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IN THE

BLACK

The *LM* Industry Pulse report reveals landscape companies are going strong with an average growth rate of 17 percent.



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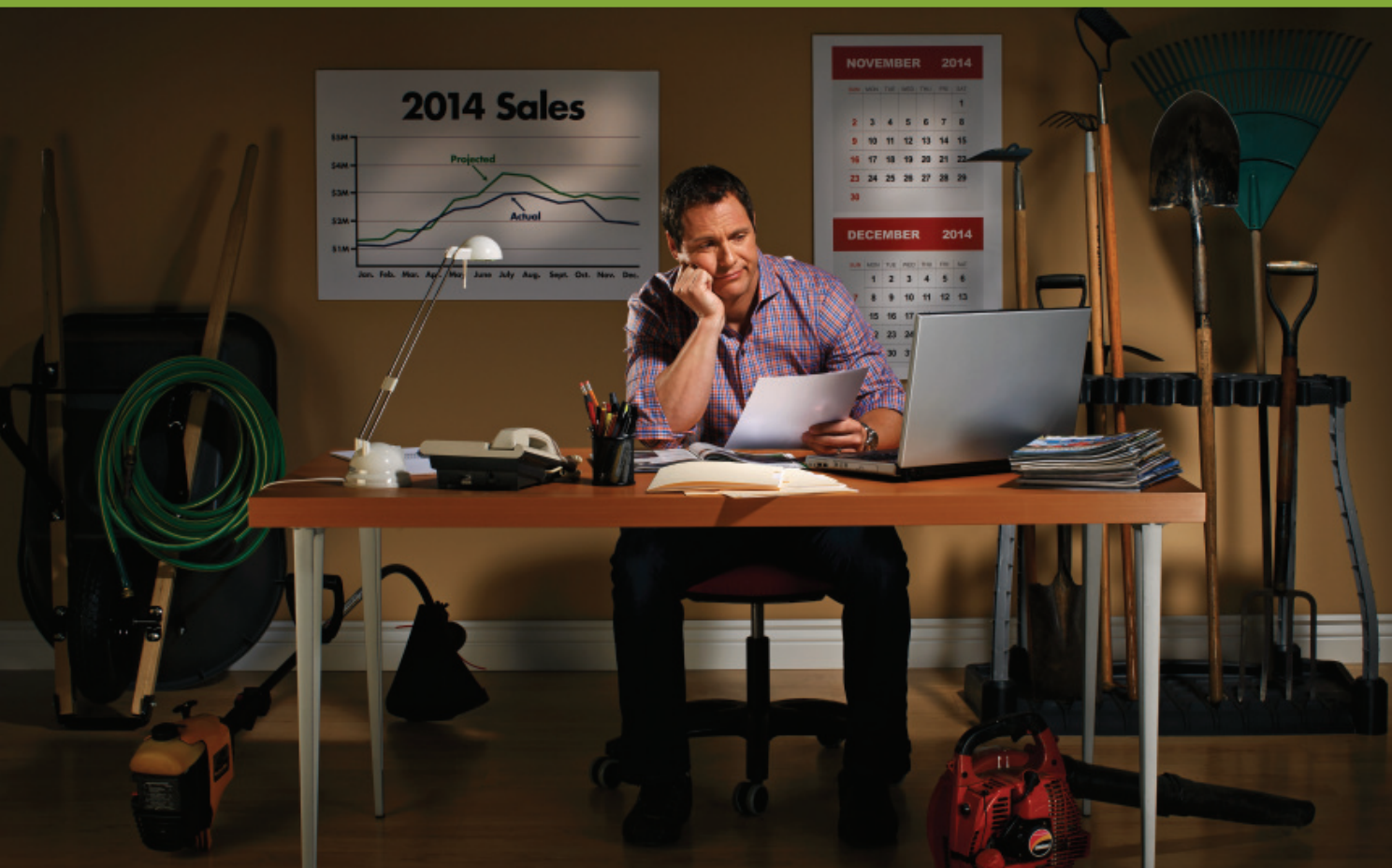
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ON THE COVER: PHOTO ©ISTOCK.COM/RENPHOTO



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NEW VIDEO ON LANDSCAPEMANAGEMENT.NET



→ We interviewed some of the country's leading lawn care operators at the 2014 *LM* Lawn Care Forum, held at Reunion Resort in Orlando, Fla., Nov. 11-13. Head to LandscapeManagement.net/video to see what attendees had to say about cash flow, hiring and more.


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Bullish bellwethers?

My ears perked up when I interviewed Philip Germann for the *LM* Industry Pulse report. The owner of Green-Lawn Specialists in Lewis Center, Ohio, said homeowners are having a hard time getting landscape professionals to return their phone calls.

It reminded me of an economic indicator, albeit unscientific, I read about a few years back: the Speed at Which Contractors Return Calls Index. According to *New York* magazine, if homeowners get a callback within 24 hours, the economy's in a recession. The idea got me thinking about other unconventional indicators economists watch to get a sense of the economy, so I tracked down the latest figures for a few of them.

The men's underwear index—Because they're a necessity, men's skivvy sales are relatively stable. During poor economic times, men hold out on buying new pairs. Thus, if men's underwear sales are up, the economy is in good shape. A brief look at the current data shows the men's underwear bottoms market grew 3 percent, reaching \$2.7 billion, in the 12 months ending in September, according to research firm The NPD Group.

The Dow Jones U.S. Economic Sentiment Indicator (ESI)—The ESI, which ranges from 0 to 100, projects the health of the U.S. economy by analyzing coverage of 15 major U.S. newspapers, using an algorithm to look for positive and negative sentiment about the economy in every article. The ESI checked in at 51.7 in October, down from 53.6 in September and 54.5 in August. That's compared with a 2013 average reading of 53—and an all-time low of 22.2 in November 2008.

Corrugated box index—Former Fed chief Alan Greenspan reportedly tracked corrugated box sales to clue in on demand for consumer goods. It's a telling metric because most nondurable goods are shipped via corrugated packaging. (You'll have to excuse the jargon. As a former editor of trade pub *Paperboard Packaging*, I'm forbidden to use the layman's term "cardboard.") What do the current numbers say? U.S. box demand will grow at 2.1 percent per year during 2015 to 2016 after being stuck at less than 1 percent per year since 2011, according to a report from industry authority RISI.

And there are many more unusual bellwethers, like the RV Index (recreational vehicle makers reported 10.5 percent year over year growth for September, the highest totals in seven years) and the Hemline Indicator (fashion forecasters are calling for midlength skirts to be on trend for 2015). When you combine the results of all these what you get is... a mixed bag of modestly good news that's probably more entertaining than it is useful.

That said, the overall theme I take away from these offbeat indicators and from putting together the 2014 *LM* Industry Pulse report is genuine optimism about the way things are going but a real concern about becoming complacent. Business owners don't want to oversell how good things are to themselves or to anyone else. There is no "irrational exuberance" like the pre-recession mid-2000s nor is there doom and gloom. There's a strong focus on doing the hard work necessary to keep their businesses in the black. ☺

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Q+A

In five words or less, describe the current state of the landscape and lawn care market.

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WEB EXTRA

See more insight from our Editorial Advisory Board in the Web Extras section at LandscapeManagement.net.

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“Best in a while.”



OUR MISSION: *Landscape Management* shares a comprehensive mix of content designed to stimulate growth and take our readers to their next level.

CORRECTION

In the November issue of *LM*, we misspelled a source's name in the cover story, “Cracking the code.” The general manager for Twin Oaks Landscape in Ann Arbor, Mich., is Chris Speen. The editors regret the error.

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BIG PICTURE

HOLIDAYS, SPECTACULAR

LOCATION Fashion Island,
Newport Beach, Calif.

COMPANY ValleyCrest Cos.,
Calabasas, Calif.

THE DETAILS This property, for which ValleyCrest won a 2013 National Landscape Awards of Excellence Grand Award from the Professional Landcare Network, has been a longtime client of ValleyCrest. Designed to make luxury shopping a destination event, Fashion Island is an iconic outdoor retail center that blends stores, al fresco dining and signature events year-round. But the holidays are truly special.

“Our team puts together the landscape of the Santa set in about 10 days,” says Ken McCausland, account manager, ValleyCrest Landscape Maintenance. “This includes pine trees of various sizes, 150 5-gallon holly bushes, about 200 flats of alyssum for ground cover to represent snow, about 800 poinsettias and several other plants to complete Santa’s yard.”

In addition, the miniature landscape surrounding an “elf village” is completed with lighting, young pine trees, sticks and rocks forming a stream.

PHOTO For the past 10 years, the client has relied on ValleyCrest’s design expertise for Christmas and Easter displays.

See additional photos and learn more online at LandscapeManagement.net/BigPicture.



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NEWS + HOW-TO'S

LANDSCAPE
INDUSTRY
TRENDS,
VIEWS
AND TIPS

RECOMMENDER

BRUCE'S VIEW

STEP BY STEP

NEW STUFF

EFFICIENCY
TIP

PIT CREW

About seven years ago, Chris Speen and the team at Twin Oaks Landscape in Ann Arbor, Mich., realized they needed to cut back on nonproduction hours—aka “a lot of guys standing around.” “We’re now at 12 crews, but as we got bigger—around four to six crews—it was hard,” says Speen, general manager of the \$2.4 million full-service company. “We thought, ‘How can we do a better job of not losing time?’”

The answer was to create a “pit crew.” Speen doesn’t recall where the idea came from, but he knows it’s been beneficial. He estimates it’s cut weekly nonproduction hours in half.

“Multiply that by 30 weeks, and you can see where there’s a significant amount of savings happening,” he says. “That goes right to the bottom line”

Here’s how it works: Four staff members make up the pit crew—two guys from the company’s recurring division and two guys from its project division. They arrive at work 90 minutes early and prep for the day, including changing mower blades, fueling trucks/mowers and running through the morning equipment checklist. That way when crew members arrive, they just get in their trucks and go. Start times are staggered every 15 minutes.

“The guys come in no more than five minutes early,” he says. “There is no standing around.”

Other benefits include giving the company’s best laborers extra hours, efficiency gains from pit crew members becoming proficient at their routine tasks and a reduction in mistakes because there are fewer hands touching the equipment.

“This is something we can control, unlike the economy, etc.,” Speen says. “You can only manage what you can control.”



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RECOMMENDER

Construction equipment

Which do you use and why?



David DeFranco, president of DeFranco Landscaping, excavating with a Kubota U35.



ANTHONY DEFRANCO
DEFRANCO LANDSCAPING
HAGUE, N.Y.

“We’ve used Kubota equipment for over 20 years. We use the U35 mini excavator and M59 backhoe every day—from loading materials in our yard to getting into the tightest areas on our job sites. We couldn’t run our business without them.”



FRANK NICASTRO
NICASTRO'S LANDSCAPING
LINCOLN, MAINE

“The John Deere 110 TLB is the best versatile machine out there. Within seconds you can put a rake, rototiller, Bush Hog and/or sweeper on it. The machine is compact for tight places and versatile. It’s a big, strong machine in a small package. It’s the best thing I did for my family business.”



TIM JOHNSON II
PRESIDENT
TIM JOHNSON LANDSCAPING
STATESVILLE, N.C.

“The Vermeer S650TX is in a league of its own when it comes to tracked mini skid-steers. We use it for everything: augering, trenching, light grading, hardscapes, mulch, etc. It is a game changer for us, especially on smaller/tighter properties.”

BRUCE'S VIEW



BY BRUCE WILSON

The author, of the Wilson-Oyler Group, is a 30-year industry veteran. Reach him at bwilson@wilson-oyler.com.

CREATE AN ACTIONABLE PLAN

Planning is crucial to profitable business growth, but few companies ever realize their plan’s full potential. Here are four ways to execute and stay on track.

1. Reach out to employees. Use a facilitator to help the process remain open and objective. A facilitator gives the employees protection to offer up their very valuable opinions without having to give them directly to you, the owner. Often the best insight is in the things left unsaid.

2. Set stretch goals. The best plans stretch your team. You can (and probably should) give your banker a conservative budget, but why not have a stretch budget? Planning should involve some realistic assessment of what’s likely going to happen if you do or change nothing. It also should focus on what you can do to achieve something special.

3. Factor in contingencies. A robust strategic plan must be grounded in your company’s economics and marketplace variables. It involves shrewd forecasting and evaluating uncertainties. The best planners plan for both best- and worst-case scenarios, especially when it comes to weather. It’s a lot of work, but preparation prevents failure.

4. Monitor and measure. The plan is not an end in itself. It must be monitored and measured. Be sure to give regular updates at management meetings; create ownership of actionable goals so someone is accountable; stay committed through due dates; review your plan against reality every quarter; target sales and marketing tools to align and link them between your business goals and revenue; and reward success. Measure what’s important, not what’s easy.

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STEP BY STEP

Identify Emerald Ash Borer damage

Infestations of the Emerald Ash Borer (EAB) once were confined to the Upper Midwest U.S. Now they're in Canada, as far east as New Hampshire and as far west as Colorado—and spreading further. Not to mention, one researcher has found evidence the invasive green beetle now is attacking the white fringetree, an ash relative.

Here are some tips for you and your crews to ID an EAB infestation. If you find a damaged tree in your area, report it to your county extension office or visit emeraldashborer.info and click on “Reporting EAB.”

