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GIE 2006 NEWS

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MANAGEMENT

DECEMBER 2006 / www.landscapemanagement.net

OUTLOOK

2007

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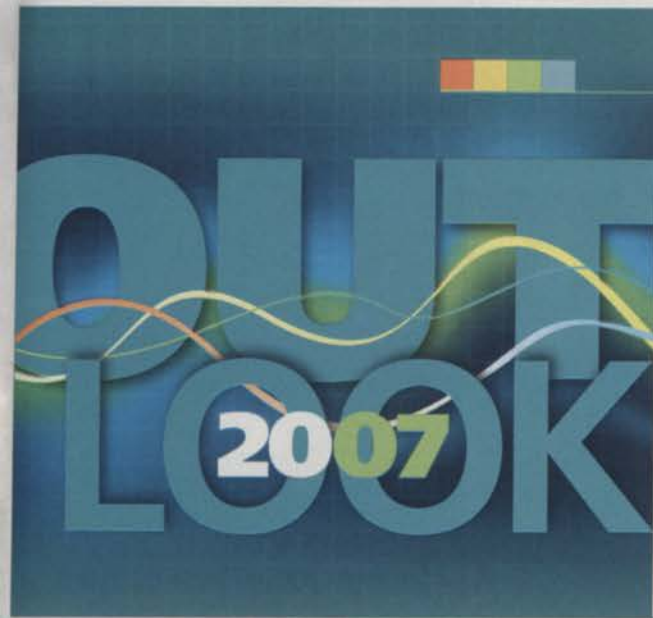
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Circle 101

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DECEMBER 2006 / ISSUE #12 / VOLUME 45



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Innovating and delivering exceptional customer service

BY RON HALL

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»Readers respond

With the new year coming, it's time to reflect on the past and look toward the future. With that in mind, **if you could start over in the landscape business, which one of these would you do most differently?** Here's what you said:

- 20% Control growth better
- 20% Join an association and network more
- 29% Go on my own sooner

30%
Pay attention in
business class

Want to weigh in? Our survey question changes every month, and we publish the results here. Visit www.landscapemanagement.net to voice your opinion.

»Overheard "If you had asked me a year ago, I would have predicted gloom and doom. But the great year we had gives me a lot of hope and optimism for the future."

—Tim Doppel, owner of Atwood Lawn Care in Sterling Heights, MI, commenting about the lawn care industry for LM's Outlook 2007.

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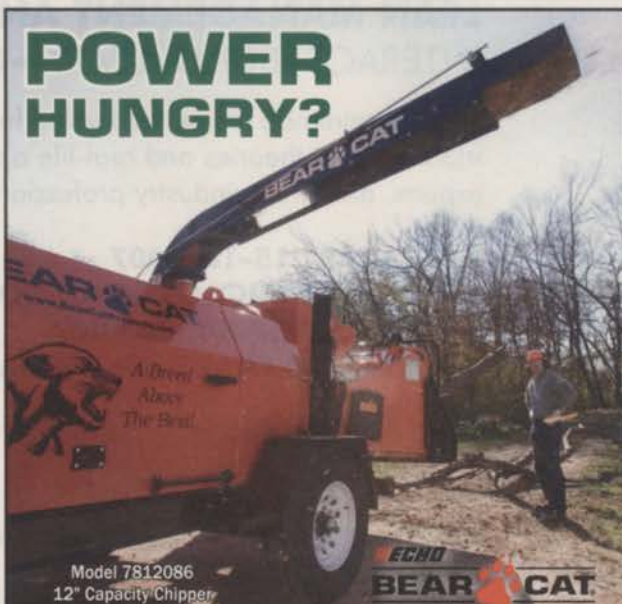
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Turning \$10 into \$1,000

BY RON HALL / Editor in Chief

How do you turn \$10 in seed money into \$1,035 in assets in one month?

You start a landscape business, of course. Or, at least that's what two students at LeTourneau University, Longview, TX, did.

Mario Olvera and Justin Rector won the University's recent TALENT business competition, mostly by hard work but aided by delivering a service that's still much in demand.

Demand — that, to a large extent, is the theme of this special "Outlook '07" issue of *Landscape Management*. Demand for landscape services in all but a few regions of the country remains strong. Will it increase as briskly in 2007 as it did in the healing (emotional and economic) years post-9/11? That's a lot to expect, probably too much to expect. 9/11 (it almost seems like a bad dream already) caused a severe but, thankfully, short-lived disruption in almost every aspect of our lives, and created trends in our market that are still being felt. Most of us, for example, developed a deeper appreciation for our homes and properties as places of refuge, security and, increasingly, entertaining.

Post housing boom world

Knowledgeable landscape people tell us that the pent-up demand for landscape construction, caused by the 2001 economic stoppage has been sopped up. Who didn't welcome the huge surge in home building, which finally slowed this past year?

Even so, it was fun reading about the two Texas students featured in an article in the *Longview News-Journal* newspaper. The proved there's still much to do.

One job leads to another

The two spent \$6 of their \$10 seed money on gasoline to get to their first job, installing a hot tub for a couple living in a nearby city. That job earned them a quick \$100 and recommendations for a series of lawn care jobs. By month's end they could count \$1,035 in assets against \$288 in liabilities, reported the newspaper.

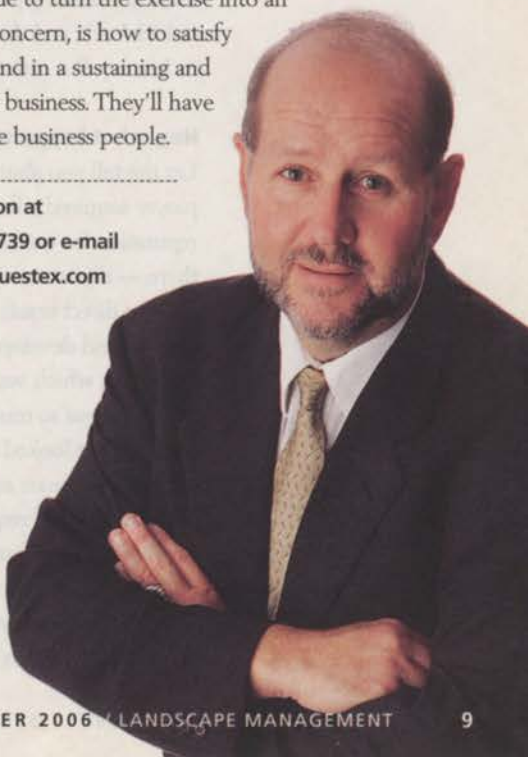
The second place team in the university competition, again starting with \$10 seed money, earned a \$51 profit in a DVD rental endeavor by the end of the month. Six of the teams didn't make any profit.

What the success of the two students tells us is something most of us already know. Yes, it's incredibly easy to get into the landscape business. And, yes, there's always a demand for the services of somebody who is willing to work hard.

What the students will have to learn, assuming they decide to turn the exercise into an ongoing concern, is how to satisfy this demand in a sustaining and profitable business. They'll have to become business people.

Contact Ron at
216/706-3739 or e-mail
at rhall@questex.com

Most indications are that demand for landscape services in all but a few regions of the country is still strong



The way to grow profitably and professionally is by developing people.



Spring training starts now

BY BILL HOOPES

Please, please, please don't miss the golden training opportunity you have in December. Build overall team knowledge and skills now! If you want the best results from your human resources don't waste this time. People who continually gain knowledge and skill become more successful and terminate at a lower rate, train now.

In December many of us stop working, shaving and having intelligent thoughts. In doing so, we fail to use a key training period. We tell ourselves it's time to kick back, and there is plenty of time for learning in January. But is that really true?

Hey, what happened here?

Let me tell you about a company my former employer acquired a few years ago. They had a great reputation for quality and happy customers. It was all there — the smart veteran staff, low cancels, etc. It was the direct result of a carefully crafted culture of training and development. The company invested in its people, which was returned many times over.

There was so much training going on in the winter the place looked like a library. Team members attended seminars and were all certified above and beyond any legal requirements. And they were proud of what they had built.

Soon, I saw that emphasis in winter training deteriorate into a "do it if you have time" scenario. Not that we said, "Don't train," we just didn't make it happen

as before. And I saw the results: higher cancels, higher employee turnover and lots of walking bad attitudes.

Couldn't be helped, you say? After all, you've got to tighten up on expenses and max out the bottom line. But it doesn't work. If a company spends the vast majority of its HR money on pay and benefits alone, it loses in the long run. The way to grow profitably and professionally is by developing people.

People take jobs because they look good (pay and benefit-wise) from the outside. But people only keep jobs if they feel good once on-board. Maintaining positive feelings takes worker pride in self and accomplishment. That, in turn, requires training.

December training checklist

- Identify basic needs, topics and resources. PLANET can help its members in that regard. Extension services are a good source for information, too.
- Set aside a controlled, comfortable space for training.
- Appoint a knowledgeable person to lead training.
- Assign topics to key veterans who want to help.
- Have the trainer prepare a one-page topic outline of key points to be taught. Your outline contains only what you want people to know and understand now.
- Rehearse the presentation.
- Maximize visuals and minimize word documents.
- Mix training with work — two-hour sessions, maximum.
- Use a review quiz to confirm understanding.

— The author is founder of Grass Roots Training in Delaware, OH. Contact him at hoopes@columbus.rr.com or visit www.grassroots-training.com.

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In the Know

BUSINESS NEWS YOU CAN USE

Columbus companies prove perfect hosts for PLANET facility tours

BY RON HALL

COLUMBUS, OH — The Brickman regional facility on the east side of Columbus, OH, was prepared for more than 500 visitors Nov. 1, as one stop on the popular facility tours that kick off the PLANET's (Professional Landcare Network) Green Industry Conference (GIC) each year.

The Brickman regional office in a river valley on the outskirts of Columbus, the first stop, is not your typical Brickman shop. For one thing, at nearly 20 acres, it's much bigger than most Brickman locations. For another, Brickman owns and does not lease it. The company, which has 150 branches in 23 states, leases more than 90% of its facilities.

The Columbus regional operation handles two branches and generates about \$8 million annually, maintenance contributing about 60% of the total.

The site itself was clean and nicely landscaped, the buildings modern and the shop and

EMI employs 83 full-time and 120 seasonal employees at its 19-acre facility outside of Columbus, OH.



Landscapers visit Peabody Landscape, left. Joel Korte at Brickman, below, greets GIE group.

storage areas orderly, although sparsely provisioned. Whenever possible Brickman has construction and planting material drop-shipped to work sites.

"Image is important at our facility," Regional Manager Joel Korte told the attendees. "You want to send your crews out on the road with the image of what you expect them to do on the job site. If they leave from a dump, they will do dumpy work."

Design/Build

Attendees on the design/build track then visited Peabody Landscape Group. Despite a cold drizzle setting in, David Peabody — who founded the company 25 years ago — and his team were gracious hosts.

Peabody explained at the peak of its season, Peabody Landscape employs 145 and runs about 23 crews. Its revenue mix is about 60% construction and 40% maintenance.

Peabody, like Brickman, is big on employee training, in particular safety training, which it conducts each Tuesday. The company has been "drug free" since 2001, a program it instituted through the local builder's exchange. Being drug free allows the company to be considered for some big bid/build opportunities.



This past year Peabody got involved in the H-2B program and will be expanding its participation in the seasonal immigrant guest worker program next season.

Maintenance

Attendees on the maintenance track had the chance to see Environmental Management Services (EMI) in action. In business since 1992, the full-service company has accumulated \$14 million in revenue (anticipated) in 2006, as well as 115 stuffed mounts, which line the office.

The team described all aspects of the business from maintenance to lawn care to irrigation to snow removal. Account representative Mike Litch described how the company has saved thousands of dollars by moving its time clock for employees to the main gate, so that they punch in immediately upon arriving and punch out as soon as they return. "That way, there's no sitting around or grabbing sodas on company time," Litch said. "They're getting out on the job on time and getting home on time. It's working out very well."



