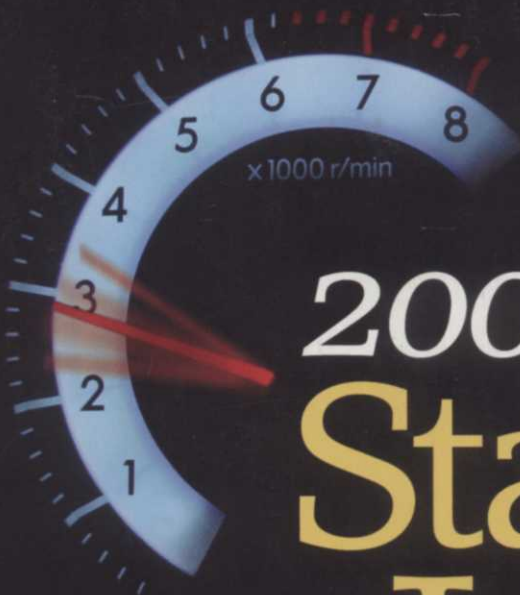


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2009 State of the Industry

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Survey/market analysis
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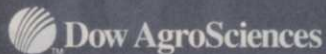
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Landscape Management

OUR MISSION: *Landscape Management* — the leading information resource for large, successful lawn care, landscape maintenance, design/build and irrigation professionals — empowers Green Industry professionals to learn and grow from their peers and our exclusive business intelligence. Serving as the industry conscience, we not only report on but also help shape news, views, trends and solutions.



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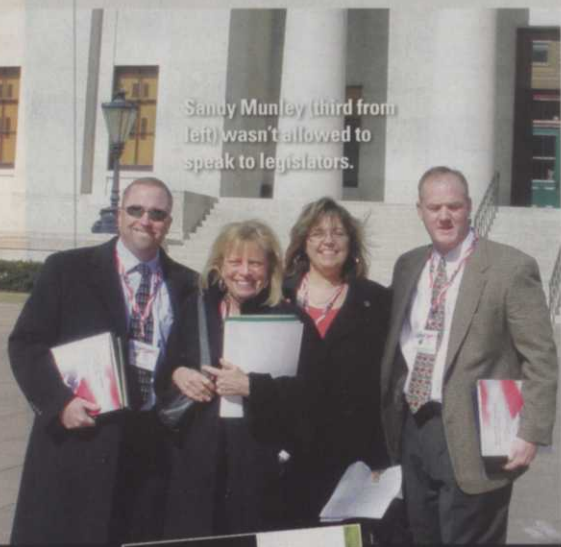


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Sandy Munley (third from left) wasn't allowed to speak to legislators.



The H-2B program under attack — again

Ohio Landscape Association Executive Director Sandy Munley discusses her ultimately futile attempts to testify before the House Oversight and Government Reform's Domestic Policy Subcommittee, which held a hearing titled "The H-2B Guestworker Program and Improving the Department of Labor's Enforcement of the Right's of Guestworkers."



DIGITAL VAULT

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WEB EXCLUSIVE

Leaders profiles

Find expanded coverage from our exclusive **2009 State of the Industry** report. Learn what some of the top executives in the Green Industry think will be the biggest opportunities and most difficult challenges in the coming year.

READERS RESPOND

What's your education level?

Graduated high school **31%**

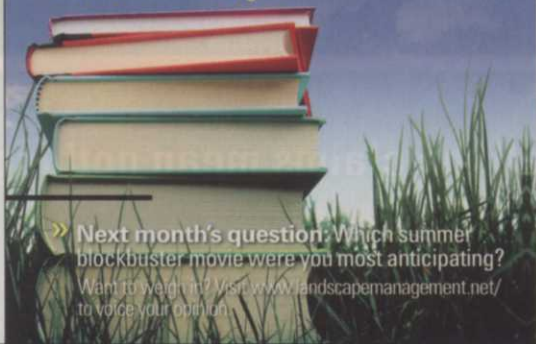
Earned master's degree **10%**

53%

Earned bachelor's degree

Earned associate's degree **3%**

Earned doctorate **3%**



» **Next month's question:** Which summer blockbuster movie were you most anticipating? Want to weigh in? Visit www.landscapemanagement.net/ to voice your opinion.

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Costs are higher; profits are shrinking. How does one recoup the deteriorating bottom line?

Athletic Turf News

A 2,500-sq.-ft. properly maintained natural grass lawn generates enough oxygen to sustain a family of four.

LD/B Solutions

The American Academy of Pediatrics released a policy statement about trends in community development that have contributed to the decline of physical activity among children and adolescents. Read how landscape design/build professionals help reverse that trend.

Get Growing

Ponds and creeks present a great opportunity to work with cultivars beyond the everyday flowerbed plantings. But what plants work best in and near ponds and creeks?

LM Consulting

Clubs

ONLINE OPPORTUNITIES

Explore recession-busting ideas with *Landscape Management's* seven inaugural **LM Consulting Clubs** — a brain trust of business coaches proven to help Green Industry contractors, industry suppliers and associations bolster everything from customer and employee relationships to revenues and margins to strategic planning and overall business valuations.

Visit the **LM Bookstore** and peruse our experts' offerings. Jeffrey Scott will teach you to increase your business with *The Referral Advantage*, Harvey Goldglantz explains why *Marketing Matters*. Jim Paluch's trio of tales, including *Five Important Things*, *Leaving a Legacy* and *Growing Dreams*, also are available.

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Smarter better than greener

Our Green Industry is becoming the greener industry. More encouragingly — and this is what excites us — it's becoming the smarter industry. This is what we see happening as we review *Landscape Management's* 2009 State of the Industry survey, the most complete and accurate snapshot of the industry you'll find anywhere.

Our survey shows that our industry is responding to environmental issues by offering an ever-broader range of so-called green products and services. For example, of those who indicated they offer sustainable services, 52% say they offer water-efficient irrigation, 42% natural lawn care, 30% soil remediation, 22% installing rain gardens and 20% ecological restorations.

This trend — driven by a combination of government agencies, the media and slowly accelerating customer demand — is starting to influence buying decisions, as well. Slightly more than a third (36%) of respondents to our survey said sustainable initiatives have “some impact” on their purchase of products and equipment and 12% said they have a “big impact” on their spending.

Nevertheless, many owners and managers are taking a wait-and-see attitude. For example, 18% of respondents indicated they have seen “no demand” for natural or overtly environmental landscape services in their markets yet and another 35% responded demand is negligible but “has potential.”

But there's a bigger picture arising from the survey — and this is what sustainability means to most of us. The survey reveals we're positioning our companies — and by extension our industry — to survive into the future, to be more efficient, to be more productive and to be less wasteful. Partly because of the unsettling uncertainty of our economy and partly in spite of it, we're planning well into the next decade. Sustainability (apart from its fuzziest green connotation) means survivability, right?

After all, in our incredibly competitive landscape and lawn service markets — characterized by reduced margins, higher costs and growing regulatory attention — sustainability boils down to providing clients with what they desire while returning a stream of revenue that rewards us for our efforts and allows us to continue investing in our companies and providing our services.

That's the biggest change occurring within our industry, according to the results of our survey, and the one that will ignite a new period of industry growth when we emerge from today's recession. Here's what you told us in the survey:

▶ About **60% of you** (410 of 679 responses) **said that you prepared a budget for 2009**. This is a much higher percentage than previous surveys.

▶ **54%** (371 of 682 responses) **told us that you have a 3-5 year business plan**. This includes 207 owners and managers who responded that they review it at least once every six months. When we asked that same question a decade ago, the percentage of owners saying they had a business plan was less than half of that.

▶ While you selected customer acquisition as your primary business focus this year, you said your **second most important goal is to improve your systems and build efficiencies within your operations**, another indication that the industry is looking ahead and planning for the future.

After you review our State of Industry report, drop me an email and share a thoughts on what the industry should be doing to remain “sustainable” within our society in the approaching decade and beyond.

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Testimonials not attributed to individuals shown in photograph.

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Hunter List Price

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Hunter List Price

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2009 Rain Bird List Price

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Rain Bird® 5004 Rotors: Save 40% over Hunter® PGP-ADJ® Rotors.*

Rain Bird List Price

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Hunter List Price

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Rain Bird® Rotary Nozzles: Save 45% over Hunter® MP2000 Rotators.*

Rain Bird List Price

\$525

Hunter List Price

\$975



Rain Bird® 5004 Plus PRS SAM Rotors: Save nearly 40% over Hunter® I-20-ADV Ultra Rotors.*

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Rain Bird List Price

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Irritrol List Price

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*Based on 2009 U.S. Rain Bird, Hunter, Netafim, and Irritrol list pricing effective May 1, 2009.

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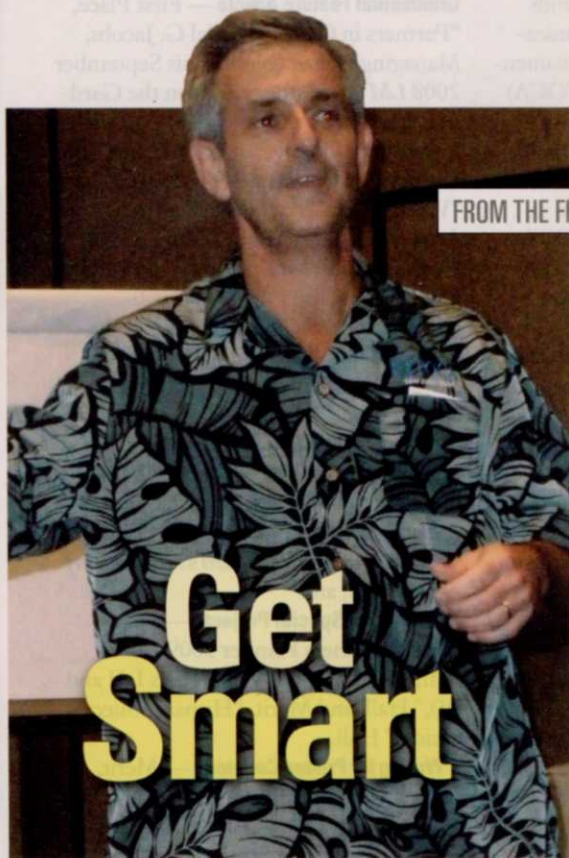
CLIPPINGS

Fine Earth recognized for doing a fine job

HARRISONBURG, VA — The U.S. Chamber of Commerce honored Fine Earth LLC with the 2009 Inaugural Community Excellence Award last month at America's 2009 Small Business Summit. The award recognizes the success Fine Earth has had in making—and maintaining—strong relationships with employees, customers, and the larger community. Fine Earth LLC was first selected as one of the nation's blue ribbon award winners from across the country. The Small Business of the Year Awards, sponsored by Sam's Club, pays tribute to businesses showcasing exemplary business practices in the areas of staff training and motivation, community involvement, customer service, and business and financial planning.

IPaWGS launches ponditat certification program

WOODSTOCK, GA — After more than two years, the International Pond and Water Garden Society (IPaWGS) has announced its Certified Wildlife Ponditat program. The focus of the program is to first promote and protect vital water resources, and secondly to protect and preserve the wildlife that thrive around waterscapes and ponds. For a small registration fee, applicants receive a year's membership in IPaWGS and gift packages from supporting corporate members of the association. They also receive a frameable certificate and an plaque suitable for mounting announcing the fact that an area is a "Certified Wildlife Ponditat."



FROM THE FIELD

Get Smart

TOCA meeting attendees discover how drawing process maps can help the Green Industry dress for success

BY MARTY WHITFORD EDITOR-IN-CHIEF

It's not often a big, strapping guy admits to considering wearing his wife's clothes.

Just as strange, the confession of this taboo occurred in front of dozens of attendees of the Turf and Ornamental Communicators Association's (TOCA's) 20th anniversary meeting, held May 12-14 in San Juan, Puerto Rico.

The cross-dressing topic came up during a TOCA breakout session in

which Jim Paluch, *Landscape Management's* Working

Smarter columnist, asked attendees to partner and process map packing for work trips. "When you process map, it's important to detail every step — the good, the bad and the ugly," Paluch urged participants.

Well, here comes the ugly: "We need to add a step where we double check all of the clothes we've packed, ensuring they're really ours," one editor warned. "I accidentally packed my wife's black pants instead of mine, once, while preparing for a work trip."

When asked whether he tried on his wife's slacks — accidentally or out of sheer desperation — the editor sheepishly admitted to sizing them up. Pointing half-way up his calf, the editor replied with disappointment, "They only came up to here."

Dressing for success is a lot easier with process maps, Paluch noted. Process maps shed light on myriad opportunities for improved efficiencies and value. They help landscape teams take hard looks in the mirror, get honest, and strip away waste.

"The key to Working Smarter is to be easy on the people and hard on the processes," Paluch reminded TOCA meeting attendees.

Paluch's high-energy consultancy, JP Horizons, has helped more than 250 Green Industry companies, on average, save tens of thousands of dollars annually through its Working Smarter Training Challenge (www.jphorizons.com/LM.htm).

"Isn't it amazing how much we learn when we process map?" Paluch asked attendees. "As soon as I broke out the big white paper and Crayola markers, you guys began sharing and growing like a room full of wide-eyed kindergartners."

20 for TOCA's 20th Questex Media wins a record number of Green Industry communications awards

Questex Media's *Landscape Management* and *Golfdom* media brands won a combined 20 communications awards from the Turf and Ornamental Communicators Association (TOCA) at its recent 20th anniversary meeting.

Landscape Management nabbed 15 awards including the coveted Gardener Award for Writing/Publishing and:

➤ **Printed Magazines: Single Page Design/Editorial** — First Place, "Business Planner 2009: Contents," Carrie Parkhill, Art Director;

➤ **Printed Magazines: Two-Plus Page Design/Editorial** — First Place, "A Look Ahead," *Livescapes*, Parkhill; Merit, "Water Wise – Part II," Parkhill;

➤ **Writing for Commercial Publications: Editorial/Opinion Piece/Column** — Merit, "Make Every Day Count" & "What's On Your 'Bucket List,'" Marty Whitford, Editor-in-Chief;

➤ **Writing for Commercial Publications: Ornamental Feature Article** — First Place, "Partners in Color," Daniel G. Jacobs, Managing Editor (Note: This September 2008 *LM* cover story also won the Gardner Award);

➤ **Writing for Commercial Publications: Business Management** — First Place, "Working Smarter," Mike Seuffert, Associate Editor; Merit, "The Hidden Costs," Jacobs; Merit, "Add-On Biz: Golf Greens," Jacobs;

➤ **Writing for Web Site: Original Content** — Merit, "Walker Family Reunion Attracts Thousands" Ron Hall, Editor-at-Large;

➤ **Writing for Electronic Newsletter: Original Content** — First Place, "Why We Shouldn't Take Chances With Staph," *Athletic Turf News*, Hall; Merit, "Eighth Wonder of the World, *LM's Athletic Turf News*," Hall; and

➤ **Writing for Special Projects** — First Place, "Business Planner 2009," *LM* staff; Merit, "Water Wise (Parts I, II and III)," Hall; and Merit, "Hispanic Success Guide," Hall.

➤ **Writing for Printed Collateral** — Merit, "Color Matters" Mike Sisti, Lebanon Turf.

LM's sister publication, *Golfdom*, brought home the hardware as well:

➤ **Best Photograph: Print Magazine Cover** — Merit, "The Natural," Larry Aylward, Editor-in-Chief;

➤ **Miscellaneous Special Projects** — First Place, "2009 Dog Days of Golf Calendar," Cynthia Andrews and Mike Sisti, Lebanon Turf/*Golfdom*;

➤ **Writing for Commercial Publications: Operations Profile** — First Place, "The Book on Steve Cook," Aylward; Merit, "A Down-Home Approach," Aylward; and

➤ **Writing for Commercial Publications: Environmental Stewardship Article** — Merit, "The Natural," Aylward.

"At Questex Media, we promise and deliver an engaged audience," says Group Publisher Kevin Stoltzman. "Year after year, independent surveys and editorial awards programs confirm our integrated print and digital media solutions deliver content — and reader loyalty — second to none."



Managing Editor Dan Jacobs shows off the Gardner Award.

CLIPPINGS

Honoring those who honor the profession

ST. AUGUSTINE, FL — Bill Kubly, founder of Landscapes Unlimited Inc., was awarded the American Society of Irrigation Consultants' 2009 Roy Williams Memorial Award at this year's annual conference. Kubly has more than 30 years experience in the golf course construction and recreational development industries. Named after an ASIC founder and one of the original independent irrigation consultants some 40 years ago, the Roy Williams award is given for significant contributions to the irrigation industry by an individual, organization or business.

Easing the tax burden on alternative fuels

ALEXANDRIA, VA — The Outdoor Power Equipment Institute announced its support of legislation from Sens. Patrick Leahy (D-VT) and Bernie Sanders (I-VT) and U.S. Rep. Peter Welch (D-VT) that provides consumers with a 25% tax credit towards the purchase of alternative energy powered lawn, garden, and forestry power equipment. Manufacturers offer a range of alternative energy powered equipment from battery, electric, hybrids, propane and solar to compressed natural gas and diesel.

Critter Control a top "low cost" franchise

TRAVERSE CITY, MI — In the fourth annual Franchisee Satisfaction Awards presented by Franchise Business Review, Critter Control ranked No. 24 in the Top 50 review of franchise systems having 50 to 200 units (Critter Control has more than 120). Franchise Business Review has surveyed more than 400 leading franchise systems, representing nearly 100,000 franchisees.

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Top students attend Jacobsen's future turf managers program



Charlotte, NC — Thirty-five students from universities across the United States, all on 4-year turf-related study programs attended the recent 3-day Future Turf Managers program at Jacobsen's headquarters here.

The students were recommended by their professors as being top-level candidates with great prospects to become future leaders as they progress their careers. They have the opportunity to learn and interact with turf professionals in an educational environment under the guidance of industry leaders, an experience impossible to duplicate in the classroom.

