiders across the country. Rather than waiting for their design team to come up with a "want list," contractors need to work ahead of the installation phase in order to secure the plants they desire, Randall advised.

Reese agreed, urging contractors to give suppliers as much latitude as possible when placing orders. "We'd rather have someone tell us they need something in six months then tell us they need it today," he observed.

Advance planning is critical, especially since orders now are placed earlier and earlier every year. At McHutchison, for example, spring orders were in by early July, according to Van Arsdale.

To brace themselves for inevitable plant shortages, contractors should stock up on popular varieties in advance, if possible.



"The past few years, contractors have been booking plant material earlier," added Danny Summers, executive vice president, Southern Nursery Association, Marietta, Ga. "Contractors are no longer waiting until the winter trade shows. If they do wait, they're basically asking 'What do you have left?'"

He noted that his association's annual show in August has become a "hot button for placing orders."

Similarly, at Forrest Keeling Nursery, larger trees already are booked two years in advance, according to Steavenson, who advised contractors to place orders on popular items such as trees, at least one year ahead.

Overall, with plant shortages of some kind

The author is Associate Editor of Lawn & Landscape magazine

almost always inevitable, contractors who are

flexible can serve themselves and clients well.

"If contractors are willing to be flexible, they

can find a large share of their want list,"

Randall noted, adding that by being open-

minded, contractors also can take advantage

of great values in the marketplace. "A cus-

tomer may specify a Red Sunset red maple,

which are popular and in short supply," he

said. "If a landscaper can recommend a simi-

lar tree variety, however, such as a Norway

or sugar maple, they can find those cheaper

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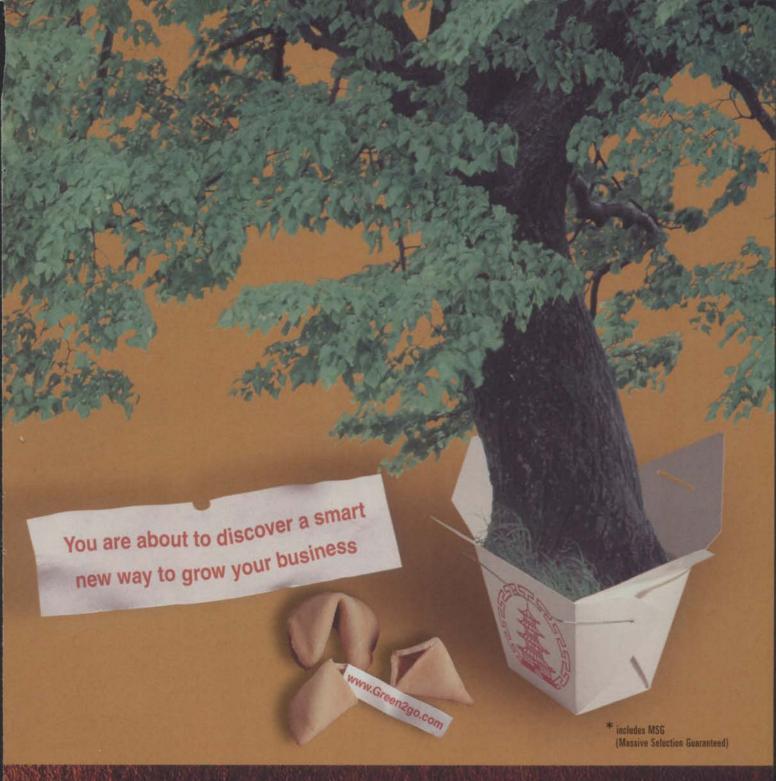
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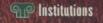
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USE READER SERVICE #39

Pruning Shrubs

by John C. Fech

Shrub pruning often can instill fear in contractors, but following simple guidelines can calm nerves and lead to successful shrub care.

Noth Alfalla

Here's a quick poll idea: At your next neighborhood gathering, ask 10 people if they remember the last time they pruned their lilac, Viburnum or dogwood. Then ask them how they went about performing that task. If they answer, "Uh, yeah, I think I whacked a few branches off of my shrubs a couple of years ago. I guess now is the time to prune them again." Then you know they have no clue.

Most folks simply don't know how to prune correctly. Believe it or not, some landscape maintenance crews don't either. This lack of knowledge leads to fear. Fear that you'll prune incorrectly and the shrub will look awful afterwards. Fear that the shrub will never bloom again. Fear that the customer will complain about the way the shrub looks. Fear that this will lead to a sudden need to peruse the "help wanted" section of the local newspaper. Relax. Shrub pruning is quite simple, actually.

RENEWAL PRUNING. There are three methods of shrub pruning that merit mentioning. The first one is "renewal pruning." This is very simple. Just cut off all the stems at the ground level. Renewal pruning works well for overgrown, heavily diseased, damaged or winter-killed shrubs where the objective is to start over with new growth.

(continued on page 108)



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Pruning Shrubs

(continued from page 106)

The types of shrubs that respond well to renewal pruning are Spiraea, dogwood, Viburnum, coralberry, Cotoneaster, privet, burning bush, butterfly bush, hydrangea and

By pruning
in early
spring,
contractors
remove dead
areas and
give shrubs
a chance to
grow full
stems before
winter.
Photos
(right and
page 106):
L & L Staff



barberry. In general, most evergreen shrubs don't respond well to this approach because they don't have apical meristems or new growing points at the ground level of the

> plant. So, avoid this method of pruning for yew, juniper, holly, Rhododendron, boxwood and muhgo pine.