38:53

Hours Bill Owen worked last week

372:16

Total hours: Irrigation

238:49

Total hours: Placing Sod

11:05

Total hours to date: Crestview

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WEEKLY TIMECARD

NAME: *Bill Owen* DATES: *11-15*

	START	LUNCH	END	JOB CODES	JOB SITE/PROJECT	HOURS
Mon.	7:00	1/2	3:30		Brentwood	8
Tues.			3:30			8
Wed.			4:00			8 1/2
Thurs.			4:00		Crestview	8 1/2
Fri.			4:00			8 1/2

SIGNATURE: *Bill Owen* TOTAL HOURS: *41 1/2*

GUESSWORK

Employee Report

Owen, Bill

Date Range: 12/11/2006 through 12/15/2006

Day	Date	Jobsite	Start	Stop	Cost Code	Hours	Total
Mon	12/11	Brentwood	7:08 AM	12:05 PM	Irrigation	4:57	
			12:41 PM	3:22 PM	Irrigation	2:41	7:38 hours
Tue	12/12	Brentwood	7:12 AM	12:07 PM	Irrigation	4:55	
			12:43 PM	3:23 PM	Irrigation	2:40	7:35 hours
Wed	12/13	Brentwood	7:12 AM	12:02 PM	Irrigation	4:50	
			12:46 PM	3:49 PM	Irrigation	3:03	7:53 hours
Thu	12/14	Crestview	7:17 AM	12:19 PM	Placing Sod	5:02	
			12:50 PM	3:46 PM	Placing Sod	2:56	7:58 hours
Fri	12/15	Crestview	7:13 AM	12:07 PM	Placing Sod	4:54	
			12:44 PM	3:39 PM	Placing Sod	2:55	7:49 hours

SIGNATURE: *Bill Owen* Owen, Bill

Total 38:53 hours

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Canadian volunteers prepare cemetery for Remembrance Day

OTTAWA, CANADA — The ceremonies at this year's Remembrance Day took on special significance for the 45 to 50 Green Industry volunteers and the 16 suppliers that donated product to beautify the National Military Cemetery in Ottawa, Canada.

The small band of volunteer workers went to work on Oct. 19 so that the cemetery would look sharp for the Nov. 11 ceremonies.

Remembrance Day in Canada is a day to commemorate the sacrifice of veterans and civilians in World War I and other wars. It is observed on November 11 to recall the end of World War I on that date in 1918. The observance is specifically dedicated to members of the armed forces who were killed during war, and was created by King George V of the United Kingdom on Nov. 7, 1919. Thousands of people gather near the National War Memorial in Ottawa. Among the crowd, war veterans pay their respects to fallen sailors, soldiers and airmen.

Canadian landscape lawn pros teamed with suppliers to improve the National Military Cemetery.

This year the Canadian landscare workers and suppliers contributed just over \$20,000 dollars in products and labor to help beautify the grounds.

"Thanks again to everyone and I hope that next year we can make the Annual Day of Tribute even that much bigger," said Chris Lemcke, one of the participants at the event. "Although we've had a good turn out the last two years and I know that everyone is very busy and it is hard to take the time out of a busy schedule I would like to challenge everyone to make a point of trying to go next year. If there was ever anything worth being involved in it is this, even if it is just to participate in the ceremonies or to watch the work that we do."



Brickman acquires GroundMasters

CINCINNATI — Brickman, headquartered in Gaithersburg, MD, has acquired GroundMasters, based in Cincinnati. GroundMasters is the Ohio Valley's largest provider of commercial landscape installation, maintenance and irrigation services, with seven locations throughout the tri-state region. GroundMasters owner, Mike Rorie, will remain with the company, as a vice president, as will the existing management team.

Symbiot selects The Toro Co.

SALT LAKE CITY — The Symbiot Business Group selected The Toro Co. to serve as the exclusive marketing partner of landscape contractor equipment to Symbiot members. Under the 3-year agreement, through Toro's equipment purchasing program, Symbiot members will enjoy special pricing and other benefits on purchases of Toro contractor equipment.

Husqvarna partners with Wilson-Oyler

CHARLOTTE, NC — Husqvarna is partnering with the Wilson-Oyler Group to create business solutions for commercial landscape professionals. The Wilson-Oyler Group helps businesses develop strategies focusing on operational frameworks, goal implementation and linking performance to strategic objectives.

[CLIPPINGS]

Exaktime

Product Focus

The JobClock System is the leading timekeeping product used in the landscaping and construction trades. It is designed to easily track employee attendance at multiple, remote jobsites. The JobClocks are rugged, weatherproof and are designed to be locked down at any work site 24/7.

Exaktime has now added to The JobClock System with an exciting new product – The PocketClock. The PocketClock is designed for crews on the move and travels with them wherever they go. If you have workers that regularly visit multiple jobsites during the course of a day, or service regular customer routes, then the PocketClock is ideal for you.

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Pilot and allows multiple workers to easily clock in and out directly on a Palm. Individual workers can clock in themselves with their own PIN or it can be put in "Supervisor Mode" where a supervisor clocks in and out for them. The PocketClock can track hundreds of labor codes and will automatically display in English or Spanish depending on the language preference for each worker.

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Tony Pappas
CEO/President

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Key contact:
Val Doran



Jacobs joins *LM* as managing editor

Dan Jacobs joined the *Landscape Management* staff in mid-November as the magazine's managing editor. He is responsible for the month-to-month production of the print issue and its related digital informational products. In addition, he will be contributing feature articles, case studies and providing his own unique perspective on industry issues.

"We're delighted to have someone with Dan's talent, experience and enthusiasm on our editorial staff," said Ron Hall, Editor in Chief. "Within days of joining our team he

was making calls to readers and really getting into the industry.

"We're particularly pleased because Dan will be sharing with our readers his valuable knowledge about small business and its many challenges and opportunities."

Jacobs has worked on daily and weekly newspapers, as well as, several business and trade publications.

Immediately prior to joining Questex Media Group, Dan was a senior editor with *Smart Business Network*, and he has also spent time as managing editor at Penton

Media. He has a bachelor's degree

in English Literature from the University of Cincinnati. In another life, Jacobs earned a Masters degree in education from John Carroll University and spent some time teaching at both the high school and college level before realizing journalism was a far less stressful occupation. He served as a yearbook advisor, started the school's newspaper and taught the publications class. He has taught classes on the First Amendment, business law, business



math, and computers.

A long-time member of the Press Club of Cleveland, Jacobs

has chaired or sat on many of the organization's programs and committees. He is the founder of the group's Media Professionals Conference. Jacobs is also finishing out his second year as president of the Cleveland chapter.

Jacobs lives in the Cleveland area with his beautiful wife and two amazing children.

When you get an opportunity, welcome him to our industry by calling 216/706-3754 or via email at djacobs@questex.com.

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Michigan landscaper's tribute to fallen soldier

EAGLE, MI — To Chip Frank of Smith Tree & Landscape in Lansing, MI, it was more than a job. It was his personal mission.

A recent article in the *Lansing State Journal* described how Frank helped create a fitting memorial to a young soldier who lost his life in Iraq.

The soldier, Army Cpl. Nyle Yates, 22, was killed by small arms fire in March, during his second tour of duty in Iraq.

His mother and stepfather, Don and Jami Edgcombs, went to Smith Tree & Landscape in June with a modest proposal for a memorial to their son. Their friends already had raised three flagpoles and the Edgcombs were thinking about creating a planter.

Frank had bigger ideas.

Stamped concrete, cut in the shape of the 101st Airborne's crest, leads to a black granite wall that surrounds the flagpoles. A 42-inch-high bronze soldier stands frozen in a salute. An etched plaque quotes a verse from Psalms: "When I get to where I'm going, and see my Maker's face, I'll stand forever in the light of his amazing grace."

Chip Frank of Smith Tree & Landscape put his heart into the design of this special memorial.

When the Edgcombs asked Frank how much it cost, he told them not to worry about it.

"This project was very special," Frank

told *Landscape Management*. "I felt that it was my way of showing patriotism and appreciation for those soldiers who have given their lives so we can enjoy our freedom."

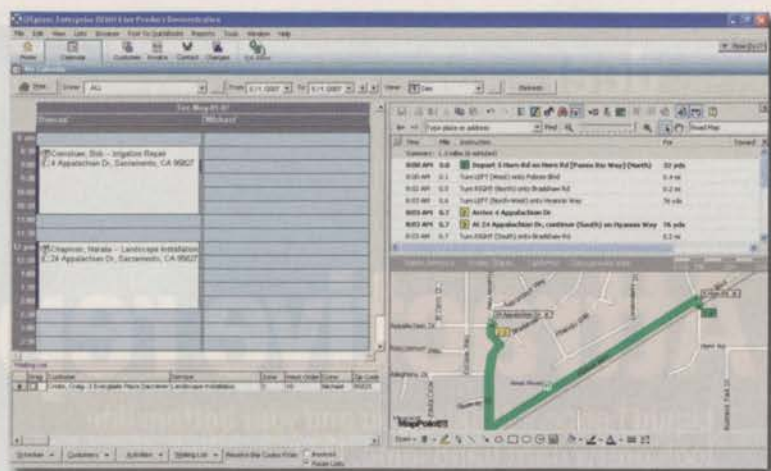
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In the Know

East coast cities mull blower bans

CAMBRIDGE, MA — Leaf blower bans aren't only for the West Coast any more.

Many cities in California have banned or severely restricted leaf blower use, in most cases because of noise. Cambridge, MA, is looking at taking similar action. Recently, city officials established a Leaf Blowers Advisory Committee to determine if the blowers' use should be banned or restricted, according to an article in the *Boston Herald* newspaper.

Some residents object to leaf blowers because they contend that leaf litter is healthy for the trees, and others point to alleged health risks associated with the particulates that the leaf blowers stir up.

Landscape and lawn service companies say a ban would increase customers costs.

Tougher standards

This comes on the heels of Westchester County, NY, proposing a law requiring landscapers to switch to leaf blowers that meet stricter pollution-emission standards.

If approved, the proposed regulations would be phased-in through 2009.

Any contractor or landscaper seeking to renew a two-year license starting in 2008 would have to list the types of leaf blowers the business owns and certify that they meet the new thresholds.

A violation could lead to a fine of \$1,000. Any contractor who fails to comply with the new standards could also have his or her license revoked or even denied.

Turf may get \$\$ in new farm bill

BY CURT HARLER

WASHINGTON D.C. — For the first time, turfgrass research may show up as a separate subtitle in the U.S. Farm Bill.

The House has earmarked \$1.4 million for turf. The Senate has tentatively appropriated \$1.8 million. If things go well, the nation's turfgrass research programs should see somewhere above \$1.5 million when the bill becomes law. The result could be two new, national turfgrass research positions, fully funded.

The appropriations are the result of a lobbying effort by the Turfgrass Research Initiative in Washington, D.C. Much of the funding has come from NTEP, which contributed \$600,000 in the past six years. NTEP says it can not continue to support the lobbying effort at that level. Turf researchers are looking for \$75,000 in 2006-07 and more money down the road.

geese deer rabbits moles voles gophers snakes tur

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People & companies



Carolina Nurseries, based in Atlanta, hired former **Southern Nursery Association (SNA)** executive vice president **Danny Summers** as

director of sales. His replacement at the SNA will be **Sam Galloway**, a former executive director of the Southern Council of Optometrists.

Valent Professional Products of Walnut Creek, CA, added **Frank Fornari** to its Professional Products sales organization as territory manager in Florida.

Jody Mills, Horticulturist with **Broccolo Tree and Lawn Care**, was recently awarded a 2006 Presidential Recognition Award by the **New York State Nursery/Landscape Association**. Broccolo co-owner **Albert Broccolo** also received Green Roof Installation Certification from Elevated Landscape Technologies.



West Coast Turf welcomed **Ryan Flaherty** to its Northern California customer service team. His responsibilities are developing new landscape business, though he will also support the servicing and expansion of golf course and sports turf accounts.

Henry Wetzel joined **Jacklin Seed** as a research scientist.

Profile Products announced **Frank Lauro**, Profile's Market Development Manager for the Western United States, has achieved the Certified Professional in Erosion and Sediment Control (CPESC) designation.

Stephen Dorer joined **Syngenta Professional Products'** Lawn & Garden team as a territory manager for Virginia and in northern areas of North Carolina.



Irrigation industry professional **Bill Savelle** has been promoted to national sales manager at **Weathermatic**.




Aquatrols hired **Tom Boerth** as research and development manager.

Ryan Klein is **Target's** new account representative for the golf and sports turf markets in San Diego.