The group was introduced to Jacobsen staff and learned about the company. Attendees toured Jacobsen's manufacturing facility followed by a tour of the Parts Distribution Center and Jacobsen

Product manager Quinn Derby explains the technicalities of the Eclipse 322

University. Students heard from high-profile industry speakers who shared their knowledge, gained from years of experience in the turf sector. The group visited the E-Z-GO plant where they toured the manufacturing facility and had a ride and drive of the E-Z-GO product range. Next stop was the University of South Carolina, where they visited the baseball stadium and got hear from field manager Clark Cox, who spoke about his turf management program at.

At the close of the event, Dan Wilkinson, Jacobsen president said, "This program provides some of the brightest new turf managers around with the opportunity to go behind the scenes at some of the premier facilities in the world."

BELIEVE IT

OR NOT ...

WII CUT

First there was Wii Fit. Now there's Wii Cut. Researchers at the University of Southern Denmark recently modified a Nintendo Wii remote control so it can communicate via Bluetooth with a computer and robotics module built into a lawnmower. Actions of the mower are matched to the tilt actions of the remote (i.e. tilt down to move forward, up to go backward). The Wii-mote can control the lawnmower, dubbed "Cosmobot," either manually or in computer-assisted mode — where the mower is guided around the edge of the area to be cut and then is left to finish the job. To watch this Wii Cut Cosmobot in action, visit www.mefedia.com/entry/the-wii-lawn-mower/16128719.



WORD ON THE STREET

"Which Green Industry services will have both the most demand and best margins during the next two years, and why?"



"Most of our work is in homeowners association, condominium and townhome care where landscape maintenance margins are tight. In isolated areas, we see associations struggling with their budgets and being forced to make some difficult decisions about the level of care they can afford. Generally, they are keeping their irrigation systems repaired and have continued to move forward with enhancement projects. These services have mostly maintained pre-recession margins and should continue to do so."

— **Matt Triplett**, Vice President, Tualatin, OR-based *Willamette Landscape Services*



"Dandelions and annual white grubs, as long as they exist, will always make demand for lawn care services high. Customers become very passionate about weeds and grubs.

Serviced correctly, with premium products, both applications offer good profit margins. Needless to say, a lush, green lawn that frames the house of a customer can help keep one of their largest investments more valuable. Even in a tighter economy like this year, the customer and potential customers' passion continues."

— **Jack Robertson**, President, *Robertson Lawn Care*, Springfield, IL



"Without question, I believe it will be maintenance. But I don't think this just because of the economic situation. I believe there are a number of forces, both good and bad, that will provide a tremendous amount of great opportunities over the next several years. It will, however, require that we think very differently and change current business models. There are times that industries change forever and I believe this is one."

— **Jim McCutcheon**, CEO of *Austell*, GA-based *HighGrove Partners*

Top ^{LM}150 companies make changes at the top

Moline, IL and Kent, OH — Two of Landscape Management's LM 150 companies — Deere & Co. and Davey Tree — recently announced changes to their top leadership.

Deere's board of directors elected

Samuel R. Allen, 55, president, chief operating officer, and a member of the board of directors effective June 1, and chief executive officer effective August 1. Robert W. Lane, 59, chairman and CEO, will serve as chairman of the board until



Samuel R. Allen

Karl J. Warnke

Allen's expected succession as chairman.

As part of the Davey Tree's executive leadership transition, Karl J. Warnke was named Chairman of the Board. Warnke, a 29-year Davey employee, adds the title to his responsibilities as President & CEO of the 129-year-old company.

"The Deere Board has completed an 18-month systematic process to choose Deere's ninth chief executive officer in its 172-year history," said Lane. "The board recognizes, as I do, that Sam is a superb, smart, ethical executive, a wise and uncommonly capable leader, and someone with the proven experience and ability to effectively lead John Deere in growing a great, sustainable, global business."

A 34-year veteran of John Deere, Allen has been president of the Worldwide Construction & Forestry Division since 2005 and has been responsible for the global operations of the Deere Power Systems Group since 2003. Allen has served since 2001 as a senior officer of the company with early senior leadership responsibilities in human resources and industrial relations and the oversight of John Deere Credit's global operations.

Warnke replaces R. Douglas Cowan, who served as Davey Chairman of the Board for 12 years. Cowan will continue to serve as a member of Davey's Board of Directors.

"It is important to recognize Doug's leadership as chairman and his selfless dedication to the principles and values that have served to guide the Davey Company through the years," said Warnke.

The transition takes place as Davey celebrates its 30th anniversary of employee ownership. With more than 7,000 employees, Davey is among the 20 largest employee-owned companies based in the United States, according to Warnke.

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—Joe Mancini, Mancini Pool Decks

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Mountain View LANDSCAPE

Bill Kemp
Monday, October 12, 2009 - Friday, October 16, 2009

Jobsite Name	Cost Code	Mon	Tues	Wed	Thu	Fri	Total
Brentwood Job	Irrigation	7:38	7:35	7:53	-	-	23:06
Creshview Job	Planting	-	-	-	7:58	7:49	15:47
		7:38	7:35	7:53	7:58	7:49	38:53

Regular Hours **38:53**
Overtime Hours - 0 -
Double Time Hours - 0 -

Bill Kemp

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PEOPLE ON THE MOVE

Schiller Grounds Care, Inc., manufacturer of seven brands of outdoor lawn and garden power equipment; including BOB-CAT, Bunton, Classen, Little Wonder, Mantis, Ryan and Steiner, announced **Diane F. Adams** as Vice President, Sales and Marketing Support. Adams comes

to Schiller Grounds Care with more than 25 years experience in sales and marketing, with extensive experience in both domestic and international sales and marketing, strategic planning and customer operations

PBI/Gordon Corp. announced the recent staff additions of **Jeremy Buhl** and **Michael Sorensen**. Buhl will serve as a sales

representative in the Midwest. Sorensen will represent the company in the South-west that includes California, Nevada, Arizona and Hawaii.



KIOTI Tractor announces the addition of **David Pettus** to its product support team. Pettus will be responsible for assisting KIOTI dealers

with telephone technical support and warranty claims from KIOTI's corporate offices in Wendell, NC. Pettus comes to KIOTI Tractor with more than 20 years experience in the technical support and service arenas.

Floral & Garden Expo says that **Albert Graves**, president of **Bloemen Décor**, has been appointed as artistic director. Graves brings more than 20 years experience in the floral decor industry.

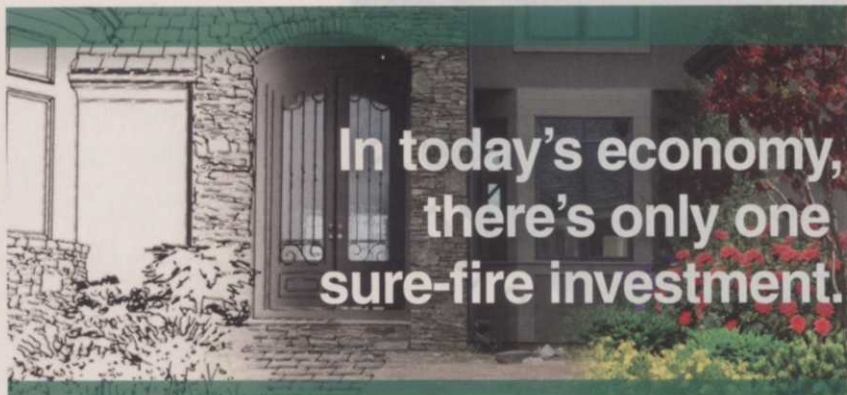
RISE (Responsible Industry for a Sound Environment) recently named **Aaron Hobbs** as its new director of legislative affairs and grassroots outreach. In this role, Hobbs will identify, track and take action on legislative activities that affect the specialty pesticide and fertilizer industries and grow membership in the RISE grassroots network to help ensure industry voices are heard.



The Fockele Garden Company General Manager **Todd Brown** has been named to the **Georgia Green Industry Association** Board of Directors.

Brown, who has been with the company for four years, serves on the Landscape Division of the board. The GGIA works to promote horticulture in the state of Georgia. Brown, who has nearly 25 years of experience in the landscaping industry, is a Certified Landscape Professional.

Flavio Velez, president and owner **LandGraphics Landscape** and **Arborcare Management**, has completed the rigorous one-year certification program to become the **California Landscape Contractors Association's** (CLCA) first Expert Certified Water Manager. Introduced in 2007, CLCA's Water Management Certification Program educates and provides the direction for Green Industry professionals to provide their customers' properties with water efficient landscape irrigation.



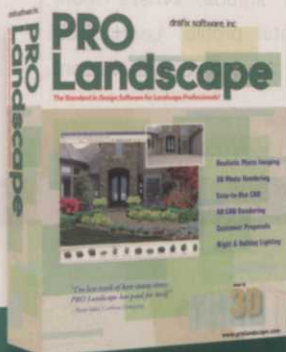
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WORKINGSMARTER

JIM PALUCH

The author is president of JP Horizons Inc. Visit www.jp horizons.com.

Take time to enjoy the good stuff

When is the last time you really had a celebration at your company? When was the last time you drew attention to a mistake?

As you ponder those two questions, you may realize we often overlook the wins and focus in on the losses. Companies that are Working Smarter have trained themselves to celebrate improvements.

Establish a team challenge

A challenge becomes more than a well-defined goal by giving direction and focus for a team or individual — and at the same time allows the freedom to work on getting better as opposed to simply reaching a destination.

Sales goals, for example, are essential to success, but set them as a measurement to support the challenge of improving the company's sales overall. A sales *goal* could be to achieve \$100,000 in sales for the month of June, but a sales *challenge* could be to improve June's sales by 20% over last month (or last year). The goal establishes a milestone to reach, and the challenge establishes the journey to reach it. Both are important, yet focusing on the challenge to improve sales develops a mindset to continually improve.

Now consider celebrations...

Balloons, confetti, loud music, large crowds and acceptance speeches bring energy to the act of celebrating, yet they might not always fit the culture or situation. Energy can be found in many ways. Here are just a few:

- ▶ **Make a joyful noise.** Many companies ring cowbells every time a milestone is reached in a challenge.
- ▶ **Clap your hands.** It costs nothing, yet can make

a significant impact. Many people have not had applause since they read a poem in sixth grade.

- ▶ **Create a tradition.** Award a fun, yet meaningful trophy that draws attention to the accomplishment.
- ▶ **Serve some grub.** Food is a universal celebration. Creating the opportunity for the owners to cook, distribute or otherwise create camaraderie among the team draws attention to the milestone achieved.
- ▶ **Send a note.** This is one of the most overlooked opportunities to celebrate and draw attention to improvements. A handwritten card acknowledging accomplishments, creates a quiet celebration that inspires individuals to continue the trend.
- ▶ **Stop and say thanks.** Perhaps the simplest, yet most powerful celebration, the act of appreciation is the foundation to creating a culture of celebration.

Draw attention to success

The main purpose of celebrating improvements is to draw attention to individual or group accomplishments. When the reward of recognition and appreciation is associated with accepting a challenge or achieving a goal, it is more likely the commitment level will be there as well.

Companies lacking a culture of celebration and recognition are always battling complacency among the team. Why should someone put out the effort if no one seems to care what that effort produces? Today's most successful companies know the power in harnessing and nurturing the commitment of the team to increase their capacity to serve.

The celebration should never signify the end, but be positioned as another stepping stone in becoming a better company, department or individual. Our companies and quality of life will improve as we learn to enjoy the accomplishments and celebrate the improvements.

MONTHLY CHALLENGE

Implement a company-wide challenge, and decide how you're going to recognize team members who meet or exceed their goals.

More than 250 Green Industry companies have participated in JP Horizons' Working Smarter Training Challenge (WSTC), typically saving tens of thousands of dollars annually. To learn whether your organization qualifies to participate in the WSTC, visit www.jp horizons.com/LM.htm today.

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YOUR GUIDE TO PRODUCT RESEARCH

COMPACT EQUIPMENT & SKID STEERS

BEFORE YOU BUY

- ▶ Take a test drive. According to the Skid Steer Purchasing Guide available at BuyerZone.com, "many dealers have a 'tow and show' trailer they use to bring a demo model for you to try out."
- ▶ Design ahead of time. Are you looking for longer reach, more power, ergonomic controls? What combination of features are you willing to pay a little more for to get the job done?
- ▶ Choose attachments wisely. Along with what features you desire, think about the costs of attachments. Again, says BuyerZone.com, "most skid steer owners spend the bulk of their time using one or two attachments. Remember that you can rent attachments for a day or week as needed. If you find yourself renting the same attachment repeatedly, you can always purchase it later."

Kubota →

The new U17 zero-tail swing compact excavator provides increased hydraulic flow for fast, responsive operation and heightened traction force for tough backfilling jobs, as well as rubber tracks for a smooth ride and low ground pressure. On the U17, productivity is maximized with a bucket close to the blade, while operator costs are reduced with features like a digital control panel. The 17-hp, Kubota D902-E3 engine teams up with an 11.9-gpm hydraulic pump capacity to boost versatility for a wide range of tasks. www.kubota.com or 888/4-KUBOTA, Ext. 900

General Equipment Co. ↓

Designed for skid steer loaders, small excavators, knuckleboom cranes and small backhoes, the 671 DIG-R-TACH Series 16 earth drilling attachment is intended for smaller hydraulic systems. The Series 24 is designed for larger hydraulic systems found with backhoes and excavators. Featuring a two-speed chain/sprocket drive and a 5- to 20-gpm hydraulic flow range,



the Series 16 balances smaller flow volumes in proportion to auger diameters. The result is a cleaner hole with less loose soil and debris. For higher-capacity drilling, the Series 24 operates in a 15- to 25-gpm hydraulic flow range and delivers a maximum drilling torque of 2,018 ft.-lbs. at 2,500 psi. www.generalequip.com or 877/DIGGER-5

John Deere

The new small-frame CT315 45-hp compact track loader already meets interim Tier 4 emissions standards. It features a 12.6-in.-wide track and a narrow overall machine width of just over 60 in. Rated for 1,500-lb. operating capacity, the unit's cushioned bucket and lift cylinders provide smooth deceleration at the end of the boom-lower position — and cushion the bucket when curling and dumping a load. The Deere PowerTech 4024T 4-cylinder 2.4-L engine provides engine-lugging capability while working heavy loads. www.johndeere.com or 309/765-8000

Caterpillar

The new 279C, 289C and 299C feature durable, steel-embedded track and steel undercarriage components for maximum life in aggressive applications. The compact track loaders deliver solid traction and reduced wear on sites with sticky, rocky soils. All three models feature two-speed drive systems, with a maximum speed of 8.5 mph, for fast movement around large sites. The electrohydraulic joystick control of the drive motors delivers straight-line tracking, and electronic torque management optimizes productivity. Caterpillar-exclusive drive motor seal guards extend the lives of seals and final drives. www.cat.com or 888/OWN-A-CAT.

continued on page 22

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continued from page 20

Cub Cadet Yanmar ↑

Built on a large chassis to accommodate a wide array of attachments, including a front loader with a universal quick-attach bucket, backhoe and three-point implements, the new Ex450 compact tractor can be used for everything from cutting grass to backhoe trenching and excavation. The unit is powered by a four-cylinder, liquid-cooled, 45-hp direct-injection Yanmar diesel engine. www.cubca-detyanmar.com or 866/246-4971

Bobcat

With a width of 47 in., the T110 compact track loader can travel through narrow openings or grade on narrow lot lines without treading on a neighboring property. Among the 26 available attachments are hydraulic breakers for demolishing concrete or asphalt; pallet forks for mov-

ing material; soil conditioners and tillers for preparing landscapes; augers for planting trees or installing fence posts; snowblowers for clearing snow; and trenchers for installing utility or irrigation lines. The Bob-Tach attachment mounting system is standard on the T110, which has an auxiliary hydraulic flow of 12.5 gal. per minute. The cab of the T110 offers many of the same comfort features as larger Bobcat loaders, including a suspension seat, superior all-around visibility, easy-to-read instrumentation panels and an optional enclosed cab with heater. www.bobcat.com or 866/823-7898

Ditch Witch

Both the RT10 and RT12 compact, walk-behind trenchers feature fully hydrostatic steering for easy handling, and are available with either high-flotation tires or heavy-duty tracks that oscillate. Both units also feature a trail wheel that increases stability and reduces breakover when loading and unloading or going over a curb. Options include a pin-on backfill blade that efficiently restores the trench after the product is installed, and the



Roto Witch, an attachment that enables the operator to bore under obstacles. ditchwitch.com or 800/654-6481

Toro ↑

The latest additions to the Dingo compact utility loader family include the narrow and wide track TX 427 models. Both loaders feature a 27-hp Kohler engine that delivers added torque for increased pulling and digging force. These models also come standard with a heavy-duty, two-stage air cleaner. Featuring four independent hydraulic pumps, the loaders deliver 16.9 gpm of flow to each track, 11.4 gpm to the auxiliary hydraulics, and 6 gpm to the loader arm. The auxiliary hydraulics on both models pump 19 hp flow to the attachment for increased productivity in ground-engaging applications. Both are also compatible with Toro's multitude of compact utility loader attachments. www.toro.com/dingo or 800/DIG-TORO



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THE BENCHMARK

KEVIN KEHOE

The author is the owner-manager of Kehoe & Co. Contact him at kkehoe@earthlink.net.

It's a brave new world

Part four of a multipart series.

Whenever the economy revives, we're not going to return to the way it was. The changes we're experiencing will be lasting.

The most important of these is pricing. Competition and the customer are changing the notion of what fair price means. The reason is more capacity relative to demand right now, and customers are using this to their advantage. While prices will recover somewhat when the economy picks up, they won't return to the rates we once charged.

Implement two critical tactics to address this challenge. The first is lowering overhead costs in relation to revenues and direct labor. The second is improving the sales management function. A successful company must do relatively more with less and actively sell instead of take orders. This economy provides the smart companies with an opportunity to remake themselves instead of hunkering down and waiting for it to pass.