- Many symptoms shown by EAB-infested ash trees resemble symptoms caused by other pests or diseases. If several symptoms or signs of EAB are present at the same time, you may have an infestation. Examples include: crown dieback or thinning at the top of the tree, which happens after several years of larval feeding; suckering or epicormic sprouting, which is new growth at the base of the tree and on the trunk (Step 1); and vertical splits in the bark or woodpecker flecking, which looks like strips of bark have been pulled off of the tree (Step 2).
- One sign includes the presence of EAB adults or larvae. Adults emerge from under the bark, creating a D-shaped emergence hole (Step 3). As larvae feed under the bark they wind back and forth, creating galleries that are packed with frass and sawdust and follow a serpentine or S-shaped pattern.
- Adult beetles are metallic green and about the size of one grain of cooked rice (3/8 inch to 1/2 inch long and 1/16 inch wide). Adults are flat on the back and rounded underneath. EAB larvae are cream-colored, slightly flattened and have pincher-like appendages at the end of their abdomens. By the time larvae are done growing they are 1 1/2 inches long. 

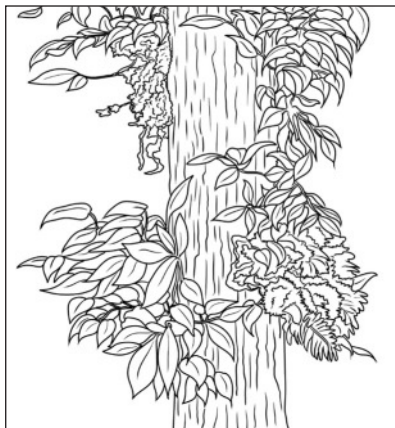
SOURCES: Wisconsin's Emerald Ash Borer Information Source, Iowa State University Extension Service, Illinois Department of Agriculture, emeraldashborer.info

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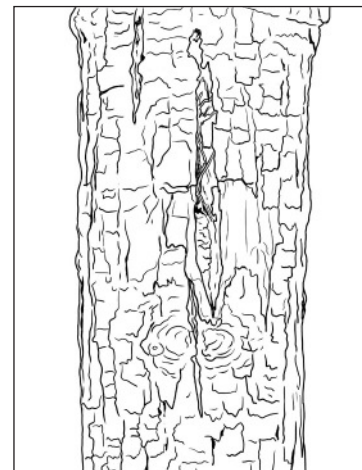
STEP 1

Look for new growth at the base of the tree and on the trunk (this is often just below where the larvae are feeding). When trees are stressed or sick, they'll try to grow new branches or “suckers” and leaves wherever they can.



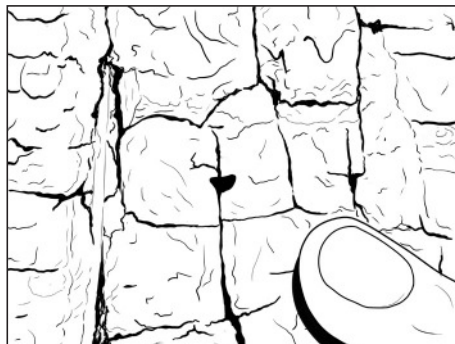
STEP 2

Notice any areas where bark has split vertically. Woodpeckers also may feed on the beetle, leaving visible damage on the bark.



STEP 3

Check trees for D-shaped emergence holes. As adults emerge from under the bark they create a unique hole about 1/8 inch in diameter. It may be anywhere on the trunk or upper branches.



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NEW STUFF



1. ATLAS JSV UTILITY VEHICLE

COMPANY: Gravelly

URL: GravellyAtlas.com

Designed for heavy job site work, the utility vehicle, aka job site vehicle (JSV), has a 1,900 lb. payload and 2,000 lb. towing capacity. The 48-in.-by-57-in. bed accommodates a standard wooden pallet. An electric cargo bed lift is standard on all models, including the Atlas JSV-3000 (pictured) and the Atlas JSV-6000. Accessories are available.



2. 40V MAX BRUSHLESS STRING TRIMMERS

COMPANY: Dewalt

URL: Dewalt.com/outdoor

The cordless trimmer comes with either the 4.0Ah lithium-ion battery or the 6.0Ah lithium-ion battery. It features a 15-in. cut swath, dual-line bump feed head and a patented gear drive design that maintains cut speed under load, according to the company.



3. RZ MASK FACE MASK

COMPANY: RZ Mask

URL: RZMask.com

Made from neoprene material and equipped with a laboratory tested active carbon filter, the RZ Mask is a filtered face mask for advanced dust and allergen protection in hard-scape and landscape applications, among others. It fits under glasses, helmets and goggles and filtrates 99.9 percent of dust and allergens while absorbing odors, according to RZ Mask.



CHECK OUT MORE NEW STUFF ONLINE

To stay up to date on all the latest landscape industry products and services, visit LandscapeManagement.net/tag/product-news.

4. X TWEEL TURF AIRLESS RADIAL TIRE

COMPANY: John Deere/Michelin

URL: JohnDeere.com/Tweel

The Michelin X Tweel Turf is an airless radial tire sold exclusively for John Deere ZTrak 900 Series models with 54-, 60- and 72-inch deck sizes. The X Tweel Turf has the same dimensions and bolt pattern as a standard 24x12x12 tire and features automotive rubber technology, allowing the tread to last up to three times longer than standard turf tires, according to the manufacturer.

5. STRYKER STAND-ON MOWER

COMPANY: Dixie Chopper

URL: DixieChopper.com

The Stryker Stand-On comes in two models: the 2648 and the 2654 (pictured). Both feature the Vanguard 810cc series 26 hp engine—the difference is a 48-in. vs. 54-in. deck. The machines are forged from 7-gauge steel and 14-gauge stainless steel and they offer the ability to flip up the operator platform to use as a conventional walk-behind.

6. HORIZON TECHNOLOGY INTELLIGENCE PLATFORM

COMPANY: Toro

URL: Toro.com/zmasterhorizon

Available on two Z Master Professional 6000 EFI models, this onboard intelligence platform allows operators to choose from three operating modes to maximize fuel efficiency in different mowing conditions. Using a simple three-position rocker switch, the operator can choose from three defined performance modes. The Horizon platform also monitors engine oil temperature and oil pressure.



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LARGE HOP CLOVER

Trifolium campestre

IDENTIFICATION TIPS

- ▶ This low-growing winter annual has trifoliate leaves similar to white clover (*T. repens*).
- ▶ Leaflets have prominent veins, with the terminal leaflet on a short stem.
- ▶ Short, hairy, slender stems are reddish in color and have a tendency to sprawl.
- ▶ Bright yellow flowers grow in clusters, each producing a single seed.
- ▶ Active growth begins with cooler temperatures and increased moisture.

CONTROL TIPS

- ▶ Apply a postemergent systemic herbicide that will move from the treated foliage throughout the plant and into the extensive root system to completely control this weed.
- ▶ Consider adjusting your fertility program to include more nitrogen and less phosphorus.
- ▶ Proper turf maintenance also will greatly reduce clover's prevalence. In addition to fertilization, proper mowing and watering will encourage healthy turf.



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BLACK MEDIC

Medicago lupulina

IDENTIFICATION TIPS

- ▶ This creeping summer annual is common in lawns stressed from compaction, heat and drought.
- ▶ Often confused with clover (*Trifolium spp.*), black medic is distinguished by its bright yellow flowers and leaf arrangement. The leaf is similar to clover and other legumes with three leaflets, but black medic's center leaflet is on a separate petiole.
- ▶ Prostrate stems, 1 in. to 2 in. long, grow from a taproot.

CONTROL TIPS

- ▶ Clean up any established black medic with a post-emergent herbicide containing florasulam. Time your application in spring or fall.
- ▶ Black medic germinates when soil temperatures are between 50 F and 75 F. Apply a preemergent herbicide containing dithiopyr prior to germination or just after elimination via post-emergent control.
- ▶ Nitrogen fertility and aeration also can help encourage a dense turf stand, minimizing black medic establishment.

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For more information regarding these and other turf weeds — and related control technologies and tips — please visit www.DowProvesIt.com or call 800/255-3726.

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'POND STARS' SECRETS

Power through pond services with these pointers from The Pond Guy, aka Greg Wittstock.

▶ PAGE 26





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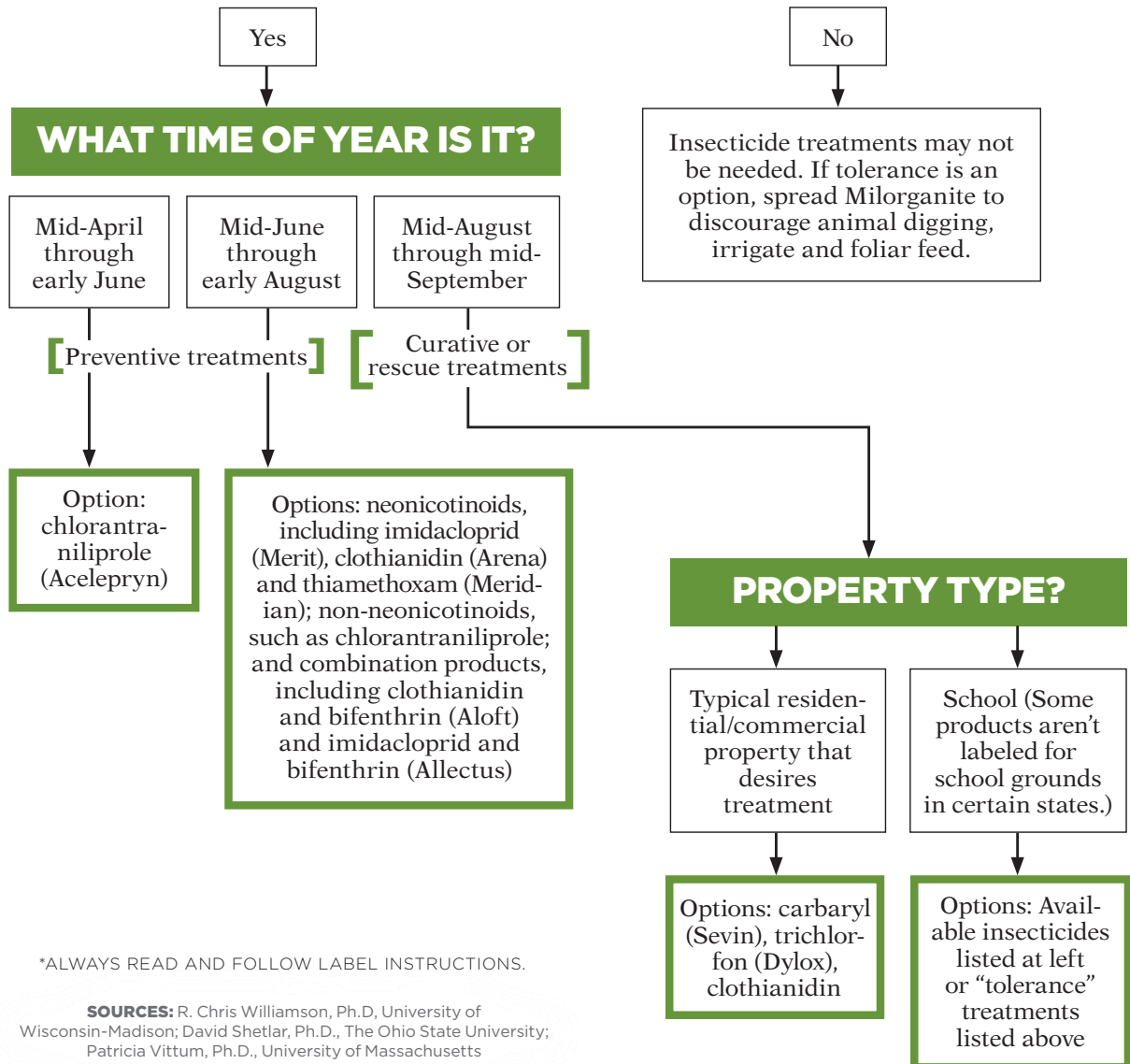
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Got grubs?

Check out this cheat sheet to help you determine if you should treat for white grubs and *how**. BY MARISA PALMIERI

ARE 5 TO 7 GRUBS PRESENT AMONG SEVERAL 12-IN. SQUARE SOD SAMPLES AND IS THERE A HISTORY OF DAMAGE?



*ALWAYS READ AND FOLLOW LABEL INSTRUCTIONS.

SOURCES: R. Chris Williamson, Ph.D., University of Wisconsin-Madison; David Shetlar, Ph.D., The Ohio State University; Patricia Vittum, Ph.D., University of Massachusetts

A WORD ON IRRIGATION...

Regardless of the control product or approach (preventive or curative), all grub control treatments must be watered in with sufficient irrigation or rainfall, says Chris Williamson, Ph.D., turfgrass and ornamental specialist, University of Wisconsin-Madison.



NEWSFEED

TRADE SHOW TIME

New England Grows, recently named one of the Top 25 Fastest Growing Trade Shows by *Trade Show News Network*, is scheduled for Feb. 4-6 at the Boston Convention & Exhibiting Center. Early registration discounts are available until Jan. 15.