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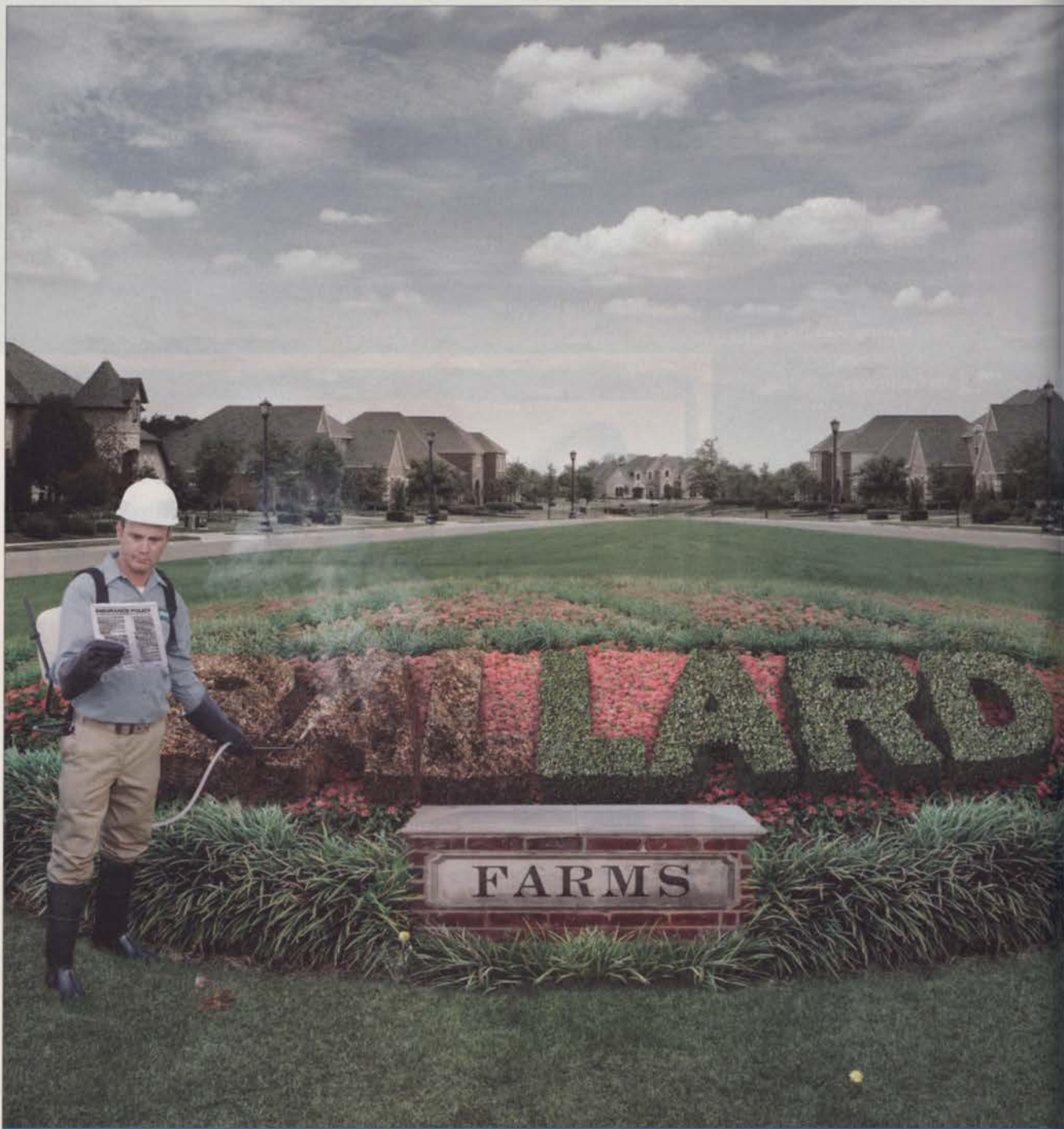


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GET A JUMP START ON NEXT SEASON

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— so far so good

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Demand for mowing and related services by property owners predicted to continue growing

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The lawn care industry looks for a strong 2007 despite the many challenges ahead

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Outdoor entertaining and renovations will keep contractors busy in spite of cooling housing market

58 Irrigation
Contractors getting the word out as to its vital role in landscape design and health

APPROACHING '07 — SO FAR, SO GOOD

It's unavoidable to try to look into the future, even just months ahead, without preconceived ideas of what it will reveal.

We plead guilty.

We editor and researcher types, too often buried behind computers, are fortunate to report on a dynamic industry. Our personal experiences and our discussions with business owners and managers can't help but color our perceptions about the state of our industry's health and the prospects for its future. So, we admit to starting this Outlook '07 project feeling that the industry, apart from some regional problems, is healthy and is poised for continued growth into 2007.

As proof, we look to our latest industry survey where nine out of the 10

Green Industry contractors describe the industry as healthy, 33% of that number describing it as "thriving."

Credible voices

These were experienced, knowledgeable people with 87.5% of the respondents identifying themselves as either owners or presidents of their companies. Another 7% claimed to be branch or franchise managers.

That heartening response of our latest survey seems to be a reflection of the 57% of owners and managers that reported that they had "plenty of work," and when they stopped to look around, saw that everyone else was busy too.

So, it's with more than a little confidence that we present the following look

at where the industry is today but, more importantly, where it's going to be next season.

We believe that the information within these reports is more than a snapshot but falls short of dissecting a subject as broad-scoped and regionally diverse as the landscape, lawn service and irrigation segments of the Green Industry.

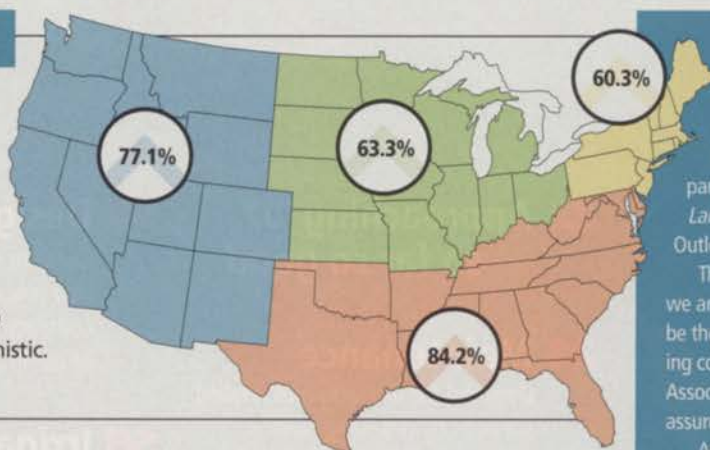
The findings on the following pages are based on multiple sources, including telephone and email interviews with Green Industry owners/managers and the editors' own experiences gathered in their travels to trade shows, conferences and face-to-face meetings with industry figures. And, of course, we draw much of the statistical information in the following reports from our ambitious mid-fall reader survey.



SALES HOPES HIGH FOR '07

The majority of contractors responding to our survey are expecting increased sales again in 2007. Respondents in the South are the most optimistic.

BASE: 554 RESPONDENTS



METHODOLOGY

Penn & Associates, a Cleveland-area research and data analysis company, conducted the study of landscape company owners and grounds managers for *Landscape Management* magazine's online Outlook '07 survey.

The number of completed interviews means we are 95% confident ± 3.8 the results would be the same if we had interviewed all landscaping companies in the United States. Penn & Associates (www.pennandassociates.com) assures us on this.

Additionally, we revisited our summer "Subscriber Insights Study" to report on the industry's projections in regards to chemical and equipment purchases into 2007. Signet Research Inc., an independent research company, conducted the survey on our behalf.

The company says the results of the survey are projectable to the total *Landscape Management* circulation at a 95% confidence level within a sampling tolerance of $\pm 7\%$.

The focus is on sales in '07

79%

Three out of four (79%) Green Industry contractors answering our survey say they will sharpen their marketing and sales efforts to boost revenues in '07. One in five (19%) say they will rely upon advertising. According to

our survey, the smaller the company, the more likely it is to advertise. Companies under \$250,000 in annual sales are six times more likely to "advertise" than companies reporting revenues exceeding \$5 million.

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BY RON HALL / Editor in Chief

The growth and evolution of professional landscape maintenance over the past several generations is astounding.

It's not too much of a stretch to liken it to a publicly traded stock such as McDonalds, which, had you bought it in 1970 would be worth 18,760 times its IPO price.

Contract mowing, once the summer occupation of neighborhood boys saving up for their first cars, is now the cornerstone of the multi-billion dollar maintenance segment of the landscape service industry. While the excitement of the design/build/install segment of the industry has eclipsed maintenance (defined as mowing, edging, pruning, enhancements) the past four years, we believe this trend will begin to reverse itself in 2007. Main-

continued on page 26



MAINTENANCE

THE BIG SPEND

\$371 million

amount Green Industry contractors say they will spend on **mower purchases** in the next 12 months.

2006 SUBSCRIBER INSIGHTS STUDY

MARKETING & HAPPY CLIENTS DRIVE SALES

Customer service/satisfaction (45.7%) and effective marketing/sales efforts (47.5%) are the top two factors that contractors cited for increased sales in 2006. Survey respondents offered lots of other reasons for their sales successes.



BASE: 337 RESPONSES





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Mike Dykstra, Dykstra Landscape Services Inc., Grand Haven, Michigan



JOHN DEERE

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See more of what Mike Dykstra has to say at www.mowpro.com

continued from page 24

tenance should begin figuring more prominently in contractors' minds in 2007 due, in part, to the much-reported slowdown in the U.S. housing market the past two years.

"We're beginning to focus more on maintenance," says Chris Davitt, President, Ruppert Nurseries, Laytonsville, MD. "Both our maintenance and our installation are up right now. But when there's a downturn, our installation will feel it much more than our maintenance."

Even so, Davitt, whose company has branches in northern Virginia, near Philadelphia, just outside of Atlanta and several near Washington, D.C., sees few clouds on the horizon for any segment of the Green Industry contractor market. Not for 2007 anyway and especially not for maintenance.

"I think that 2007 is going to be a very good year," he says. "I would anticipate — and this is speculation — that we may start to see signs of a downturn in 2007. But, I don't see anything out there that is going to come fast enough to make 2007 a bad year."

He bases his prediction on the activity of building contractors in the Mid-Atlantic markets that Ruppert

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CHRIS DAVITT OF RUPPERT NURSERIES SAYS THE INDUSTRY WILL HAVE TIME TO ADJUST IF THE ECONOMY TURNS DOWN.

BIG BOYS SOAK UP IMMIGRANT LABOR

The more annual revenue a company generates the greater its need for non-domestic employees. The data find 58% of workers at landscaping businesses with more than \$5 million in annual revenue are U.S. citizens — 42% are immigrant. Companies with less than \$100,000 in annual revenue report 99% of their employees are homegrown.

EVERYBODY'S USING CELL PHONES

96%

percentage of landscape pros that own and use cell phones on a regular basis. It doesn't matter in which region they're located, but respondents from the West batted 73 for 73 — 100%.

BASE: 538 RESPONSES

Owners expect to pay more for labor

The cost of labor is going up, with or without legislation to bump up the \$5.15 an hour federal minimum wage for non-exempt employees. Senator Ted Kennedy (D-MA) proposes raising the minimum wage by \$2.10 an hour. Senator Rick Santorum (R-PA) counters that an increase of \$1.10 is in order. Sentiment in Congress is strong to raise the minimum wage in 2007. The minimum wage has not been increased since 1997.

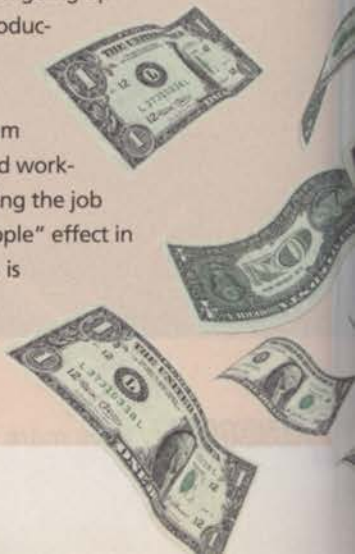
Although the law of supply and demand — which applies to labor as surely as any other commodity — guarantees that landscape workers, including laborers, work for wages significantly higher than \$5.15 an hour, most landscape business owners do not want to see the minimum wage increased. In fact, they see little reason to increase it.

Just slightly more than 58% (308 out of 529) of the respondents to our recent survey said they expect to pay their employees more in 2007. Companies in the \$1 million to \$5 million category will be the most generous with 76% of those respondents raising wages.

For the first time since we've been surveying readers, respondents tell us that average hourly wage for laborers will exceed \$10 an hour, a foreman's wage will approach \$15 an hour and field supervisors will be making, on average, \$19.23 an hour. These figures are based on 273 responses. Respondents say they employees' salaries account for 35% of their expenses this year, the average of 365 reader responses. They expect these costs to rise .7% in '07, according to the survey.

In light of these findings, why raise the minimum wage, our readers wonder? Unemployment remains low at 4.5% (3.8% for adult men), and finding willing, able-bodied young employees remains one of the industry's most pressing challenges.

Real wages have been going up because of increased productivity and robust demand for industry services. Raising the minimum wage for the least skilled workers and those just entering the job market will create a "ripple" effect in the labor market, which is working fine without government wage interference. — RH



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services, which, although not as robust as it was in '03 and '04, is still relatively healthy.

"Landscapers have a bit of an advantage in that we get to watch the general contractors, and when it slows down for them, we have a year before it really affects us on the installation side and maybe another half year before it affects us on the maintenance," he says.

Bottom line: the maintenance market will continue to grow in 2007 and into the foreseeable future.

How much? We couldn't determine the rate of growth nationwide from the data, and, even if we could, it would be meaningless to individual business owner/contractors. Indeed, there's a huge difference in the size of maintenance companies with smaller companies projecting growth anywhere from 30% to 100% next year, and larger companies — those with revenues of \$5 million or more — budgeting for sales increases in the 5% to 10% range.