MAINTENANCE PROFIT & LOSS STATEMENT

	Old way		New way	
Revenues	\$1,000,000		\$1,187,500	
Labor	\$350,000	35%	\$498,750	42%
Materials	\$100,000	10%	\$118,750	10%
Direct cost	\$450,000	45%	\$617,500	52%
Gross profit	\$550,000	55%	\$570,000	48%
Indirect cost	\$150,000	15%	\$170,000	14.3%
G&A cost	\$300,000	30%	\$300,000	25.3%
Net profit	\$100,000	10%	\$100,000	10%
Labor hours	30,000		42,750	
Labor cost per hour	\$11.67		\$11.67	
PRICE per hour	\$30		\$25	20%
Overhead leverage	2.22		2.53	

More with less

You must restructure. For example, a company that had two mechanics now has one. Another that had four office staff now gets the job done with two. Account managers who handled \$1.5 million in work now handle \$2.0 million. Salespeople sell 50% more than they did last year.

If you want to be price-competitive, you need to increase the personal productivity of everyone on staff — starting with the shop and office. Better systems, training and reprioritization are the essential tools of this restructuring. It can be done, and is being done, successfully.

Selling, not order-taking

You must have a sales management game plan, including a competitive price, a pipeline system and a proposition to win business. None of this is new. It was just never really necessary to be that sharp at it before. Frequent direct contact, speedy turnaround, weekly tracking, accountability and perseverance are the essential success strategies.

The company that connects with prospects monthly, turns around requests in a day and negotiates hard on the spot to close the deal will win more than it loses. Simple marketing messages, trained sales staff and efficient estimating systems are the keys.

Competitive price (per labor hour)

What are the relative price reductions we might expect? The table, left, demonstrates the before and after picture of 20% price-per-hour rate reduction from \$30 to \$25 per hour. The effect is that in the future we'll be working with lower gross margins and higher revenues on top of a relatively stable overhead cost structure.

I'll discuss this table's implications at greater length next month. For now, it's essential to look at your people and structure, as well as your sales management system, to prepare for these permanent pricing changes.

A SUPPLEMENT TO

Landscape Management



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2009 State of the Industry

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A closer look at the state of our industry



Ken Taylor, CLP
John Deere Commercial
Segment Marketing Manager

AT JOHN DEERE, we appreciate the work you do every day to beautify the land that we live, work and play on. That's one of the many reasons we're pleased to sponsor the State of the Industry Report. We know it will be helpful to you as you work to strengthen your businesses, improve your service and prepare for the future.

When we consider the challenging economic conditions under which you've been operating in recent months, we realize 2009 has not been an easy year for many of you. The majority of respondents to this survey, for instance, say that the service markets in their regions are slightly or significantly down. You also say current economic conditions have changed the frequency with which you replace equipment.

That's why John Deere is continually finding ways to help you become more successful, even in tough times. For the third year in a row, we were the Green Industry Conference (GIC) Platinum Sponsor for PLANET and the Gold Sponsor for PGMS. Classes offered at GIC helped you earn industry certifications and find solutions to a wide range of business operation challenges. Through our National Account Contract with PLANET, we're also giving PLANET members easy access to competitively priced commercial equipment that keeps their businesses running — from zero turn mowers to tractors to utility vehicles and more.

We're also finding ways to help you operate more efficiently and cost-effectively. Our dealers' service organizations are working closely with customers to ensure down time is minimized and John Deere Credit is helping professionals purchase or lease the equipment you need on terms that make sense for you. That, along with our full product and service offering through dealers and John Deere Landscapes, is helping lessen the economic effects we're all feeling these days.

While you're reading through the report, be sure to notice the notes of hope. For example, more than half of you expect to maintain or increase revenue this year. You also recognize that while economic recovery might seem slow in coming, it will come, and you're preparing for that day.

In 172 years of business, John Deere has seen its share of downturns and upswings — and we're here to see you through both. We're proud to serve you as a true business partner. Thanks for making us part of your team.



JOHN DEERE

Sponsor's View

LM's 2009 State of the Industry

The ultimate Green Industry dashboard

To run your business efficiently, you need real-time performance information in a quick and easy-to-understand format — like your car dashboard displays.

Landscape Management's 2009 State of the Industry — one of our most-anticipated issues of the year — delivers the ultimate Green Industry dashboard, including our exclusive **LM 150** (up from 100), a look at the nation's largest landscape, lawn care, design/build and irrigation contractors.

We provide an unprecedented view inside the Green Industry with:

➤ 11 new **LM Top 25 charts** breaking down revenue leaders by region, customer mix and sector; and

➤ 15 **LM Leader Profiles** — Executives share their keys to success and the greatest opportunities and obstacles facing the industry.

With data culled from *LM's* exclusive survey, we bring unparalleled insight into how more than 680 of your peers are thinking and performing. A bevy of charts, factoids, infographics and quotes give you a quick read on the past, present and future.

We offer our traditional caveat that while bigger isn't always better, bigger commands attention. Whether you rival or revile the companies on this list, in many ways they provide a benchmark for rest of the industry.

With no desire to rest on our laurels, we've been working hard to make the business intelligence we provide even more valuable. To that end, we bring you *LM's* 2009 State of the Industry report, brought to you with the gracious support of John Deere. *LM*



Company	2008 Revenue (in millions of U.S. Dollars)
1 The TruGreen Cos.	1,410
2 ValleyCrest Landscape Cos.	990
3 The Brickman Group, Ltd., LLC	680.8
4 The Davey Tree Expert Co.	600
5 USM	480.7
6 Scotts LawnService	311.9
7 Bartlett Tree Experts	170
8 Ambius	123.3
9 OneSource Landscape & Golf Services	117.05*
10 Lawn Doctor	90
11 Weed Man	86.48
12 U.S. Lawns	86
13 Yellowstone Landscape Group ^o	81
14 Gothic Landscaping / Gothic Grounds Management	80
15 Massey Services	77.49
16 Vila & Son Landscaping Corp.	62.575
17 Ruppert Nurseries	57.7
18 Middleton Lawn & Pest Control	57.6
19 American Civil Constructors	56
20 Savatree	55
21 Jensen Corporate Holdings	53
22 ISS Grounds Control	45
23 Clintar Landscape Management	44
24 Tropics North Landscaping	42.5*
25 The Bruce Company of Wisconsin	42
26 Marina Landscape	50
27 Choate USA	40*
28 Landscape Concepts Construction	39.5*
30 The Groundskeeper	38
30 Acres Group	37.6
31 McDonnell Landscape	37*
32 Sierra Landscape Co.	34.7
33 Denison Landscaping	36.2*
34 Nanak's Landscaping	36
35 Chapel Valley Landscape Co.	36
36 AAA Landscape	35.9
37 Teufel Landscape	35.5
38 NaturaLawn of America	35.4
39 Oak Leaf Landscape	35*
40 Mariani Landscape	35
41 Mainscape	35
42 Nissho of California	32.6*
43 Spring-Green Lawn Care Corp.	32.4
44 Mission Landscape Services	33
45 Landscape Concepts Management	31.07
46 The Greenery	30.8
47 Cagwin & Dorward	30
48 Scott Byron & Co.	29.6
49 Ecoscape Solutions Group	29.08
50 Metroplex Garden Design Landscaping LP	28.8

LEGEND * = 2007 revenue; NR = Not reported; + = Satellite locations not included;
^o = Formed in 2008 from Piedmont Landscape and Bio Landscape & Maintenance

2007 Revenue (in millions of U.S. Dollars)	Employees 2008 Full time / Part time	Headquarters	Locations
1,500	17,725 / 730	Memphis, TN	283
935	11,000 / NR	Calabasas, CA	120
609	4,382 / 5,486	Gaithersburg, MD	160
506.14	7,258 / 326	Kent, OH	NR
352.5	NR	Norristown, PA	NR
291.1	2,132 / 0	Marysville, OH	160
161	1,500 / 200	Stamford, CT	97
126.4	1,242 / 159	Buffalo Grove, IL	NR
117.05	1,122 / 214	Tampa, FL	12
86	55 / NR	Holmdel, NJ	460
78.19	788 / 2,625	Oshawa, Ontario, Canada	110
82	1,577 / 450	Orlando, FL	196
NR*	600 / 300	Plano, TX	9
125	1,158 / NR	Valencia, CA	11
74.34	780 / 0	Orlando, FL	61
64.55	736 / 0	Miami, FL	7
55	550 / 0	Laytonsville, MD	10
54.32	497 / 9	Orlando, FL	28
58	250 / 240	Lakewood, CO	6
50.3	450 / 60	Bedford Hills, NY	20
45.5	354 / 0	San Jose, CA	7
45	750 / 0	San Antonio, TX	6
38	160 / 350	Markham, Ontario, Canada	23
42.5	425 / NR	Homestead, FL	9
45.22	225 / 400	Middleton, WI	3
38	500 / 5	Anaheim, CA	2
40	200 / NR	Carrollton, TX	8
39.5	30 / 260	Richmond, IL	1
38	750 / 0	Tucson, AZ	11
33	102 / 700	Wauconda, IL	5
37	133 / 21	Brookeville, MD	1
34.7	294 / 0	Palm Desert, CA	2
36.2	190 / 180	Fort Washington, MD	1
33	500 / 250	Longwood, FL	5
43	255 / 135	Woodbine, MD	5
38.6	475 / 2	Phoenix, AZ	2
39	312 / 92	Portland, OR	3
33	235 / 21	Frederick, MD	68
35	120 / NR	Anaheim, CA	1
33	100 / 280	Lake Bluff, IL	2
43.4	300 / 120	Fishers, IN	10
32.6	300 / 0	Vista, CA	4
29.6	NR	Plainfield, IL	82
33	530 / 0	Tustin, CA	8
25.28	125 / 470	Grayslake, IL	6
35.6	460 / 41	Hilton Head Island, SC	3
32.02	335 / 50	Novato, CA	14
29.6	63 / 200	Lake Bluff, IL	2
36.6	215 / 0	Charlotte, NC	7
30.4	36 / 36	Dallas, TX	3

listing continued on next page

THE TENACIOUS 12

Companies that showed the highest rate of growth from 2007 to 2008

1 Dworsky Services
43.33%

2 Heaviland Enterprises
32.34%

3 Lambert Landscape Co.
28.99%

4 USM
26.67%

5 The Fockele Garden Co.
25%

6 Perficut Lawn, Landscape & Erosion Services
24.81%

7 Marina Landscape
24%

8 DLC Resources
23.32%

9 Environmental Management Services
23.11%

10 Maldonado Nursery & Landscaping
20.83%

11 Heads Up Landscape Contractors
20%

12 PROscape
19.55%



ALL ILLUSTRATIONS/PHOTOS BY: ISTOCK INTERNATIONAL INC.



Competition doesn't have to drive down pricing. Look at all of the gas stations — they are all near uniformity in pricing. The same holds true for the cost of a gallon of milk from one supermarket to the next. Why can't our industry be more open and uniform with its pricing — so we can all work and earn quality livings.

Treat your customers right and they will keep you in business for years with their referrals.

Don't stick your head in the sand. Keep doing the things you need to do to get the work.



CONTRACTOR COMMENTS

FROM THE SURVEY

We are only in the beginning stages of an all-out fist fight with each other, and I'm not sure the ones left standing will be able to hold their hands up in victory.

It's a great time to improve systems and procedures and recruit additional talent.

Don't cut quality or professionalism to lower prices.

If you know your niche, times are not that bad.



Company	2008 Revenue (in millions of U.S. Dollars)
51 LJ Thalmann Company dba Chalet	28
52 Dixie Landscape Co.	26.5
53 Cornerstone Solutions Group	26
54 Countryside Industries	25.5
55 Sebert Landscaping	25
56 Lucas Tree Expert Cos.	25*
57 Heads Up Landscape Contractors	25
58 Maldonado Nursery & Landscaping	24
59 McFall and Berry Landscape Management	22.83
60 CoCal Landscape	22.8
61 Shearon Environmental Design	22*
62 Mariposa Horticultural Enterprises	22*
63 Clarence Davids & Co.	22
64 DLC Resources	21.98
65 Complete Landscaping Service	21.91*
66 Dennis' Seven Dees Landscaping	21.9
67 Russell Landscape Group	21.23
68 Girard Environmental Services	21.2
69 Environmental Management Services	21.2
70 Sunrise Landscape	21*
71 David J. Frank Landscape Contracting	21
72 Stiles Landscape Co.	20*
73 Senske Lawn & Tree Care	20
74 Northwestern Landscape Co.	20*
75 Moore Landscapes	20*
76 Artistic Maintenance	20
77 McHale Landscape Design	19.6
78 Christy Webber Landscapes	19.2
79 Hazeltine Nurseries	19*
80 Lambert Landscape Co.	18.66
81 Gachina Landscape Management	18.5
82 Benchmark Landscape	18.5
83 LMI Landscapes	18.2
84 Creative Environments Design & Landscape	18.13
85 Western Dupage Landscaping	18.1*
86 Urban Farmer	18
87 James River Grounds Management	18
88 Realty Landscape Corp.	18*
89 Dora Landscaping Co.	17.84
90 Reyburn Landscape Cos.	17.7
91 Swingle Lawn, Tree & Landscape Care	17.6
92 Meadows Farms Nurseries	17.5
93 Fairco	17.5
94 The Highridge Corp.	17.33*
95 Dobson's Woods & Water	16.8
96 Gibbs Landscape Co.	16*
97 PROscape	15.6
98 Outside Unlimited	15.6*
99 The Dworsky Services	15
100 ArtisTree Landscape Maintenance & Design	14.5

2007 Revenue (in millions of U.S. Dollars)	Employees 2008 Full time / Part time	Headquarters	Locations
28	100 / 150	Wilmette, IL	2
37.25	215 / 0	Miami, FL	5
38	200 / 25	Dade City, FL	NR
26	65 / 280	Wauconda, IL	2
23	60 / 325	Bartlett, IL	4
25	350 / 125	Portland, ME	5
20	350 / 15	Albuquerque, NM	1
19	206 / 3	San Antonio, TX	2
22.6	150 / 260	McLean, VA	5
33	200 / 210	Denver, CO	2
22	NR	Plymouth Meeting, PA	NR
23	420 / 0	Irwindale, CA	3
22	90 / 215	Matteson, IL	3
16.86	345 / 0	Phoenix, AZ	1
21.91	140 / 40	Bowie, MD	2
23.89	300 / 30	Portland, OR	5
18.93	NR	Dacula, GA	NR
17.9	200-250 / 0	Sanford, FL	5
16.3	160 / 310	Plain City, OH	2
21	120 / 0	Tampa, FL	1
20.1	225 / 100	Germantown, WI	6
20	NR	Fort Lauderdale, FL	NR
18	200 / 50	Kennewick, WA	7
20	NR	Puyallup, WA	4
20	46 / 190	Northbrook, IL	3
NR	300 / NR	Lake Forest, CA	6
19.6	200 / 0	Upper Marlboro, MD	4
18.2	245 / 1	Chicago, IL	2
19	155 / 0	Venice, FL	1
13.25	156 / NR	Dallas, TX	1
17.44	270 / NR	Menlo Park, CA	4
22	230 / 0	Poway, CA	3
21.3	225 / 0	Carrollton, TX	4
30.61	300 / 90	Tempe, AZ	2
18.1	32 / 160	Naperville, IL	2
19	350 / 0	Thornton, CO	1
15.55	315 / 1	Glen Allen, VA	6
18	NR	Newtown, PA	4
16.97	100 / 0	Apopka, FL	2
20.2	170 / 0	Henderson, NV	1
18.6	230 / 3	Denver, CO	2
18.2	150 / 250	Chantilly, VA	23
24.5	150 / NR	Scottsdale, AZ	3
17.33	160 / 1	Issaquah, WA	1
20.2	248 / 1	Ocoee, FL	7
16	285 / 50	Smyrna, GA	3
12.55	275 / 1	Orlando, FL	5
15.6	150 / 100	Hampstead, MD	2
8.5	310 / 0	Gardena, CA	6
15	180 / 60	Venice, FL	4

listing continued on next page



INVESTING TIME & MONEY

74%

Are increasing personal contact with clients and prospects.

42%

Are increasing their marketing budgets.

MARK-DOWN MADNESS

"Low-ball bids" tied "the down economy" as contractors' top concern.



DOWN THE DRAIN

44%

Project a drop in lawn care customer retention.



Employee training is key. Lifting a person's vision to higher sights is the raising of that individual's performance to a higher standard.

People need to stop talking about how bad the economy is. It only seems to be bad because it was overheated for several years due to too much debt and greed. Now, when things are normal, everybody thinks things are bad.

Quality service remains the flagship to weathering these economic storms.

This down economy is a time for creative thinking, cutting dead weight and getting lean and mean.

I knew for us to prosper in 2009 we'd have to double our marketing investments. So many companies are doing the opposite — cutting back on their advertising. They are the ones who will be really hurting — if they're still around — when this economy rebounds.

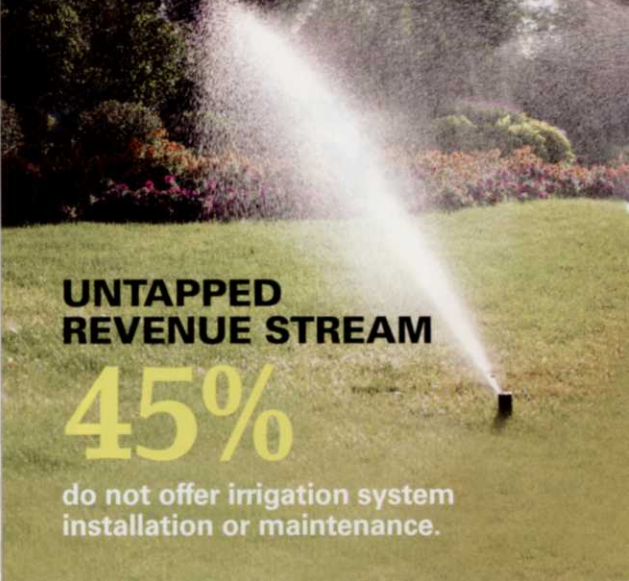
Everyone is pinching pennies. If we don't give them their money's worth, they will find someone who will. Any 12-year-old kid can do much of what we do, but to make the customer proud takes a real caring person.