> Renewal pruning should be done in early spring or mid-to late fall for best results. The key is to allow for several months of good growing conditions for the shrub to encourage new, healthy stems to form. Early fall is not an ideal time for renewal pruning, as the new stems need a few months to harden off before experiencing winter's cold temperatures. Early fall renewal pruning lets the shrub develop ample new, succulent growth to make it

susceptible to winter kill. This is especially true of landscapes in the transition zone of Illinois, Missouri, Iowa, Nebraska, Kansas and Indiana, where extreme winter temperature fluctuations are common. Meanwhile, pruning too late in the year doesn't allow enough time for significant shoot growth.

Other entomologists and plant pathologists that I have discussed renewal pruning with have commented on how much they like this method. The benefits from their point of view are twofold. First, renewal pruning offers a great opportunity to remove diseased stems and insect-infested tissue from the plant. In many cases, fungal cankers develop on a plant. There are no effective control methods for these diseases other than to cut out the affected areas of the plant. Crown gall of Euonymus, black knot of ornamental plums and cherries, anthracnose of Spiraea, and cytospora canker of corkscrew willow are good examples. Likewise, lilac borers and (continued on page 110)

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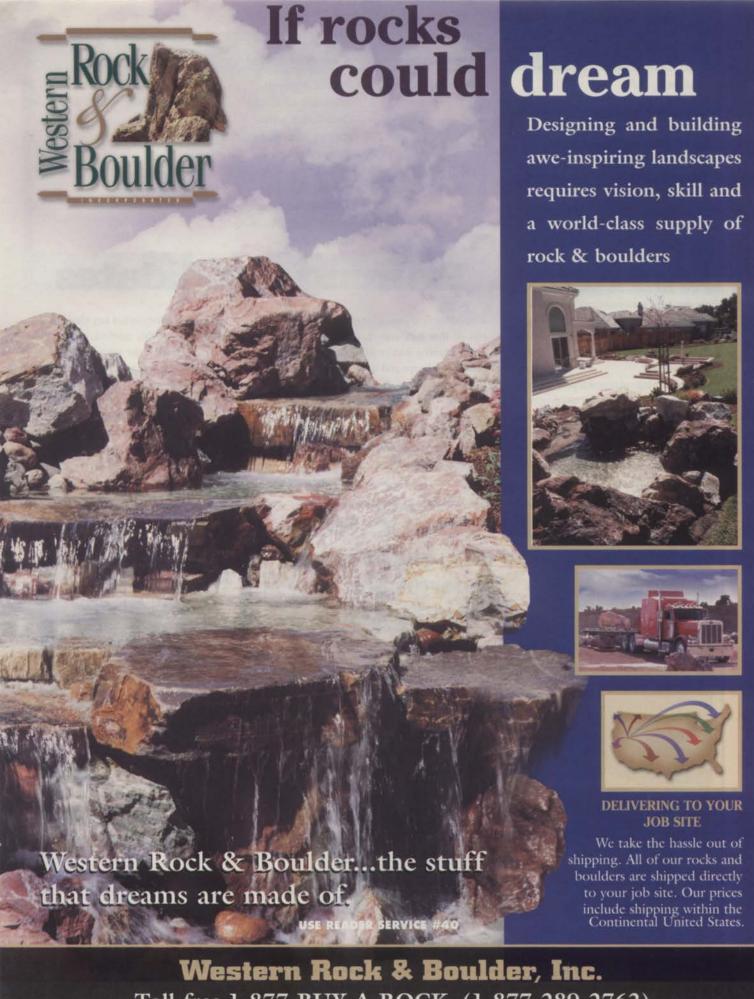
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Pruning Shrubs

(continued from page 108)

various scales on Cotoneaster, privet or Euonymus can be partially or completely controlled by removing infested stems.

A second advantage that pest specialists highlight is the improved shrub architecture that renewal pruning creates. As new stems develop and replace those that were removed there is less stem mass, which presents better opportunities for air flow through the stems. This leads to leaves that stay drier and are less likely to develop foliar diseases such as leaf spot and rust. The new plant growth allows landscape maintenance crews to work with the new shoots as they develop to produce the proper spacing and orientation, instead of dealing with a solid mass of ungangly stems.

A disadvantage of renewal pruning is the delay of future blooms. Most customers are probably used to seeing their lilacs and dogwoods bloom each year. Because this method removes wood of flowering age and replaces it with new shoots, no blooms are likely to be

| PRUNING METHOD | GOOD CANDIDATES | BAD CANDIDATES |
|-----------------|--|---|
| Renewal pruning | Spiraea, dogwood, Viburnum, coralberry, Cotoneaster, privet burning bush, butterfly bush hydrangea, barberry | yew, juniper, holly, boxwood rhododendron, muhgo pine |
| Thinning out | Spiraea, Viburnum, dogwood, holly, yews juniper, azalea, boxwood, rhododendron | pine, spruce, fir |

Pruning Candidates

formed the first year after pruning. Regardless of that fact, convince clients that renewal pruning is an investment in the health of their landscape and should be considered a viable procedure. Avoid renewal pruning on all of a client's landscape shrubs in any given year, however. This may lead to client dissatisfaction. After all, the client is paying the landscape contractor to improve the look of the landscape, not worsten it.