Encouragingly, 78% of respondents (431 of 583) to our survey predict growth. Only 22 respondents (4%) expect fewer sales in

continued on page 30

5 maintenance trends

- 1 The bigger you get, the more you'll need H-2B workers.** If you're small enough, you can do it all yourself or with a few of our buddies. But there comes a time when you need guys that can work 10 hours a day and are grateful for the work.
- 2 Mechanization is reducing labor needs.** Tough jobs like putting down mulch are simplified with equipment such as mulch blowers or that nifty Mulch Mule. Advances in compact equipment and attachments make tasks less labor dependent.
- 3 GPS-equipped service vehicles are speeding service delivery** as they take a lot of the worry out of vehicle and equipment misuse.
- 4 Workers comp costs and OSHA's focus** on the industry are awakening owners to the need for ongoing safety training.
- 5 Enclosed trailers and increased yard security** measures will be a priority, as companies look to reduce incidence of vehicle and equipment theft.

— RH

Labor costs heating up

\$1.23

average amount of increase in the hourly rate companies expect to pay their supervisors in '07. Respondents, almost across the board, indicated they expect to be paying all their employees more next season.

Wages rise with rising sales

fraction of landscape businesses with increased revenue in '06 paying employees more in '07. Only 41% of companies suffering a revenue decrease in '06 will shell out more for help.

2/3

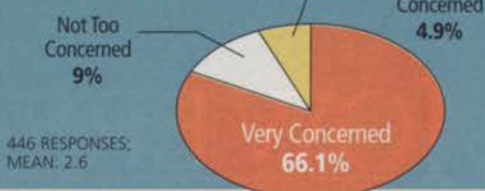
LOW-PRICE MYTH DEBUNKED

So you think that your bargain basement prices will boost sales? Wrong. **Only 5.3% of respondents cited price as the reason they grew in 2006.** Even some of these respondents aren't totally convinced that's the route to go since only 3.9% told us that's their strategy for '07.

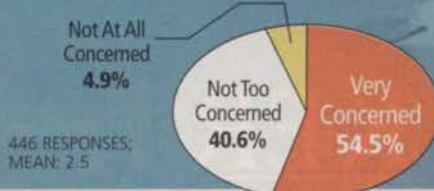
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continued from page 28

2007 than they had in 2006. By contrast, 66% (386 of 583 respondents) said they experienced increased sales this past season.

Like the Energizer Bunny, our society's demand for landscape maintenance just keeps on going. Much of this is due to demographic and lifestyle trends that almost override economic cycles.

Consider that the Baby Boomers (born between 1946 and 1964) represent more than 25% of the U.S. population. They fueled apartment building in the 1970s, powered the 1980s housing market, added to their net worth during the high-flying 1990s and saw appreciable gains in the market value of their homes and properties in recent years. And they're still driving the U.S. economy, buying second homes, resettling in the Sunbelt, moving into full-service communities or upgrading their homes and properties. As a group, they're busier than ever, either with their careers or other activities, and increasingly look to service providers to free up their time for leisure, social and recreational activities. That's good news for all property-focused service businesses. Not for just 2007, but for years afterwards, as well. And the trend for do-it-for-me services is expected to continue.

The U.S. population is aging. The median age of the U.S. population has increased from 34 in 1994 to 35.5 in 2000 and will peak at 39.1 in 2035, predicts the U.S. Census Bureau.

According to our survey, maintenance of residential single-family homes is expected to account for 48.4% of the revenue generated by contractors in 2007, with commercial establish-

continued on page 32

It's on your 'to-do' list

76.9%

In what should be good news to the Professional Landcare Network (PLANET) and the Outdoor Power Equipment Institute, who are planning the first-ever Green Industry and Equipment Expo in Louisville next year, **76.9% of company owners and managers say they'll be attending trade shows in '07**, an increase of 6.5% from 2006.

BASE: 314



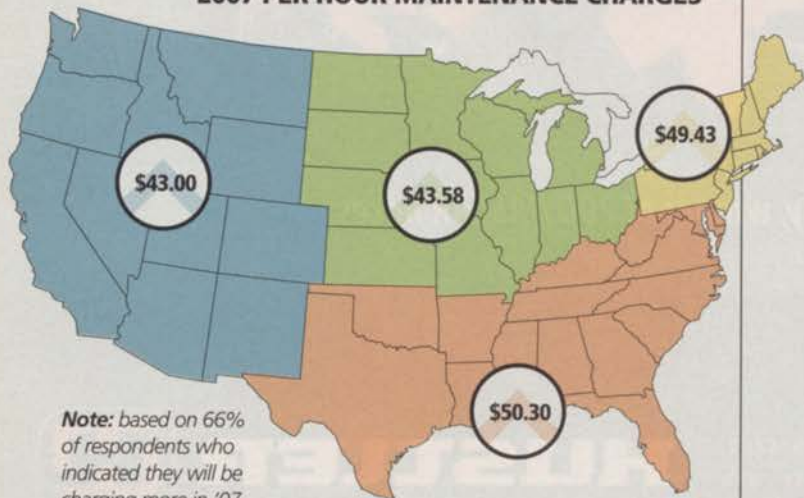
ROUTING VIA THE SATELLITES

GPS tracking is getting popular in professional landscaping, and the bigger the company, the more likely it is to equip its service vehicles with GPS. One-third of 620 respondents said they have or "plan to have" GPS-equipped vehicles.

The number jumps to 66% for companies with revenues exceeding \$5 million annually.



2007 PER HOUR MAINTENANCE CHARGES



Note: based on 66% of respondents who indicated they will be charging more in '07

'Must haves' for success

Maintenance/mowing contractors say these attributes rock ("are very important") in the success of their efforts:

- 86% ▶ Fast response
- 78% ▶ Technical service
- 69% ▶ Value
- 69% ▶ Customization
- 67% ▶ Full service
- 58% ▶ Innovation

93%

Ongoing client communication



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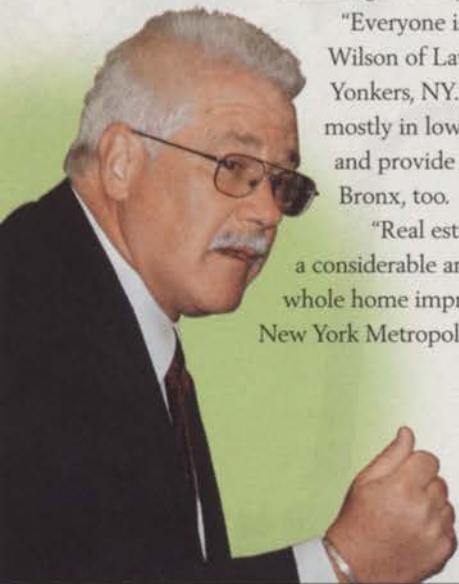


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continued from page 30

ments accounting for 28% and condos/apartments and HOAs 16%. As a company grows the ratio begins reversing itself with commercial generating increasingly more revenue.



"Everyone is busy here," says Larry Wilson of Lawn Landscape Design, Yonkers, NY. He and his crews work mostly in lower Westchester County and provide some services in the Bronx, too.

"Real estate prices here have fueled a considerable amount of growth in the whole home improvement market in the New York Metropolitan market," says Wilson.

continued on page 34

LARRY WILSON SAYS HIS CLIENTS ARE STILL POURING MONEY INTO THEIR HOMES AND PROPERTIES.

HEAD WEST YOUNG MAN

63% percentage of respondents from the U.S. West who told us they're increasing their fulltime workforce in '07. We surmise this

is a reflection of greater population growth and construction activity there. By contrast just 27.8% of respondents from the Midwest will add to their employment base next year.

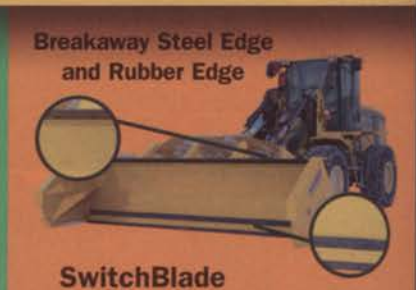
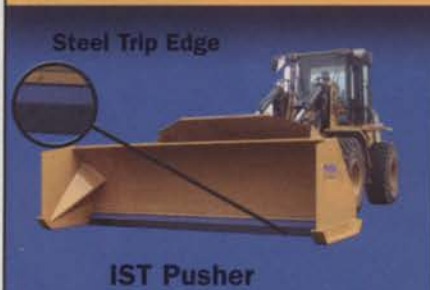
Company Web sites proliferating

The West is the best when it comes to percentage of Green Industry contracting companies with Web sites. Of the 74 respondents from that region answering our study, 64 (86.5%) say they either have or will have a Web site in 2007. Here's a breakdown of the industry as a whole:

- Have and Use Regularly **40.8%**
- Have but Not Used Much **13.8%**
- Plan to Have in '07 **14.3%**
- Do Not Have **31.1%**
- TOTAL RESPONSES: 537



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continued from page 32

"People have realized tremendous equity in their homes. They're making home improvements, and quality landscaping is high on their list."

But what do these maintenance customers, whether they're residential or commercial, expect of their service providers?

They want personalized communication, they want quick response from service providers and they want value, and in that order, our survey revealed. Somewhat less important are factors such as technical knowledge and being able to offer a full palette of landscape services, respondents said.

How are contractors going to grow their revenues? Apart from finding new customers and upselling existing clients, two responses popped up more often than others — more reliance on labor-saving equipment (37%) and offering customers new services (31%). This response rate, we feel, is closely tied to an-

other trend in landscape maintenance, more focus on employee training. If contractors are adding new equipment and services, employees must be trained in both areas.

Seven out of 10 of contractors told us that they intend to "make time for employee training" next year. The larger the company the more likely it is to train. The survey said that 92% of companies in the \$1 million to \$5 million range and 93% for companies with revenues more than \$5 million are training.

We're confident that this optimistic view of next year's maintenance is an accurate one. That said, it's the experienced business owner who keeps a finger to the wind and plans for what's coming that succeeds.

"As long as the industry has appropriate warnings when a down market comes, it can adjust budgets, cut costs and learn to be profitable," says Ruppert's Chris Davitt. "Where people get hurt is when they don't have or don't heed the warnings." **LM**

Industry seeks permanent H-2B fix

All right, it's pretty much agreed (even among politicians) that the H-2B seasonal immigrant guest worker program is a win for everybody — U.S. small businesses, our economy and for the foreign workers, the huge percentage of which return to their home countries after working in the United States.

Isn't about time this program got fixed? For good?

Supporters of the H-2B seasonal immigrant guest worker program, including a large number of landscape company owners, are pushing for just that.

"We're working behind the scenes feverishly," says immigration attorney Donald Mooers, one of the principle drivers of the Save our Small and Seasonal Businesses Act, the small stand-alone bill that, the past two years, has provided small business with access to H-2B workers.

However, that Act, passed in 2005 and given a one-year reprieve again in 2006, is no more than a band-aid for

a troublesome small business issue — continued labor availability, he says. The reason: It's temporary in nature, expiring September 30, 2007, and it doesn't provide enough workers for U.S. small business, says Mooers.

In 1990 Congress established the H-2B program, limiting it to 66,000 guest worker visas. That quota has not changed, although the American economy has expanded greatly along with the labor needs of small business owners, he explains.

While the passage of the 2006 version of the Act by Congress as part of a larger appropriations measure (literally minutes before the '05 Act expired) enlarged the pool of returning immigrant workers to U.S. businesses through '07, it's not enough, Mooers claims.

Backers of the Save our Small and Seasonal Businesses Act 2007 (the likely name of the new effort) are seeking three things:

1. Make the returning worker exemption permanent.

2. Reinforce the security needs of the country by making sure that the returning workers receive full security reviews and pass through a U.S. embassy during one of the prior three years of their eligibility as an H-2B or H-2R (returning) worker.

3. Expand the number of seasonal immigrant guest workers visas available to U.S. businesses.

Mooers says that he expects Senators Barbara A. Mikulski (D-MD) and John Warner (R-VA) to continue to support the Act. He is confident that co-sponsors will be found in the House, as well.

"Whether the Save our Small and Seasonal Businesses Act is outside or inside the broader immigration debate, this is a small business issue," adds Mooers. "We don't care through which legislative vehicle this is passed. This is a small, stand alone bill and most small, stand alone bills get attached to larger legislation."

— RH

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Circle 121



LAWN CARE

BY MIKE SEUFFERT / Associate Editor

The very wise Lisa Simpson once told her distressed father Homer that the Chinese use the same word for "crisis" as they do for "opportunity."

"Yes," Homer replied excitedly. "Crisi-tunity!"

Homer's mental deficiencies notwithstanding, the idea of keeping a positive outlook — seeing the challenges ahead as a potential advantage — is in full effect for the lawn care industry. In fact, despite noted concerns about energy prices, health care, competition, employees, material prices and government regulations, 74% of lawn care professionals expect sales to increase in 2007, according to *Landscape Management's* State of the Green Industry report.