150

	Company	2008 Revenue (in millions of U.S. Dollars)
101	Berghoff Design Group	14
102	Becker Landscape Contractors	14
103	The Spencer Co.	13.55
104	Raymow Enterprises	13.5
105	Precision Landscape Management	13.5
106	Complete Property Maintenance	13.5
107	Perficut Lawn & Landscape	13.3
108	NATURESCAPE	13.22
109	Intermountain Plantings	13.15
110	Luke Brothers Landscape Services	12.8
111	Cleary Bros. Landscape	12.5
112	Florida Landscape Service	12.28
113	Sun City Landscapes	12
114	Parker Cos.	12
115	Kinsella Landscape	12
116	Mickman Brothers	11.8*
117	Santa Rita Landscaping	11.6*
118	Land-Tech Enterprises	11.5
119	Basnight Land & Lawn	11.4
120	Sposato Landscape	11
121	Gardeners' Guild	11
122	Arteka Cos.	11
123	Mill Brothers Landscape	10.8
124	Lied's	10.75
125	HGS, LLC dba Angler Environmental	10.5
126	Heaviland Enterprises	10.02
127	New Way Landscape & Tree Services	9.8
128	McGinty Bros.	9.6
129	Pacheco Brothers Gardening	9.5
130	ILT Vignocchi	9.5*
131	John Mini Distinctive Landscapes	9.15
132	Carol King Landscape Maintenance	8.9
133	Tomlinson Bomberger Lawn Care & Landscape	8.76
134	Greener Landscaping	8*
135	B&L Landscaping	8
136	Angler Environmental	8*
137	Plantique	7.9
138	The Pattie Group	7.85
139	Hoffman Landscapes	7.85
140	Clearwater Landscape & Nursery	7.4
141	Fine Earth Landscape	7.2
142	Rancho West Landscape	7.16*
143	Borst Landscape & Design	7.09
144	Greenscape	7.08
145	Tree Tech	7
146	Southview Design	7
147	The Lawn Ranger	6.9
148	Commercial Scapes	6.88
149	Maffei Landscape Contractors	6.55
150	Jacobsen Landscape Design & Construction	6.5



2007 Revenue (in millions of U.S. Dollars)	Employees 2008 Full time / Part time	Headquarters	Locations
13	155 / 1	Scottsdale, AZ	3
13.25	60 / 140	Indianapolis, IN	2
12.63	217 / 7	Houston, TX	2
13.5	250 / 0	Oldsmar, FL	8
12.4	172 / 242	Dallas, TX	2
13.3	275 / 40	Coconut Creek, FL	3
10	55 / 95	Des Moines, IA	1
12.4	152 / 10	Muskego, WI	18
11	40 / 120	Bluffdale, UT	1
15.98	295 / 1	Holiday, FL	8
13.5	175 / 0	Danville, CA	6
15.8	60 / 0	Orlando, FL	2
21	147 / 0	Las Vegas, NV	1
12.2	150 / 15	Scotch Plains, NJ	NR
10	48 / 65	Blue Island, IL	2
11.8	115 / 215	Ham Lake, MN	2
11.6	150 / 150	Tucson, AZ	1
14.36	168 / 35	Warrington, PA	2
12.14	95 / 85	Chesapeake, VA	1
10	120 / 80	Milton, DE	3
12	125 / 0	Richmond, CA	1
10.5	110 / 0	Minneapolis, MN	2
11.23	45 / 100	Fort Collins, CO	1
12.975	150 / 18	Sussex, WI	1
12	80 / 5	Manassas, VA	4
6.78	184 / 0	Vista, CA	4
9.28	0 / 188	San Diego, CA	4
9.6	50 / 45	Long Grove, IL	2
8.9	130 / NR	Hayward, CA	5
9.5	25 / 135	Wauconda, IL	1
8.11	63 / 42	Congers, NY	1
8.35	136 / 42	Orlando, FL	1
8.87	82 / 5	Lancaster, PA	1
8	90 / 0	Lowell, MA	1
6.6	120 / 0	Oak Park, MI	1
8	80 / 4	Manassas, VA	3
7.7	105 / 25	Allentown, PA	2
8.12	50 / 35	Novelty, OH	2
6.4	75 / 0	Wilton, CT	3
8	65 / 4	Ijamsville, MD	1
7.5	60 / 0	Poolesville, MD	1
7.16	75 / 3	Temecula, CA	1
7.4	20 / 55	Allendale, NJ	1
6.9	80 / 57	Holly Springs, NC	2
7	68 / 5	Foxboro, MA	1
9	23 / 50	Inver Grove Heights, MN	1
6.1	19 / 80	Eden Prairie, MN	1
5.75	55 / 3	Bristow, VA	1
7.18	84 / 0	Mashpee, MA	1
6.5	38 / 51	Midland Park, NJ	4

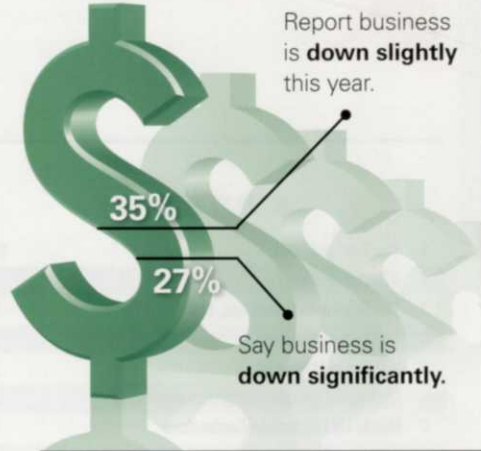


UNTAPPED REVENUE STREAM

45%

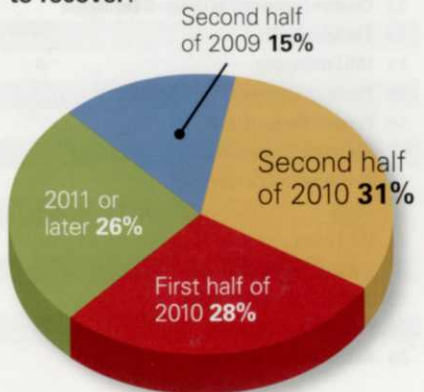
do not offer irrigation system installation or maintenance.

DISAPPEARING DOLLARS



TEST OF TIME

When do you expect the economy to recover?



2008 REVENUE BY REGION

(IN MILLIONS OF U.S. DOLLARS)



LM Top 25

NORTHEAST

1	USM	480.7
2	The TruGreen Cos.	352.5
3	The Brickman Group, Ltd., LLC	211.04
4	Bartlett Tree Experts	95.2
5	Scotts LawnService	93.57
6	Savatree	50.05
7	Denison Landscaping	32.58
8	Ruppert Nurseries	25.96
9	NaturaLawn of America	18.76
10	Chapel Valley Landscape Co.	18
10	Realty Landscape Corp.*	18
12	U.S. Lawns	17.2
13	McHale Landscape Design	15.09
14	Outside Unlimited	14.82
15	Parker Cos.	12
16	Land-Tech Enterprises	11.5
17	Arteka Cos.	11
17	Sposato landscape	11
19	Lied's	10.75
20	John Mini Distinctive Landscapes	9.15
21	Tomlinson Bomberger Lawn Care & Landscape	8.76
22	Greener Landscaping	8
23	Plantique	7.9
24	Hoffman Landscapes	7.85
25	Fine Earth Landscape	7.2

SOUTHWEST

1	The TruGreen Cos.	183.3
2	AAA Landscape	35.9
3	The Brickman Group, Ltd., LLC	34.04
4	The Groundskeeper	32.3
5	ISS Grounds Control	31.5
6	Metroplex Garden Design Landscaping LP	28.8
7	Heads Up Landscape Contractors	25
8	Yellowstone Landscape Group ^o	22
9	DLC Resources	21.98
10	Scotts LawnService	21.83
11	Maldonado Nursery & Landscaping	21.6
12	Lambert Landscape Co.	18.66
13	Creative Environments Design & Landscape	17.58
14	The Spencer Co.	13.55
15	LMI Landscapes	13.5
16	Precision Landscape Management	13.5
16	Berghoff Design Group	13.3
18	Santa Rita Landscaping	11.6
19	American Civil Constructors	11.2
20	Fairco	8.75
21	U.S. Lawns	8.6
22	Bartlett Tree Experts	6.8
23	Greater Texas Landscapes	5.14
24	Horticulture Unlimited	4.13
25	NaturaLawn of America	1.42

WEST

1	The TruGreen Cos.	225.6
2	The Brickman Group, Ltd., LLC	88.5
3	Gothic Landscaping / Gothic Grounds Management	80
4	Jensen Corporate Holdings	53
5	Marina Landscape	50
6	American Civil Constructors	44.8
7	Teufel Landscape	35.5
8	Sierra Landscape Co.	34.7
9	Mission Landscape Cos.	33
10	Cagwin & Dorward	30
11	CoCal Landscape	22.8
12	Dennis' Seven Dees Landscaping	21.9
13	Senske Lawn & Tree Care	20
14	Gachina Landscape Management	18.5
14	Benchmark Landscape	18.5
16	Urban Farmer	18
17	Reyburn Landscape Cos.	17.7
18	Swingle Lawn, Tree & Landscape Care	17.6
19	The Highridge Corp.	17.33
20	Dworsky Services	15
21	ISS Grounds Control	13.5
22	Intermountain Plantings	13.15
23	Cleary Bros. Landscape	12.5
24	Scotts LawnService	12.47
25	Sun City Landscapes	12

SOUTHEAST

1	The TruGreen Cos.	282
2	The Brickman Group, Ltd., LLC	136.16
3	OneSource Landscape & Golf Services	105.34
4	Scotts LawnService	93.57
5	Massey Services	77.49
6	Vila & Son Landscaping Corp.	62.57
7	Middleton Lawn & Pest Control	57.6
8	U.S. Lawns	43
9	Tropics North Landscaping	42.5
10	Nanak's Landscaping	36
11	Ruppert Nurseries	31.73
12	The Greenery	30.8
13	Yellowstone Landscape Group ^o	30
14	Scott Byron & Co.	29.6
15	Ecoscope Solutions Group	29.08
16	Dixie Landscape Co.	26.5
17	Cornerstone Solutions Group	26
18	Bartlett Tree Experts	25.5
19	McFall and Berry Landscape Management	22.83
20	Girard Environmental Services	21.2
21	Chapel Valley Landscape Co.	18
21	James River Grounds Management	18
23	Dora Landscaping Co.	17.84
24	Dobson's Woods & Water	16.8
25	Mainscape	16.45

MIDWEST

1	The TruGreen Cos.	296.1
2	The Brickman Group, Ltd. LLC	204.24
3	Scotts LawnService	90.451
4	The Bruce Company of Wisconsin	42
5	Clintar Landscape Management	40.92
6	Mariani Landscape	35
7	Landscape Concepts Management	31.07
8	Scott Byron & Co.	29.3
9	LJ Thalmann Company dba Chalet	28
10	Countryside Industries	25.5
11	Sebert Landscaping	25
12	Spring-Green Lawn Care Corp.	23.32
13	Clarence Davids & Co.	22
14	Russell Landscape Group	21.23
15	Environmental Management Services	21.2
16	David J. Frank Landscape Contracting	21
17	Christy Webber Landscapes	19.2
18	Western Dupage Landscaping	18.1
19	Perficut Lawn & Landscape	13.3
19	Becker Landscape Contractors	13.3
21	NATURESCAPE	13.22
22	Mainscape	12.95
23	Kinsella Landscape	12
24	Bartlett Tree Experts	11.9
25	McGinty Bros.	9.6

COMMERCIAL

1	The Brickman Group, Ltd., LLC	660.37
2	USM	480.7
3	Ambius	122.06
4	OneSource Landscape & Golf Services	117.05
5	U.S. Lawns	86
6	Yellowstone Landscape Group ^o	78.57
7	Vila & Son Landscaping Corp.	62.57
8	Ruppert Nurseries	57.12
9	American Civil Constructors	56
10	Marina Landscape, Inc.	50
11	Gothic Landscaping / Gothic Grounds Management	48
12	Tropics North Landscaping	42.5
13	ISS Grounds Control	40.5
14	Jensen Corporate Holdings	39.75
15	The Groundskeeper	38
16	Clintar Landscape Management	37.4
17	Nanak's Landscaping	36
18	AAA Landscape	35.9
19	Acres Group	35.72
20	Mainscape	35
21	Bartlett Tree Experts	34
22	The Bruce Company of Wisconsin	33.6
23	Denison Landscaping	33.3
24	Mission Landscape Services	33
25	Teufel Landscape	30.88

RESIDENTIAL

1	Scotts LawnService	305.62
2	Bartlett Tree Experts	136
3	Weed Man	82.15
4	Massey Services	68.96
5	Middleton Lawn & Pest Control	47.8
6	Savatree	44
7	NaturaLawn of America	32.56
8	Gothic Landscaping / Gothic Grounds Management	32
9	Mariani Landscape	31.5
10	Spring-Green Lawn Care Corp.	29.16
11	Scott Byron & Co.	29
12	LJ Thalmann Company dba Chalet	28
13	The Brickman Group, Ltd., LLC	20.42
14	McHale Landscape Design	18.62
15	Lambert Landscape Co.	18.28
16	Meadows Farms	16.62
17	Ecoscope Solutions Group	15.99
18	Creative Environments Design & Landscape	14.5
19	Chapel Valley Landscape Co.	14.4
20	Senske Lawn & Tree Care	14
21	Metroplex Garden Design Landscaping LP	13.53
22	Jensen Corporate Holdings	13.25
23	NATURESCAPE	11.89
24	Swingle Lawn, Tree & Landscape Care	11.44
25	Sun City Landscapes	11.40

BY MIX
(IN MILLIONS OF U.S. DOLLARS)



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Go ahead, build it. And when you do, John Deere will be there, supporting you every step of the way. From the earth moving equipment you need to start the job, utility vehicles for transporting supplies, and professional mowing equipment to put the finishing touches on the project. You can also count on us for the very best in parts, service, and financing. For everything you need on the worksite, call your local John Deere dealer today.



JOHN DEERE

DESIGN/BUILD

1	Gothic Landscaping / Gothic Grounds Management	53.6
2	The Brickman Group, Ltd., LLC	40.84
3	Ruppert Nurseries	33.46
4	Vila & Son Landscaping Corp.	31.28
5	Denison Landscaping	30.04
6	Jensen Corporate Holdings	29.15
7	Metroplex Garden Design Landscaping LP	28.8
8	Ambius	28.35
9	American Civil Constructors	28
10	Yellowstone Landscape Group*	24.9
11	Scott Byron & Co.	21.31
12	Teufel Landscape	21.3
13	Dixie Landscape Co.	21.2
14	AAA Landscape	20.82
15	Ecoscape Solutions Group	17.53
16	Mariani Landscape	17.5
17	Sierra Landscape Co.	17.35
18	McHale Landscape Design	17.05
19	Tropics North Landscaping	17
20	The Bruce Company of Wisconsin	16.38
21	Heads Up Landscape Contractors	16.25
22	Chapel Valley Landscape Co.	15.84
22	Meadows Farms	15.75
24	ISS Grounds Control	15.75
25	Countryside Industries	15.3

LAWN CARE

1	The TruGreen Cos.	987
2	Scotts LawnService	311.9
3	Weed Man	86.48
4	Lawn Doctor	85.5
5	Middleton Lawn & Pest Control	46.08
6	NaturaLawn of America	35.4
7	Spring-Green Lawn Care Corp.	29.97
8	Massey Services	15.49
9	Florida Landscape Service	12.28
10	OneSource Landscape & Golf Services	11.7
11	Santa Rita Landscaping	11.6
12	Savatree	11
13	NATURESCAPE	10.57
14	Urban Farmer	9.54
15	Senske Lawn & Tree Care	7.6
16	U.S. Lawns	5.16
17	Cornerstone Solutions Group	3.9
18	Christy Webber Landscapes	3.84
19	Swingle Lawn, Tree & Landscape Care	3.16
20	Tomlinson Bomberger Lawn Care & Landscape	2.8
20	LJ Thalmann Company dba Chalet	2.8
22	Mainscape	2.2
23	Tropics North Landscaping	2.12
24	B&L Landscaping	1.92
25	Gothic Landscaping / Gothic Grounds Management	1.6

IRRIGATION

1	Marina Landscape	20
2	Sierra Landscape Co.	11.79
3	Jensen Corporate Holdings	7.95
4	Fairco	7.87
5	Teufel Landscape	7.1
6	Rancho West Landscape	6.8
7	ISS Grounds Control	6.75
8	Yellowstone Landscape Group*	6.08
9	U.S. Lawns	6.02
10	Maldonado Nursery & Landscaping	6
11	OneSource Landscape & Golf Services	5.85
12	Dixie Landscape Co.	5.3
13	Ecoscape Solutions Group	4.79
14	Reyburn Landscape Cos.	4.42
15	LMI Landscapes	4.19
16	Denison Landscaping	3.98
17	Cornerstone Solutions Group	3.9
18	Dobson's Woods & Water	3.86
19	AAA Landscape	3.59
20	The Highridge Corp.	3.46
21	Urban Farmer	3.24
22	Vila & Son Landscaping Corp.	3.12
23	Chapel Valley Landscape Co.	2.88
24	Mainscape	2.62
25	Dennis' Seven Dees Landscaping	2.41

MAINTENANCE

1	The Brickman Group, Ltd., LLC	551.44
2	The TruGreen Cos.	352.5
3	Ambius	94.94
4	OneSource Landscape & Golf Services	91.29
5	USM	62.49
6	U.S. Lawns	60.2
7	Nanak's Landscaping	36
8	Vila & Son Landscaping Corp.	28.15
9	Acres Group	24.44
10	Mission Landscape Services	23.1
11	ISS Grounds Control	22.5
12	American Civil Constructors	22.4
13	The Groundskeeper	22.04
14	Tropics North Landscaping	21.25
15	Gothic Landscaping / Gothic Grounds Management	20.8
16	Landscape Concepts Management	20.16
17	Sebert Landscaping	20
18	Ruppert Nurseries	19.61
19	The Greenery	19.4
20	Mainscape	17.95
21	Mariani Landscape	17.15
22	Cagwin & Dorward	16.5
23	DLC Resources	14.92
24	Chapel Valley Landscape Co.	16.2
25	Jensen Corporate Holdings	15.9

(IN MILLIONS OF U.S. DOLLARS)

BY SECTOR

LM Top 25



Gauge your performance

Even finely tuned companies are taking a beating in this off-road economy. Information is the key to navigating this rough terrain and finding your way back onto the fast track.