DAVEY EXPANDS

The Davey Institute welcomed Christine Balk and Aaron Carpenter to the organization to develop treatments for tree diseases and provide diagnostic support for the Mid-Atlantic region, respectively.

EAB ELECTROCUTION

A team of international researchers, including some

from Penn State, created female Emerald Ash Borer (EAB) decoys that electrocute male EAB beetles when they attempt to mate.

SCOTTS RESULTS

Scotts Miracle-Gro Co. reported a \$166.2 million income for 2014, compared to \$161.1 million a year ago. In addition, Scotts Lawn-Service sales increased 2 percent this year to \$263 million.

BAYER/DUPONT DEAL

Bayer CropScience purchased crop protection and land management assets from DuPont in the U.S., Canada, Mexico, Australia and New Zealand. Terms were not disclosed.

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MOWING+LANDSCAPE MAINTENANCE

Taking a stand

As the stand-on mower category grows up, its audience grows too. BY BETH GERACI

With various mower types, such as zero-turn radius (ZTR) and walk-behinds, competing for space in the mower market, stand-ons elbowed their way in during the late 1990s. And their useful place in the world of mowers is becoming more firmly cemented as time goes on.

Lawn maintenance operators are taking a stand for stand-ons for several reasons, most of all for their productivity. Aaron Fine, owner of Fine Landscaping, a full-service company in Mansfield, Mass., switched from walk-behinds to Wright Manufacturing stand-on mowers 15 years ago. The move boosted his crews' productivity by nearly 20 percent, he estimates.

And that's just it, says Carl Agee, product manager, John Deere Commercial Mowing. "The stand-on mower offers a compact package that offers operators the ability to increase productivity when compared to commercial walk-behind mowers."

The 20 percent jump in productivity was significant for Fine, considering half of Fine Landscaping's business is maintenance. (The other half is

landscape construction.) With a customer base that's 80 percent residential, Fine's crews work about 360 homes a week.

Agee says one look at the growing number of stand-on manufacturers that have emerged since 2009, and it's easy to see that stand-ons are becoming more popular. John Deere, Wright, Scag, Exmark, Gravely, Dixie Chopper and Toro are among the manufacturers that offer stand-ons today.

"That is a testament that the popularity and awareness is growing," Agee says. "More importantly, it has driven customer acceptance as a cost-effective solution wanting to move away from the traditional commercial walk-behind products."

In Fine's area, stand-ons are the most common type of mower he sees on lawns, he says. "They were a good machine from the start, but they weren't as popular then as they are now."



Aaron Fine

OTHER BENEFITS

While Fine contends his stand-ons empower his crews with more energy throughout the day, as opposed to slogging behind a walk-behind, Eric

A STAND-UP PRODUCT

Wright Manufacturing pioneered the stand-on mower in 1997. Here's its latest model, the Stander ZK.



Olseen, president of Paradise Lawns & Landscaping in Cocoa, Fla., also finds stand-ons more efficient than other types of mowers.

"They get the job done quicker," says Olseen, whose company did about \$4.5 million in annual revenue last year. "We ran some numbers earlier this year, and according to our applications, the stand-ons proved to be about 15 to 20 percent more efficient overall."

Operators and manufacturers alike tout stand-ons for their clean cut, compactness, lighter weight and ability to mow in tight areas. By being lighter, stand-ons produce fewer ruts on lawns than their counterparts, they say. And their compact size makes them easy to transport and creates more space on trucks. It all contributes to increased productivity on the job, Agee says.

At Paradise Lawns & Landscaping, Olseen says they can fit up to eight stand-ons on each truck, versus two or



Carl Agee

PHOTO: WRIGHT MANUFACTURING

NEWSFEED

WORLD RECORD

On Aug. 20 at Molly Caren Agricultural Center in London, Ohio, Dixie Chopper Market-

ing Manager Eli Kean set the Guinness World Record for largest area of grass mowed by a single-deck, ride-

on lawn mower in 24 hours. Kean set the record with Dixie Chopper's XCaliber 3574.

MOWER RECALL

Briggs & Stratton recalled about 8,500



Snapper rear engine riding mowers to repair faulty welding. Visit buff.ly/1vk6Pfb to see what models and serial numbers the recall involves.

PARTNERSHIP

Reliable Property Services formed a strategic partnership with Lawn Ranger. Both companies are located in the Twin Cities.



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MOWING+LANDSCAPE MAINTENANCE

three ride-ons. And for a company such as Fine Landscaping, where stand-ons constitute 90 percent of the mower fleet, the mowers' compactness means the company can invest in smaller trucks and thereby save money.

Perhaps most importantly, stand-ons have gained a reputation for being safer than ride-on mowers. Their higher perch offers operators greater visibility, leading to increased operator attention, fewer mistakes and less damaged turf. For operators, less damage ultimately translates into financial savings and customer retention.

Stand-ons also aren't subject to rolling over like some ride-ons are. Whereas ride-on operators typically must lift the rollover protection safety device to exit the machine, stand-on operators can simply jump off.

ORIGIN STORY

Stand-ons made their debut in 1997 with the release of Wright Manufacturing's Wright Stander. It was a concept that had been formulating in CEO Bill Wright's mind since 1989, when he and his team member Jim Velke developed a stand-on "sulky" that trailed walk-behinds. It was branded the "Velke Sulky" and intended to make mowing easier for crews.

"When we had our lawn mowing service, Lawn-Wright, Inc., in the 1980s, I realized that with our roughly 35 guys walking 20-plus miles a day, production mowing was leading to very high turnover," Wright recalls.

The Velke Sulky quickly became a highly productive invention for the company and another high-volume product in its wintertime manufacturing division. But it wasn't enough.

"In 1993, after our sales had skyrock-

eted, I read an article in *Inc.* magazine to the effect that every manufacturer needs to invent a product that makes their own obsolete before someone else does," Wright recalls.

"This thought startled me into racking my brain to think of a way to obsolete the stand-on sulky," he continues. "Then it occurred to me, why not stand on the mower itself instead of trailering a more cumbersome sulky behind a walk-behind?"

By 1994, Wright Manufacturing was making stand-on mower prototypes and applying for patents. "The rest, as they say, is history," Wright says.

Today's stand-ons have features such as adjustable platforms, increased horsepower and fuel efficiency, and Mulch on Demand, which was only available on zero-turns until John Deere added it to its stand-ons last year.

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Bill Wright

DRAWBACKS

As popular as stand-ons are becoming, they're not a remedy for everyone. At Paradise

Lawns & Landscaping, three-fourths of the mower

fleet are stand-ons and the clientele is 90 percent commercial, including many large properties. But that combination is unusual.

Landscape contractors maintaining larger properties "tend to still prefer a sit-down ZTR," Agee says. "The ZTR still provides a productive solution where space is not a constraint."

The stand-on mower also has "a size-limited capability to collect grass," Agee says. Fine warns that inexperienced workers should be careful not to turn too quickly, so as not to rip up the grass. And Olseen says stand-ons aren't so stellar on wet hills and inclines.

"If the area is too steep, the mower seems to struggle," he says. "Therefore, the strengths for this mower would be more level terrain or minute inclines."

For inexperienced operators, the learning curve for stand-ons is a bit steeper, too, says Bill Wright, CEO of Wright Manufacturing. Curb hopping takes practice.

"I think the biggest drawback has been that to become proficient, new operators need an extra week or so of experience than they do to learn to operate mid-mount zero-turns and walk-behinds," Wright says. "But once they do learn it, their productivity goes up between 20 and 35 percent compared to other styles of mowers."

WHAT THE FUTURE HOLDS


Manufacturers expect stand-ons to become more popular in coming years. "Customer feedback will drive other features and benefits as the product matures," Agee says.

Wright expects stand-ons to become more popular in areas where the concept hasn't yet taken hold. That will

require educating and demonstrating for nonusers who "assume it's harder to stand up than sit down," Wright says.

In the meantime, Fine and Olseen will continue to enjoy the mower's benefits.

"Time is money in this business, and

every other business for that matter," Olseen says. "To take a product and increase productivity is everyone's No. 1 goal." 

Geraci is a freelance writer based in Cleveland.



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Pond pointers

As the CEO of Chicago-based Aquascape and the face of Nat Geo Wild's "Pond Stars," Greg Wittstock offers his expertise on pond installations and maintenance. **BY SARAH PFLEDDERER**

Q: WINTER IS HERE. ANY TIPS FOR MAINTAINING A POND IN THE FRIGID TEMPERATURES?

A: Have a hole open in the ice for carbon dioxide to be released and have a supplemental aeration system. If there's a big fish in there, they're going to need extra air. With bottom aeration or a waterfall, you add oxygen in and allow carbon dioxide to be released.

Q: SHOULD EVERY POND HAVE WILDLIFE IN IT?

A: The No. 1 thing, and this is such a critical element, is to design ecosystems. A pond should be self-balancing. This is something that's very rarely achieved because the vast majority of water features are improperly constructed. There are five

elements that need to be in proper order, in proper balance for an ecosystem: 1). rocks and gravel, 2). plants, 3). fish, 4). mechanical and biological filtration, and 5). pump/plumbing.

If you have those five parts in the proper balance, you will have a low-maintenance ecosystem pond (see Web Extra). That's how I built the world's largest company in my space.

Q: WHAT ARE SOME OF THE MOST COMMON MISTAKES YOU SEE IN POND INSTALLATIONS?

A: Think assembly line cookie-cutter when you



Greg Wittstock

think water features. They all should be built the same way. You should not deviate from your set methodology. Just follow

the plan, Stan. When you do that you can have success. The way to make money is to do every pond with exactly the same construction methodology. Every setting is unique and every design is different, but the process to build it should never change.

Q: CAN YOU EXPAND ON THAT PROCESS?

A: Aquascape has a set

A SET METHOD
Think 'cookie-cutter assembly line' during pond installs, Wittstock says. Use a set methodology each time that adapts to different dimensions.



methodology for construction of water features. This is polar opposite of the way most water features are built. Most water features are built differently every time. A landscape contractor wouldn't dream of putting a patio down, planting a tree or putting in an irrigation system differently. But when it comes to ponds, they do all sorts of ways—whatever suits their fancy. Subsequently, they never get good at it. When I think ponds, when I think water features, I think cookie-cutter assembly line. It allows you to spend all of your time on the creative

NEWSFEED

TWEEL TAKES OFF

Michelin expanded its airless radial tires for use on skid-steers with the release a 12N16.5 X

Tweel SSL All Terrain and a 12N16.5 X Tweel SSL Hard Surface. With the growing demand for the Tweel,



Michelin also recently opened a manufacturing plant for the tires in Piedmont, S.C.

FREE EVENTS

Techo-Bloc mapped out its 2015 Contractor Showcase, comprising 38 free hardscape events across the nation. The showcase kicks off Jan. 6 in Frederick, Md.

SKID-STEER UPGRADES

Bobcat added the S450 to its M-Series skid-steer lineup. The unit replaces the manufacturer's K-Series S130 skid-steer.



elements instead of trying to figure out how to do the install. That's what we do. We teach a set methodology. For shooting "Pond Stars," I travel all over the country to film an episode and I show up with the cameras in tow and we start building. I've built that pond thousands of times before because it's the same pond with just different dimensions.

Q: HOW DO YOU DETERMINE THE BEST LOCATION FOR A POND?

A: The No. 1 thing about designing a water feature is you want it up close and personal to the living space. Most consumers will ask you for the back corner of the yard. That's not where you put it. Even outdoor-loving people spend 95 percent of their time in their houses.

BEHIND THE SCENES

Wittstock opens up about his professional image as The Pond Guy and landing a reality show on Nat Geo Wild.

Q: IS IT TRUE YOU TRADEMARKED YOUR NAME THE POND GUY?

A: Yes, I did a long time ago. In 1996, I think.

Q: WAS IT ALWAYS A GOAL OF YOURS TO HAVE A REALITY SHOW?

A: Everybody always would go, "Wow, you build ponds." They would say, "You need a reality show." We have our YouTube channel, Aquascape4. A producer out in Los Angeles was looking for aquatic plants for her pond. She stumbled across one of our plant videos and thought we were kind of interesting. That was three years ago. Today, here we are.

Q: YOU'VE BEEN ON YOUTUBE FOR QUITE SOME TIME NOW. WHAT'S THE IMPORTANCE OF VIDEOGRAPHY TO YOUR BUSINESS?

A: I started filming in 2008. The No. 1 thing that made it successful for us was we were consistent with it. Every Friday, I created a video and posted it on YouTube. We still do, to this day, our Friday videos. Now we have over 5 million views.

Q: WHAT LED TO YOUR INTEREST IN PONDS?

A: I've got a lot of turtles. My wife calls me a turtle hoarder. That's how I got into this business. I needed a home for my pet turtles when I was a 12-year-old kid. I took my hobby and turned it into the largest business in the world of its kind. My main business right now is to train, educate, teach and inspire. Most contractors don't want to touch water features because they build them a hundred different ways. But water is the most critical element in any landscape. Water is the only form of landscaping that sells future work. People can sell a patio and be done. Do plants and be done. Do lighting and irrigation and be done. When you do a water feature, you need those other elements to support it. If a contractor masters what we teach them, the art of water features, then they create the need for future work.



UP CLOSE

Keep water features as close to the living space as possible.



From the kitchen window, the view from your living room, the sound from your master bedroom, these are things to consider when you're designing a pond.