Clear communication is a key element to successfully adopt this method, especially with new accounts. Take some time to explain to the customer that in most situations the growth will be about 12 to 18 inches high in a few months, and after a growing season the shrub will return as a vibrant part of the landscape. If you don't warn clients in advance, they might accuse you of killing the (continued on page 112)



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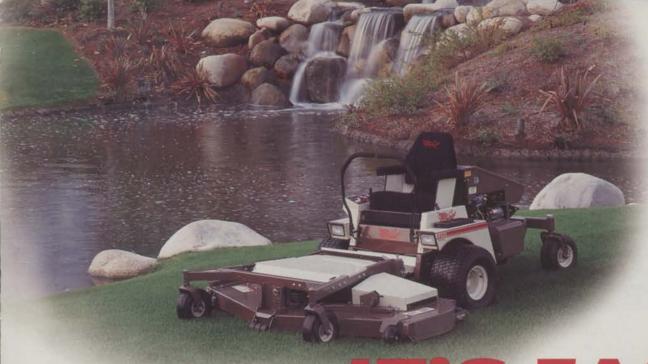
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Pruning Shrubs

(continued from page 110)

plant by cutting it back too far. "Before" and "After" photos will help to explain this rapid regrowth potential.

THINNING OUT. Another common shrub pruning method is "thinning out." Each year, after blooming, remove about one-third of the oldest stems at the ground level. This method produces a balance of young, middle-

In general, removing one-fourth to one-third of the stems produces the desired results, allowing greater air flow through the shrub and benefiting the shrub's health. For example, if a Spiraea has 30 stems, remove seven to nine of them. When a shrub has just a few stems, like some black haw Viburnums do, then removing only one or two stems may be sufficient. Remember that the

picious abnormalities or holes with fine sawdust surrounding them. As previously discussed, these are common homes for various pest species.

After the stems have been selectively removed, finish by removing a few more straggly stems to give the shrub some shape. In most situations, a few stems that are growing at undesirable angles or are much taller/longer than the rest of the plant will remain. Give the shrub a finished look by removing them entirely or clipping the objectionable part of the stem. This lets customers know that contractors are concerned with aesthetic appeal as well as overall plant health.

Similar to renewal pruning, shrub varieties that respond well to thinning out are deciduous species such as Spiraea, Viburnum and dogwood. A few evergreen shrubs also respond well to this technique, and holly, yews, junipers, azaleas, rhododendrons and boxwood will benefit from periodic thinning.

(continued on page 114)

Renewal pruning should be done in early spring

or mid- to late fall for best results.

aged and mature wood in the shrub. This means getting down on your hands and knees, pushing aside the stems to identify them and then cutting them at the crown of the plant. In most cases, a by-pass hand pruner, lopping shears and a small pruning saw will be the only tools needed.

When uncertain about how many stems to remove from a shrub, do some quick math.

goal is to produce a shrub that has new and mature wood.

Older stems are easy to identify as removal targets. They are generally darker in color and thicker than newer stems. In many shrub species, older stems tend to produce a naturally exfoliating or peeling bark. This is a cue that the stem must be removed. Other targets for removal include stems with sus-

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USE READER SERVICE #42

Pruning Shrubs

(continued from page 112)

Conversely, pines, spruce and fir do not produce regrowth when this method is used, so double checking the plant's identity is an important step that should be taken before pruning.

Thinning out should be done in early spring or mid- to late fall for best results.

In general, removing one-fourth to one-third of a

shrub's stems produces the desired results, allowing

greater air flow through the shrub and benefiting

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HEADING BACK. A third pruning method, "heading back," is appropriate only for new hedges, and rarely should be used. Ironically, this is the technique that most homeowners and some novice landscape contractors use. This approach involves using a hedge trimmer to make arbitrary, indiscriminate cuts in the shrub. Heading back produces an attractive plant the first few times it is practiced. The shape is nice and clean, the lines are sharp and the plants can be manipulated to appear identical.

However, in a few years, an area of knotty growth develops near the area cut by hedge trimmers. This area becomes unsightly in a short period of time. The worst consequence of this pruning method is that when mechanical injury occurs from sunburn, vandalism or routine wear and tear, the shrub has no mechanism to replace the affected area. In most cases, the shrub developes large voids or dead looking areas with no leaves at all.

A few special situations exist where heading back is recommended. If a client desires a high-maintenance landscape and requests evergreens be cut into funny-shaped balls or depictions of elephants and animals, then this is the way to do it.

More reasonably, heading back can be exercised to keep an evergreen shrub or tree from growing into a sidewalk area or over a driveway to maintain clearance for traffic. In this case, cut the new growth in half in midsummer. This allows the plant to thrive in the landscape for many years before lateral growth shadows activity on the path or patio. Actually, Christmas tree growers use this technique each year when they prepare and shape their crop for sale.

By using a thinning out or a renewal pruning technique, customers will be well served and landscape contractors will be satisfied from producing an aesthetically pleasing, healthy landscape for them.

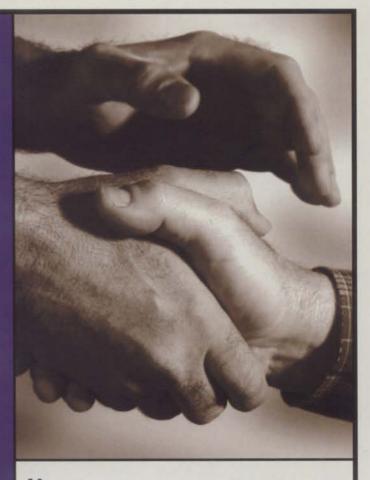
The author is an extension educator at the University of Nebraska, Lincoln, Neb.

