

Make Mine a (Walk-Behind)

The Big Three manufacturers discuss the time and effort (but not the dollars) they spend to bring new walk-behind machines to market

By Frank H. Andorka Jr., Managing Editor

An indication of how competitive the walk-behind greens mower market is that none of the Big Three manufacturers will reveal how much it costs them in research and development to bring one to market.

"I don't think I want to talk about those numbers," says Helmut Ullrich, senior marketing manager for The Toro Co.'s Greensmaster products. "The market's more competitive than ever."

"We're not at liberty to disclose specific numbers," says Jon Gorman, group product and brand marketing manager for John Deere Co.

"We hold those numbers very closely," says Shawn Daly, product manager for Jacobsen. "I'm sure you can understand why."

What is becoming increasingly clear is that the demand for high-quality turf maintenance has fueled a demand for walk-behind greens mowers. Superintendents like them because they offer a better quality of cut than the average triplex. In turn, there's mounting

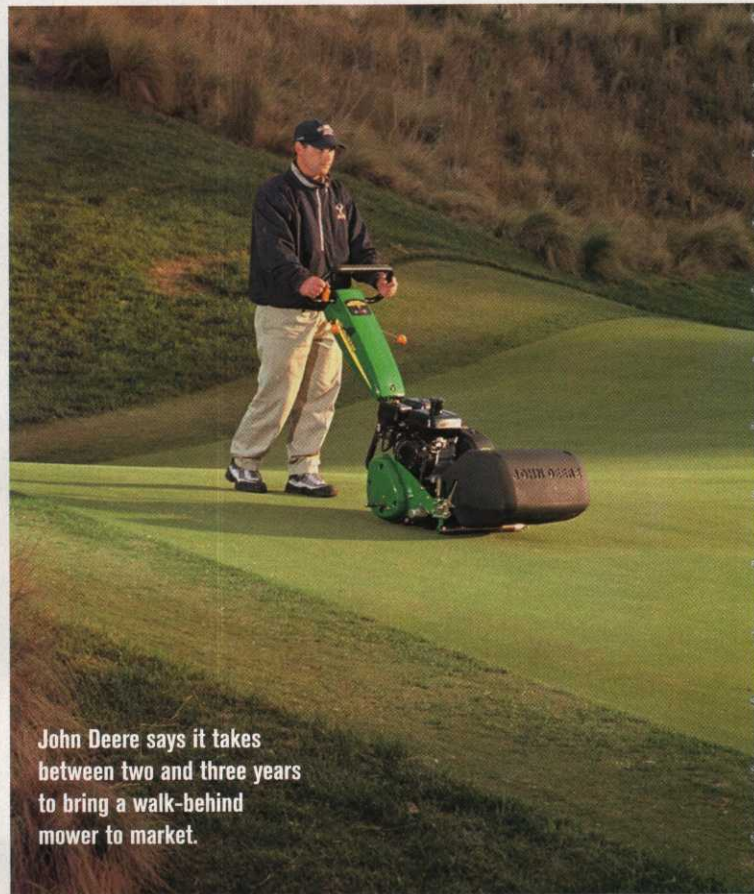
pressure on the manufacturers to put new products on the market as quickly as possible. But if manufacturers produce them too fast, they may contain mechanical defects. Those problems can alienate superintendents who value reliability above all else.

"You don't want to bring a product to market just to say you did it," Daly says. "You want to make sure you do it right. After all, the reputation of your company is at stake. If you lose that in this segment, you lose a lot."

What's driving the competition

While the mower business has always been competitive, it's become more intense in the past couple of years because the number of newly built courses has plummeted to 248 in 2002, according to a National Golf Foundation study. That's half of what it was just four years ago, and the slide is expected to continue.

"It requires you to take a look at your existing walk-behind products and whatever new ones you



John Deere says it takes between two and three years to bring a walk-behind mower to market.

want to put in the pipeline," Daly says. "You need to meet your customers' needs exactly because you can't afford to miss in a tight market."

Ullrich says new grass cultivars have also fueled the growth in the walk-behind mower market. Some dwarf varieties allow superintendents to cut the greens at lower heights, and that's required a rethinking of the manufacturing approach to mowers.

"We've got a model that can go down to one-sixteenth of an inch," Ullrich

says. "That was unheard of a few years ago. But the market demanded it, so we met its expectations."

Tracy Lanier, Deere's product manager for golf and turf, says newly designed golf courses also have more contoured greens than older courses, and those new contours require that mowers be lighter and smaller in footprint. Walk-behind mowers fit the bill for those conditions.