Q: WHAT'S THE MOST TRYING PART OF BEING IN THE POND INDUSTRY?

A: People don't know what they want. People think they know. The No. 1 rule is to not give a customer what they ask for, give them what they want. That comes through education. Not just educating the consumer, but for me to educate the contractor on how to do that. Fifty percent of the time somebody tells me how high their waterfall is, I tell them I have to make it half that size to make it look natural. What they really want is a natural waterfall. They

don't want a volcano, but they don't know that. Follow the rule of not giving the customer what they ask for but give them what they want. That customer, what they really wanted was a 2-foot high waterfall in their flat backyard to be to scale with their property. When a customer asks you for something, what they're really asking you for is your opinion. Do not give customers what they ask for. Give them what they want.

Q: IT SOUNDS LIKE YOU'VE BESTOWED THAT ADVICE BEFORE.

A: About a gazillion times. This is my 34th year as a hobbyist and my 23rd year as a business owner. 🐢

WEB EXTRA

Visit LandscapeManagement.net to download a copy of Aquascape's 20-step process for building low-maintenance ecosystem ponds.



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Irrigating a capital

How Nutri-Lawn Ottawa navigates certifications and security clearances to provide irrigation services for government properties.

BY SARAH PFLEDDERER

Looking beyond its hefty duty to water every blade of government grass in Canada’s capital—and receiving security clearances and certifications to do so, Nutri-Lawn Ottawa has a surprisingly simple end in view.

“Hopefully we’re as nice to the homeowner as we are to the prime minister,” says Rob Johnstone, irrigation project manager for the branch of Nutri-Lawn Corp.

Headquartered in Toronto, the corporation has 28 locations. Nutri-Lawn Ottawa maintains 2,500 irrigation accounts, a fifth of which are commercial, including the government account it has secured for 10 years. It’s the largest irrigation service provider in the city, Nutri-Lawn Ottawa’s Irrigation Coordinator Martina Charlebois says.

The branch has taken a two-sided approach to get to that point: 1). On the job site, it makes safety a top priority through certifications, and 2). When it comes to customers, it operates with a “you call, we come” manifesto.

CERTIFIED TO PROVIDE

Certifications vary from region to region in Canada, Johnstone says. The four that Nutri-Lawn Ottawa requires its irrigation technicians to hold include Workplace



Hazardous Materials Information System (WHMIS); first aid; confined space; and fall arrest, aka fall safety.

“You have to have all four of those just to get on the job site in a lot of places,” Johnstone says.

WHMIS and first aid are required on all job sites, whereas the confined space certification and fall arrest certification are necessary for commercial job sites.

With Nutri-Lawn Ottawa’s irrigation segment comprising 30 percent of the business, the certifications can be handy in its other profit centers as well. Lawn care makes up 50 percent and lighting (landscape and holiday) accounts for the remaining portion.

Employing up to 30 irrigation technicians during its busy season, Nutri-Lawn Ottawa makes an ample investment in certifications each year. Most require daylong courses and cost around \$80 per certification per person, Charlebois says.

It’s a small price compared to what could occur if something went wrong, Johnstone says, especially on commercial accounts where there are more hazards. Plus, with all mainline pipe located 5 feet below ground in Ottawa, the confined space certification is a safeguard for technicians who must enter manholes or concrete bunkers.

In accordance with the certification, technicians who enter such confined spaces must test the air quality before entering the area and be attached to a winch, plus complete the proper paperwork to affirm procedures were followed.

The fall arrest certification, “that’s basically for anybody who’s going to be using ropes and harnesses on a

CONFINED SPACES

Nutri-Lawn Ottawa requires techs to hold confined-space certification to work on commercial job sites, such as this city athletic field.



Martina Charlebois



Rob Johnstone

roof, anywhere you can fall,” Johnstone says.

It’s been necessary for irrigation installations on green roofs—a service on the upswing at Nutri-Lawn Ottawa, Johnstone adds.

FAMILIAR FACES ARE KEY

Like certifications, security clearances are a requirement for some Nutri-Lawn Ottawa technicians who work on government property.

“All our employees have site-access security clearance,” Johnstone says. “Then anybody who has to go into the buildings to turn on and off the water, they have to have an upgraded security level.”

To receive clearance, technicians must fill out an eight-page form, providing previous employers, criminal record, “a full rundown of your life,” Charlebois says. If approved, the clearance is good for four years.

Though, not all Nutri-Lawn Ottawa employees work on the government sites. “The group we use for the government accounts have been with us for over five years,” Charlebois says.

Johnstone adds, “We keep those techs on those routes to keep the familiarity there.”

In the event a “rookie” technician receives security clearance, he or she must shadow a cleared “veteran” technician to learn the ropes on government sites and build relationships with personnel on the account.

Nutri-Lawn Ottawa uses this familiar-face tactic for residential accounts, too, keeping technicians on the same routes to develop more personal customer relationships.

“Generally we maintain the same service level,” Johnstone says. “We just do good work, and show up on time when they need us to. We excel in ‘you call, we come.’ That keeps people happy.”

NEWSFEED



2014 IRRIGATION SHOW

Held Nov. 19-20 at the Phoenix Convention Center, the 2014 Irrigation Show & Education Conference drew 4,100 attendees and 304 exhibitors. In addition, the New Product Contest returned this year, with Hydro-Rain taking the

crown in the landscape/golf category for its PVC-Lock Manifold Tee. Hunter Industries’ MP800SR received an honorable mention.

E3 PROGRAM

The Irrigation Foundation named 13 students and faculty as winners of the 2014 Irrigation E3 Program. The founda-



tion sent the group to the 2014 Irrigation Show, where The Toro Co., donated \$20,000 to the organization in support of the program.



JAIN HIRE

Jain Irrigation hired Richard Restuccia, formerly director of water management solutions at ValleyCrest, as its vice president of landscape solutions.

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SNOW+ICE

GUIDE



LEADERS
From left:
Jay Felton
and Fritz
Frazier.

Systemized SUCCESS

How Winter Services uses systems to streamline operations and drive growth. BY SARAH PFLEDDERER

Puzzled faces stare back at Jay Felton, president of Winter Services, when he poses the question, “How many of you are unworried about your business when you’re away?” during a presentation to snow professional peers at the Snow & Ice Symposium, held June 18-21 in Columbus, Ohio.

Finally, Felton’s business partner and CEO Fritz Frazier breaks the silence in the conference room at the Columbus Convention Center.

He waves a 2-inch-wide binder with four tabs above his head. It’s Winter Services’ “systems journal,” Frazier explains, “nothing super sexy,” just “simple.” It’s how he and

Felton keep peace of mind that operations are running smoothly at their headquarters in West Allis, Wis., in their absence.

The binder’s tabs represent four business divisions—administration, fleet management, operations/production and sales and marketing. They house the deliverables for each division 365 days of the year and, most importantly, the deadlines by which those should be met by its 20 full-time employees and 500 seasonal employees.

The tome embodies the secret sauce to Winter Services’ success: systems or, as Frazier puts it, “how things get done” at the commercial snow removal company.



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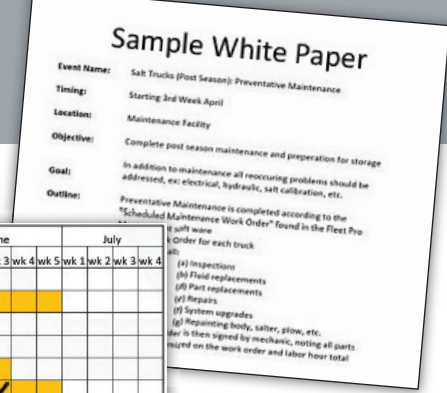
SNOW+ICE GUIDE

IDENTIFY A NEED

It all started with a “midlife crisis,” Frazier says, jokingly.

“I had a dream,” he recalls. “I wanted to run a business, enjoy the fruits of labor. I ended up buying a freaking snow removal business.”

Week	April				May				June				July			
	wk 1	wk 2	wk 3	wk 4	wk 1	wk 2	wk 3	wk 4	wk 1	wk 2	wk 3	wk 4	wk 1	wk 2	wk 3	wk 4
Salt Trucks																
Preventative Maintenance																
Truck, Plow, Liquid, Spreader Inspection																
Plow, Liquid, Spreader Parts Order																
Rhomer and Paint touch up																
Install all Repair Parts																
LOGO/DOT Inspections																
Calibration of Salt/Liquid																
Load Test & Run																



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LEADERS IN ICE CONTROL

Working as an executive at Kohl's at the time, snow removal seemed sound due to its singular focus. In Frazier's eyes, it also was an admirable occupation, being that it's more need-based than service-based.

Within six months of taking over the business in 2005, Frazier noticed his need-based business had a lot of needs itself, especially in the areas of cash flow, sales, routes and employee management.

From prior experience, he knew systems were the answer.

Frazier, who calls himself “more of a visionary,” welcomed Felton to the business in 2007. Felton, who also came from Kohl's, is more execution-oriented and helped steer Winter Services into a system-focused organization, Frazier says.

Drawing on both of their experiences from the department store and Frazier's experience at PC maker Gateway, the executives piggybacked off the ways those large corporations ran successful companies.

Operational systems are the focus, Felton says. The gist is to create documents to manage people's behaviors.

To jump-start the systemization process, “We got everything out of everyone's heads and put it on a calendar,” Frazier says.

SET MILESTONES, WORK BACKWARD

The first step is identifying critical business domains, such as Winter Services has with administration, fleet management, operations/production and sales and marketing.

continued on page 36

PHOTO: WINTER SERVICES

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Continued from page 32

"Each area in your business should have a designated point person who will be responsible for building and maintaining their respective portion of their systemization process," Felton says.

Next, have those point people identify milestones to be met every year (see sidebar below). Then, plot those milestones on a Gantt chart or tracking document, such as an Excel spreadsheet, creating deadlines for when each should be accomplished.

From there, work backward. Plot small milestones that must be completed to meet the larger milestone on deadline, also noting who is responsible for completing them.

"Write down all these key steps and how far in advance you would like them accomplished," Felton says.

Use historical data to determine the milestones. It's critical to have employees plot these timelines themselves, he adds.

"It forces your employees to be realistic about what they have to get done," Frazier says. "The reality of it is they don't make some of those deadlines, but it gives them guardrails of your business so you don't fall off the cliff and totally miss something."

For example, if a piece of equipment needs serviced within 30 days, small milestones could include when the equipment should be assessed by and when blades must be ordered.

Winter Services tags such small milestones also as "check-in dates," when employees must fill out a white paper noting the extent to which a task has been completed and by whom.

Ask yourself.

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MILESTONES: WHERE TO BEGIN

Approximately 90 percent of snow removal activities occur at the exact same time every year, Winter Services President Jay Felton says. With that in mind, here are five questions to answer and consider creating milestones for:

- When do I have to get my routes done?
- When do I have to finalize my salt order?
- When would I like all my preventive maintenance complete?
- When would I like all my accounts receivable cleaned up?
- What are my sales goals and when do I want all the agreements?



THE TEAM Winter Services, with 500 seasonal workers, maintains more than 900 accounts.

White papers should include information such as the event name, time to complete it, location, objective, goal and materials (as needed), Felton says.

The compilations of those documents—the Gantt chart and/or flowchart and white papers—become a “business bible,” Frazier says.

It creates historical data to benchmark team performance to set goals for future initiatives, Felton says.

In terms of organizing those documents, it’s quite simple at Winter Services.

“It’s an Excel document,” Frazier says. “You just list the task and the date you want it done.”

Housing the deadlines in a single spot and keeping them up to date also eases job roles, especially in the event of a new hire. Having documents that highlight the responsibilities of each position provides transparency and a clear path for training employees.

REVEL IN RESULTS

The systems journal comes into play here, in that Frazier keeps hard copies of the documents in the binder as a quick reference for the systems in place.

The struggle with systemization, Felton says, can be finding the time and people to implement the initiatives. On the flip side, once you start implementing the processes, it will unveil “who has the capacity to work harder for you,” he says.

For some perspective, Felton pointed out Winter Services’ employee retention is around 75 percent to 80 percent year-to-year.

In addition, as Winter Services closes in on its 10-year anniversary in 2015, Frazier notes it has grown from 85 accounts in Milwaukee to more than 900 accounts in seven states. It heads into that landmark with a 90 percent customer renewal rate—a statistic Frazier credits to systems.

“Your renewal rate is the success of your systems,” he says. “Your systems are what run your business, and your people are what run your systems.”

PHOTO: WINTER SERVICES

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BY PHIL HARWOOD

The author is president and CEO of Pro-Motion Consulting. Reach him at phil@mypmcteam.com.

In-season data collection

During a winter event, a typical approach is “all hands on deck.” In the midst of all this activity, little if any effort is put toward data collection.

It’s clearly a secondary priority (after taking care of the customer). Still, snow professionals with reliable information at their disposal are better equipped to assess the profitability of their operations. They’re also able to plan during the off-season and make better decisions.

Let’s look at three broad areas of data you may collect: marketing, operations and finance.