BY DANIEL G. JACOBS MANAGING EDITOR

THE ECONOMY HAS slammed on the brakes. The navigation system's down and there's a strange noise coming from the engine. Like the drivers of an aging vehicle, Green Industry business owners study their dashboards trying to gauge the health of their operations — hoping not to end up in a ditch in need of a tow and a good body shop or, worse yet, having to walk away and sell everything as scrap.

Good information is essential to gauging the state of your business. We surveyed more than 680 of your peers, crunched and interpreted the numbers, and present the results here. Some of the data reminds us of the gentle hum of a well-tuned engine — while other bits are more reminiscent of

the black-smoke-spewing, oil-leaking junker just ahead on the side of the road.

Of course, you don't need a tachometer to tell you how your business is doing. Some markets have been hit harder than others. Some company offerings have held up pretty well, while others have seen a need for their services dry up like a puddle in the Southwestern sun. But perspective does help. Even if it offers nothing more than the chance to commiserate with your fellow executives on the sorry state of the economy and its affect on your businesses (and that is by no means the case for all of you), having a benchmark with which to measure your operation against allows you to step back, take a deep breath and evaluate the situation. And it might just make it a bit easier to pass that guy in the slow lane just in front of you.

Let's start with a little perspective. The LM 150 companies in this industry accounted for nearly \$6.8 billion in revenue and employed more than 77,000 people full-time and another 20,000-plus part-time. And despite the economy, one of the biggest complaints we still hear about is the lack of workers: "Where's all that available labor that's supposed to be out there? I still can't find enough workers. The federal government really needs to do something about this!" one survey respondent remarked.

SOI Analysis



Plan for success

So what do the numbers say? According to *LM's* 2009 State of the Industry survey, 63% of you describe the market in your region as "slightly down" or "down significantly." Only 37% selected the terms "relatively healthy" or "very healthy."

However, we're a little leery of those numbers because 40% of you confessed you didn't prepare a budget for 2009. If you don't have a budget in place, it's hard to know how well or poorly you're doing and almost impossible to compare one year against another. There are too many variables to track, and gut instinct might be good for deciding what's for dinner, but it's not so good for running a business.

Interestingly, 46% of you have three- to five-year business plans, and more than half of you (56%) review them at least once every six months.

While it's not all doom and gloom, the survey clearly indicates you are taking a cautious approach to the near future. Thirty-eight percent of respondents project their revenue will increase in 2009. Specifically, 5% expect a more than 20% uptick; 15% are planning for a 10% to 19% increase; and 18% expect to bump revenues between 1% and 9%. Twenty-

three percent of you expect to hold even with 2008, while 40% expect negative revenue growth.

The *LM 150* fared slightly better. For the biggest of the big (among those for whom we have complete data), 53% experienced a revenue increase over 2007; 38% saw a drop in revenue; and 9% held their own year-over-year.

One contractor in our survey tried to put a common-sense perspective the current situation: "People need to stop talking how bad the economy is. It only seems to be bad because it was overheated for several years due to too much debt and greed. Now, when things are normal, everybody thinks things are bad."

Maybe so, but perception is reality and whether "normal" has been reset to a higher level after years of strong growth or we're just uncomfortable with the old normal, few of you are expecting things to improve this year. According to our survey, only 15% expect a return to moderate growth (3% GDP or better) by the second half of this year. Twenty-eight percent think it will come in the first half of 2010 and 30% believe it will be the second half of next year. Slightly more than a quarter of you (26%) say the recovery is not coming until 2011 or later.

SOI Analysis

LIQUID GOLD

61%

Say landscape designs must be more water efficient.



58%

Predict water-use regulations will become more stringent and spread.



55%

Expect the price of water to continue to shoot upward.

ALL THUMBS

40% See business getting worse this year.



37% Expect their revenue to rise in 2009.

TALENT TITLE WAVE

75%

Say attracting top talent is among 2009's top-two opportunities.

Waste not, want not?

With all of the above in mind, you have indicated you're looking for ways to reduce your spending.

Some 58% are extending the equipment turn-over rate by keeping machines longer. Another 6% are more strongly considering renting some tools instead of buying them, and 9% are looking at used or reconditioned equipment as an alternative to new. As one of you said: "Looking forward to seeing what the industry is like. Our market has definitely felt the pinch. It has been pretty secure and recession-proof for almost 25 years. A turn to reality for everyone."

Whether we're facing facts or frightened by them, there are a few gauges every contractor should review. Customer retention is certainly one key performance indicator.

Of those who do maintenance, 49% have seen a decrease in customer retention rates this year over last year. Whether they're giving their business to low-price outfits or doing the work themselves is unclear. That's why, as one contractor put it, "It is more critical than ever that we give the greatest service possible to all our customers and to our prospects."

The key, says another contractor, is to "treat your

customers right and they will keep you in business for years with their referrals."

That might be easier said than done. The downturn in the economy has many of you worried about the future. "I believe we are only in the beginning stages of a full-out fist fight with each other, and I'm not sure that the ones left standing at the end will be able to hold their hands up in victory," says one contractor. "They will have had to spend every resource they have to get there, and may not have anything left to fight with."

One challenge is that you are no longer competing with just your traditional rivals. In an industry with a relatively low barrier to entry and a market littered with laid-off workers, you have a host of new competitors. A glut of competition from frantic newbies drives prices down. And poor quality from some of those same inexperienced operators leaves a stain on the industry.

"A lot of desperate landscape companies are undercutting the market," one contractor lamented. "Some are already out of business. Many others will follow. Failure to recover equipment and business overhead in pricing is not sustainable."

ROAD TO RICHES

Top two add-on "sustainable services":

- #1 Permeable pavers
- #2 Rainwater harvesting

SHOPPING LIST

Things you're looking to buy this year:

- 69% Handheld power equipment
- 46% Mowers
- 38% Light trucks

LAY OF THE LAWN



The bright side

Opportunity still exists among those willing to work to get it. Many of you are looking to deliver your services to more customers or develop new markets. Nearly half (49%) consider the residential market the best opportunity for your company. Twenty-eight percent are looking to increase commercial accounts. Nine percent are looking at condo, multi-family or homeowner associations (HOAs) as a way to draw additional revenue, while 11% are turning their sights toward the government.

How you reach those markets is key. Forty-two percent of you plan to increase your marketing budgets, while only 21% plan to decrease the marketing spend.

"I knew for us to prosper in 2009, we'd have to double our marketing investments," one contractor offers. "So many companies are doing the opposite, cutting back on their advertising. They are the ones who will be really hurting — if they're still around — when this economy rebounds."

Personal contact is still the most popular way to touch your clients. Some 74% of you plan to make yourselves more available to your customers.

According to the survey, the single most effective form of advertising to attract new prospects is word-of-mouth referrals. Seventy-one percent of you say that is the best strategy. Only 2% of you say radio or TV is the best way to increase your client base.

We were impressed with some of the "other" responses we got, including billboards, community meetings, home and garden shows, Internet (specifically, Craigslist.com) and good, old-fashioned door-to-door direct marketing.

It's all about getting your name out there. Some of you are adding tried and true marketing strategies to your efforts. Those include: starting a newsletter (22%), participating in community service projects (28%) and offering coupons or special incentives to new customers (29%).

Of course, this is only a sampling of what you'll find inside *LM's* 2009 State of the Industry report. On these pages, you'll find more charts, graphs and quotes to give you vital insight into the state of the Green Industry. You'll also find profiles of executives from several of the *LM* 150. While you're still the best mechanic for your business, having this dashboard of information at your fingertips helps you understand how well your company is running. *LM*

EQUIPMENT LIFECYCLES

58% Plan to keep their equipment longer than usual.

27% Plan to replace equipment per usual because machinery is key to productivity.

9% Are strongly considering buying reconditioned instead of new equipment.

6% Are strongly considering leasing rather than purchasing new machinery.



MONEY MAGNETS

71%

Say **referrals** is the most-effective way to attract new business

BIG 3 PRIORITIES

#2
Increasing efficiency

#1
Retaining and adding customers

#3
Cutting labor, equipment and material costs

After being in business 18 years, I'm now as close to failing as I ever have been.

I'm sick of grass cutters low-balling the landscape market and devaluing our services and our industry as a whole.

Where's all that available labor that's supposed to be out there? I still can't find enough workers. The federal government really needs to do something about this.

I think we are 12 months away from what really will happen to this economy. When the debt catches up with reality, companies will exit this industry in droves.

Treat customers like they're worth every penny they pay you — but do not let them take advantage of you.

A lot of desperate landscape companies are undercutting the market. Some of them already are out of business and others will follow. Failure to recover equipment and business overhead in pricing is not sustainable.

It's more critical than ever that we give the greatest service possible to all of our customers and prospects.

Keep the faith.

Don't give in to the bad times. March forward as best you can.

FOUNDATION FOR GROWTH

24%

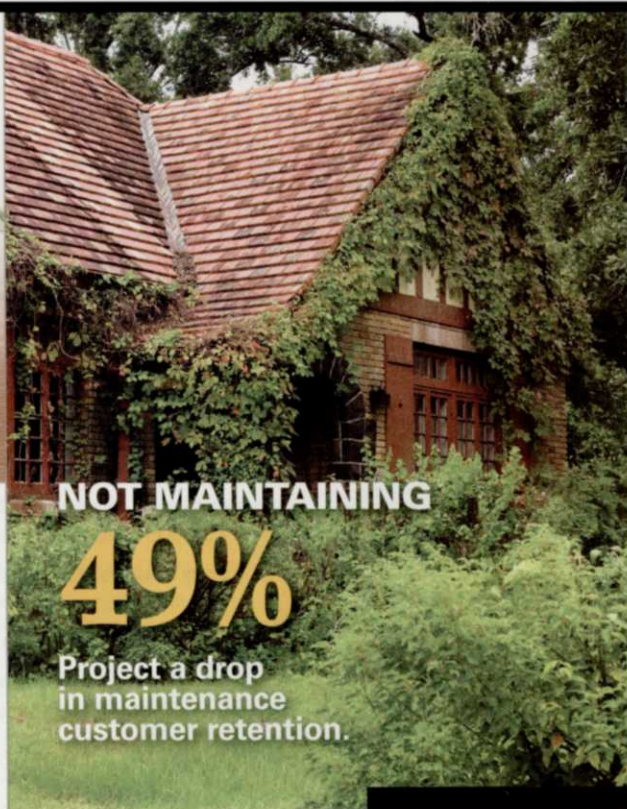
Forecast their design/build business to grow in 2009.



HEADS DOWN

40%

Admitted to not even preparing a budget for 2009.



NOT MAINTAINING

49%

Project a drop in maintenance customer retention.



Sierra Landscape Co.

Headquarters: Palm Desert, CA
Web site: sierralandscapecompany.com
Leader: George Gonzalez, President
Year founded: 1980

2008 sales: \$34.7 million

Company's biggest obstacle in '09: Pricing pressure: Competitors are bidding desperately low margins, if any.

Company's biggest opportunity in '09: Restructuring and improving companywide efficiency, and to be poised for the turnaround.

Three keys to success: Adaptability, commitment and planning

How's the economy treating you?: These are the most challenging times next to our start-up 29 years ago.

Yellowstone Landscape Group

Headquarters: Dallas **Web site:** yellowlandscape.com
Leaders: John Miller, CEO; and Operating Company Presidents: Edward Schatz, Robert Taylor and Drew Watkins
Year founded: 2008 **2008 sales:** \$81 million
Company's biggest obstacle in '09: Addressing the impact of the economy on our customers.
Company's biggest opportunity in '09: Acquisitions
Three keys to success: Expansion, service and cost-control
How's the economy treating you?: Despite margin pressures, we are finding areas of business growth.

Weed Man

Headquarters: Oshawa, Ontario, Canada
Web sites: weedmancanada.com and weedmanusa.com
Leader: Michael Kernaghan, Chief Operating Officer
Year founded: 1970
2008 sales: \$86.48 million (U.S.)

Company's biggest obstacle in '09: Negativity. It can be debilitating if an owner loses the focus on vision for his or her company. If owners can stay focused on their visions, and are willing and able to change to embrace the future, they will be able to face any obstacle.

Company's biggest opportunity in '09: The economy. We always strive in times of recession. However, (other companies') layoffs enable us to attract better employees and attract new franchisees.

Three keys to success: A willingness to change, execution and persistence.

How's the economy treating you?: The economy is hurting everyone, but Weed Man has been [a] lawn care service leader for 40 years and in that time, there have been a few economic downturns. We persevered and flourished through all of them, and will succeed in this one as well.



LM Leader Profiles



Heaviland Enterprises

Headquarters: Vista, CA **Web site:** heaviland.net **Leader:** Tom Heaviland, President and Co-Founder
Year founded: 1985 **2008 sales:** \$10.02 million
Company's biggest obstacle in '09: Adjustments (discounts) being made in customer contracts because of current economic conditions.

Company's biggest opportunity in '09: Water management and the programs available for our customers to upgrade their systems.

Three keys to success: Employees, training and communication

How's the economy treating you?: In commercial landscape management, although not recession-proof, there still exists opportunities to grow your business.

Scotts LawnService

Headquarters: Marysville, OH **Web site:** scottslawnservice.com **Leader:** Peter Korda, Senior Vice President

Year founded: 1868 **2008 sales:** \$311.9 million **Company's biggest obstacle in '09:** Consumer insight in DIY trends.

Company's biggest opportunity in '09: Our continued focus on winning with our customers and team members — do everything we do even better than before, and help homeowners in new and different ways.

Three keys to success: Customers, listening and simplification

How's the economy treating you?: On the balance, our homeowner customers are more similar to 2008.

Greenscape

Headquarters: Holly Springs, NC

Web site: greenscapeinc.com

Leader: Michael Currin,
President and Founder

Year founded: 1979

2008 sales: \$7.08 million

Company's biggest obstacle in '09: The slowdown in landscape construction opportunities, which means there is more pricing pressure on the opportunities that are available.

Company's biggest opportunity in '09: There will be more companies that will not make it through this time, and even more companies that have laid off some key positions in an effort to survive. We have been able to keep our team intact because we focused on being more efficient and operating very lean prior to the recession. We have not had to lay off a lot of people as a result. For that reason, we feel like we can respond more quickly to the opportunities that present themselves. As recovery continues, we will be in a better position than some of our competition to take advantage of these opportunities.

Three words for success:
The Greenscape Way

How's the economy treating you?: We have had good opportunities for growth in our Weed Man Lawn care branch, as well as in our landscape management branches.



Ruppert Nurseries

Headquarters: Laytonsville, MD

Web site: ruppertnurseries.com

Leaders: Craig Ruppert, CEO (left); and Chris Davitt, President (above)

Year founded: 1990 **2008 sales:** \$57.7 million

Company's biggest obstacle in 2009: Developing and exciting our people while we hold our company to standards that will exceed our customers' expectations.

Company's biggest opportunity in 2009: Growing through tough economic times, which allows us to build market share and create opportunities for employees.

Three keys to success: Values, employees and customers.

How's the economy treating you?: It has created obstacles that our company is fully capable of overcoming.



Ambius

Headquarters: Buffalo Grove, IL (Divisional Head Office) **Web site:** ambius.com

Leaders: Jeff Mariola, Divisional Managing Director; Michelle Rodwell, Divisional Vice President Marketing (pictured); and Larry Rutkowski, Executive VP Sales

Year founded: 1963 **2008 sales:** \$123.3 million

Company's biggest obstacle in '09: Our biggest challenge is to educate our current and prospective customers on the real and perceived value of the services we provide, and how cutting back can have a direct impact on people's morale and productivity. With businesses operating leaner, it's more important than ever to continue providing and investing in services that enhance work environments so people can thrive.

Company's biggest opportunity in '09: Our biggest opportunity is two-fold: To provide world-class service to our current customers, while continuing to expand our reach within our 40-plus markets in North America by offering a full range of services — from interior landscaping to wall art, ambient scenting and holiday decorating.

Three keys to success: Inspire, connect, engage

How's the economy treating you?: Like most service companies today, the downturn in the economy has affected discretionary spending.



Mainscape

Headquarters: Fishers, IN **Web site:** mainscape.com

Leaders: Dave and Zyg Mazanowski, Co-Founders and CEOs

Year founded: 1985 **2008 sales:** \$35 million

Company's biggest obstacle in '09: Collecting accounts receivable.

Company's biggest opportunity in '09: A changing economic environment.

Three words for success: The triple win

How's the economy treating you?: Overall, we are doing well in this economy, both from an income statement and balance sheet perspective.



The Brickman Group, Ltd., LLC

Headquarters: Gaithersburg, MD

Web site: brickmangroup.com

Leader: Scott Brickman, CEO

Year founded: 1939

2008 sales: \$680.8 million

Company's biggest obstacle in '09: For Brickman, the same challenges that are impacting business in general and our industry specifically, notably the economy and consumer spending, create for us challenge and opportunity at the same time. Adapting to our clients' imperatives to reduce costs and provide the highest level of value for every dollar they must spend allows us to focus on what has always been a driving force in our business: providing the best quality product at the lowest possible price. Reinforcing this discipline and engaging our teams at all levels to focus on efficiency and cost savings is generating a sense of purpose that has brought our teams together and created an exciting outlook on the future. We know these improvements will make us even more productive in the years to come.