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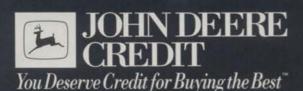
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by Kristen Hampshire

Landscape
companies are
working doubleduty, adding
interiorscape
services to the
mix to tap into
the expanding
market and boost

A winning strategy for contractors aiming to team landscape and interiorscape services involves more than filling bleachers with customers demanding indoor attention. The right equipment and plant know-how combined with a starting line-up of technicians that can tackle customer relations and provide detail-oriented service helps build a competitive, successful crossover business.

Interiorscape, a flourishing market, can stimulate a company's growth by attracting customers interested in improving the aesthetics of their home or office, which in turn, increases the client base for the exterior portion of the operation. One-stop shopping is a feature consumers seek in service businesses. Together, exterior and interior landscape open doors to a more profitable, customer-service driven operation, explained Sue Tufenkian, sales and marketing manager, Gardeners' Guild, San Rafael, Calif.

"Offering both is a tremendous advantage," she noted. "Providing multiple services is also a coordination puzzle that needs to be worked out. The interior and exterior divisions need to work hand in hand with continuity in scheduling, communication and even simple choices like design and color."

Contractors achieve this balance by understanding both markets and molding their businesses to respond to the challenges each facet presents, whether it be dedicating professionals to indoor projects or educating current technicians on interiorscape installation and maintenance techniques.

"There's an economy of scale and efficiency that can be sold if you offer both services," Tufenkian added. "You can coordinate colors depending on the job and you have efficiencies with mobilization and logistics. There are advantages and opportunities to explore when doing both."

the nine

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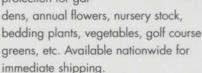
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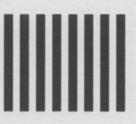
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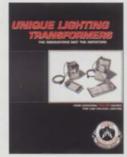
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Interior Crossover

(continued from page 116)

THE STRATEGIC ADVANTAGE.

Partnering interior and landscape holds consolidation advantages for contractors and consumers. Companies who add interior-scape streamline management, resources and labor while offering opportunities for technicians to fine-tune customer service skills—a crucial requirement for interior jobs. Clients gain the convenience of working with a single-service provider.

"You can coordinate the two and have a flow of the same style," described Linda Novy, president, Gardners' Guild. "For jobs where interiorscape is a smaller piece of the contract, we train exterior crews to care for the plants it passes savings on to the customer."

Compacting certain costs is advantageous, but companies that offer both services must realize the contrasts between indoor and outdoor pursuits and hire or train employees accordingly. For example, interiorscape technicians must gauge environmental conditions, such as lighting, room temperature and traffic, stressed Toby Langner, president, Langner & Associates, Chicago, Ill.

"The biggest difference is in some of the care and the function that we have to provide," he explained. "The scheduling is more intricate as far as access to areas and the housekeeping requirements are higher for interiorscape services. The adding of chemicals and treatment of pests and diseases is more demanding in interior.

"The size of the equipment used is limited," he continued, adding that overhead equipment costs pale in comparison to land-scaping. "You need more housekeeping items, like protection materials that minimize the effects of chemicals and wash that can occur on an interior service."

Technicians on an interiorscape team boast qualities such as knowledge of plants and their needs beyond watering. Some hold



Interiorscape services demand detail- and service-oriented technicians. Photos: Roger Mastroiani

degrees in horticulture or design or have nursery experience. Interiors cape is a detail-oriented, human relations image service where technicians manipulate indoor plants to thrive in an artificial atmosphere. Stacy Richie, new business development, North Haven Gardens, Dallas, Texas, said maintenance means playing the role of a magician.

"How successful you are depends on how your technicians can trick plants into think-(continued on page 120)

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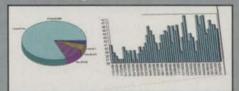
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Interior Crossover

(continued from page 118)

ing they are in a tropical environment," she ovserved, adding that detail-oriented care plays a part in plant mind games. A customer's magnifying-glass view of indoor installations allows little leeway for mistakes.

"Plants are in the lobby, they are the thing you sit next to and stare at, they are in the boss' office, they are in the board room," Richie listed. "So, the level of grooming and detail work is more intense."

DRAFTING A TEAM. The defining characteristics of an ideal interiorscape technician are different from those of a landscape crewmember. Much how right- and left-brained people might choose contrasting careers, the winning personality for interiorscape technicians often differs from their exterior counterparts. For starters, customer service is more important for indoor employees who are in close contact with customers.

"We have to rely on our people to put out our image for us," Richie emphasized. "The personalities that our technicians have – how good they are with customers – is important. I've had technicians who are wonderful plant people but not good with the client."

Richie's "wanted" ad admittedly targets a split personality, meshing qualities like "friendly" and "organized" with "hermit," because technicians often handle routes solo. This is why a starting line-up of qualified employees with a polished appearance will be crowd pleasers.

"You look for such a combination of skills because interiorscape is very personal," Richie explained. "The person has to be someone who looks good and can carry on a conversation with someone at this level."