MARKETING

Now that the selling season for snow and ice contracts is over, it’s a good time to compile these results. Metrics include:

- Booked sales—total amount of contracts in terms of dollars (average winter) and total number of contracts.
- Average sale—total dollars divided by number of contracts.
- Proposals—total amount of proposals in terms of dollars (average winter) and total number of proposals.
- Average proposal—total dollars divided by number of contracts.
- Closing rate—booked sales volume divided by proposal values and the number booked sales divided by the number of proposals.
- Marketing expense—total cost of marketing for snow and ice, including sales efforts.
- Marketing efficiency—total booked sales divided by total marketing expense (could also be calculated for each specific initiative).

The benefits of collecting marketing data are many. One is to improve planning for next season’s sales and marketing goals and initiatives. Another is for accountability if these metrics are individualized. Another is to reward high levels of performance and to celebrate achievements.

OPERATIONS

Now that the season is here, it’s important to collect these data so they may be evaluated, whether evaluation occurs in real time or at a later date. The opportunity to collect operations data only exists during the season—right now. Don’t miss this chance. Metrics include:

- Productivity—total crew hours spent on a job site working divided by total crew hours paid.
- Efficiency—budgeted crew hours divided by the actual crew hours spent on a job site working.
- Dollars per hour—revenue for a route divided by total crew hours, including drive time.
- Incidents—number of accidents, injuries, thefts, etc.
- Attendance—number of employees reporting for work divided by number scheduled.
- Turnover—total number of terminated employees divided by total number of employees.

Every operational process has some amount of inefficiency or waste. When the lights are turned on, the waste becomes exposed and the bottom line improves.

FINANCE

For a snow and ice business, there are many financial data points that may be valuable. Here are a few:

- Gross profit by event; by service


(plowing, sidewalk clearing, deicing, etc.); by customer (all properties of the same customer combined); by property; and by crew, area or manager.

- A/R as a percentage of sales.
- Labor costs as a percentage of sales.
- Material costs as a percentage of sales.

Financial data may be compared to last year, industry benchmarks, budgets or goals to assess performance. Having gross profit information available for an event, shortly after that event is valuable, as it allows managers to understand the overall financial results of the event. A low-profit event requires more detailed analysis compared to a high-profit event. When do you learn how profitable a certain event is, if ever? Most contractors never have this information. It’s nice to have after the season ends, but you can’t make adjustments at that point.

BALANCED SCORECARD

A best practice is to develop a scorecard to report metrics most relevant to you. A balanced scorecard includes marketing, operational and financial metrics.

Scorecards are powerful tools because numbers don’t lie, as they say. Just because everyone feels good about your last snow event doesn’t mean it met your profit goals. Collecting and reporting information during the winter season will promote profitability, accountability and professionalism. Winter is here. Now go forth. 

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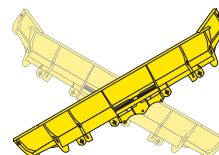
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SNOW+ICE GUIDE PRODUCTS

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COMPANY: The Toro Co.

URL: Toro.com/professional

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BRINE PRO 2000

COMPANY: SnowEx

URL: SnowExProducts.com

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PELADOW

COMPANY: OxyChem

URL: IceFreeSidewalks.com

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SNOW REMOVAL PACKAGE

COMPANY: CASE

Construction Equipment

URL: CaseCE.com

The Snow Removal Package for Case's 90-hp SR250 (radial lift, pictured) and SV300 (vertical lift) skid-steers includes features such as larger tires; high-flow auxiliary hydraulics and hydraulic self-leveling; Ride Control; an enclosed cab; and a heated air-ride suspension seat. A block heater assists in cold starts, while a 4-corner LED strobe kit and heavy-duty lighting optimize visibility.



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URL: Hiniker.com

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Boston, MA	Dec 9-10	Long Island, NY	Feb 19-20
Atlanta, GA	Feb 2-3	Cedar Rapids, IA	Feb 19-20
Phoenix, AZ	Feb 5-6	Boston, MA	Feb 23-24
Minneapolis, MN	Feb 9-10	Salt Lake City, UT	Feb 23-24
Toronto, ON	Feb 9-10	Raleigh, NC	Feb 26-27
Halifax, NS	Feb 12-13	Jacksonville, FL	Mar 10-11
St. Louis, MO	Feb 12-13	Miami, FL	Mar 12-13
Lansing, MI	Feb 16-17		



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PROCESS REVIEW

The winter allows time to review, revise and improve your company's systems.

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‘Tis the season for processes



BY PHIL HARWOOD

The author is president and CEO of Pro-Motion Consulting. Reach him at phil@mypmcteam.com.

The winter months provide an outstanding opportunity to review and fix processes that need attention. In my experience, most organizations have some processes that are either broken or missing. For those without serious process problems to address, the winter months allow for review, revision and improvement of processes that may be adequate but could be better.

Broken or missing processes cause problems. That’s why they need to be fixed. Look no further than your problem areas to identify processes to work on this winter. If you’re still at a loss, ask your people. Those who are in the trenches every day may have more insight into process problems than managers do.

“Those who are in the trenches may have more insight into process problems than managers do.”

Processes that are commonly missing or broken include:

- Onboarding process for new hires;
- Financial budgeting and review;
- Employee feedback and review;
- Strategic planning;
- Professional development;
- Business development;
- New customer onboarding;
- Account management;
- Customer service; and
- Quality control.

When I consider my organization, I see several processes that need attention. They may not be broken, per se, but they’re on my radar screen. I recognize the potential benefit that excellent process management brings.



I also recognize the potential damage that poor process management has regarding employee and customer satisfaction, efficiency and profitability.

CHAMPION VS. DOER

Once the process has been identified, it’s important to clarify who’s accountable for the process, keeping in mind the owner of the process may or may not be the person who implements the process. For example, let’s say that the process to be improved is your onboarding process for new hires. You and your team decide that Joe is accountable for this process. As the process owner, Joe will take responsibility for creating a written process document that meets the approval of the team. This process will most likely involve many steps that Joe will not personally execute. He is the “champion” of the process, not necessarily the “doer” of the process.

My advice to Joe is to interview select people in the company to fully understand the existing process and what’s wrong with it. I would encourage Joe to do his homework and research better processes for onboarding. Joe should reach out to

his network contacts—those people he met from attending industry events—to learn what they have in place.

Once Joe has a draft, I’d encourage him to present it to the team to gain their input. Armed with this feedback, Joe will continue to refine his documented process until the team approves it. The approved process will then need to be implemented, which may or may not involve Joe.

As you and your team work on your processes this winter, there are a few best practices to keep in mind. First, be sure to consider all potential processes before diving into one of them. This will prevent you or your team from working on lower-priority processes while overlooking more important processes. Spring will be here before you know it, so it’s imperative to prioritize.

Second, save documented processes in a place where they’re easily retrievable and back them up. The last thing you want to do is misplace process documentation or lose files during a computer malfunction.

Third, follow a systematic process for process documentation. That’s right—a process for processes. ‘Tis the season! ☺

LET'S GROW

Avoid the red lights



BY JEFFREY SCOTT

The author is owner of Jeffrey Scott Consulting, which helps landscape companies grow and maximize profits. Reach him at jeff@jeffreyscott.biz.

Four years ago I visited with a contractor in New York state. He was losing money for the first time, while working 80 hours a week. He had a good brand and lots of work. His problem was he chased too many red-light leads.

A red light is someone who's not going to buy from you, no matter how many "maybe" signals they send you. They are shoppers, undecided or simply a wrong fit. The key is to remove them from your appointment calendar so they don't negatively affect your time management or your psyche.

First, you have to define their profile. Take a full year or two of proposals that you've written but not sold and identify the three to five traits they have in common. Next, develop "questions" that will uncover their red-light cues, and plan to screen these folks when they call in.

Red-light qualities vary by company, but here are some common traits to look out for: getting five bids, wrong geographic area, first-time buyer, haven't been to your website or seen your work, unrealistic turn-around time or budget, not in pain with current contractor or doesn't know anyone using you.

Don't just rely on my list. Look back over a year or two of records to get clarity on the red lights attracted to your company.

MAKE YOURSELF SCARCE

The key to successful selling is to protect your time and your psyche. The problem with red lights is they're always sending you negative signals, lowering your confidence and putting downward pressure on your pricing. Staying away from them will allow



TAKE ACTION

1 Identify the bottom 15 percent of your leads from 2013 and 2014 that you need to stop selling to in 2015.

2 Create qualifiers you can use on the phone, email and during the first appointment.

3 Identify which services aren't meeting your sales-margin goals and take action: raise the fees, stop doing the work, work in density clusters only or shift the material mark-ups of those jobs.

your margin to float higher, your confidence to soar and your sales win-to-loss ratio to climb. You'll estimate your work correctly, do better work and get more referrals.


After I visited with the New York contractor, we implemented qualifiers for his company that had an immediate positive impact. They included:

- Consultation fee. If the clients moved forward, it was credited back to them.
- Minimum job size. This measure removed the shoppers and posers who didn't want to spend above X amount.
- Four-figure design fee. Such a fee told the prospect that we respected our skills and profession and you need to, as well.
- Limited number of appointments per week. This move protected the owner's time and conveyed scarcity.
- List of qualifying questions. The office staff would discuss these points with all leads. If they gave too many red-light answers, they were screened out.

You might have the same initial reaction to these changes that my client had: "I can't do that. No one else does that." My response? "That's exactly why you need to do it—to stand out from the crowded marketplace and start making some real cha-ching."

ESTIMATING ACCURATELY

We also identified the type of work this contractor made money on and where he needed to raise his fees. We made some big changes in his mix of work and his pricing. After three years, his net profit increased from zero to between 20 percent and 25 percent, and he cut his hours to 60 per week. Plus, he's able to take off two-plus months in the winter.

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CASE STUDY: OUR WAY

Growing day

Shutting down for a day to help improve employees' lives is pricey but worth it for one firm. **BY CASEY PAYTON**



From left: Todd's Enviroscares Owners Anna and Todd Pugh with Growing Day speakers Barbara and Dave Zerfoss.

Not too many business owners would help employees pursue a dream outside of their landscape career, but Todd Pugh isn't like most owners. In fact, some might even call him crazy for shutting down business for a day just to focus on employees' future aspirations. But Pugh believes that happy employees are better employees—even if they aren't ultimately going to stay with his company. That's the idea behind Growing Day, an event held for all 185 employees of his Louisville, Ohio-based company Todd's Enviroscares. This year's daylong meeting took place Nov. 3.

Employees from all four of the company's branches came together at its headquarters to hear a variety of guest speakers for the second annual Growing Day. Pugh, CEO, hand-picked the speakers not only from the green industry but from the worlds of finance, insurance and manufacturing.

Presenters included Dave and Barbara Zerfoss, authors and consultants with The Zerfoss Group. Dave Zerfoss is past president of Husqvarna and Barbara Zerfoss is a former marketing executive with the Charlotte, N.C.-based equipment manufacturer. All employees received a signed copy of the book "The Power of Nothing" by Barbara Zerfoss, in addition to a company sweatshirt.

Between the handouts, providing breakfast and lunch and shutting down for an entire day, Pugh acknowl-

edges the event is a major investment—approximately \$50,000. But he says the return has the power to be tenfold.

"Who better to invest in than your own people?" he says.

TEAM TAKEAWAYS

Several key points really hit home with employees, Pugh says. One speaker, a financial planner, touched on delayed gratification and how putting money away now adds up in the future. Barbara and Dave Zerfoss spoke about starting with a blank sheet of paper and knowing that your future can be anything you want it to be. They also discussed letting go of the past.

"I think people get really jazzed up right after the event and are excited about taking the right steps for their future," Pugh says. "The challenge is keeping that excitement going. If you invest in an event like this you need to keep checking in with employees."

The week following the event, Pugh spent a day at each branch talking to all the teams about what they learned. This provided great feedback for next year and also kept employees motivated. "One guy opened up his first savings account," Pugh says. "Another employee told me his goal was to be the best DJ in the world. I am a realist and I know that some of our employees have dreams outside of this company. I'm OK with that. I want to help them work toward their goals so that they're happy and productive while they're here. And chances are they know someone great

to replace them when they do part amicably with us."

Pugh says he launched this initiative because he believes in his workforce. And he says that helping make them better people makes them better employees. Other companies considering hosting this form of an event should be prepared to be honest and transparent, he says. That's why he doesn't guide speakers with what he wants them to say. He tells them to speak from the heart.

Company size doesn't matter when it comes to hosting an employee development event, he adds. "I think a lot of smaller companies probably have the misconception that they couldn't do it," Pugh says. "But the truth is that an event like this is easier when you're small, when you can just host it at a restaurant. Every company could benefit from an event that inspires employees to be better people." 

Payton is a freelance writer based in Philadelphia.