Company's biggest opportunity in '09: At the same time, we have remained true to the core value of treating our team members like family, and I am encouraged to see how tough times bring us together. The Brickman Foundation, created to help our neediest team members in times of financial hardship, has received the highest level of employee contribution since its inception. This is a heartwarming sign of our special culture in action — and reinforces our commitment to each other to pull together through these challenging times.

Three keys to success: Integrity, discipline and courage

How's the economy treating you?: We choose to rise to the challenge in the economy. We see it as an opportunity to further hone our processes and improve our efficiencies to continue to provide the best quality and value to our customers. If we can partner with them to help them through the tough times, we come out of it with even stronger relationships going forward.

Gothic Landscaping/ Gothic Grounds Management

Headquarters: Valencia, CA **Web site:** gothiclandscape.com

Leaders: Michael E. Georgio, CEO; and Jon S. Georgio, President

Year founded: 1984 **2008 sales:** \$80 million

Company's biggest obstacle in '09: Clearly, the deterioration of the economy and the housing industry in particular. General economic contraction is our biggest headwind.

Company's biggest opportunity in '09: The downturn in housing has created a new sense of urgency to accelerate our growth in landscape maintenance, public work construction and general contractor partnerships.

Three keys to success: Service, partnership and discipline

How's the economy treating you?: We would prefer the economy presented a growing market, but we always seem to strengthen our focus in a declining market.

ValleyCrest Landscape Cos.

Headquarters: Calabasas, CA **Web site:** valleycrest.com

Leader: Richard A. Sperber, President & CEO

Year founded: 1949 **2008 sales:** \$990 million

Company's biggest obstacle in '09: A key to success in 2009 will be keeping employees motivated during these challenging economic times.

Company's biggest opportunity in '09: A big opportunity we see in 2009 is adding the right new talent to the ValleyCrest team. There is a growing pool of top talent that is interested in joining a stable national company.

Three words for success: Keep it simple.

How's the economy treating you?: It is a challenging time, but we'll get through it.



The TruGreen Cos.

Headquarters: Memphis, TN **Web site:** trugreen.com **Leaders:** Stephen M. Donly and Rick Ascolese, Presidents

Year founded: 1974 **2008 sales:** \$1.41 billion

Company's biggest obstacle in '09: Both our residential and commercial customers are experiencing the effects of a slow economy. In 2009, we must focus on the value we bring to our customers by providing superior service with green, visible results.

Company's biggest opportunity in '09: We have a tremendous opportunity to develop stronger relationships with our customers — both residential and commercial — to ensure we are viewed as partners rather than vendors. We do this by educating our customers on the financial and environmental benefits of healthy lawns and landscaping, by providing a choice of lawn and landscape options for our customers, including natural, organic options, and by developing custom lawn and landscape programs that directly address each customer's needs.

Three keys to success: Service, results and growth

How's the economy treating you?: Our customers are certainly affected by the economy, but we are able to think creatively to find innovative ways to demonstrate our value.



Lambert Landscape Co.

Headquarters: Dallas

Web site: lamberts.net

Leaders: Walter Dahlberg, Chairman and Senior Landscape Architect; Paul Fields, President, Director of Design and Senior Landscape Architect; and Dan Morgan, CEO

Year founded: 1919 **2008 sales:** \$18.66 million

Company's biggest obstacle in '09: Joe and Henry Lambert, who founded Lambert, started this company on the heels of World War I and steered it through the Great Depression — just in the first 20 years of its existence. As a business, we realize that maybe times are not quite as bad as they could be, or at least not as dire as the media leads us to believe. The economic challenge is real, but so is our unwavering commitment to emerge from this recession as a continued industry leader for design, construction, maintenance and tree care.

Company's biggest opportunity in '09: Our entire team is working smarter, tightening our belts and finding ways to better serve our clients, staff and the environment. We are implementing ways to make our company leaner, greener and more efficient. As other firms are reducing staff or closing their doors, we are still blessed with opportunity. Accordingly, we will continue to employ and train passionate professionals to provide our clientele with the highest quality products and service at the best value available.

Three keys to success: Quality = Referrals = Market Saturation

How's the economy treating you?: We continue to work with wonderful clients — individuals who have the desire and resources to design, implement and maintain gardens of timeless design.

WEB EXTRA!

Visit landscapemanagement.net for LM Leader Profiles on Bartlett Tree Experts, Carol King Landscape Maintenance, Dworsky Services, Jensen Corporate Holdings and Marina Landscape.

The Bruce Co. of Wisconsin

Headquarters: Middleton, WI

Web site: brucecompany.com

Leader: Bliss Nicholson, President and CEO

Year founded: 1952

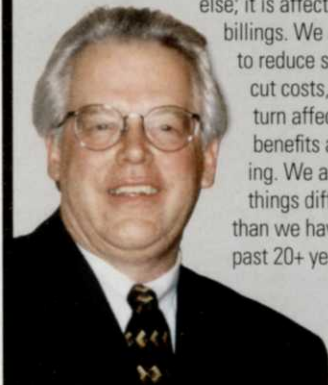
2008 sales: \$42 million

Company's biggest obstacle in '09: Being able to maintain the relationships we have with clients in light of pricing awareness and the economic challenges everyone is facing.

Company's biggest opportunity in '09: To continue to present ourselves as a leader in our area and continue our long-term relationships by showing our commitment to service and doing what we say we will do.

Three keys to success: Listening, service and follow-through

How's the economy treating you?: We are in the same situation as everyone else; it is affecting our billings. We are having to reduce services to cut costs, which in turn affects wages, benefits and staffing. We are doing things differently than we have for the past 20+ years.





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FILL 'ER UP — WITH ALTERNATIVE FUELS

Ferris's IS 3100ZP propane mower

Gasoline's economic and ecologic impact has many looking at new ways to power their mowers and handheld equipment.

BY DANIEL G. JACOBS MANAGING EDITOR

CONTRACTORS MIGHT BE feeling a familiar dull ache in the scars left from last summer's spike in fuel prices: This May and June, gasoline prices began climbing again. While far from the \$4 peaks that had contractors scrambling, the fear (or inevitability) of another rise have many looking at alternative ways to fuel their tools of the trade.

Proponents of alternative fuels claim their products are cheaper than gasoline, are better for the environment and require fewer trips to the repair shop — all of which contribute directly to the bottom line. The latest entrant into the commercial market — introduced in April — is Dixie Chopper's compressed natural gas (CNG) mower.

"This is the next step, in our opinion," says Rick Judy, Dixie Chopper's media marketing manager. "In the very near future, CNG is going to be where propane is now."

Whether it's CNG, propane or electric, the future, these manufacturers argue, is not going to be with gasoline.

"That's where our society is going," Judy says. "People are putting bids out, large manufacturers and cities are looking for people to cut their grass and they are looking for green, commercial cutters. We've sold a lot of propane

mowers because of that. The commercial guy needs to start looking in that direction. There's a lot of money to be made out there to be the first guy to 'go green' in your community."

Overcoming concerns

Contractors unfamiliar with the alternative options typically raise three concerns when considering a propane mower: safety, availability and fuel supply.

"The first thing you hear when you pull a propane mower into a show," Judy says, "is 'you've got two bombs, one on either side of you.'"

Judy counters that the forklift industry has been using propane tanks safely for years. Besides, the same people who express concerns over a propane mower often think nothing of going home at the end of the day and firing up their propane grills, he says.

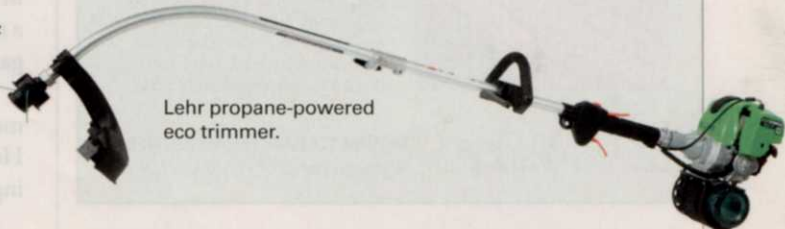
Manufacturers of propane lawn equipment hope a similar attitude of acceptance will carry over to mowers.

"The time for alternative fuel is ripe, more so than it ever has been before," says Jim Lawton, commercial sales manager for Ferris Industries. "The forklift industry was there 20 years ago; they put some incentives in for conversions. We look at that industry today, and the majority of them are running around with those 33-lb. cylinders on the back of them and nobody thinks any more of it."

Ferris joined the propane movement when the company was purchased by Briggs & Stratton, which already had a propane engine, Lawton says.

"It was a perfect one-two combination," he says. "It's really all driven from demand. In the Austin, TX, area we've had dealers doing mower conversions — and we've been selling equipment over the last three years with some pretty nice success."

What may slow the acceptance of propane and CNG



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ALTERNATIVE FUELS

mowers in other areas, however, is the limited availability of the fuel. Dixie Chopper's CNG mower requires refilling the tanks, and not all areas of the country have the infrastructure for easy supply. In those instances, there are portable filling stations contractors can carry on their trucks and trailers. And for those who do business in areas that are equipped, there is a type of fill station that can be installed to feed off an existing natural gas line.



MANUFACTURERS WITH ALTERNATIVE FUEL EQUIPMENT

Propane

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EnviroGard
Ferris Industries
Husqvarna
Lehr
Scag Power Equipment
Zipper

Compressed Natural Gas

Dixie Chopper

Electric

Hustler

— Propane Education & Resource Council

For contractors looking to make an immediate switch to an alternative fuel, there are conversion kits. But manufacturers warn that the engines may not run as efficiently because they were originally designed for gasoline.

The environment

While the alternative mowers have a higher up-front cost, some states subsidize the cost of the machines — putting them on par with their gasoline brethren. So, why all the fuss? According to PERC: "Propane engines run clean without sacrificing performance — delivering approximately 20% savings on fuel costs over gasoline while reducing hydrocarbon emissions by nearly 70%."

There are a number of other advantages in addition to reducing the impact to the environment. Propane is about 30% less expensive

than gasoline, Lawton says.

There's also the longevity factor. "Engines that run propane tend to last two to three times longer than their comparable gasoline equipment," says Bernardo J. Herzer, CEO/founder of Lehr. "An engine that runs propane also tends to have less maintenance issues. Between 80% and 90% of the problems generated with small handheld internal combustion engines are derived from carburetion."

Both propane and CNG are still in their infancy, especially in the United States. By comparison, Herzer notes, nearly a third of the vehicles in Europe run on one or the other gasoline alternative.

"Around the world, natural gas and propane are much more commonly used as an alternative fuel for consumers," Herzer says, adding, "In the U.S. it is coming — and it's coming very quickly." LHM

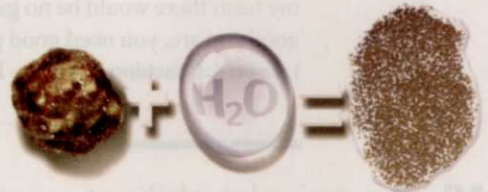
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Everything I need to know about business I learned playing softball

You can attend all the classes you want, but there are few things that prepare you for your chosen occupation as well as real world experience. And sometimes those lessons come from the most unexpected places.

After spending nearly five years away from the game, I rejoined a softball league this season. I was struck by how much my return had to teach me about the stuff I spend much of my time writing about.

Lesson 1: If you don't use it you lose it — My once (in my mind) considerable talents have diminished. Skills, like muscles, atrophy without regular use.

Lesson 2: Proper preparation is essential — My muscles have begun their rebellion but warming up before I play prevents injuries. From client meetings to job sites, preparation is essential for any business activity.

Lesson 3: It's a team effort — Over the course of a couple hours and two games, I might have only three or four plays at third base. Without the rest of my team there would be no game. No matter how good you are, you need good people all around you.

Lesson 4: Coaching is vital — I'd like to think a

lifetime of playing means I've learned everything I need to, but I can always learn something new and refine and improve what I already do well.

Lesson 5: Someone has to be in charge — It might be fun to bat cleanup, but I've got to do what's best for the team. Someone experienced needs to be designated to make your team's game plans and game-day decisions.

Lesson 6: Bruises are part of the game — A poorly thrown ball hitting me in the calf on my dash to home plate makes for a good story (I scored). If you don't play hard, you're not going to win.

Lesson 7: Sometimes you need outside help — Umpires have the toughest job on the field. Sometimes they get it wrong. Shake it off and move on.

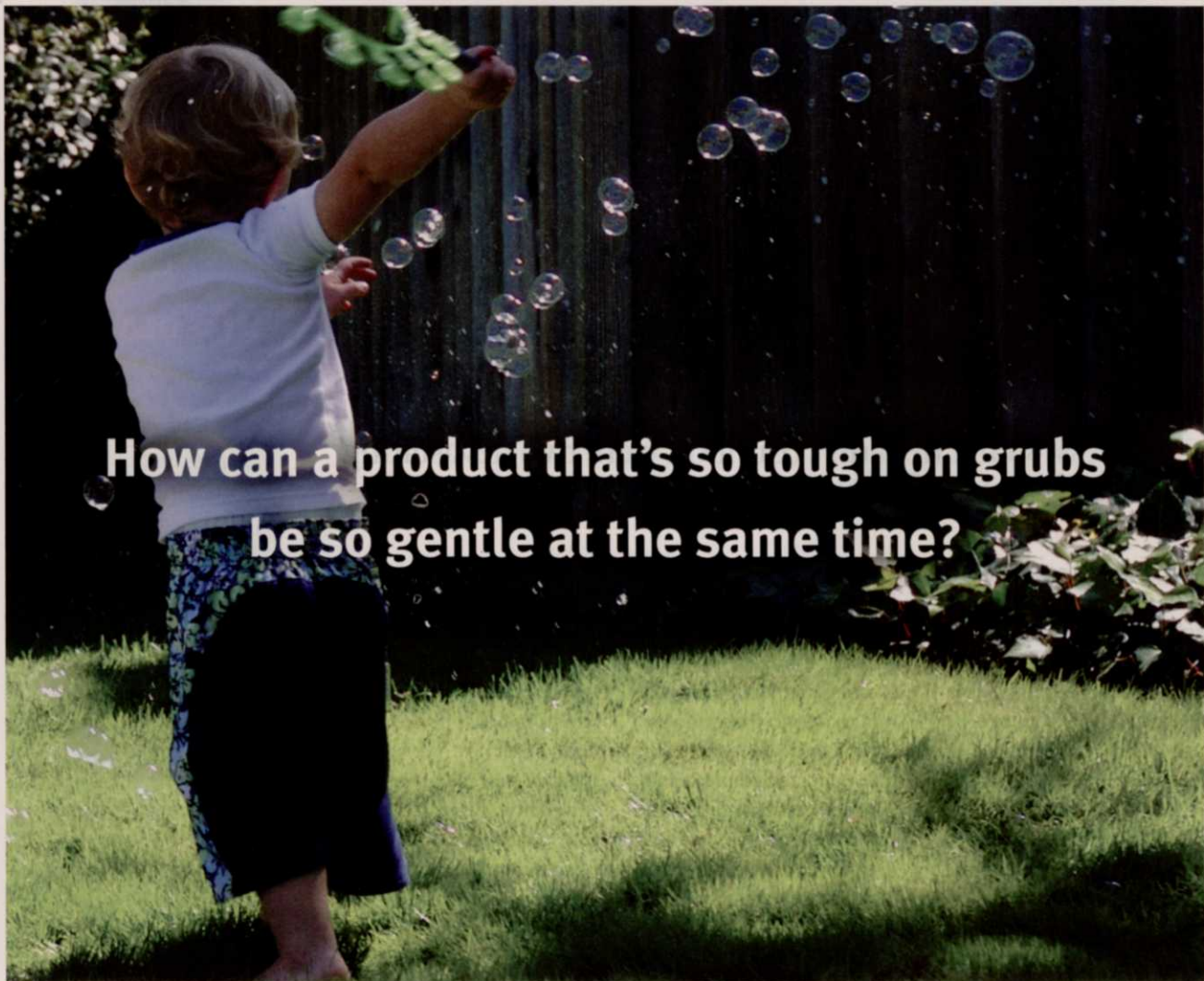
Lesson 8: You need the right equipment — The wrong size bat or a glove with a hole in the webbing isn't going to do much good. Proper tools are essential to play the game well and for your employees to complete their tasks.

Lesson 9: Practice. Practice. Practice — Questions? See Lesson 1.

Lesson 10: It's all about having fun — If you don't enjoy doing it, why bother.

Classroom training on how to identify and eradicate weeds and pests, properly build retaining walls and install irrigation systems is helpful, but no replacement for on-the-job training with experienced technicians. But we're all formed and influenced by our experiences. Just remember: Don't discount learning moments no matter where, when or whom they come from. There's an old saying, "Good judgment is the result of experience and experience is the result of poor judgment." But I would argue, wisdom is the ability to apply the lessons learned in one experience to the challenges of another. Now, if you wouldn't mind, toss me a high, arching fat one. I want to crank one outta here.

Wisdom is the ability to apply the **lessons learned** in one experience to the **challenges** of another.



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LAWNCAREPRO

LM'S OPERATOR OF THE MONTH » BY RON HALL



Dean Moore started in the lawn care business with rented hedge clippers, a motorcycle and an understanding that quality work and honest, personalized service would lead to success. What he didn't count on were two devastating floods in his part of Iowa.

Your market in and around Cedar Rapids and Iowa City suffered incredible flooding in June 2008. Tell us about it.

Our area flooded in '93, so we had some experience in operating from temporary headquarters. As the waters rose last year and flooded low-lying areas, city officials kept us updated with flood crest predictions, which led us to move to higher ground four days before the waters reached our shop and offices.

A lot of credit goes to our terrific staff. We didn't miss a single day of operations because of flooding. We rented a couple of empty warehouses and put our office staff in two hotel rooms and operated like that from the middle of June until the end of October.