Interior and exterior departments at North Haven operate like separate businesses. Richie staffs the interior division with a general manager who oversees the department and an operations manager who imports plants from Florida and supervises the greenhouse, inventory, deliveries, installations and special services. Four team leaders mimic the role of landscape foremen and 20 technicians service accounts, she explained. Sales people also are divided, with one representative dedicated solely to new accounts and another focused on evaluating satisfaction.

"Clients don't want new faces, so we try to keep the same people on a route," Richie added.

Maureen Connolly, interior manager, Kujawa Enterprises, Cudahy, Wis., added that the knowledge interiorscape work requires demands specialized employees, and she finds that cross-trained employees are not always experts in addressing specific plant needs. Her two divisions are teamoriented, she added, but a healthy rivalry existed between the two branches when the interiorscape division launched. "When they worked with us at holiday time, we earned their respect," she said. Though the exterior division outnumbers interiorscape 130 to 15 employees, their revenues closely match.

(continued on page 122)



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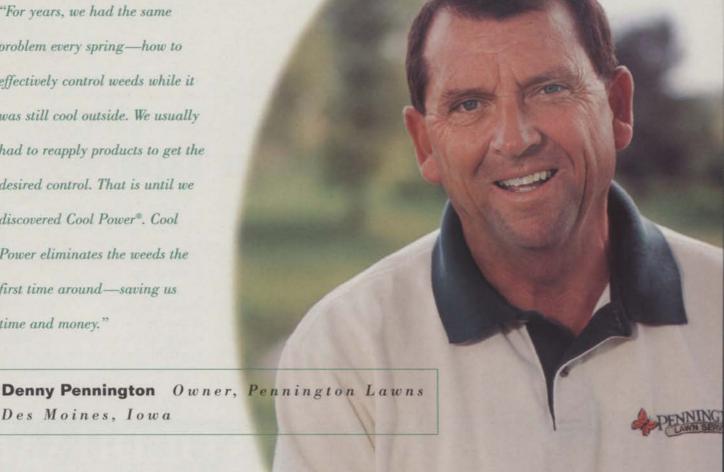
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Interior Crossover

(continued from page 120)

Connolly earned this success with the help of employees who are not only plantpeople, but also people-people.

"You have to love plants," she stated simply. "If I don't see this quality on an application, I don't look it over much."

Connolly learned the importance of instating an organizational strategy through trial and error, citing her company's initial plant tracking system as a cumbersome practice that eventually was replaced by labeling plants in each container. Learning from inefficiency and changing the system improved overall operation in this case, she noted. Hiring employees is no different.

THE GROWING GAME PLAN. Whether a company divides interiorscape and landscape services into two divisions or cross trains employees to play both fields, most contractors see a growing demand for indoor installation and maintenance.

Connolly saw her interior division grow from

- · Bring in a consultant or institute a training program to educate employees.
- · Hire experienced workers and qualified technicians.
- · Don't overextend yourself by growing your interiorscape business too quickly.
- · Be available to clients so you can respond quickly to their needs.
- · Don't invest heavily at first take it slow.
- Because interior and exterior are two separate entities, work together to help each other, but develop an interiorscape plan.
- Don't give up easily. "It's hard to break into the business, but once you get established and people understand that you are service oriented and have a good work ethic, it will show." Maureen Connolly, interior manager, Kujawa Enterprises, Cudahy, Wis.

Expansion Tips

seven to 158 accounts in four and a half years, and while this influx of customers reaped generous profits, she stressed the dangers of growing too quickly. Most contractors find that shoddy service chips away a solid reputation.

"Our company has grown and grown,"
Connolly noted. "For a while we were getting nervous because we wanted to meet the
demand for services. We wanted to find
people who were going to make it a career.
We didn't want to grow too fast."

Connolly didn't seek additional sales representatives during her division's growth spurt, so interior accounts remained at status quo and technicians preserved quality service.

Languer's small company approaches interiorscape expansion differently. He doesn't focus at all on growth. He trains employees in both areas for versatility and maintains his company philosophy, which is

(continued on page 140)





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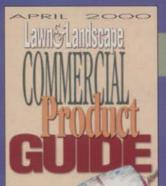


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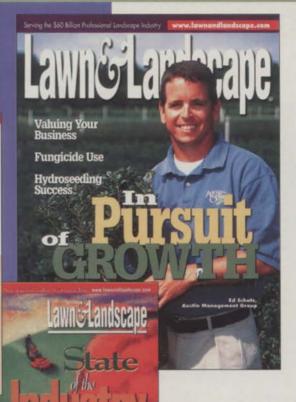
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• Specifications for the 20-hp model



include: 653 cc engine with 80 mm bore, 65 mm stroke, measures 328 by 400 by 449 mm, weighs 90 pounds, 8.8:1 com-

pression ratio and produces 33.3 pounds per foot of torque at 1,800 rpm.