BUSINESS BREAKDOWN

COMPANY: Todd's Enviroscares

REVENUE: More than \$10 million

SERVICE MIX: 20% design/build+ installation; 60% mowing+landscape maintenance; 20% snow+ice management

CUSTOMER MIX: 90% commercial; 10% residential

EMPLOYEES: 100 full-time, 85 part-time

PHOTO: TODD'S ENVIROSCAPES

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COMPANY: HydroPoint Data Systems
URL: Hydropoint.com

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ELEMENTS SERIES

COMPANY: Unique Lighting Systems
URL: UniqueLighting.com

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ESP-LX BASIC CONTROLLER

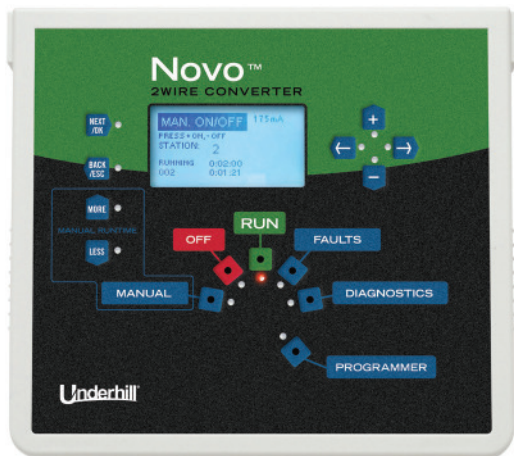
COMPANY: Rain Bird Corp.
URL: RainBird.com

As the latest controller in its ESP-LX Series, Rain Bird's ESP-LX Basic is an entry-level controller that provides the water management features and modular options that commercial sites use most, according to the company. Patent-pending technology makes it possible to switch the controller's language from English to Spanish with the simple turn of a dial. This controller's base model can operate 12 stations and is expandable up to 48 stations.

NOVO W-NOV-2U TWO-WIRE CONVERTER

COMPANY: Underhill International
URL: Underhill.us

Novo model W-NOV-2U has the ability to test and program field decoders and 8-station senders (used on sites with more than 32 stations). No additional wire harnesses are required. The user plugs in the connectors, slides the switch from "run" to "program" and can test or program a decoder or sender as needed. A new diagnostic feature avoids repeated callbacks by clearing a displayed field fault to confirm it has been resolved. Novo is compatible with all major controllers.





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[FEEDBACK] **BUILDING A LAWN**

Thanks for the article on organic lawn care in the November issue. We're a small design/build firm that added organic lawn care; no synthetics are used at all. Our company believes in doing no harm. Organics aren't hard to employ, but it takes a well-rounded education on soil, plants and weather. Organics require a different mindset of the applicator. Weeds, bugs and fungus are telling you, the applicator, what the soil needs. Contrary to the article, compost tea is one of the most effective ways to grow good plants. Organic lawn care is a money maker but probably not for traditional LCOs. A design/build company is better suited, due to the equipment they already have and the crew's understanding of the concept of "building a lawn."

—Eric Hart, foreman, Hartsclapes, Eldersburg, Md.

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"We got involved in animal rescue after adopting two kittens 10 years ago. Those we cannot find homes for somehow end up staying with us. We have more dogs and cats than I am willing to admit to!"

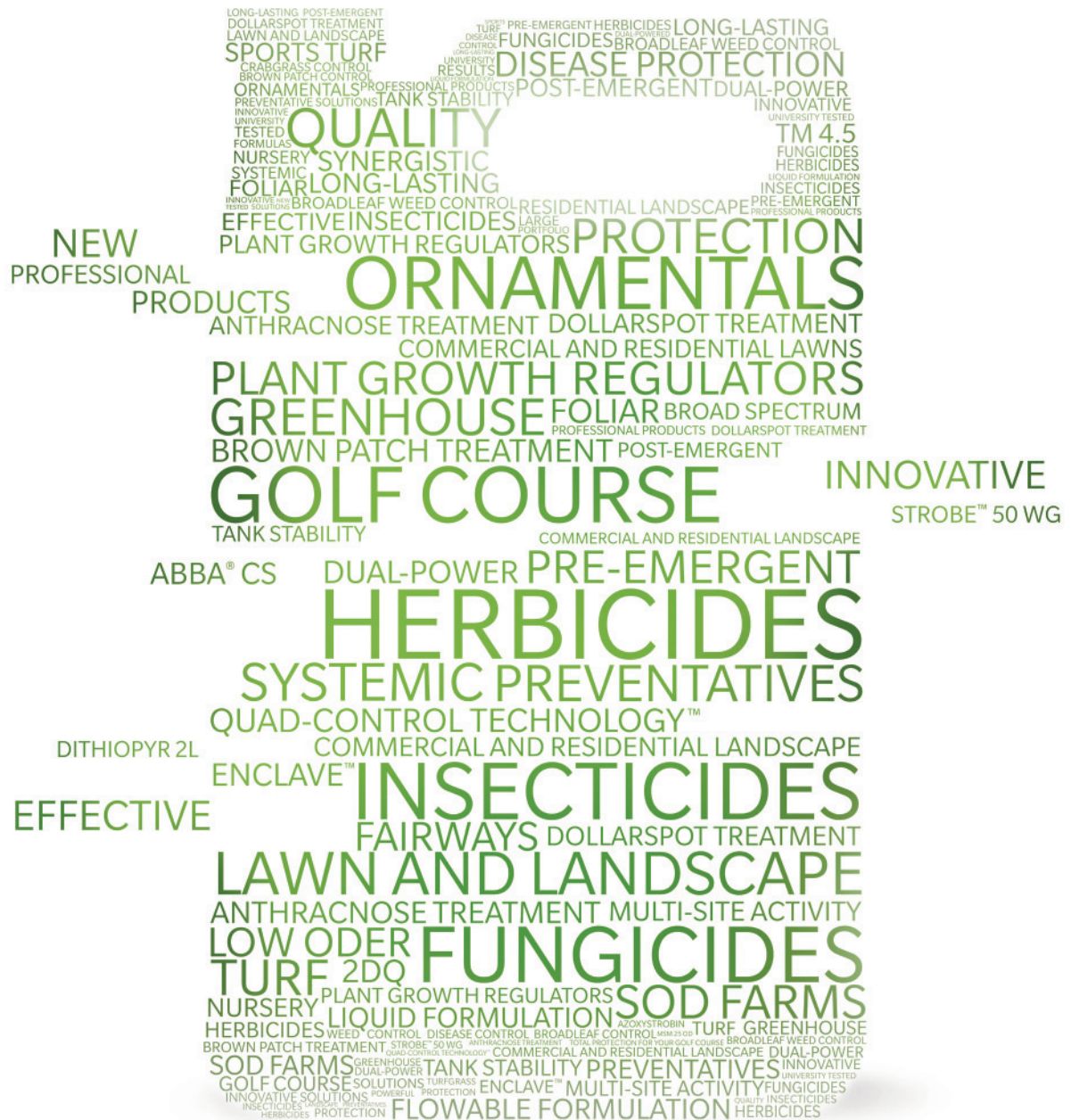
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Rutgers University New Brunswick, N.J. 1981-1983
WORK EXPERIENCE
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1989-1996 Owner Crystal Irrigation Plainsboro, N.J.
1996-2004 Irrigation manager/ general manager Various companies New York, New Jersey and Delaware
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"I started working for Stan's Lawn Service in my hometown, which grew into Park Landscaping, when I was 14. Our first big account was cutting a 10-acre site with push mowers. It took two of us the entire week, and every Monday we would start over."

"I interviewed with the owner 10 years ago. ... We stumbled across each other again when I was consulting, and at the time I really missed seeing something you are truly accountable for grow."

WORDS OF WISDOM "Quality is always more important than quantity." • "Hire slow—fire fast. ... I cannot say that strongly enough. I have seen one bad employee destroy entire companies that were built up over years of hard work." • "Trust but verify. Give your staff the authority to do whatever is necessary, and hold them accountable through proper systems."



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In this Industry Pulse survey, nearly 90% of professionals have an optimistic outlook for business in 2015. Syngenta is committed to working with you to strengthen and grow your businesses next year and beyond. We are honored to participate with *Landscape Management* to develop this Industry Pulse supplement and thank you for your inspiring dedication and passion for the lawn and landscape industry.

All the best,



Laurie Riggs
Lawn Care Market Manager | Syngenta Turf and Landscape



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GOING STRONG

“Cautiously optimistic.” “New normal.” “Recovery mode.” These are all terms that have sprung up in the *LM* Industry Pulse report over the last several years as the effects of the Great Recession caused trouble for the green industry.

You won't see them in this year's report. What will you see? A confident outlook. Upward price movement. Healthy revenue growth and improved profits. In fact, 90 percent of landscape companies are in the black.

Of course, it's not all good news. The top challenge? It's tough to find qualified labor.

On the pages that follow, we share the numbers—and what's behind the numbers—of the 2014 Industry Pulse.

METHODOLOGY

For the 2014 Industry Pulse report, *LM* surveyed subscribers online in October and November garnering 350 complete responses. Respondents were offered the chance to win one of three \$100 gift cards as an incentive. Based on the number of responses, we assume a +/- 5 percent margin of error. Unless otherwise noted, all charts and figures in this report come from this survey.

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[INDUSTRY OVERVIEW]

IN THE

BLACK

The word is, clients can't get landscape companies to return phone calls or show up to give estimates. To Philip Germann, owner of GreenLawn Specialists in Lewis Center, Ohio, that's good news.

"In general, demand is stronger than supply in our area," he says. His assessment fits the findings of the 2014 LM Industry Pulse research. The study reveals landscape and lawn care professionals are satisfied with their businesses in 2014 and feel positive about their prospects for 2015.

In fact, 80 percent of landscape professionals called the state of the market healthy and nearly nine out of 10 have an optimistic outlook for 2015.

"Just about every landscaper I've talked to is having his best year for profits and revenue since the recession," Germann says.

According to research firm IBISWorld, the landscaping services industry is a \$73 billion market with

The LM Industry Pulse report reveals 2014 was a win—with strong profits and an average growth rate of 17 percent.

BY MARISA PALMIERI

a 3.4 percent annual growth rate since 2009. Despite challenges over the last half decade, the research firm forecasts a prosperous next five years, due to a rapid construction sector recovery and steady disposable income growth.

To that point, the housing market continues its gradual march back to normal, according to the National Association of Home Builders Chief Economist David Crowe. In an October report, he attributes the continued housing market growth to historically low mortgage interest rates, steady job gains and significant pent up demand.



Philip Germann



Lynn Tootle

Lynn Tootle also has seen an uptick this year. He's general manager of Gro-Masters, the Savannah, Ga.-based turf and ornamental care division of Tide-Water Landscape Management.

"In my market, it's finally heading in a positive direction after the difficulties following the recession," he says. "In 2011 we saw the bottom of the market; 2012 started in a good direction, but not aggressively; 2013 built on it; and this year we've seen a lot of positive signs—total revenue, profitability and new jobs coming down the pike."

Gro-Masters will end 2014 with a 10 percent increase over 2013.

Mark Todd, owner of Todd Quality Landscape Services in Spring City, Pa., agrees. "More people are pulling the trigger on jobs I quoted a year ago, saying, 'We're ready to go. How soon can you do it?'" he says. Todd senses people are more comfortable with the economy. His full-service, mostly residential company is on track to do \$550,000 in 2014, up about 30 percent over last year.

"Before, there was speculation about layoffs, and now (customers are) taking a deep breath and they're going to be OK," Todd says. "They're happy with their home values and confident they're not going to change. They're looking to invest in their homes."

On the commercial side, property managers are ready to reinvest, too, contractors report.

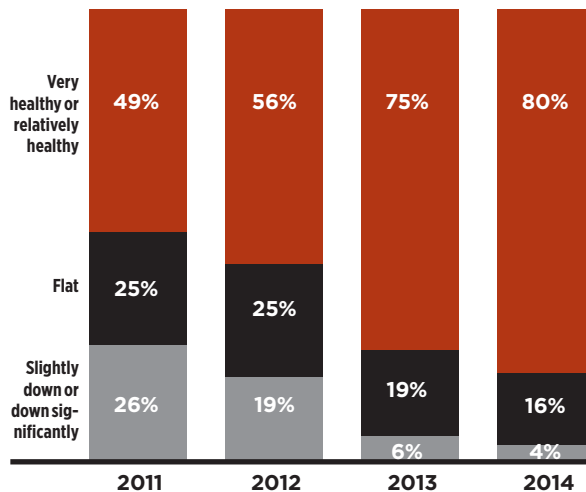
"Over the past four years they've tightened their budgets and the properties have suffered for it," says Craig McBryde, owner of McBryde Landscape & Maintenance Solutions/Green Impact in Greenville, S.C. The primarily commercial maintenance company expects to do \$1.5 million in 2014 revenue with 20 percent growth next year. "They (property managers) are trying to put money back into curb appeal."

Some markets are soft, though. For example, consumers are uncertain in Vermont, says Aaron Smith, general manager for S&D Landscapes in Essex, Vt. He points to the state's attempt to pass its own single-payer health care law and the buyout of a major employer in his area.

"We've had a number of projects get through with either a lot of negotiation to get it to come to fruition or (the customer) saying 'We'll wait until next year,'" he says. "Everybody's got this wait-and-see attitude."

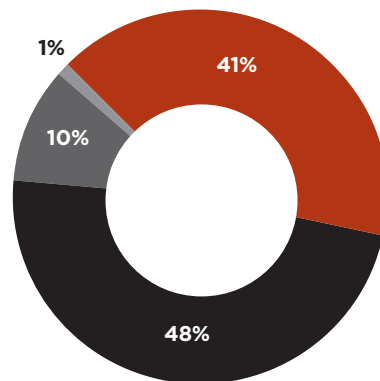
FEELING WELL

How landscape professionals describe the state of the market.