The flood impacted our clients in different ways. We didn't lose many clients as a percentage of our business because of flooding. At a few locations we changed our maintenance service to clean up and replanting.

Quality Care is recognized for its community service efforts. Tell us about that. Our longest association has been with our

local Goodwill Industries. We were introduced to the concept of supported employment in 1985 and hired a young man who's now the longest tenured employee on our staff. Over the years, the supported employment concept has expanded to include students with learning disabilities or coming from disadvantaged situations. We strive to have 10% of our staff comprised of folks who have come through supported employment, which is usually Goodwill Industries. They make a significant contribution to our business, and are loyal and grateful for the opportunity. Goodwill recognized us as their "Employer of the Year" in 1998, which was very meaningful to me.

Your company's marketing material emphasizes the training your employees receive. Share your training strategy. All of our operations staff leaders came up through the

ranks, beginning as lawn or landscape maintenance staff. So the people managing the work have done the work themselves. We also have a training handbook for each area of service. We hold weekly staff meetings in each division to reinforce training and expectations and to discuss topics of importance specific to the time of year. For example, emerald ash borer has been identified across the river from northeast Iowa, and we're preparing for it.

What do you see as the biggest opportunity for Green Industry contractors during the next decade? I see two. The first is for Green Industry businesses to distinguish themselves by providing the highest level of customer service. The people who hire us want their properties to look great and their service providers to respond immediately and completely to their needs. Beyond that, the

AT A GLANCE

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FOUNDED: 1980

PRINCIPAL: Dean Moore, President

NUMBER OF LOCATIONS: 1

EMPLOYEES: 107

SERVICES OFFERED: lawn care, tree and shrub care, landscape maintenance

INDUSTRY INVOLVEMENT: PLCAA/PLANET member since 1980, Iowa Professional Lawn Care Association

WEB SITE: www.quality-care.com

best service companies will identify and preemptively correct potential problems before they become bigger.

The second opportunity is to offer the "greenest" service possible. The business that best promotes itself as environmentally conscious, and correctly identifies the ways in which its business practices enhance the environment, will be the company with which clients want to work. We all need to be examining the ways we make an impact on our natural world.

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Combination machines like the Rapid M with the Gravely Car Pusher can pay off if you have the market for the services.

ORDER THE COMBO PLATTER

Multipurpose equipment can be a worthwhile investment for many reasons, not the least of which is service flexibility. **BY CURT HARLER**

THE COMBINATION PLATE at a Chinese restaurant or fish house is usually the best deal. You get a meal that offers several tasty treats. Combination equipment works much in the same way: For one price you get a product offering at least a couple of functions.

“For the typical landscape professional, a machine built to handle a variety of attachments is going to deliver a better return on investment

than a single-purpose machine,” says Roger Gifford, Cub Cadet Yanmar’s compact product manager, adding it gives a landscaper the ability to adapt to the challenges of each job.

“It also provides flexibility in terms of the types of jobs a landscaper can take on, which is important for capitalizing on a continually changing market,” Gifford says.

“By investing in multi-purpose equipment, you save money by lowering your initial investment, buying one piece of equipment versus multiple machines,” says Tim Mercer, value stream director of turf products and Auburn operations for Ariens in Auburn, NE.

Dan Paschke, product manager for John Deere’s compact utility tractor line, agrees, saying it comes down to capital and what you have available to do the job.

Will it pay to go big?

Paschke says the smaller company with a couple of guys on the road is likely to benefit from a combination



A combination machine is ideal for the occasional call for stump removal. When the job is done, reattach the bucket.

machine. Those few workers will get to a jobsite and have to do everything. One machine with several functions will let them accomplish that goal.

"A compact utility tractor with a loader on front and backhoe on back will do the same jobs as a miniexcavator and skid steer," Paschke says. "It's not as efficient, but it will do the job for less money."

If your business is in the fortunate position of taking on new, larger contracts, you're likely pondering whether it will pay to step up to a compact tractor versus adding attachments to a commercial mower. This depends on the scope of the business.

"If your business is primarily cutting and maintenance, you're better to stick with a well-built commercial mower," Gifford advises. "But if you want to pursue new opportunities and growth by expanding your capabilities, you need one piece of equipment you can bill out to more avenues, like a versatile compact tractor and attachments."

As with any significant business decision, purchasing a compact and attachments should involve a thorough financial analysis.

In a shop, multipurpose equipment typically takes up less floor space than several single purpose machines, Mercer says.

"You have less maintenance, parts and upkeep for multiuse equipment," he says.

In addition, multiuse equipment is easier to upgrade. You buy it as you can afford the outlay or your business opportunities grow. Plus, it gives you the opportunity to capitalize on multiple-season use for increased revenue. For example, Gravely's Rapid M two-wheel tractor with attachments includes a 30-in. deck, a 32-in. snow blower, a 44-in. brush, a 48-in. blade and a new car pusher.

"The various attachments allow it to be used in all seasons," Mercer says. "And, trade-in value is typically higher for equipment with accessories."

KEEP YOUR SEAT TO KEEP IT SAFE

With attachments coming on and off regularly, operator safety is always a concern to effective operation.

"The key to safety is putting yourself in the safest place possible when changing attachments," says Dan Paschke, product manager for John Deere's compact utility tractor line. "In most cases, that means in the driver's seat and not between the tractor and mower or loader."

Most manufacturers have systems that allow the operator to connect a mower, loader or backhoe from the seat. John Deere's iMatch AutoHitch combination is one such coupling system that allows landscapers to attach rear-mounted, power take-off driven implements without getting out of the seat. The patent-pending system requires no tools to attach implements after initial installation is complete. — CH

Landscapers are well advised to purchase combination products as a package from their dealer.



Room to grow

As your company expands, you're likely to need a dedicated machine for the job. First, you have to find the right compact tractor and attachments to fit your capabilities and the opportunities in your market, Gifford says.

"Then weigh the additional revenue those capabilities will bring in against the cost of the equipment," he says.

Include all operating costs — to transport and maintain the equipment, to name just two — in addition to the purchase price.

If it looks as though a compact tractor is in your future, be sure you get a happy marriage of tractor and attachments.

"The compact tractor and attachments should come with a comprehensive list of specifications," Gifford says. "Review these carefully and make sure they match in terms of capabilities."

Gifford advises landscapers to purchase combination products as a package. By buying the attachments from the same dealer, you're likely to get the most affordable pricing and a simpler (and perhaps more attractive) financing package.

"Do your homework and talk with your dealer to determine what attach-

ments make the most sense for your business, then purchase them together with your compact tractor," he says. "This will make it easier to budget, because once you purchase and finance the tractor, you can't go back and add attachments to your finance package."

Dedicated machines typically require larger trucks or trailers to transport, Paschke says. Get to a certain size, and the state may require a different license for moving heavy equipment.

"It isn't just about the cost of the machine ... it's the total cost of ownership," he says.

To get a good estimate, Mercer suggests giving your equipment an hourly rate and dividing that by your total investment. Hourly rate can be figured by dividing all fixed costs (lease or loan payment plus insurance and depreciation) and variable costs (labor, maintenance, fuel) by the hours of use.

"If there's a labor savings, you can compare an old piece of equipment to the new for quicker payback," Mercer says.

The match game

The simplest way to assure that mix-and-match attachments are properly sized to the drive unit is to buy from

COMBO MACHINES

the same manufacturer. Many short-line companies produce equipment purpose-designed for landscaping operations that are worth the money. If short-line equipment is in your future, it's important to work with a dealer you know and trust to match the equipment to the drive unit.

"It used to be there was a clean split between compacts and utility tractors at 40 hp," Paschke says, citing how compact tractors used a Cat 1 hitch and utilities had a Cat 2 hitch as an example. "There are utility tractors

"A MACHINE BUILT TO HANDLE A VARIETY OF ATTACHMENTS IS GOING TO DELIVER A BETTER RETURN ON INVESTMENT THAN A SINGLE-PURPOSE MACHINE."

— ROGER GIFFORD, CUB CADET YANMAR

down in the 30- to 40-hp range and compacts up around 60 hp. That makes it vital to determine the linkage, the geometry of the hitch and the right hitch ball size for every attachment. Don't just go on tractor type."

Paschke says a landscaper using a box scraper to grade a yard easily could hit a sidewalk or paved driveway.

"If you have too small a box blade behind too big a tractor, something is going to break," he says.

While manufacturers will have spot-on recommendations for their own brand equipment, look at the dealer in each case.

"You want a dealer with a full line of machine forms and attachments," Paschke says. "As your business grows and you're ready to expand to dedicated machines, you'll be able to trade up with the same dealership, someone who knows your business and will make serving you a priority."

DON'T OVERBUY

There's no reason to buy equipment or attachments your business can't use.

Tim Mercer, value stream director of turf products and Auburn operations for Ariens, says you should ask the following questions:

- ▶ Does your business have the ability to profit from the purchase of additional attachments?
- ▶ Does the manufacturer recommend and/or sell the attachments for the equipment?
- ▶ How long does it take to change attachments?
- ▶ What tools are needed for changeover?
- ▶ What are the warranty, parts and service associated with the equipment and attachments?

Try all the attachments to make sure they perform to your expectations using the same standards you look for in a single-purpose machine for its intended purpose, he adds.

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BEST PRACTICES

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Improve your bottom line

Among the many challenges this and other industries face this year is trying to improve bottom-line results. Not only are we challenged by lower prices for our work, but retaining accounts has become a growing issue in many markets because customers are demanding reduced costs. It's not uncommon to have clients ask their vendors for cost concessions.

Some opportunities exist to reduce costs. Here are some ideas:

▶ **Revisit your benefit plans.** Survey your competitors to see what benefits they're providing. Many probably have reduced benefits and your benefit plans may be excessive in this economy. You want to achieve a balance. You still want to retain employees, but many companies have cut benefits at the field level because the employees don't value them. We've all lost people for a competitor's 25 cents more an hour, for example, so the amount of take-home pay may have more value than time off for these employees, for example.

▶ **Reduce the dumb taxes.** Dumb taxes are the costs you incur that customers shouldn't be expected to pay. You absorb the cost yourself or try to pass it on to the customer as part of your overhead. One obvious example might be in your uniform expenses.

There's a balance to be achieved. You still want to retain employees, but **many companies have cut benefits at the field level** because the employees don't value them.

Are you providing your middle management team costly logo wear, for example? The costs easily can get out of hand.

Personal use of company vehicles is another area where dumb taxes reside. Many companies have reduced this cost exposure because when several employees live a long way from the company office, the cost of this benefit to become disproportional and unacceptable.

Here's another expense that doesn't seem that important, but it adds up. I've been in the offices of many contractors who bring food into meetings, often way more than needed. While this is a nice perk, is it a cost you want to pass on to clients?

▶ **Renegotiate with your vendors.** Your clients are asking you for cost concessions, so why not look to your vendors for help? Consider approaching your landlord and asking him or her for a decrease, perhaps in exchange for extending your lease. Why not ask uniform suppliers for concessions?

Many of you consistently pay your vendors on time while your competitors don't. Ask for larger on-time discounts. Shop your cell-phone services and look to lower those costs. If you get a lower price, your provider will match usually.

Finally, examine your office phone bills. You may find you're being charged for lines you no longer have or for things that you don't need, such as line maintenance and call forwarding, as examples.

▶ **Fine-tune your shop management.** Many owners and managers aren't well versed on shop management. The shop is inundated by salespeople offering "deals" that might look good to the shop manager because of some perk that's included. They get comfortable with the vendor, but over time, the good deal isn't so good. Turn an objective eye to evaluating the vendor relationships to ensure you're not overspending in this area.

There are many opportunities for you to save money for your business. They may not all be pleasant, but these are somewhat unprecedented economic times.

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"GREEN" is the New

Tools for online marketing research

I am sorry to say doing more with less is back in fashion. It's amazing how things come and go and then come back around again — although for smart business owners, this one has been rule No. 1 for as long as I can remember.

Still, using the right technology means you don't need to go without. Let's take a look at four free online tools to polish your Web site and marketing efforts.

Increasing sales through your Web site relies on one key metric — Web traffic. Just as in traditional marketing venues, exposing more customers to the sales pitch online is directly related to more sales.

Boosting Web traffic can be broken down into two areas:

1. Inbound links to your Web site.
2. Content, such as text, pictures and video.

Growing the number of links and quality of your content are closely related.

Customizing content | <http://google.com/trends>
<https://adwords.google.com/select/KeywordToolExternal>

As of now, Google is the only search engine that matters. It's the market leader. If you're not on the first page of its search results, then you're, for all practical purposes, invisible. The key is to get listed with the right search terms.

Google provides two great tools to help you understand which search terms are most popular and how they compare with one another in terms of search volume. Google Trends can help you com-

pare search topics to determine the most sought-after content, while the Google AdWords keyword tool makes it easier to narrow topics into the best search terms people are using.

Use these tools to find the topics to write about and the right words and phrases to describe your business, products and services. The right combination of words will work in your favor to ensure people find your company when they search. Better search results translate to increased traffic and inbound links from those visiting your Web site who find your new and interesting content.

Optimizing feedback | <http://www.google.com/alerts>
<http://search.twitter.com>

Hopefully, your customers are talking about you. Google Alerts is a great service that harnesses the power of Google's vast Internet indexing engine to notify you when it finds Web pages with your specific search terms. Try setting up alerts for your company, competitors and links to your Web site.

The smart business owner will use this service to find and reward positive comments — and also quickly reverse negative attitudes through special discounts and quality customer service. The key is to engage in the online discussions you find in a personal and authentic manner.

Twitter is going mainstream as an online form of conversation. Use its search feature to augment your Google alerts to ensure you're seeing as many conversations about your company as you can.

I also find Twitter to be a great source for human-recommended (vetted) links to quality content in the areas my company services. I use that content to help my customers find the information they're looking for through content and links from my own Web sites.

Whether your goal is to increase Web-site sales or better understand your customers, you can't beat these free tools. The secret is to jump right in and get started. A little research can pay huge dividends in the long run.

Just as in traditional marketing venues, exposing more customers to the **sales pitch online** is directly **related to more sales.**



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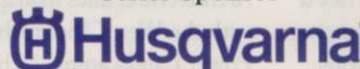
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THE MOUNTAIN WEST COMES HOME TO CHICAGO

Even though they couldn't spend their entire lives on vacation, one couple found a way to bring a bit of vacation back home with them.

BY DANIEL G. JACOBS MANAGING EDITOR

IF THE MOUNTAIN won't come to Mahomet, Mahomet must go to the mountain, or so goes the saying. Well, one couple, with the help of Grant & Power Landscaping, has done both.

The longtime Grant & Power clients regularly retreat to a vacation home in the beautiful and verdant mountains of Colorado, but the couple wanted to bring a little bit of that back to their North Chicago neighborhood. They'd already planted scores of quaking aspens but wanted a trickling stream flowing past their remodeled A-frame home leading to a pond and sitting areas.

Enter Grant & Power.

A large, once relatively bare lot was transformed into a Colorado mountain-style property with the addition of evergreens, quaking aspens, a variety of flowers and shrubs, and the longer than 50-ft. stream that drops about 10 ft. as it meanders its way past the home.

"It's amazing; it doesn't look like the same house," says Jan-Gerrit Bouwman, senior vice president of Landscape Architecture, sales manager and partner with the West Chicago-based Grant & Power Landscaping. "This project was pure synergy. Several of our company people were involved to create

what it is, and the clients were heavily involved."

Challenging logistics

It wasn't all smooth sailing, however. There were obstacles along the way, including buried utility lines that made placing and digging a pond challenging. And because the couple wanted a stream to run right next to their home, the company had to take extra care when installing the boulders to prevent damage. Carting the tons of heavy granite, aqua blue and Wisconsin boulders about 200 ft. from the road to build the stream, was challenging.





Grant & Power also installed a couple of natural stone bridges over the water feature, one of which was so large, a crane had to be brought in for proper placement. The water is cycled back using one of the largest pumps the company has ever used. The bridge also gives visitors a glimpse of the waterfall that drops the last few feet into the pond.

About 15 of Grant & Power's 90 employees — installation crews, designers, salespeople and a pond crew — were



involved at the site. The company has worked at the home for years and continues to do projects for the couple.

In addition to the stream, the company installed walkways, including one leading to the front of the home, a porch, a driveway, retaining walls, a patio and sitting areas by the stream.

The homeowners provided the entire vision for the project, which had advantages and disadvantages, Bouwman says. It made planning a bit more difficult because changes

Opposite. Grant & Power transformed a turfgrass-dominated view into a mountain-style vista.

This page. A 50-ft.-long stream provides a soothing sound and incredible views. Walkways make the landscape features accessible.

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sometimes had to be made midproject. But the clients respected suggestions from Grant & Power.

"The customer is extremely important in this," Bouwman says. "He had the vision, and we were able to feed off of that."

For example, the central water feature originally was going to be just a



Above: You can follow the stream along its 10-ft. drop to the pond and landings. **At right,** hydrangas in full bloom compliment the other perennials, much of it installed by the owners.



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small pond, but it evolved into the 50-plus-ft. stream that drops down as it passes the front of the home. The owners wanted to see and hear the water from their home.

Grant & Power installed a series of steps and landings all along the water feature for the homeowners and their visitors to enjoy when the weather permits. Decorative concrete block walls were used to create planter boxes at the entrance to the home and along the foundation.

The homeowners spend much of their time and energy on planting gardens, but the crews from Grant & Power installed a number of plants to enhance the grounds.

Among the plantings were: Endless Summer Hydrangea, different types of hostas, astilbes, grasses and irises. There aren't many big plants because the property already had plenty of trees, perennials and ground cover, Bouwman says.