- Specifications for the 23 hp model include: 725 cc engine with 83 mm bore, 67 mm stroke, measures 328 by 400 by 449 mm, weighs 90 pounds, 8.8:1 compression ratio and produces 37.7 pounds of torque at 3,000 rpm.
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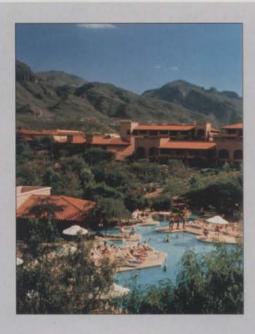
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postings

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straight

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from the

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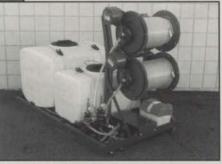
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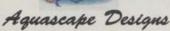


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• 6 hp model features pivoting head

• Trimmer is an ideal tool for reaching

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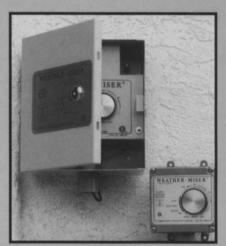
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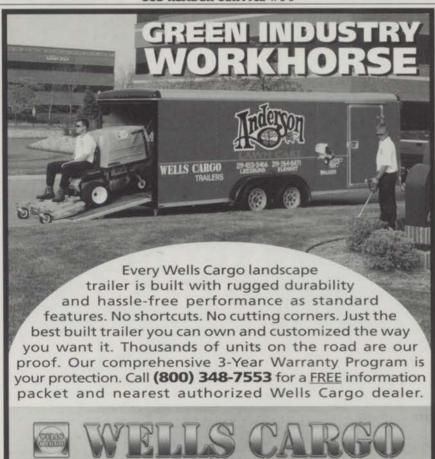
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Circle 226 on reader service card



(continued from page 68)

how we accomplish something, they look at how they were treated and how we responded to questions, problems and concerns."

Some lawn care veterans also feel that IPM's environmentally friendly approach makes it easier to sell to clients. "I've never had a customer willing to have four or five pesticide applications on their lawn when one would get the job done," Troutman said.

But maintaining loyal customers after the initial sell presents another problem, Linker said. "Under an IPM program, most of the advantages are evident after three years," he said. "Constantly reminding customers to be patient for a coming pay-off is difficult. Most people who are paying a higher price expect instant results. While some results of IPM can be instant, the full benefits take time."

IPM's CHANGING FUTURE. IPM "has come a tremendously long way," Troutman pointed out. "We'll continue to make progress. New developments will improve the efficiency of the way we do business."

However, as legislators and environmental activists continue forward with a movement to reduce or eliminate pesticide use, lawn care companies will bear stricter guidelines to control pesticide applications, Miller said. "Having to notify neighbors more routinely before you spray lawns will increase and IPM will get more intensely managed," he said. "And customers will pay increased prices for lawn care service as this happens."

Ottley said he "fully expects an all-out war" between local environmental activists and clients who want affordable lawn care service in New York. "Because the 48-hour notification law will raise our costs 35 percent, we are going to have to charge more for our services," he said. "Clients believe a licensed applicator should be able to provide a reasonably priced service.

"Plus, using IPM to control pests, weeds and diseases is a time-sensitive approach," Ottley continued. "With this law, I'm not sure we can continue to practice IPM."

While IPM faces extensive restructuring and could fizzle out in the process – a possible reality in New York's future – contractors across the country will continue to modify and finalize their IPM definitions in the midst of pending legislation.

The industry forgets that this cycle has happened repeatedly over time, and only contractors who learn from this will benefit, according to Shetlar. "History has shown us that when we use the same groups of insecticides time and time again, pests become resistant or the environment reacts in unpredictable ways," Shetlar said. "I vote we keep all the good things we've learned about IPM. We should use pesticides wisely, which

means using the principles that were developed for IPM when pesticides were less friendly. Don't use pesticides when they aren't needed – not because of safety concerns, but for good stewardship reasons."

The author is Managing Editor of Lawn & Landscape magazine.



Interior Crossover

(continued from page 122)

to commit to attractive projects that fit his goals for quality service, he said.

"We look at all of our projects, no matter what the task is, as a function of how the job best fits into our company and our direction as far as the size and quality of the work and the company mission," he explained.

Langner does not recommend exploring interiorscape unless contractors can deliver a first-class job, listing employee motivation, attentiveness and housekeeping as common pitfalls. He avoids common pitfalls like housekeeping and attentiveness by training employees in both realms.

Whether a company controls quality by dividing interior and exterior work into two segments or training employees to take on both tasks, there is more at stake than retaining clients when delivering consistent, impeccable results, Richie reminded. "You have to make sure you have good, knowledgeable people who know the business, so that the industry keeps its integrity."

SCORING A PROFIT. The swelling popularity of interiorscape service is a profit prophesy for contractors exploring the market. A healthy economy combined with customers' desire to improve the aesthetics of indoor spaces creates a ripe opportunity.

"People spend more money on plants because they have more money, they want to look affluent or they want to make their company look established," Richie said. "We're brought in to enhance image.

"Interior landscape is a great indicator of the economy," she added. Though interiorscape businesses suffer the same low price problems that exterior operations face, as long as the building cycle continues to flourish, people will seek "extras."

Richie commented that her interior and exterior divisions rake in comparable annual sales dollars, but the difference lies in the number of accounts each branch manages to achieve this profit. Four hundred clients comprise the interiorscape client list,

while 50 accounts form the landscape roster. "There are little things interior accounts want done daily, so there is a lot of interaction and little things that add up to dollars."

Selling customers a package with both interior and exterior services is another way to build a company's profit margin, Tufenkian suggested. This method of piggy-backing services and providing clients with a single-source contact offers a one-stop shopping approach and saves the company money on hidden costs, like transportation, she said.