2015 business outlooks

- Very optimistic
- Somewhat optimistic
- Uncertain
- Somewhat pessimistic
- Very pessimistic (Less than 1 percent)



21
AVERAGE
NUMBER OF
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Still, S&D will end 2014 with \$450,000-plus in annual revenue—up from \$427,000 in 2013. Its sights are set on \$600,000 for 2015.

"We've had a good year, but it's not how I thought we'd get there," he says. "I was expecting install to be our shining star, but we've done less install revenue than last year, although we've done quite a bit more overall revenue than last year."

SOME TROUBLE

Although green industry professionals are satisfied and are growing overall, challenges exist. At the top of the list is finding qualified workers.



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Federal unemployment has declined gradually since its peak in 2009, eliminating some of the labor pool that migrated to the landscape and lawn care sectors during the recession and driving up labor costs.

“Our biggest challenge is the labor market,” Germann says. “It’s getting more expensive for a lower quality worker. We can’t get the quality we could even a couple of years ago.”

The rising costs of insurance are another concern.

Health insurance, for example, is “through the roof,” Tootle says. “We offer a small group plan through the company, but it’s extremely expensive, even with us paying a substantial portion for the employees.” Luckily, workers’ comp and liability insurance are staying fairly steady, although Tootle says the company invests a lot of time and effort into safety programs to ensure the rates don’t budge.

MOTHER NATURE’S IMPACT

Weather always has an impact on the landscape business, but overall Mother Nature didn’t deliver too much to complain about in 2014.

“It’s been a great weather year,” Smith says. “It was a great summer with consistent rainfall. We just got a little dry in the fall, so it made some of our aerating and overseeding not quite as effective as it could have been, but the grass was kept green by the dew.”




Mark Todd

In Pennsylvania, Todd also was content with the weather this year.

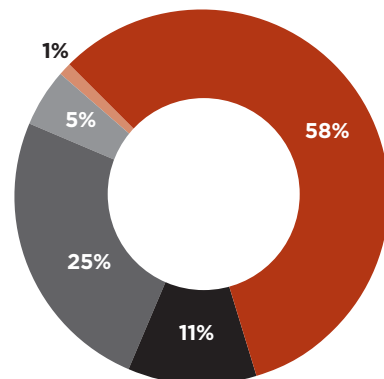
“In our area, when July hits we’ll typically have three to four weeks where we don’t cut grass,” he says. “We didn’t have that. We didn’t have as many rainouts this year as normal.

There were no issues with begging people to water plant installations. We didn’t have too many days of extreme heat. It made things a lot less stressful this year.”

Despite an active winter of 2013-2014 for operators who do snow removal, precipitation in 2014 was slightly above average through October at 26.04 inches—0.68 inches above the 20th century average, according to the National Oceanic & Atmospheric Administration (NOAA). Although, above-average precipitation dominated many northern states, where Wisconsin and Michigan each had one of their top 10 wet year-to-date periods through October. Below-average precipitation occurred in parts of the West and Southern Plains.

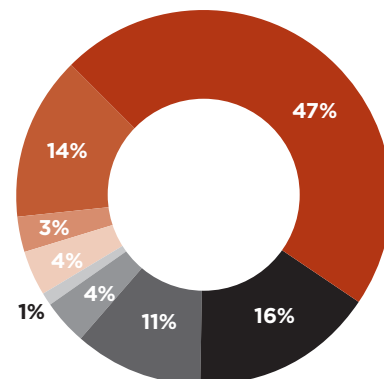
Average temperatures were 55.4 F, 0.5 F above average, through October. The West continued to be much warmer than average, where eight states had a top 10 warm year-to-date. California was record warm for January through October, with a temperature 4.2 F above its 20th century average. It’s likely 2014 will be California’s warmest year on record, NOAA reports. States in the Mississippi River Valley continued to be much below average. No state was record cold. 

BY THE NUMBERS



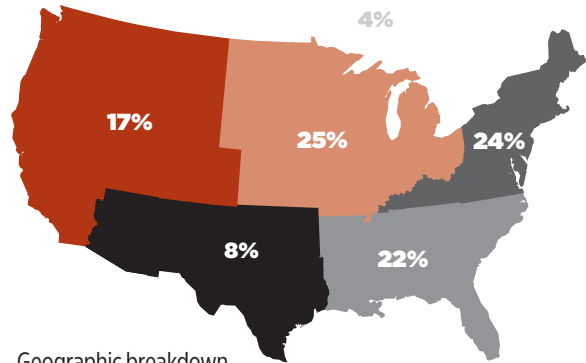
Customer mix

- Single-family residential
- Multifamily residential
- Commercial/industrial
- Government/institutional
- Other



Service mix

- Full-service landscape contractor (maintenance, lawn care, design/build and irrigation)
- Landscape maintenance contractor (mowing, trimming, etc.)
- Landscape design/build contractor (design, installation)
- Chemical lawn care company (excluding mowing)
- Irrigation contractor
- Tree and shrub care company
- Landscape architect
- Other



Geographic breakdown

- Midwest: OH, IN, IL, MI, WI, MN, MO, IA, ND, SD, NE, KS
- West: AK, CA, CO, HI, ID, MT, NV, OR, UT, WA, WY
- Southeast: AL, AR, FL, GA, KY, LA, MS, NC, SC, TN, VA, WV
- Southwest: AZ, NM, OK, TX
- Northeast: CT, DE, ME, MD, MA, NJ, NH, NY, PA, RI, VT, D.C.
- Canada/other

17%

**AVERAGE
PROJECTED REVENUE
INCREASE IN 2015
OVER 2014.**

67%

**PERCENT OF FIRMS
THAT WILL MEET
OR BEAT THEIR 2014
REVENUE GOALS.**

Annual revenue change 2013-2014 – anticipated

+17% Total

Mowing+Landscape Maintenance	Design/ Build+Installaton	Turf+Ornamental Care	Irrigation+Water Management
+12%	+14%	+6%	+5%

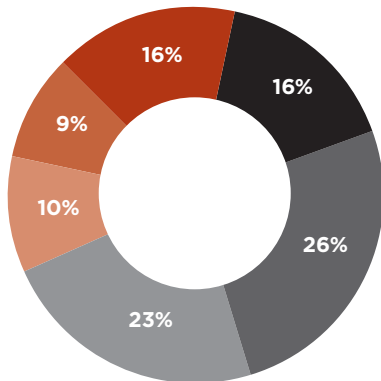
Annual revenue change 2012-2013 – reported

+16% Total

Mowing+Landscape Maintenance	Design/ Build+Installaton	Turf+Ornamental Care	Irrigation+Water Management
+11%	+13%	+5%	+5%

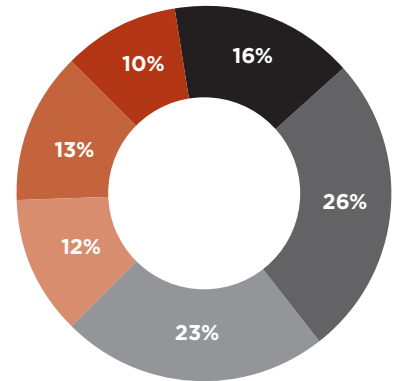
Profits
2013 – reported

- No profit
- 1% to 4.9%
- 5% to 9.9%
- 10% to 14.9%
- 15% to 19.9%
- 20% or more



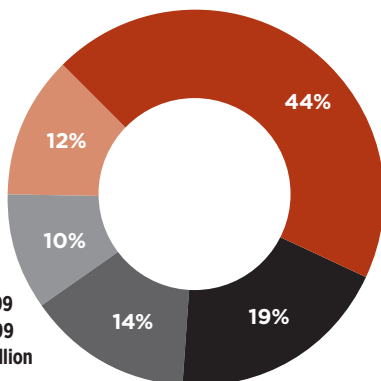
Profits
2014 – anticipated

- No profit
- 1% to 4.9%
- 5% to 9.9%
- 10% to 14.9%
- 15% to 19.9%
- 20% or more



Annual revenue
2013 – reported

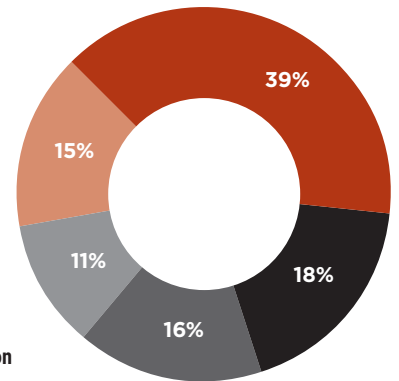
- Less than \$250,000
- \$250,000 to \$499,999
- \$500,000 to \$999,999
- \$1 million to \$2.49 million
- \$2.5 million or more



Percentages don't equal 100% due to rounding.

Annual revenue
2014 – anticipated

- Less than \$250,000
- \$250,000 to \$499,999
- \$500,000 to \$999,999
- \$1 million to \$2.49 million
- \$2.5 million or more



Percentages don't equal 100% due to rounding.



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Herbicides



The longest-lasting pre-emergent herbicide, Barricade[®] controls crabgrass and more than 30 other weeds with the flexibility to apply in the fall or spring.



This post-emergent herbicide is all about versatility. In the spring or summer, it gives you control of several tough weeds including all major sedges. And you can control *Poa annua* in warm-season turf with a winter application.



Tenacity[®] protects your seeding investment from the start. When you apply it just before, or at seeding, you'll help prevent 46 broadleaf and grassy weeds from competing with newly seeded turf. Plus you can order free marketing brochures by visiting TenacityMarketing.com.

Insecticides



Meridian® delivers preventative and curative control of grubs, chinch bugs and other surface-feeding pests. And you don't have to water in the product for up to 7 days following turf applications.

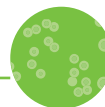


One application in April or May gives you season-long control of white grubs, billbugs and turf caterpillars without harming non-target insects.



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[LABOR REPORT]

NOW HIRING

Lack of qualified employees causes labor costs to rise.

BY MARISA PALMIERI

When answering, “What keeps you up at night?” Lynn Tootle could have been speaking for green industry owners and managers everywhere.

“Through the recession my concern was, ‘How am I going to get enough work to keep my people working?’” says the general manager of Gro-Masters, the Savannah, Ga.-based turf and ornamental care division of TideWater Landscape Management. “Now, it’s ‘How am I going to get all this work done?’”

With a federal unemployment rate of 5.8 percent in October—down from its peak at 10 percent five years earlier—it’s clear there’s a lack of qualified workers for lawn care and landscape companies.

“This has been the most difficult year labor wise, and I’ve done this for 16 years,” says Tootle, whose toughest position to fill is lawn care technician. “You had a glut of skilled laborers from manufacturing and other industries that slowed or ground to a halt. Now that they’re picking back up, that skilled labor is going back to those careers that are beyond what we’re capable of paying.”

Some of his labor rates have increased 15 percent over last year, he says.

Philip Germann, owner of GreenLawn Specialists in Lewis Center, Ohio, agrees. He adds the government’s failures to create a workable guest-worker visa program and enforce immigration laws hinders growth. The H-2B visa program is too expensive and paperwork-intensive for his firm. Meanwhile, the lack of immigration law enforcement rewards companies who break the law by hiring undocumented workers. “I’d be all for the government mandating everyone use E-Verify,” he says of the federal government’s online employee eligibility verification system. Only a few states mandate its use. “To fix the problem long-term, you have to require everyone to use it, deport (undocumented workers) and have a program that lets working people have a pass.”



Lance Forsee, president of Colonial Lawn & Garden in Yakima, Wash., hit the street to “panhandle” for job applicants earlier this year.

In some markets, competition for labor has gotten fierce. Craig McBryde, owner of McBryde Landscape & Maintenance Solutions/Green Impact in Greenville, S.C., says his region faces a problem with other landscape companies approaching laborers on the job and offering them a higher wage than they currently make. For him, basic laborers are the scarcest. “We’re trying to be more creative about it,” he says, noting he plans to add an employee recruitment bonus and potentially advertise in an Hispanic newspaper in 2015.

For Germann, the toughest position to fill is the driving foreman. His firm is trying to combat that by paying employees all winter, even above what they make to plow snow. “We look at that as cheaper than laying them off and hiring someone else if they don’t come back,” he says.

WAGE REPORT: SALARY

	Current Salary	% Change Year to Year
Crew foreman/team leader	\$34,184	+10%
Salesperson	\$48,419	-1%
Equipment mechanic	\$36,060	-6%
Landscape designer	\$47,642	+13%
Landscape architect	\$56,569	-6%
Account manager	\$47,044	+8%
Supervisor	\$41,844	+6%
Operations manager	\$54,394	-3%
Office manager	\$39,513	+12%
Owner/president	\$80,007	+1%
Branch manager	\$69,909	-2%

WAGE REPORT: HOURLY

	0-5 Years Experience	% Change Year to Year	>5 Years Experience	% Change Year to Year
Mower operator	\$11.36	+5%	\$13.76	+8%
Construction worker	\$12.82	+9%	\$16.57	+7%
Lawn care technician	\$13.78	+9%	\$16.50	+7%
Irrigation technician	\$14.36	+11%	\$18.45	+15%

[COSTS REPORT]

NOT TOO BAD

Operating costs inch up, but landscape professionals don't have much to complain about. BY MARISA PALMIERI

Despite the *LM* Industry Pulse revealing an 11 percent increase in overall operating costs over last year, contractors interviewed for the report didn't report many outrageous increases.