"Our goal is to increase our net revenue, and maintain our growth rate of about 10-12%," says Rob Shauger, president of Advanced Applications Tree & Lawn Service in Utica, NY. Though Shauger expects to see an-

continued on page 38

The big spend

\$70
million

amount Green Industry lawn service providers say they will spend for **chemical application equipment** in the next 12 months.

2006 SUBSCRIBER INSIGHTS STUDY

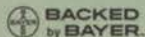
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Armada™



continued from page 36

other push from activists to implement a neighbor notification law on lawn care applications, he plans to open a second office.

"We haven't been touched by the cooling housing market," Shauger says. "We're not having trouble finding new customers, and we haven't had any of our current clients cancel on us. They are pretty loyal. And the new market we are moving into has triple the population, triple the number of businesses and triple the disposable income as the area we service now."

Economic woes

It is too early to be singing the blues, with the national unemployment rate at 4.5% and the stock market setting or at least hovering near record-highs, but leading economic indicators do point to a slow down coming in 2007.

But that doesn't mean the lawn care business will be drying up, according to Scott Frith, vice president of marketing and franchise development for Lawn Doctor. "As many consumers spend less on luxury goods and vacations, specifically, they will spend more time at home and want it to look its best," he says.

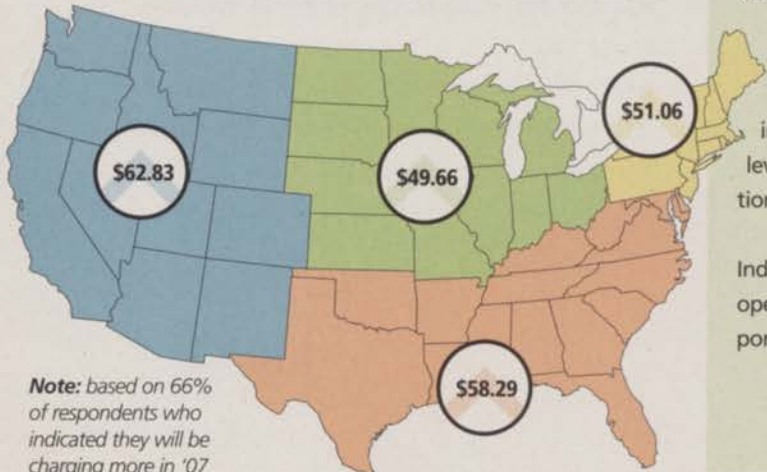
I also see an opportunity for Lawn Doctor to dramatically increase the number of franchises in 2007. As midlevel managers and executives are laid off, they will want to start businesses of their own with the stability that comes with experienced franchisors."

continued on page 40



ROB SHAUGER SAYS AN AVERAGE CLIENT SPENDS \$600 ON LAWN CARE SERVICES.

2007 PER HOUR CHEMICAL SERVICE CHARGES



Note: based on 66% of respondents who indicated they will be charging more in '07

Franchising remains attractive option

BY SEAN GALLAGHER

The Green Industry is a fragmented industry. That's why franchised businesses in the industry have continued to grow and earn business with their recognizable, trusted brands.

As a whole, franchise unit growth is estimated at about 10% annually, according to the International Franchise Association (IFA). In fact, an estimated 900 new franchise concepts have entered the franchising arena over the past three years, and franchised businesses now span approximately 80 different industries. You may not know it, but many companies you do business with on a daily basis are franchised. The convenience store where you buy your morning cup of coffee, the gas station where you fill up your tank and the restaurant where you take your family out to dinner may all be franchise operations.

In the home services sector, there's competition among the large national players and those businesses operating solely on the local level. The balance consumers are looking for is the quality service provided by a vast depth of knowledge, often associated with large corporate operations, while benefiting from local execution and support. In essence, many consumers want to work with a trusted, knowledgeable business whose owner they know by his or her first name. With franchising, this is possible.

Another key advantage of operating a franchised business, rather than an independent one, is that individual franchisees can take advantage of the cost savings afforded by a franchise system's collective buying power.

"Independent operators may find themselves in a position where they may want to consider franchising as a way to increase efficiency to compete with low-cost producers that can take advantage of economies of scale," says Scott Frith, vice president of marketing and franchise development for Lawn Doctor, the largest lawn care franchise in the United States. "Franchising provides the best of both worlds, the ability to leverage collective buying power and brand recognition, while maintaining a level of independence."

Based on the inherent fragmentation of the Green Industry among a few large players and many small local operators, franchising continues to provide a viable opportunity for current and future land care operators.

—The author is the marketing project manager for Lawn Doctor Inc., Holmdel, NJ Contact him at 732/946-0029 or spatrickgallagher@comcast.net



DON'T COUNT ON THIS.

continued from page 38

Tim Doppel, owner of Atwood Lawn Care in Sterling Heights, MI, says the economy in Michigan hasn't been good. Even so, his company achieved 11-12% growth in 2006.

"Even in this economy, there are still lots and lots of people who want lawn care," Doppel says. "But in a tough economy, you have to be able to show customers the value they're getting for what they're paying. The customers you want will not be put off by the higher price. They want to see the quality of work you provide."

Our survey shows that customer service is the key to growth in 2007. To go along with that, 64% of lawn care companies plan to increase their sales and marketing efforts, 10% expect to invest more into the company — either through new employees or locations, and another 10% plan a shift in strategy, such as focusing more on commercial jobs.

Advanced Application's Shauger will increase aeration and topdressing services to his clients. He doesn't see a lot of companies in his market offering those services. Frith sees an opportunity to deepen relationships with customers by providing a premium service level. Doppel agrees, and says the company's big push in 2007 is "getting customers to use more of our services," rather than attract new customers.

continued on page 42

Project EverGreen seeks consumer action '07

BY DEN GARDNER

115 million. That's the number of consumers Project EverGreen told about the benefits of green spaces in 2006. Project EverGreen, the two-year-old coalition of Green Industry associations and companies, begins 2007 with the same ambitious aim — to build a greater appreciation of green spaces among the public.

One key initiative is the transition of ProjectEverGreen.com to a community-based Web site that will engage consumers. Consumers visiting [Project EverGreen.com](http://ProjectEverGreen.com) will likely be able to join an affinity club for yard enthusiasts, get tips and how-to in-

formation on maintaining green spaces, take trivia contests and quizzes, and take part in local and regional programs.

Of course Project Evergreen will continue to seek landscape and lawn service companies to participate in its successful GreenCare for Troops program. This public service initiative provides free lawn care for families of armed forces personnel whose major breadwinner is serving in the Middle East. The GreenCare for Troops' slogan is "Serving You While You Serve Us." Are you a volunteer yet? Many more military families need lawn care help. By the end of November, Project

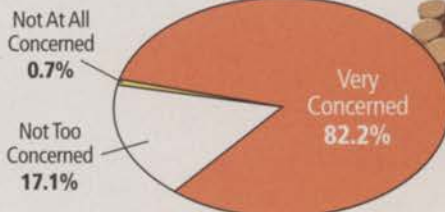
Evergreen had 2,100 families signed up and almost 500 landscapers/lawn care operators volunteering to help them nationwide.

EverGreen continues to act as the face of the Green Industry by offering resources to the media. It also stimulates interest in all types of well-maintained green spaces — lawns, landscapes, trees, gardens, parks, sports fields and golf courses — with a variety of programs.

Volunteer, contribute and get involved! Sign up online at www.projectevergreen.com. Or call me toll-free at 877/758-4835.

— The author serves as executive director of Project EverGreen and helped found its current mission and strategies just two years ago.

YIKES, ENERGY PRICES!



456 RESPONSES;
MEAN: 2.8

'Must haves' for success

Lawn care providers say these attributes rock (are very important) in the success of their efforts:

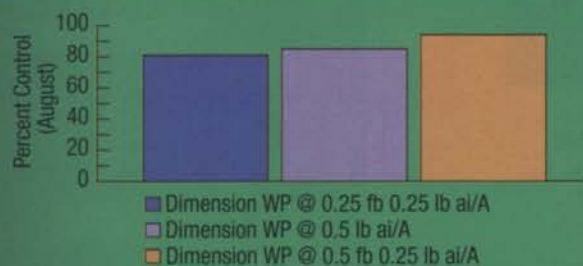
- 84% ▶ Ongoing client communication
- 74% ▶ Value
- 58% ▶ Technical service
- 51% ▶ Customization
- 48% ▶ Full service
- 33% ▶ Innovation

85%
Fast response



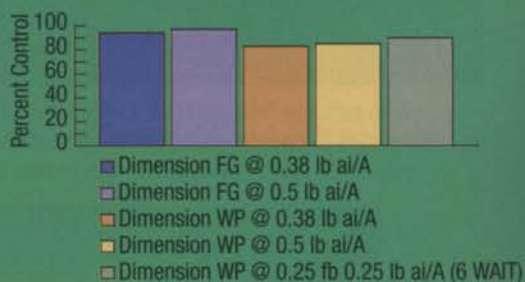
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continued from page 40

Regulation: danger ahead

It looks like that for the lawn care industry, concern over increased government regulation increases as you move north, closer to Canada where the environmentalist movement has led to bans on the cosmetic use of pesticides in 122 communities.

But even though increased regulation is a concern, it is not a death knell for lawn care, explains Laurie Broccolo, CEO of Broccolo Tree and Lawn Care in Rochester, NY.

"Last year was very challenging due to regulations requiring 48 hour advance notice to clients' neighbors. We managed to turn this burden into a marketing campaign. We focused on customer communications to alert them of our struggles to comply, but also our commitment to quality," she says. "The constant mailings for notifications inspired many neighbors to take a look at Broccolo lawns, and this fall we have had an influx of inquiries and sales for the 2007 season."

"Our outlook for 2007 is very positive and we are expecting a 10% growth after a few years of status quo," Broccolo adds.

continued on page 44

Lagging behind on the Web

Lawn care companies are not as likely to have or maintain Web sites as landscape contractors specializing in design/build or maintenance. **Just 50% of the LCOs responding to our survey say they "have" or "plan to have" Web sites next season.** Contrast this to the 78% of design/build contractors and 69% of the maintenance operations answering affirmatively to these questions.

AIM FOR 90% CLIENT RETENTION

Churning is evil. Retention is heavenly. Profitable customers retained from year to year build profitable companies. Successful Green Industry contractors retained 87% of their customers in '06. When that number approaches 80%, companies begin experiencing declining sales. The goal of high-profit companies — 90% retention.

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Circle 125

continued from page 42

Bern Bonifant, vice president of Bay Country Lawns in Merrifield, VA, says he is concerned about increased restrictions on products that the company is accustomed to using. Still, he likes the performance he has seen from several new granular products, and he will use 2007 as an opportunity to include new products and their related services into the company's offerings.

As for the difference the new political climate will have on the company, "All I know is that, since we're in the (Washington), D.C. area, a lot of guys and guys' bosses just lost their jobs and will be moving out of the area," Bonifant jokes. "And there's going to be new people moving into town to take their place. That's an opportunity for us to find new business."

Weather worries

Given that your typical weatherman can't tell you what the weather tomorrow is going to be like with any accuracy, it is really impossible to forecast how 2007 will affect the lawn care industry. Will the South see more droughts? The East Coast more

continued on page 46

5 lawn care trends

- 1 **More emphasis on customer retention.** Replacing lost customers in the post-telemarketing era is expensive and time consuming.
- 2 **Perimeter pest control** is an increasingly attractive service add-on for many homeowners.
- 3 **Tighter, more efficient service routing** in an effort to hold the line on fuel costs.
- 4 **More "combo" chemical products**, such as fertilizers containing insecticides, herbicides and fungicides targeted at a broader spectrum of weeds or diseases.
- 5 **A growing number of generic products** containing popular active ingredients. Will they work as well?

— RH

The big spend

\$1.5 billion

aggregate amount lawn care company owners/managers say they spent this year on lawn care products. That translates into an average of \$28,800.

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continued from page 44

floods? Are we due for more hurricanes? Or will frogs just start falling from the sky? Regardless of what happens, lawn care companies will just deal with it, as they always do.

Bonifant says in 2006, the Washington, D.C.-area saw days with up to 14 in. of rain. "These caused a lot of excitement, a lot of growth, but also a lot of diseases," he says. A strong fall weather-wise got Bay Country Lawns' customers' lawns back on track and healthy. "We think neighbors will be able to see the difference our program makes, and with a strong push on referrals, will lead to more business in 2007."

Brad Johnson, president of Lawn America in Tulsa, OK, has budgeted for

continued on page 48

BRAD JOHNSON SAYS HIS COMPANY WILL BE MORE AGGRESSIVE IN GETTING REFERRALS IN 2007.



SOFTWARE USE NOT MAXED YET

57.4%

In spite of being on the second or third generations of some popular industry-specific business management/routing software, there's still apparently a **big market out there for these handy administrative/operations tools.** Of the 531 people responding to our survey, 57.4% say they have or "plan to have" these tools in 2007. That leaves 42.6% still doing their own thing.