But in the end, nothing has driven superintendents to walk-behind mowers like the increased demands of

Mower



JOHN DEERE

golfers. Mike Koppen, Deere's national sales manager for turf, says the old adage about the greens making the golf course remains as true today as it was in the days of Old Tom Morris. "That's how golfers measure the course, and walk-behind mowers give superintendents a better quality of cut at lower heights," Koppen says.

Sweating the details

So how do manufacturers decide when to pursue new ideas? All three mower companies says they don't reach

that step until they've spent extensive time with customers and distributors to find out what niche is missing in the market.

Toro's Ullrich says he's on the road frequently with superintendents and turf professionals to find out the latest challenges in golf course maintenance. That's how some of the latest Toro walk-behind technologies became reality.

"I like to keep in constant touch with our end-users," Ullrich says. "Sometimes we bring people to us to discuss new ideas we have. When I feel there is a market position we can meet, I sit down with our engineers and brainstorm how to meet it."

Daly says he and his colleagues at Jacobsen are always talking to dealers, distributors, end-users and mechanics (from whom Daly insists the company gets some of its most important feedback). The conversations focus on how current Jacobsen walk-behind mower lines are meeting superintendents' needs and to see what the company can do to improve its products. He also says he starts most of his conversations with the unconventional question, "What are we doing right?"

"It's important that we know what we're doing right in addition to what we should change," Daly

says. "After all, we don't want to change a feature of our machines just for the sake of changing it. If what we're making is working for the customer, why mess with it?"

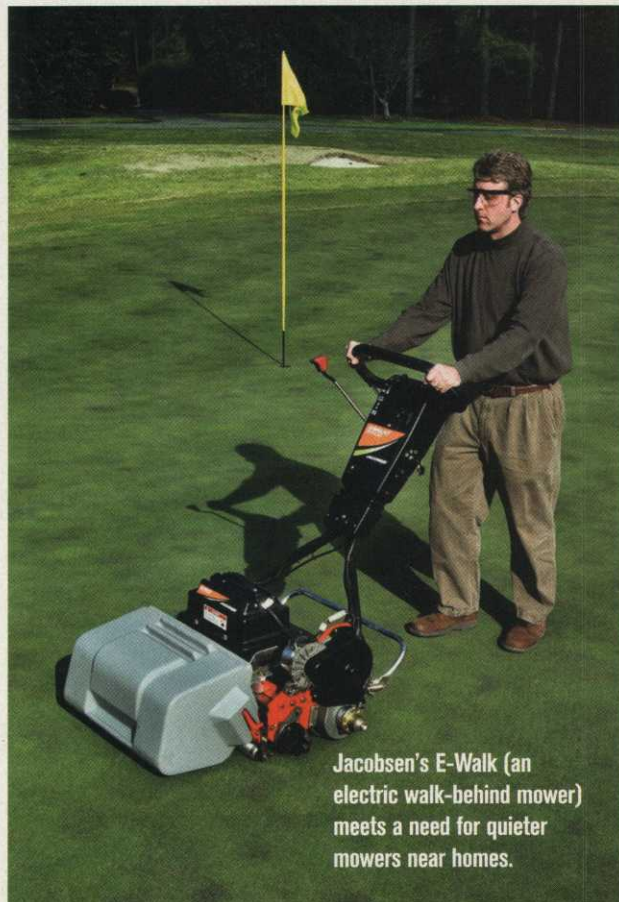
Deere's Koppen says his company has formalized programs to bring customers to its Raleigh, N.C., headquarters to talk with them about new products and show them the prototypes. Gorman says Deere strives to have personal relationships with the people it brings in to look at its equipment. The company

wants them to feel comfortable criticizing a design if it makes no sense.

"We don't hide our engineers from customers," Gorman says. "We bring the two groups face to face so they can hash out any problems. It's a great exercise that keeps our production people connected with the market."

The manufacturers agree the time frame on bringing a new walk-behind mower from the drawing board to the market is between two and

Continued on page 72



Jacobsen's E-Walk (an electric walk-behind mower) meets a need for quieter mowers near homes.

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Walk-Behind Mowers

Continued from page 71
three years. Toro's Ullrich was the only one to reveal how long it usually takes before the company sees a full return on investment, putting it at between five to seven years. "For some of our products, the payoff takes longer," Ullrich adds. "For others, it's shorter."

But how well a walk-behind mower performs on greens is what ultimately determines its success, Ullrich says.

"It all depends on how well you know your customers and how well your products fit the niche," he adds. "It takes time, but it can make or break your product line, so you'd better do it right the first time." ■

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The Toro Co. expects its investments in walk-behind mowers to pay off in five to seven years.

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