For Chris Solimini, the most difficult cost to contend with is taxes. "You're trying to have a legitimate business and play by the rules, and it's coming out to 35 percent of every dollar," says the president of Pavilion Landscape Management in Ballston Spa, N.Y. The four-year-old company expects to do \$200,000 in revenue this year. "When you're trying to make enough money to give your employees a respectable salary, it's very challenging."

In some years, skyrocketing costs for fuel, fertilizer or other supplies have added to the challenge. This year, manageable increases were reported for most categories.

For example, the survey showed a 7 percent increase in fuel costs for 2014 over 2013; however, gas prices are decreasing in the fourth quarter and could come in even lower. Companies are happy to see those savings fall to the bottom line. The fuel expense at S&D Landscapes in Essex, Vt., is tracking \$2,000 less this year than last year, despite an expected 5 percent to 10 percent increase in business from \$427,000 to more than \$450,000.

"Prices were pretty stable through the summer this year and gas started going down in the last two weeks," said General Manager Aaron Smith in November.

In some regions, however, plant material costs are up and grass seed is scarce and expensive.

On many of the installation jobs Mark Todd bid last year that weren't agreed to until this year, he had to go back to the customer and explain plant cost increases and shortages. The problem was with trees and shrubs, said the owner of Todd Quality Landscape Services in Spring City, Pa. Annuals held steady. Turf seed also jumped about 10 percent for him—by \$8 or \$9 per 50-pound bag.

OPERATING COST OUTLOOK

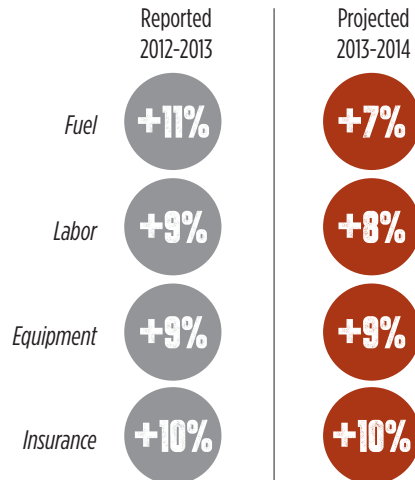
+10%

Reported increase in operating costs from 2012 to 2013.

+11%

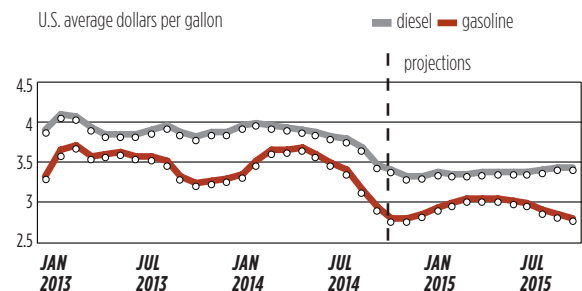
Anticipated increase in operating costs from 2013 to 2014.

AVERAGE % CHANGE IN COSTS



FUEL PRICES EASE UP

Gasoline Regular Grade and Diesel Fuel Retail Prices Including Taxes



SOURCE: SHORT-TERM ENERGY AND WINTER FUELS OUTLOOK

Solimini is seeing even larger increases on turf seed. "Grass seed is very hard to come by and it jumps," he says. "I was used to paying \$75 to \$80 per bag for a good blended mix," he says. "Now a bag of straight perennial rye is \$115."

Suppliers tell him supply is down at turf seed farms and drought in the West isn't helping.



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[CUSTOMER REPORT]

ON THE RISE



Buyers of landscape services in both the commercial and residential markets are opening their wallets again—and prices reflect that demand.

BY MARISA PALMIERI

The LM Industry Pulse research shows green industry members’ optimism is rising—and that correlates with their customers’ positive feelings.

Data from both the commercial and residential customer segments show confidence measures moving in the right direction. As a result, landscape and lawn care firms have been able to gradually raise prices, and our pricing research reflects that trend (see charts below).

RESIDENTIAL MARKET

The Conference Board Consumer Confidence Index in October, the most current month for which data were available at press time, is up from the previous month and the same month the previous year.


The Index now stands at 94.5 (compared with a baseline reading of 100 in 1985), up from 89 in September 2014 and 71.2 in October 2013. The reading was 72.2 for the same month 2012. (October 2013 took a hit due to the government shutdown.)

“Consumer confidence, which had declined in September, rebounded in October,” said Lynn Franco, director of economic indicators at The Conference Board. “A more favorable assessment of the current job market and business conditions contributed to the improvement in consumers’ view of the present situation. Looking ahead, consumers have regained confidence in the short-term outlook

COMMERCIAL SERVICE PRICING

AVERAGE PRICES REPORTED	2013	2014	% CHANGE
Maintenance price/visit	\$154	\$215	↑ 40%
Design/build price/job	\$34,879	\$47,143	↑ 35%
Lawn care treatment price/visit	\$124	\$183	↑ 48%
Irrigation maintenance price/hour	\$64	\$64	flat

ILLUSTRATION: ©ISTOCK.COM/PORCOREX



for the economy and labor market, and are more optimistic about their future earnings potential.”

That’s good news for companies like Pavilion Landscape Management in Ballston Spa, N.Y., which primarily serves residential clients.

“Customers don’t seem that interested in messing with the price,” President Chris Solimini says. “They say, ‘I’d like to get this done.’ Instead of cutting back, they’re adding on, which is great.

“The wealthiest of my clients are also business owners,” he says. “Business has been good and they’re not stressed about it. They’re spending money and that trickles down to me.”

COMMERCIAL MARKET

Data show executive confidence is up among business executives and real estate professionals, too. The Conference Board’s quarterly Measure of CEO Confidence checked in at 59 for the third quarter of 2013. This is down slightly from 62 in 2014’s second quarter, but up from 54 in the third quarter of 2013 and up from 42 in the third quarter of 2012. (A reading of more than 50 points reflects more positive than negative responses.)

Likewise, the Building Owners and Managers Association International’s 2014 Experience Exchange Report, its annual benchmarking study, showed increases across most income and expense categories for privately owned office buildings, indicating post-recession growth across commercial real

“Looking ahead, consumers have regained confidence in the short-term outlook for the economy and labor market, and are more optimistic about their future earnings potential.”

— Lynn Franco, director of economic indicators at The Conference Board.

estate properties. Notably, the “roads and grounds” expense category rose 16.7 percent, from 18 cents per square foot in 2012 to 21 cents per square foot in 2013.

Craig McBryde can attest to those increases. He’s “pleasantly surprised” at how much commercial accounts are ramping up enhancement spending.

“Stuff we presented two years ago to HOA boards and to property managers is finally getting signed now,” says the owner of McBryde Landscape & Maintenance Solutions/Green Impact in Greenville, S.C. “We’re really excited about that.”

With a steady maintenance business and a growing enhancements business, McBryde plans to increase prices slightly in 2015 by \$1 dollar per man-hour.

“It’s kind of hard to increase the prices or you’ll price yourself out of the game,” he says. “Especially in a numbers situation. It’s a bit of an obstacle.”

RESIDENTIAL SERVICE PRICING

AVERAGE PRICES REPORTED	2013	2014	% CHANGE
Maintenance price/visit	\$47	\$55	↑ 17%
Design/build price/job	\$15,454	\$15,738	↑ 2%
Lawn care treatment price/visit	\$69	\$72	↑ 4%
Irrigation maintenance price/hour	\$58	\$69	↑ 19%



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YEAR IN REVIEW

A look at the 2014 headlines that could have a lasting impact on the green industry.



TRUGREEN: ON ITS OWN AND PREPARING TO GROW

ServiceMaster completed the separation of its TruGreen business on Jan. 14. The move was announced in November 2013, after the company reportedly lost 300,000 customers in two years. It was executed as a tax-free spin-off to ServiceMaster stockholders. In March, TruGreen President David Alexander told the *Memphis Business Journal* the company planned to focus on execution and internal operations in 2014 and it will grow again—organically and by acquisitions—in 2015.

DAWN OF 'BRICKMAN-CREST'

When the *Financial Times* first reported in April that the landscape industry's two power players, ValleyCrest Cos. and the Brickman Group, could merge, much speculation surfaced about what it could mean for the industry. First, folks were shocked. But when they looked closer, they realized it made sense, following the November 2013 acquisition of Brickman by New York investment firm KKR. "None of these (private equity) guys like to hold on to things they invest in very long," explained Bruce Wilson, consultant with the Wilson-Oyler Group and *LM* columnist. "They like to invest in something for five or six years and then sell it to invest in something else." ValleyCrest had been majority owned by MSD Capital, Michael Dell's private investment firm, since 2006.

Though the deal closed June 30, questions remain about how many details will shake out. What brand will the merged entity retain? Which company's structure and culture will be adopted? It's likely 2015 will hold some of those answers.

TRUGREEN LANDCARE'S BIG HIRE

Ijamsville, Md.-based landscape maintenance firm TruGreen LandCare appointed Michael Bogan as CEO, effective Nov. 3. He spent 23 years with Brickman


before starting a consulting business in 2013.

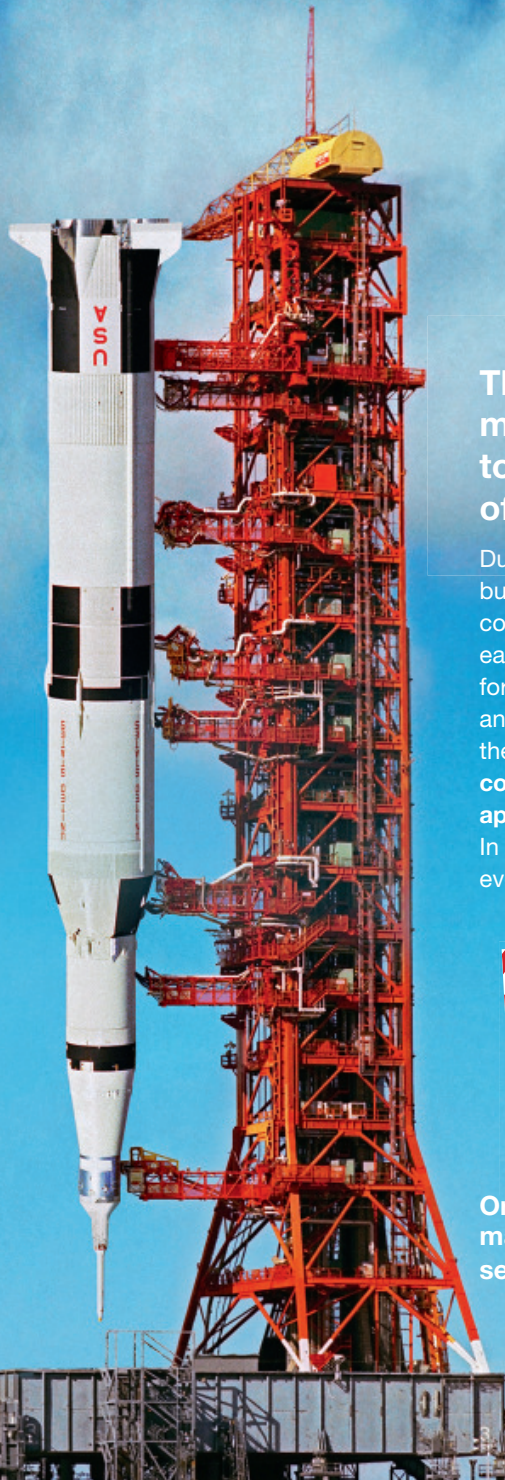
During Bogan's tenure at Brickman, he was involved with both organic and acquisition growth opportunities. The appointment is a significant step for TruGreen LandCare, which was purchased from ServiceMaster by Los Angeles-based private investment firm Aurora Resurgence in early 2011, said M&A expert Ron Edmonds of the Principium Group. Expect acquisitions to come.

JOHN DEERE LANDSCAPES MAKES MOVES

After being acquired last year by private equity firm Clayton, Dubilier & Rice, John Deere Landscapes (JDL) made some news, shaking up the executive team and acquiring companies. Doug Black, formerly with Oldcastle, joined JDL as CEO. The company also picked up several smaller competitors, including Boston Irrigation Supply Co. with five locations in the Northeast; The Stockyard Horticultural Supply in Arlington, Tenn.; Diamond Head Sprinkler Supply in Honolulu; and Eljay Irrigation in Calgary, Alberta. John Deere retains a 40 percent stake in the now standalone company, which has more than \$1 billion in annual revenue. Industry observers anticipate a rebranding in its future.

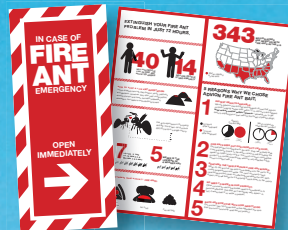
SCOTTS LAWN SERVICE MAKES PEST PLAY

Scotts LawnService agreed to acquire Action Pest Control, a residential pest control company based in Louisville, Ky., with operations in Indiana, Kentucky and Illinois. The transaction, which is expected to close by January, marks the company's first acquisition of a residential pest control business. Scotts LawnService, with anticipated sales of approximately \$260 million in fiscal 2014, is currently the No. 2 player in the lawn care category behind TruGreen. Scotts LawnService expects the Action Pest Control business to do \$15 million in sales in 2015. 



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