The services sell each other and the nature of interiorscape appeals to customers, who respond positively to technicians' regular "check-ups." Just as contractors welcome new accounts, clients enjoy opening their doors to visual enhancements for their homes.

"We're the plant people," she piped. "They're happy to see us."

The author is Assistant Editor of Lawn & Landscape magazine.

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JOIN A LEADER. Hunter Industries is a growing manufacturer of high quality irrigation products, located in North San Diego County. We are seeking a Technical Services Representative. This individual responds to all incoming irrigation questions on technical support line, and coordinates special testing of warranty products. Maintains the competitive product library, and assists in market research. An associate's degree in landscape and irrigation design or equivalent is preferred. Minimum of four years progressive experience in landscape irrigation, agricultural industry, or wholesale distribution. Knowledge of irrigation and pumping system design. Problem solving skills, interpersonal skills, and computer literate. Strong mechanical and technical skills required. We offer a competitive salary and benefits package, which includes a corporate fitness center. Submit your resume and salary history to: Hunter Industries Attn: Human Resources - 7037, 1940 Diamond Street, San Marcos, CA 92069. EOE

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HELP WANTED



EMPLOYMENT OPPORTUNITIES AVAILABLE

The Green Plan, Inc. a seventeen year old full service landscape, tree care and irrigation company located at the base of the Colorado Rocky Mountains is continuing to grow and expand operations. Current Positions Available:

current Positions Available:

- Chemical Division Manager
- · Licensed Tree and Lawn Spray Technicians
- Irrigation Service Technicians
- Landscape Maintenance Foreman
- Landscape Installation Foreman
- Customer Service and Sales Representative

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- Operations Manager
- Branch Manager Trainees

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Scotts Lawn Service, newest division of America's favorite lawn care company is building our management team for the future. By year's end, we'll open new branches in:

Detroit • Chicago • St. Louis • Pittsburgh
 • Akron • Dayton • Harrisburg

• South New Jersey/Delaware • Northern Virginia. Additional supervisory positions will also be filled in Atlanta (Asst. Br. Mgr.), Columbus, Cleveland, Cincinnati, Philadelphia and Baltimore. The successful candidate will be: a proven, quality oriented, goal driven professional in the green industry (lawn, landscape, golf course). We'll provide needed Scotts systems training.

- Branch Manger Responsible for all branch operations
- Assistant Branch Manager Atlanta position only
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- Production Manager Responsible for branch production quality and results in lawn and tree/ shrub care departments.

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HELP WANTED

Salespeople - Check It Out

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- 3. Superior Results: Snow, Landscape Maintenance, Construction, Nursery

In recent customer surveys, 2 out of 3 customers rated Acres above peer companies in both "WILL" & "SKILL" while scoring Acres as "meeting and frequently exceeding expectations!"

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Acres Group, Northern Illinois largest independent landscape contractor growing at +18%, seeks additional landscape maintenance salespeople to continue our growth. Our maintenance management and production staff delivers. Are you experienced and enthusiastic enough to successfully manage and grow an Acres' portfolio? If so, apply now. Superior compensation and benefit opportunities. Three facilities - Naperville, Roselle, Wauconda. Call Maureen for immediate confidential consideration. Phone: 847-526-4554, Fax: 847-526-4596. EOE.

HELP WANTED

Western States Reclamation, Inc. (WSRI) is an 18 year old company with unique clientele and projects. Services and projects include land restoration, large landscape/irrigation construction, minor earthwork, and light civil engineering. Present project size ranges from \$1K to \$4M. WSRI seeks an individual with 10 plus years of experience to handle project management and estimating.

- PM Position requires a minimum of 5 years experience in a recognized construction company. Position involves supervision of multiple projects and intense scheduling of materials, manpower and machinery. Ideal candidate will have experience in revegetation, erosion control, urban park construction, and civil/earthwork. Degree preferred in civil engineering, construction management, landscape architecture or equivalent. Computer literacy a must.
- Estimator Entry Level/Mid Level/ & Senior Level
- Upper level positions require previous construction estimating experience up to \$5M single project. Must be computer literate and have experience with CADD and estimating software. Degree in related field preferred.
- Entry level position requires computer knowledge, good math skills, and 2 years experience in related field degree helpful.

Above average salary, benefits, incentive program, 401K plan and company vehicle. Send salary history and requirements to WSRI, 11730 Wadsworth Blvd, Broomfield, CO 80020, fax 303-465-2478,

email <u>wsridrc@aol.com</u>
<mailto:wsridrc@aol.com>.
Website <u>www.wsreclamation.com</u>
<http://www.wsreclamation.com>

CAREER OPPORTUNITY



All Pro Landscaping, Inc. is hiring Managers, Superintendents and Supervisors looking for an excellent career opportunity. All Pro seeks energetic, team oriented candidates with proven leadership, communication and interpersonal skills who wish to take on an exciting entrepreneurial job with one of South Jersey's highest quality, fastest growing full service landscape companies.