- 38.6% Use Regularly
- 10.7% Have but Not Used Much
- 8.1% Plan to Have in '07
- 42.6% Do Not Have

531 RESPONSES; MEAN: 2.8



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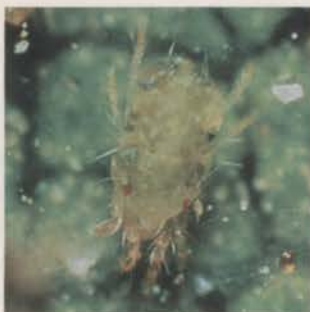
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continued from page 46

22% growth in 2007 — up to \$2.2 million — despite the ongoing drought that has affected states like Texas, New Mexico and Oklahoma (and on top of 16% growth in 2006). The growth will come from upwards of five new franchises he plans to start next year, which would double the current five franchises of Lawn America.

"With the drought, it's been feast or famine for a lot of areas," Johnson says. "We're dealing with spring dead spot, and even

some battles with brown patch on fescue grasses. What this has done is really show the importance of our services, and necessitated ongoing communication with our customers."

Johnson says his company will be even more aggressive in using customer referrals in 2007, focusing on bringing in the new franchises and teaching them Lawn America's system.

"There's always room for more people who do business the right way, have patience and stick to the program to build up their customer base," he says. **LJM**

Lawn care's future lies at local level

BY STACEY PINE

Mid-term elections brought newly elected policy makers who have advancing "environmental" agendas as top legislative priorities. Too often, this "environmentalism" translates to anti-pesticide and anti-fertilizer.

Nationally, Democrats hold a 230-192-seat majority in the House and a 51-49 majority — including two Independents — in the Senate. A similar shift occurred at the state level. Democrats control the legislative and executive branches in 16 states.

The shift in power placed a number of aggressive "environmentalists" in leadership positions who will be looking to limit or ban use of the pesticides and fertilizers. At the federal level Senator Barbara Boxer (D-CA) has become chair of the Senate Environment and Public Works Committee. Boxer is opposed to virtually all pesticide use and has tried a variety of means to restrict such use. Newly elected New York Governor Elliott Spitzer was a strong proponent of the state's 48-hour neighbor notification legisla-

tion and continues to keep "environmental concerns" a top policy priority.

At the local level, a patchwork of product restrictions and bans have been put in place in recent years ranging from notification and posting ordinances to outright bans on certain products and classes of products.

Responsible Industry for Sound Environment (RISE) has worked on more than 20 different local proposals threatening the use and sale of pesticides and fertilizers. Proposals ranged in scope from 48-hour pre-application neighbor notification to school IPM policies stipulating the use of pesticides on grounds and athletic fields only as a last resort, if at all.

Local politics present challenges because proposals advocated by a minority can advance quickly. Anti-lawn care activists tell an emotional story unchallenged and unencumbered by science so local bans and restrictions can be enacted quickly.

How could you run your

"THE THREAT OF A LAW ADVERSELY AFFECTING YOUR BUSINESS IS REAL,"
— STACEY PINE

business when faced with different ordinances and policies for pesticide and fertilizer sale and use every time you crossed a county or town line? It would be nearly impossible, which is why 41 states have laws on the books preventing localities from passing any laws related to pesticide sale and use. Ten states have laws preventing local regulation of fertilizer. In spite of these state laws, localities continue to pass restrictions. If you don't believe the threat is real, consider Canada. Activists have succeeded in banning the "cosmetic use" of pesticides on turf and landscapes in more than 122 communities and one entire province.

The threat of a law or policy adversely impacting your business is real.

Be aware of what's happening in the towns where you operate and get to know local policy makers. Show up and speak up if you learn about a proposal to ban or restrict products you count on to be available when you need them. Take action while you can still make a difference.

— The author is with DC Legislative and Regulatory Services in Washington, D.C., and manages the RISE grassroots program. Contact her at spine@delrs.com.



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DESIGN/ BUILD

BY JAMIE J. GOOCH /
Contributing Editor

It's no secret that consumers are spending more time at home, and spending more money on their homes. In recent years, this has painted a rosy picture for landscape design-build professionals. Demand for decks, patios, pools, gardens, outdoor kitchens and anything else that turns a family's backyard into a destination nearly outstripped contractors' abilities to fulfill that need.

Though real estate pundits have predicted another 12% drop in new-home construction in 2007, demand for landscape design-build professionals isn't cooling. That may be because there's still more than a six-month inventory of new homes for sale at the current sales pace, according to the U.S. Commerce Department.

What's old is new

But even if the new home construction slump does catch up with the design-build business, it's unlikely to be too detrimental in 2007.

continued on page 52

The big spend

\$353
million

amount respondents to our survey say they will spend for **construction/installation equipment purchases** in the next 12 months.

2006 SUBSCRIBER INSIGHTS STUDY

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of design/build professionals they let their mouse to the walking when it comes to buying services and materials online.

They are easily the most active group of Green Industry contractors. When we asked all respondents to compare their anticipated '07 online purchasing to their 2006 activity, 42.4% (146) said they will increase online spending.



continued from page 50

That's because new homes aren't the only market indicator for the design-build segment of the landscape industry. Many homeowners are calling on contractors to renovate the landscapes of their existing homes.

"Most of our work is renovation work," says Jeff Rak, president of Land Creations Landscaping Inc., Columbia Station, OH. The 16-year-old company focuses on residential hardscapes. "We didn't notice when the housing bubble burst this year. In fact, it was a record year for sales."

Rak says renovations have become a niche for the 12-employee design-build firm. And most of its business – 76% to be precise – comes from previous customers and referrals.

Referrals are powerful

JTS Landscaping, Seville, OH, also relies on his current customers. The 10-employee firm does about \$1.5 million in annual sales, largely by reminding its customers how important their referrals are.

"Referrals and word-of-mouth advertising are our number one marketing tool," says Joe Pavlovicz, president of JTS Landscaping. "And most of them are justified leads, in terms of panning out, because they know what to expect from us."

Referrals and repeat business is so high, in part, because keeping up with the Jones' yard these days means a lot more than having a perfectly manicured lawn. It means outdoor living spaces that make the home the place to be.

continued on page 54

'They're like family'

With all the challenges design-build professionals have to look forward to in 2007, finding and retaining workers is perhaps the most significant. Fuel prices can be added into bids, new technologies can be learned and there's still plenty of room for competition. But labor is the biggest expense and may also be the biggest cause of sleepless nights for design-build contractors.

For many design-build firms, labor equals H-2B visas. Thankfully, due in part to widespread industry pressure, a one-year extension on the visa cap allows workers who entered the U.S. with an H-2B visa in 2004, 2005 and 2006 to return under an H-2B visa and not count against the 66,000 visas per-year cap.

That's great news for Jeff Rak, president of Land Creations Landscaping Inc., Columbia Station, OH. Rak joined others in Washington, D.C. to fight for the extension.

"The H-2B program has been a saving grace for our company and our industry," Rak says.

Tom Gerhardt, sales rep for Land Creations, agrees. He recalls the days before the company used H-2B.

"We had a foreman sign out front all summer one year and couldn't fill the position because no one was qualified," he says. "We didn't know which jobs we'd be able to do each day because we didn't know who would show up."

In the past three years under H-2B, however, Land Creations' employees have missed a total of three days. That can be attributed to their work ethic and the way the company treats them.

Every Wednesday this year the company paid for an English teacher to come in and teach the crew. The company also hosts monthly get-togethers for the employees, their families and friends where they get to know each other socially. When it was time for the workers to return home, the company threw a party for them and had it catered by a local Mexican restaurant.

"They're like family," Rak says.



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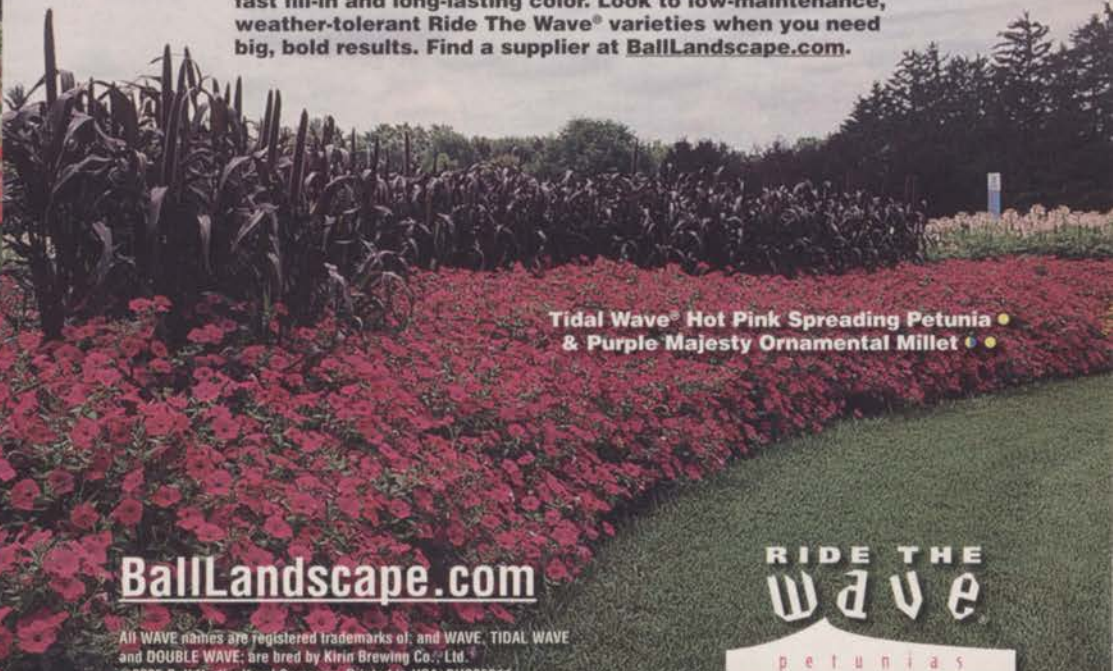


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RIDE THE
wave
petunias

5 design/build trends

1 Is synthetic turf in your future? You bet it is, especially if you're working in the arid Southwest where there's

pressure to limit turfgrass. Elsewhere, synthetic backyard putting greens and play areas are becoming popular with homeowners.

2 More fireplaces and outdoor kitchens.

There's something satisfying but primitive about cooking outdoors. There's no reason not to do it in great style, right?

3 Big beautiful pots, urns and statuary.

Even if your clients don't live on estates, they want to feel like they do. You may need a "gardener" on your staff to please these HGTV-influenced clients.

4 Water. Water. Water. After a tough day at the office, the working couple finds the gurgle of a fountain or the soft splashing of a waterfall downright soothing, especially after a gin and tonic or two.

5 No more design freebies. The days of putting together a free design in hopes of landing a job are over — or they should be. The industry is finally getting smart about giving away its creative work.

— Ron Hall



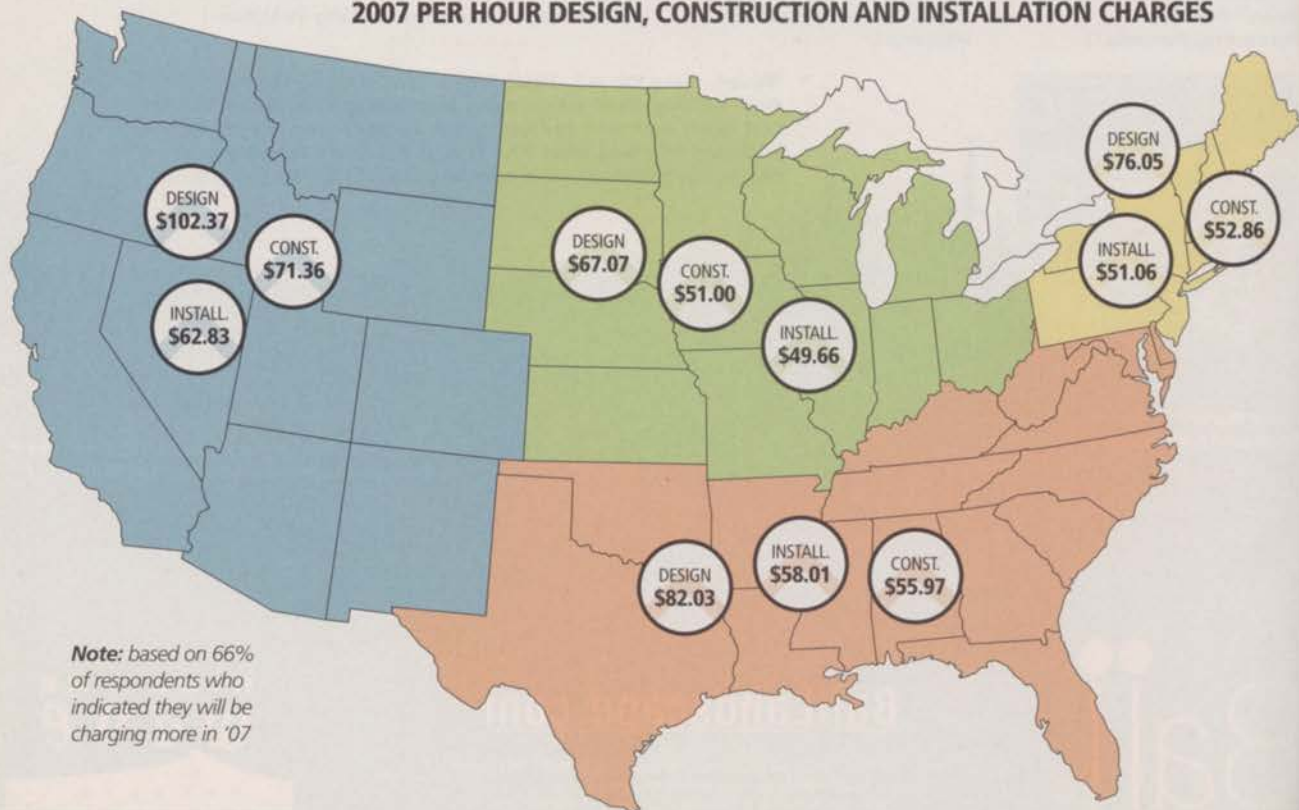
continued from page 52

Brian Helgoe, general manager of Estate Gardens by ValleyCrest, agrees that there is a definite trend toward outdoor living and entertaining. ValleyCrest is one of the top providers of landscape development and maintenance services in the United States. Earlier this year, it acquired two landscape architecture firms, HRP LanDesign, Orange County, CA, and Site Works, Fairhope, AL, to further capitalize on the popularity of the design-build segment. Estate Gardens by ValleyCrest was then launched in October as a full-service residential landscape design, construction and maintenance practice.