- Landscape Construction Manager/Grounds
 Maintenance Manager
- Purchasing Agent
- Construction Estimator/Salesperson
- Construction Project Managers
- Grounds Maintenance Superintendents
- Lawn and Pesticide Superintendents

Experienced leaders with strong management and communications skills and a desire to do quality work should apply. Complete compensation package includes excellent base salary, bonus opportunity, company vehicle, medical, dental, vision and 401k retirement plan, sick and personal time. Please call Avi at 609-261-1655 for more information on position requirements or fax resumes and salary requirements to 609-261-1624. EOE

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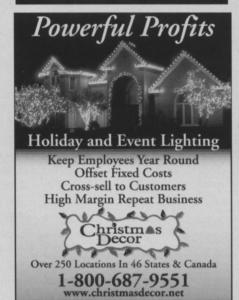
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<u>How We Do It</u>

Scheduling Christmas Crews at Plantscape

Plantscape is a diversified landscaping company specializing in interior and exterior landscaping. We have become Pittsburgh, Pa.'s largest corporate Christmas decorator, winning major national awards for our work.

To effectively schedule interior or exterior Christmas crews, we follow a list of cardinal rules and refer to these rules throughout the process:

- · Finish early
- · Establish professionalism
- · Consider many uncertain variables
- · Involve advance contingency planning
- · Permit flexibility
- · Consider equipment, vehicles, supplies, type/numbers of manpower needed
 - · Initiate good and frequent communication
- · Commit to excellent client service and a real concern for your staff

Before scheduling begins, we appoint one full-time leader to be in charge. This Christmas coordinator is responsible for all paperwork, phone calls, scheduling, vehicles and staff. We choose a coordinator who is available for the entire season, is well organized, has a strong background running crews and leading others, and is committed to working long hours and overseeing all aspects of the work.

If we have a large volume of work, we will appoint a full-time assistant coordinator to avoid "burning out" the lead coordinator.

In early October, we post large, monthly wall calendars in our sales department for November, December and

January. These calendars are large enough to easily write on and read. We

choose a maximum number of available man-hours and post them on these calendars for each day of the week and weekend. By evaluating our projected labor force for target months, we can determine our labor limit in advance.

We try to sell as many Christmas installation jobs as possible before Thanksgiving so crews can easily get through the crunch weeks following Thanksgiving.

Once a client accepts a job, a tracking number is assigned to it. Then the salesperson logs the job date and projected man-hours on the wall calendar. We typically have salespeople sell jobs as "week of" instead of specifying a date, and then we clearly note the job entries on the calendar as "firm" or "week of." We continue to subtotal daily man-hours and immediately mark "closed" days that have reached their assigned daily limit.

The Christmas coordinator works from the tentative posted schedule the salespeople have organized. The coordinator then makes necessary adjustments and decisions to formulate a final weekly schedule.

Next, we geographically subdivide the daily work. We group jobs together to minimize travel time, especially when there is a large workload. After our jobs are organized geographically, we decide on the number of crews needed each day, and the crew sizes/mix so we can assign crew leaders. After researching the job sizes for each crew, we then assign vehicles and special equipment.

After developing a final weekly schedule, we post the information in a central location. This schedule summarizes the jobs, crew leaders, crew members and vehicles assigned to each daily crew. Then copies of the Christmas

> schedule are distributed to all the key people involved.

> The next step is preparing the paperwork packages each crew needs, which are organized in separate file folders.

> Only the Christmas coordinator and crew leaders have access to the all the job files. Having this limitation reduces the risk of misplacing important paperwork - Tim Stancec

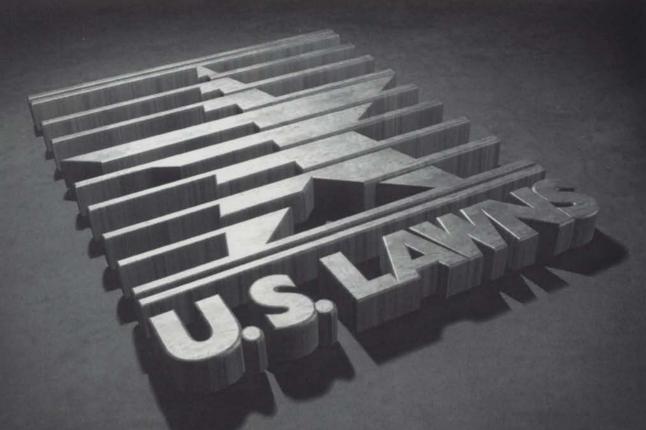
> The author is Christmas coordinator/landscape field manager for Plantscape, Pittsburgh, Pa.



- 1. Appoint one full-time Christmas coordinator to lead projects.
- 2. Plan in advance by posting large monthly wall calendars in the sales
- possible so the weeks following Thanksgiving are easier to handle
- 5. Minimize travel time by grouping jobs together geographically.

OCTOBER 2000

Catch the rising star in the landscape maintenance industry.



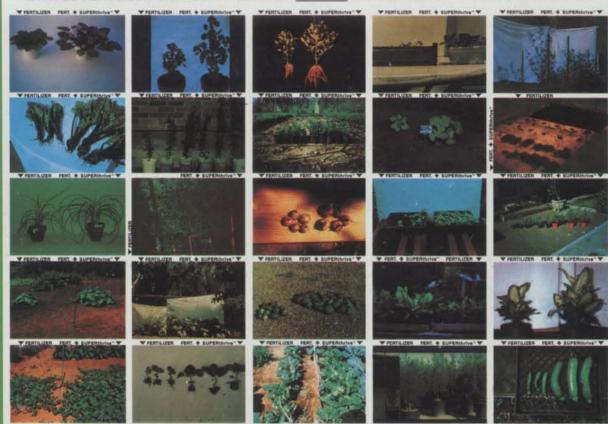
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