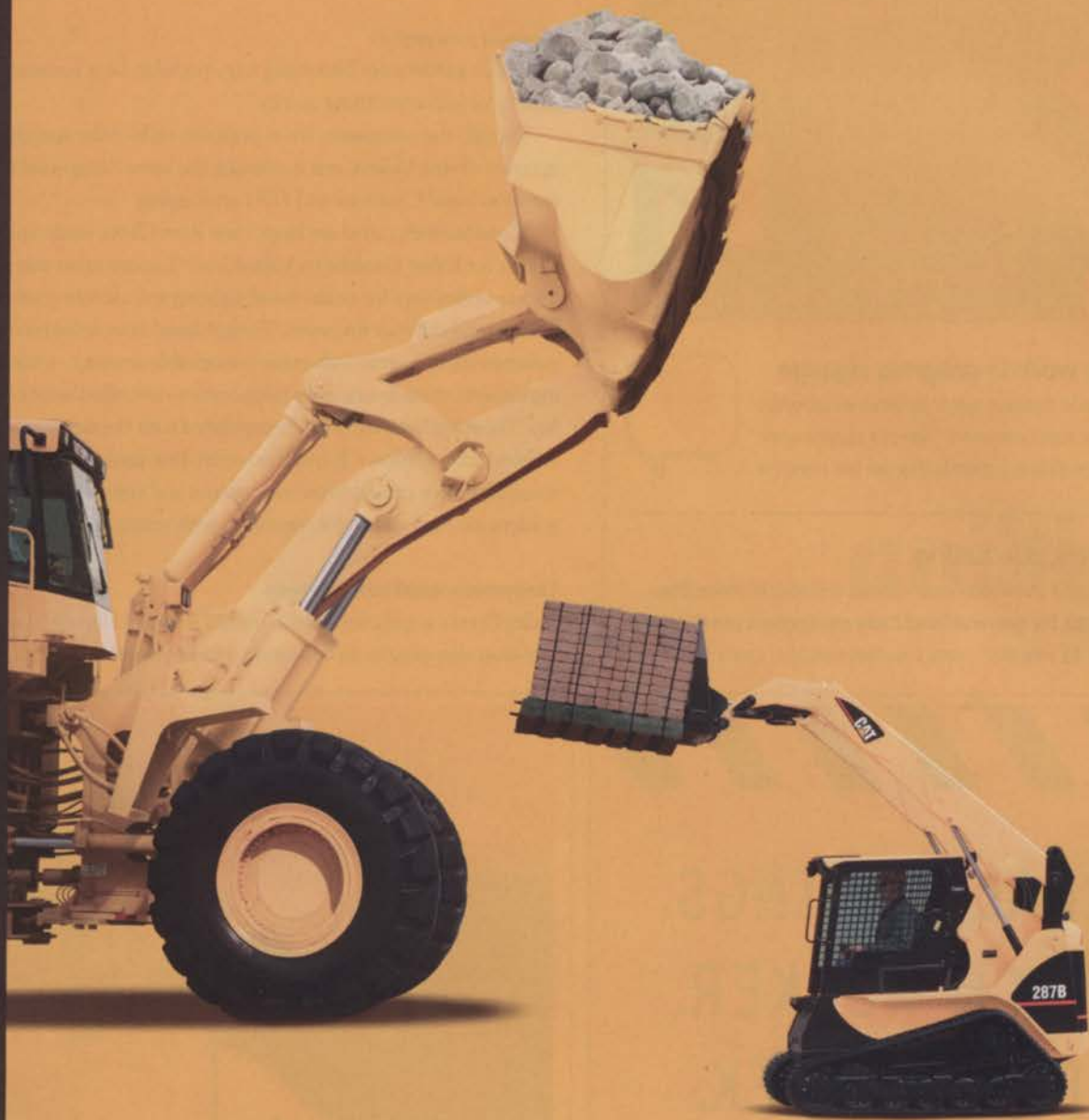
"Generally, our clients who live on larger properties are requesting gardens that create a destination at home," Helgoe says. "We see more focus on child- and family-friendly landscapes — including athletic features, eco-friendly habitat programs (bird/butterfly gardens), and comfortable, functional and livable outdoor spaces for entertaining. Garden art and

continued on page 56

2007 PER HOUR DESIGN, CONSTRUCTION AND INSTALLATION CHARGES



Note: based on 66% of respondents who indicated they will be charging more in '07



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- 91% ▶ Ongoing client communication
- 78% ▶ Technical service
- 72% ▶ Fast response
- 72% ▶ Full service
- 70% ▶ Value
- 53% ▶ Customization
- 35% ▶ Innovation



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Equipment purchasing

Landscape and lawn service companies will spend more than \$964 million for general landscape equipment purchases in the next 12 months. 2006 SUBSCRIBER INSIGHTS STUDY

continued from page 54

sculpture gardens are becoming very popular, be it museum quality or just something quirky."

Though the companies are at opposite ends of the spectrum in terms of size, ValleyCrest is noticing the same design-build trends as Land Creations and JTS Landscaping.

"Entertainment areas are huge," says Russ Cletta, landscape architect for Estate Gardens by ValleyCrest. "Lounge areas that integrate technology for audio-visual, lighting and climate control systems and outdoor fireplaces. The hot trend now is the outdoor gourmet kitchen areas with every conceivable amenity — warming drawers, pizza ovens, even temperature-controlled wine cellars. These kitchens are often incorporated with the desire to grow edibles in the garden. Clients often want their gardens to produce something they can eat: fruit trees, grapes and vegetable and herb gardens are high on the list, especially with young families."

Customers want convenience

ValleyCrest's acquisitions and launches this year allow it to offer one-stop shopping to its customers. Homeowners appreciate,

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and are willing to pay for, the convenience of one company creating or renovating their entire landscape. Smaller firms can offer the same thing through subcontracting.

JTS Landscaping, for instance, is building a network of subcontractors that will allow the 15-employee firm to handle just about any design-build project for its clients.

"We're getting more into subcontractors to handle the whole project for the customer – whether it be pools or barns or fences or whatever – because on larger projects the customer likes just dealing with one person."

With the additional demand for landscapes that incorporate a number of design elements comes the need for design-build professionals to offer turn-key services. A water feature, irrigation system, patio, retaining wall, low-voltage lighting and sod installation may seem like specialized services to those in the know, but to the customer, they're all becoming norms of residential landscapes. **LM**

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Circle 140

BY HEATHER PITTINGER / Contributing Editor

Try finding "irrigation" on a contractor's bid list and you'll have to hunt a bit. It's usually lumped in with landscape construction, as though the design, installation and maintenance of a professional irrigation system doesn't require a separate budget or extra consideration.

The Irrigation Association (IA) – and more than a few irrigation professionals – begs to differ. While many landscaping firms are opening irrigation divisions or subcontracting to specialists in order to give clients that "one-stop shop" service, the successful ones understand that irrigation requires a skill set all its own.

The experts agree that there are three major trends emerging in irrigation: water efficiency, certification and pricing. And within each of those trends are a lot of different factors, some varying by region. Water efficiency, for example, is not nearly as big a deal in the Midwest as it is in the Western states. But many believe it won't stay that way for long.

Kurt Litton, president of Jetstream Landscape & Irrigation, says that while reuse practices are more prevalent in Cal-

ifornia than in his market of Grand Blanc, MI, "municipalities are creating more water conservation restrictions even when there is no drought."

Lorne Haveruk, president of DH Water Management Services in Toronto, agrees. "Growth and demand are becoming much larger than supply in many areas," he says. "This is especially detrimental to irrigation systems based on city water supply."

However, he sees this as an opportunity for irrigation contractors: "You don't have



IRRIGATION

The Big Spend

\$525 million

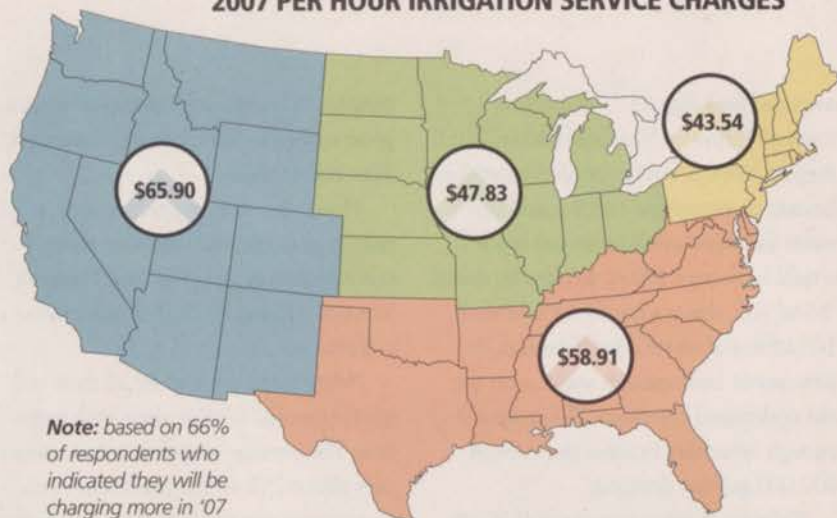
amount Green Industry contractors say they will spend for **irrigation equipment purchases** in the next 12 months. This figure includes sprinklers/rotors, controllers, valves, systems, pumps and trenchers.

2006 SUBSCRIBER INSIGHTS STUDY

PHOTO COURTESY, RAINBIRD



2007 PER HOUR IRRIGATION SERVICE CHARGES



Note: based on 66% of respondents who indicated they will be charging more in '07

to rely on city water," he says. "There are options like rainwater harvesting, stormwater collection, ponds, wells, collecting condensation from HVAC pipes into a cistern – even large-scale dehumidifiers that withdraw moisture from the outside air and send the water to onsite storage tanks."

Municipalities are quickly realizing the economic impact of good irrigation planning. For example, Haveruk explains how a summer drought almost shut down the

continued on page 60

BUSINESS OF IRRIGATION

42%

percent of readers of *Landscape Management* who report they offer irrigation services of some kind. Most industry experts expect this number to climb in 2007 and beyond.

2006 SUBSCRIBER INSIGHTS STUDY



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continued from page 59

town of Tofino on Vancouver Island last August. Were it not for bottled water for human consumption and trucked-in water for other uses, the tourist town would have been forced to close its doors. "Mind you, this is a rainforest area with 103 inches of water a year," he says. "It just cannot hold enough water with the old undersized reservoirs. There are not enough reservoirs to meet the current 600,000 gal/day demand."

Tofino and other towns across North America could benefit from an efficient irrigation method known as "low-volume point source watering," which can reduce consumption up to 80% over conventional spray/rotor methods. "You only need the water at the root zone of the plant, so switching existing spray/rotor

systems to low-volume drip systems is a great service to offer existing customers," Haveruk explains.

However, while the technology is readily available, the technical ability to put it to proper use is lacking. Haveruk likens it to using all the features on one's cell phone.

"How many people use all their cell phone menus? It's the same with irrigation: The average irrigation service person uses about 25% of the controller's programming features," he says. "Manufacturers have leading-edge products, there are lots of options – but there's no incentive for contractors to do so. No one is saying 'You're going to make more money if you do it this way.'"

Water is viewed as plentiful and inexpensive, Haveruk continues, so "a rude

5 irrigation trends

- 1 Watering restrictions directed against turfgrass and landscapes multiply.** Homeowners in growing Sunbelt communities will be incentivized to reduce or remove turfgrass and replace it with native landscapes.
- 2 Irrigation manufacturers and distributors increase their educational and outreach efforts for Green Industry contractors.**
- 3 "Smart" irrigation technology outpaces advances elsewhere in the Green Industry.**
- 4 Water harvesting and collection of air conditioning condensate for irrigation gains more attention and acceptance with water authorities.**
- 5 Fertigation grows in popularity, especially on sports fields, parks and commercial properties.**

— Ron Hall

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awakening awaits many in the near future when their water stops flowing freely from the tap. Certification and licensing the trade could be one answer to force compliance."

Andy Smith, state and affiliate relations director for the Irrigation Association in Falls Church, VA, says his organization is working on a policy to mandate conservation while creating an economic opportunity for irrigation companies.

"As an industry, we basically need to find ways to make this happen," says Smith, a former irrigation contractor. "Applied science has the ability. But current policy doesn't make it economically viable. This is still a price-driven market, unfortunately, and sometimes the quality of workmanship suffers because of that."

Certification brings professionalism

Smith says the industry needs better communication with the public about how a system designed and installed by a professional can conserve water and thus be more cost-efficient and environmentally sensitive. One major way of spreading this message is through IA's certification program.

Litton agrees, noting that he ensures customers know he's certified and thus able to give them a higher-quality job. "Irrigation requires more specialized

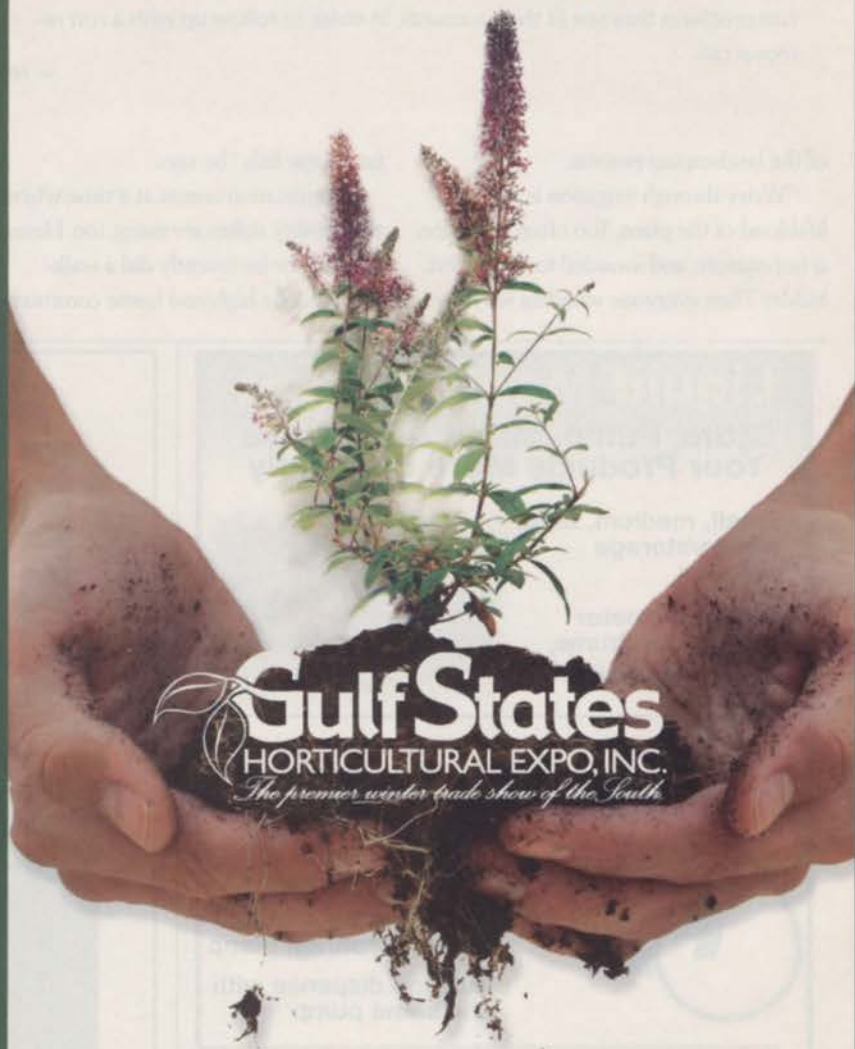
EXPECT MORE WATER
RESTRICTIONS EVEN IF
THERE IS NO DROUGHT,
SAYS KURT LITTON/

knowledge than landscape maintenance," he says, adding that finding and keeping qualified technicians is among his greatest business challenges. "Plus, on the landscape side, your supervisor is always there, but on irrigation you're usu-

ally on your own. There's a lot of responsibility there."

Haveruk, whose consulting and design business also offers irrigation certification training, believes it's high time some recognition comes to the "unsung heroes"

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Circle 123

Preplanning turns a profit

Despite the negative economy his home state of Michigan is experiencing, Kurt Litton, president of Jetstream Landscape & Irrigation, is keeping his client retention rate high by pre-scheduling winterization services and offering a 10% discount on prepayment.

"We try to pre-schedule our winterization in early September," he explains. "We send a card saying 'We'll be there on Oct. 21 between 1 and 3 p.m. Please let us know if you need to reschedule.' Then, when someone knocks on their door with a deal of \$30 if they do it today, the customer looks at the card on their fridge and says 'No, I have someone coming for that already, thanks.'"

Litton also expanded the services in his irrigation division to include rust removal, fertilizer injection and night lighting. Eventually, he plans to have an incentive program in place where his landscape crew will alert the office to any rust problems they see at their accounts, in order to follow up with a rust removal call.

— HP

of the landscaping process.

"Water through irrigation is the lifeblood of the plant. Too often, irrigation is last-minute, and awarded to the lowest bidder. Then everyone wonders why the

landscape fails," he says.

Certification comes at a time when the liability stakes are rising, too. Haveruk recalls how he recently did a walk-through of a high-end home community

that went with a low bid.

"The spray sprinklers were installed poorly, essentially spraying the homes' foundations on a regular basis and now they have mold problems," he explains. "Homes were damaged and they're suing the builder."

Pointing out your credentials and reputation to builders during a bid, from a professionally prepared irrigation design, he says, will offer them peace of mind that they are not going to face trouble down the road.

Pricing a hot topic

While certain parts of the country are thriving, other areas, like hard-hit Michigan, are seeing plant closures and the loss of both white- and blue-collar jobs. This makes it harder to sell irrigation systems

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in the residential housing market.

"The hardest thing to combat is price," Smith admits. "Business is business, no matter what. You have to be in tune with what the market needs and wants."

Litton is experiencing it first-hand. Because of the economic situation in his market, he is forced to make up his irrigation service profit in volume.

"With rising interest rates, new construction came to a screeching halt, which meant less new-install jobs," he says. "Now we're going to clients who want to upgrade. There are more clients and less revenue, which is not a great business model but we're not in the position to do anything else."

Still, Haveruk believes there is room for optimism in the irrigation industry. "A lot has happened throughout the last



Irrigation as an add-on

5.2%

percent of landscaping companies surveyed plan on **adding irrigation services** to their offering lineup in 2007.

three or four years," he says, referring to technological and conservatism advances. "The Green Industry is taking note, and now we are having the pros stepping up and saying, 'I have the expertise.'

"People want continue to want nice landscapes," he concludes, "and that is helped with a well-thought-out and professionally designed and installed irrigation system." **LM**

TeeJet













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	Contact	Systemic			Contact	Systemic	
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Turbo TeeJet® Induction 	---	Excellent		Turbo TwinJet® 	Excellent	Excellent	
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Very Fine Fine Medium Coarse Very Coarse Extremely Coarse
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 02 Lawn Care Service Companies & Custom Chemical Applicators (ground & air)
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 04 Other Contractors/Service Companies (please specify) _____
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 11 Dealers, Distributors, Remanufacturers & Brokers 12 Manufacturers
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 20 Manager/Superintendent - Arborist, Architect, Landscape/Grounds Manager, Superintendent, Foreman, Supervisor
 30 Government Official - Government Commissioner, Agent, Other Government Official
 40 Specialist - Forester, Consultant, Agronomist, Pilot, Instructor, Researcher, Horticulturist, Certified Specialist
 50 Other Titled and Non-Titled Personnel (please specify) _____

3. Which of the following services does your company provide? (fill in ALL that apply)
(check all that apply)
 01 Mowing 04 Turf Disease Control 07 Irrigation Services 09 Tree Care
 05 Turf Fertilization 06 Turf Aeration 47 Bedding/Perennial Installation 10 Pond/Lake Care
 02 Turf Insect Control 45 Hydro-seeding 37 Utility Vehicles
 03 Turf Weed Control 46 Erosion Control 08 Ornamental Care 11 Snow Removal

LANDSCAPING
 12 Landscape Design 14 Irrigation Installation 48 Landscape Lighting Installation
 13 Landscape Installation 15 Paving/Deck/Patio Installation

4. Which of the following landscape products do you purchase or specify? (fill in ALL that apply)
 21 Mowers 22 Herbicides 28 Ornamental/Nursery Products 33 Tractors
 18 Engines 21 Fungicides 24 Irrigation Systems 44 Pick up Trucks
 16 Blowers 40 Biological/Organics 38 Ponds/Water Features 43 Cab Forward Trucks
 17 Chain Saws 36 Turf Seed/Seed 29 Pavers/Masonry/Bricks/Rocks 37 Utility Vehicles
 26 Line Trimmers 32 Spreaders (Hardscape Materials) 41 Business Management Software
 20 Fertilizers 39 Bedding/Perennials 31 Skid Steers 57 Other (please specify) _____
 23 Insecticides 42 Compact Track Loaders

5. My firm's annual revenue is: (fill in ONE only)
 001 More than \$4,000,000 003 \$1,500,000 - \$1,999,999 005 \$500,000 - \$999,999
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 20 Manager/Superintendent - Arborist, Architect, Landscape/Grounds Manager, Superintendent, Foreman, Supervisor
 30 Government Official - Government Commissioner, Agent, Other Government Official
 40 Specialist - Forester, Consultant, Agronomist, Pilot, Instructor, Researcher, Horticulturist, Certified Specialist
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Winners

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Garrick-Santo Landscape

Innovating and delivering exceptional customer service

BY RON HALL / Editor in Chief

There's a lot to be said for quiet and efficient competency.

Garrick-Santo Landscape Company, Malden, MA, goes about its business with little fuss or fanfare, delivering exceptional customer service around Boston and elsewhere in New England.

Even so the management of Garrick-Santo finds itself "in a fishbowl," says CEO Richard "Rick" Gottschalk, Jr. "This is a tight market with lots of competition. Whenever a new or innovative piece of equipment hits the road, or we do something different, it's not long before we're not the only ones," he says.

For instance, the Malden, MA-based company was one of the first in its market to use Toro Dingos, Super Lawn Trucks or Mulch Mules. "It's a compliment to know we are being mirrored and set trends."

That's the style of the Garrick-Santo management team



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The Garrick-Santo team offers a full palette of service including maintenance, lawn care, snow management.

— quiet, day-to-day service with trained, valued employees using the latest technology. The company offers a full-palette of services — design/build, property maintenance, lawn care and snow management.

While price is important to customers, value and performance are more important in the long run, says Gottschalk.

"We're pretty low key. Rather than hype we put our energy into doing things the right way," he says. "We absolutely feel we have an ethical and moral responsibility to our people, our families and our

clients to run a good business."

Although the principals in Garrick-Santo have a combined 44 years in Green Industry contracting, and the legacy operation began in 1981, Garrick-Santo is just seven years old, and resulted when Gottschalk and Robert Santo joined operations.

Complimentary styles

Gottschalk oversees financials and major purchases. Santo, a former professional baseball player, runs maintenance sales and most day-to-day operations, including scheduling. Anita Gottschalk, Rick's wife, handles all aspects of the design/build division.

The partnership has worked out well, perhaps because it involves individuals with strikingly different per-

sonalities, with Santo being the go-out-and-get-it-done-right presence and Gottschalk the primary strategist. The one thing both men agree upon is a completely ethical operation. No shortcuts.

While customer service is foremost, the owners also realize they're responsible, to a degree, for employees and families that depend upon them for employment. They know that to provide opportunity for their employee family "to assist them to step up to the next level so they can grow," Garrick-Santo must grow too.

To that end, Rick and Rob actively participate in industry associations. They know that the only way they can continue to improve is to learn new skills and implement new ideas. **LM**

►► **Online:** www.garrick-santo.com **Location:** Malden, MA
Principals: Richard Gottschalk, Jr., MCLP, CEO, Robert Santo, MCLP, COO Maintenance, Anita Gottschalk, MCLP, Design/Build Manager **Projected 06 revenues:** \$2.6 million
Founded: 1981 **Employees:** 26

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