The project earned Grand & Power a merit award at the Professional Landcare Network's 39th annual Environmental Improvement Awards. **LMI**



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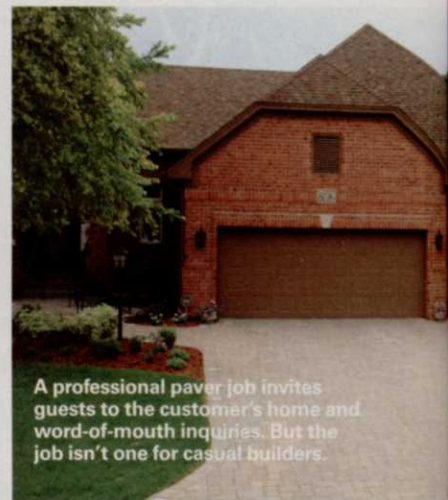
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HARDSCAPES *made easy*

BY CURT HARLER

THE ROAD TO profits can be paved with pavers. But putting a fine edge on sales, installation and product choice spell the difference between a profitable job and just another week's work.

Success starts with proper training.

"I struggle with landscapers doing hardscaping," says Steve Jones, president of *Pave Tech Inc.*, Prior Lake, MN. "Too many landscapers are trying to fill their card for the season and see this as a good line. They need to know this requires a skill set they don't necessarily have."

A good sales pitch will include the basics and up-sells, and how you approach the customer is paramount.

"A contractor needs to understand even a basic walkway or patio is going to cost the customer \$2,000 to \$5,000," says Michael DiRienzo, vice president of *SEK Inc.* (*Snap Edge/Kerr Lighting*). That's a substantial amount of

money, especially when folks are tight with their hard-earned cash.

"Make sure you're as serious and professional as your consumer," he adds. "Dress professionally and educate the consumer about the work."

Many consumers aren't aware of upgrades that'll add to their property's value, or what they might look like when completed.

"Whether it be a seat wall, paver lighting, outdoor kitchen or fireplace, carry a photo album of work you've done, or use magazines to plant the seed," DiRienzo says. "Ask questions to learn their hobbies and interests. You might build an excellent outdoor kitchen, but if they don't entertain much or enjoy cooking outside, then you're not going to sell that upgrade."

Retaining walls differ from pavers in that they often support weight.

Jennifer Cargill Gardner, marketing manager, licensees and distributors for Atlanta-based *Tensar International Corp.*, suggests having a good system and design prepared by someone who's done it before.

Most states require an engineer's stamp on any wall over 3-ft. high. The limit is 2.5 feet in Florida.

There are two broad categories of retaining wall: structural, which uses a geo-grid for reinforcement, and gravity, which depends on the strength of the block to hold it. Gravity walls never should exceed three feet, Gardner says.

"If it's not done properly, you'll have problems with the law," she says. "Repairing a job done incorrectly is an enormous expense."

Gardner advises working with an installer who has at least five years experience with walls.

"A 2-ft.-high wall for a tree border will be different in design and installation than a 10-ft. wall with a driveway on top," she says.

There are various edging products on the market, but DiRienzo warns against using cheap ones.



"You get what you pay for," he says. "Do you consider the work you perform to be cheap or inexpensive? Why settle for less than good quality edging?"

A landscaper only needs to order one type of edging, which comes in a rigid state for straight applications. To make smooth curves, snip the back support. SEK has its own brand of polymeric sand, called Polysweep, that offers good sand gradation, superior strength and produces little to no hazing, mostly due to the fact there's no Portland cement in the mix design.

The New World Stoneworks system lets a mason install the stonework 10 times faster than traditional methods, plus there's no dusty or loud onsite cutting. The system, which qualifies a project for as many as four LEED

credits, is delivered by the Uxbridge, MA, firm to the jobsite palletized and ready to install. No cutting is required. Installation is by number and section, following the laminated instructions that arrive with the system.

Gardner recommends a proven retaining wall system like the Mesa retaining wall system.

"Hire a professional engineer to design the wall and an installer with experience in the type and height of wall proposed for the site," she says.

DiRienzo adds: "You can buy many different varieties of aggregates at several different price points, but you should be selecting and ordering the materials that'll meet industry specifications. That goes for the selection of sand, pavers, joint sands, as well as a premium-grade paver edge restraint."

Aside from little things like color, most wall grids cost about the same, Gardner says, suggesting to charge based on the total number of square feet of face area and include engineering fees, materials and installation.

Be aware if the job involves fill or cut. An engineer should be aware of loading conditions on top of the wall, as well as soil type.

"Examine every job for access, delivery options for receiving materials, size of project," DiRienzo says. "Break down every aspect of the job and calculate how many labor hours each aspect will require. Increased productivity will deliver labor savings, but understand what you can accomplish in a day. Make sure you're prepared with timing of material deliveries and the proper tools to perform those functions."

Jones says many landscapers neglect to count their own time and cost when making estimates. Or worse, they look at someone else's estimate and add or subtract a few bucks — not knowing about the other guy's figures.

Understand how many people you need to perform each function and keep the others busy.

"On too many jobs, I've seen where there are two people performing a function, and there are two other employees watching," DiRienzo says. **LM**

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THE MISSION

Wood Landscape Services creates a retreat capable of being enjoyed by individuals of all ages.

Wood Landscape Services' Ryan Kolb points to the clients' previous West Coast lifestyle as the inspiration behind this water-centric design for a residence in central Ohio. But his biggest challenge was creating a design to meet the municipality's strict guidelines.

"The guidelines, combined with existing site conditions, restricted the usable lot space," he says. "But through symmetry spatial organization, we connected the new space with the home's architecture, satisfying the municipal guidelines and clients' wishes."

The pool, spa, fire bowl and covered outdoor living space are visually connected by the central axis. Access from the house is provided through a newly located sliding door and new basement walkout. Stepping out of the home's main floor leads to an exposed aggregate pool deck that acts as a foyer to the back yard.

There's a covered outdoor living space that enables the clients to enjoy a fire or lower the screen to the built-in projector to watch TV in surround sound.

Water elements give the client a place to cool off. The table in the pool offers a popular gathering spot for kids, while the adults keep close watch from the spa. The installation also included lighting and irrigation.

Plants include Colorado blue spruce, Endless Summer hydrangea, Bloodgood Japanese Maple, spirea and yucca. Assorted annuals include King Tut grass, impatiens, begonias, geraniums, mandevilla, foxtail ferns and salvia.

"The elements seamlessly flow together, creating a cohesive home and entertaining space," Kolb says."





PHOTOS BY VISUAL EDGE IMAGING STUDIOS

THE WORK

1 | NO ACCESS. Before Kolb and his team began the project, there was a lack of direct access to the rear property. Note the gradual slope, which affected drainage. Retaining walls and drainage pipes were added to protect the existing drainage swale.

2 | SEAMLESS TRANSITION. The new rear door and basement walkout location blend the architecture of the home through function and material selection.

3 | DUAL PURPOSE. Irrigated planters and containers are placed strategically throughout the spaces — some for aesthetic purposes, while this one provides a frost barrier to the new basement walkout.

4 | CONNECT THE SPOTS. The central axis links the pool and spa to the covered outdoor living area through access between the kitchenette bar top. Note how the annual plantings add interest to the raised sun deck, which is placed to take advantage of the summer sun. The 6-in. step serves as a diving platform for the kids.

5 | ELEGANT ELEMENTS. Water elements and fire bowl, as viewed from the new sliding door location. The umbrella rises from an in-pool table and submerged stools.

6 | HOME NOT-QUITE-AWAY FROM HOME. Personal accents decorate the covered outdoor living space, which is anchored by a custom-built fireplace and kitchenette. Brick and stucco blend the new space with the existing residence.

7 | VISUAL MUSIC. The tumbled *noche* tiles and stucco were selected to coordinate the clients' Mediterranean tastes with the home's existing architecture. The plantings were selected based on texture and color.

Owner Thomas Wood, CLP, founded Wood Landscape Services Ltd., Hilliard, OH, 19 years ago. The firm's services include commercial and residential landscaping design, installation and maintenance; estate gardening; hardscaping; mowing; outdoor lighting; patios; snow plowing; tree, turf and shrub care; and water features. This particular property garnered a 2008 Environmental Improvement Award from the Professional Landcare Network (PLANET). For more information, visit www.woodlandscape.com.

PROBLEMSOLVER

LANDSCAPE TROUBLESHOOTING TIPS » BY H. BRUCE HELLERICK



PROBLEM

This is one of my pet peeves in the landscape. An otherwise beautiful looking display is marred by small but highly visible problems. Something is amiss. Do you see the weed?



SOLUTION

The definition of a weed is a plant out of place. It's a detail issue.

Yes, the red tulip is beautiful, but it's a plant out of place and, therefore, a weed. The quickest solution is to pull out the flower and give it to the first person who walks by. It's fun to do, and you will get a huge smile from the recipient.

The problem with leaving the red flower is that everyone knows the red flower shouldn't be there. Leaving the red flower in the bed reduces your core image as a landscape management professional. It may sound like a silly statement, but think about it. Is your client now thinking, "They don't see the wrong colored flower in the bed, what else are they missing in my landscape?" It's all about details.

Every day you see horticultural problems. Sometimes the solution is obvious, but others are much more difficult to solve. Brickman Group Senior Horticulture Specialist H. Bruce Hellerick tackles these issues each month in Problem Solver. He can be reached at Hellerick@BrickmanGroup.com.

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IRRIGATING, DROP BY DROP

BY **RON HALL** EDITOR-AT-LARGE

DRIP IRRIGATION, SOMETIMES called micro- or low-volume irrigation, can save as much as 30% irrigation water compared to sprinklers. In light of this, water agencies are starting to recognize drip's role in water conservation.

"Rebate programs should be focused on total systems, and drip is a vital part of those systems," says Russell Clark, marketing manager for Netafim, which introduced drip irrigation to the landscape industry several decades ago. "I'm encouraged that the authorities who put rebate programs in

place for products such as ET controllers and rotator spray nozzles are changing their rebate philosophy to include drip irrigation and other water-saving devices, too."

place for products such as ET controllers and rotator spray nozzles are changing their rebate philosophy to include drip irrigation and other water-saving devices, too."

Rebates aside, there are compelling environmental and business reasons to become familiar with and begin incorporating drip into your irrigation designs and installations.

"I use drip mostly in beds," says Peter Pappas, president of P.J. Pappas Co., Woburn, MA. "There have been a lot of improvements made to it since we started our business. The Rain Bird XF dripline has made a huge difference in my business. We install miles of drip line every year because it's flexible, resists kinking and lays flat."

Pappas, whose 25-year-old company serves 3,000 clients, says that although the cost of installing drip is slightly higher than installing sprinklers, property owners recover that expense because of water savings.

Turfgrass, too

Clark says drip isn't just for landscape beds, but it's also being used in turfgrass, such as in sports fields and in areas such as median strips where runoff from sprinklers might become an environmental or liability issue. The key to irrigating these types of properties efficiently with

continued on page 51

Drip irrigation is used mostly for landscape beds, but it's also being used in sports fields and areas where runoff from sprinklers might be an environmental or liability issue.



DRIP IRRIGATION

INSTALLATION MADE EASY

Benjamin Raines of the DIG Corp. says drip irrigation installations are relatively simple. They require a proper head assembly, valve, filter and pressure regulator. Drip systems operate with low pressure (25 to 35 psi), and installing a system without a pressure regulator will result in inconsistent flow rates and emitters popping off the mainline, Raines says.

Raines advises starting at the water source and running poly tubing throughout the areas you'll be irrigating with drip. Poly tubing in 1/2-, 3/4- and 1-in. diameters is the primary lateral line. Insert drip emitters directly into the poly tubing with a small handheld punch, or branch off to plants using 1/4-in. microtubing. You can bury poly tubing or leave it on the surface, depending on your aesthetic preference.

After you've run the desired length



Drip irrigation systems require a proper head assembly, valve, filter and pressure regulator.

of poly tubing, close off the end of the line with a Figure 8-end closure or a compression end cap, leaving the end of the poly tubing so you can flush periodically to remove debris from the drippers, Raines says.

Point source drip emitters are most commonly used in a drip irrigation system. The most popular are the pressure compensating (PC) emitters that contain internal self-cleaning diaphragms that regulate to the specific flow rate stated. Use PC emitters for long runs and uneven landscapes



because they'll provide a more consistent and accurate flow rate, Raines says.

Retrofitting

Existing sprinkler systems can be easily converted into multi-outlet drip systems. Retrofit drip manifolds mount directly onto 1/2-in. risers, in place of existing sprinkler heads and are available in four to

12 outlets. Drip manifolds come with preset and adjustable

flow rates (1/2 - 20 GPH) and don't require an inline pressure regulator if your existing pressure is at or below 60 psi. Poly or vinyl microtubing of 1/4-in. is used to run from the drip manifold to the plant in lengths as long as 25 feet. Drip manifolds, which are used for first-time installations, are typically set within plant groupings and placed below the surface inside 6-in. valve boxes.

Emitter line, or dripline, is another method of installing drip irrigation. Drip emitters come preinstalled within the poly tubing, which can be easily

TIP: Leaving the poly tubing in the sun for a few hours makes it pliable and easy to work with.

rolled out along the desired area to be irrigated. With multiple flow rates and various dripper spacing, dripline is

an uncomplicated installation that's useful for row plantings and densely planted areas. The preinstalled drip emitters are self-flushing and typically contain two outlets per drippers to minimize clogging. Additionally, dripline is available with pressure-compensating drip emitters to ensure consistent flow rates.

Drip irrigation systems use compression fittings and require only one tool — a hand-punch for installing drip emitters. The systems don't require glue. Repairs and modifications because of changes in the layout of the landscape are simple. To change the location of a drip emitter, simply pull out the emitter, insert a so-called goof plug and use a punch to install in a new location.

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drip is understanding their soil types.

"Soils are typically grouped into three main categories: clay, loam and sand," Clark says. "We suggest contractors use lower flow rates and wider spacing for the clay-type soils, and higher flow rates and closer spacing for sandy soils. You have to match the

application rate of the drip system to the infiltration rate of the soil. Then it becomes a matter of scheduling."

Clark says root intrusion, one of the biggest challenges for maintaining drip systems, has been largely eliminated by the use of root barrier as well as Tech-filter, a disc filter impregnated with the chemical root inhibitor trifluralin.

Dave Palumbo, manager of Rain Bird's Drip Division, believes the biggest challenge getting contractors to use drip is unfamiliarity.

"Once contractors install the first two or three drip systems, they learn how to bid it," he says. "They see they can do it efficiently, and they can make money, too." LJM

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- › Drip reduces weed growth because it delivers water only to the base or root zones of the landscape plants.
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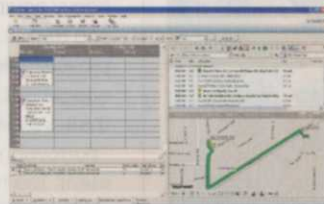


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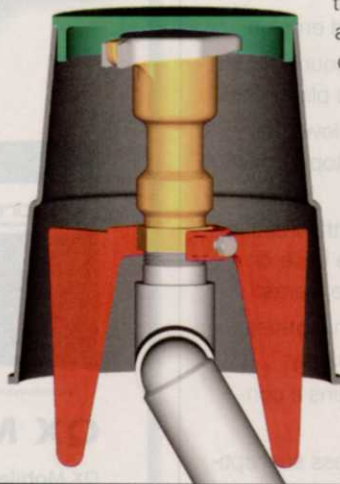
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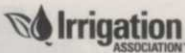
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WHIT'SWORLD

MARTY WHITFORD EDITOR-IN-CHIEF

Contact Marty at 216/706-3766 or via email mwhitford@questex.com

Treasure trove

A 5-ft. iguana swimming laps in the hotel pool was my first clue. The resort staff and some of the more-settled guests acting like it was nothing was my second.

I didn't know it on the first day of the business meeting, but I soon discovered the treasure trove of animal and plant species we mainlanders call San Juan, Puerto Rico.

I, along with dozens of other attendees of the Turf and Ornamental Communicators Association's (TOCA's) 20th anniversary meeting, hit the mother (nature) load when we toured the El Yunque National Rainforest May 14.

El Yunque is the only sub-tropical rainforest located in a U.S. territory. The 28,000-acre worldly wonder is home to an array of wildlife — including the small and precious Coqui singing frog found nowhere else and the endangered Puerto Rican Parrot — as well as more than 250 species of trees, 50 types of ferns and 20 varieties of wild orchids.

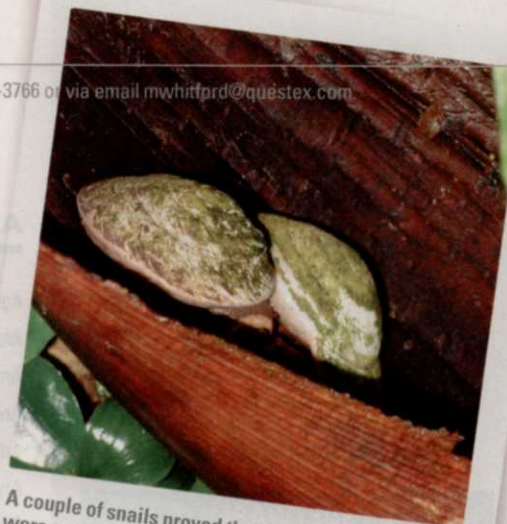
I'll let photos I took during the tour tell the story because I can't come close to doing it justice.

But, in closing, I must say it saddens me that globally we lose 50 million acres of rainforest annually due to our seemingly unquenchable quest for food, water and land development. To put things in perspective, the U.S. Forest Service oversees a com-

bined 200 million acres, including El Yunque. Hard to imagine those 200 million acres vanishing by 2013 — but that's what's happening on a global level to our most-precious parcels.

Tropical rainforests cover 2% of Earth's surface yet sustain half the world's plant and animal species. An estimated 40% of the world's oxygen is generated by rainforests in the Amazon alone. And one-quarter of all pharmaceuticals originate in tropical rainforests.

If we don't better sustain our rainforests, many more plants and animals — possibly including *homo sapiens* — will hit the endangered species list. Granted, that's down the road a bit. But, in the meantime, we can expect to continue to share our pools with more and more wildlife. After all, how can we expect them to respect our turf if we don't respect their habitats?



A couple of snails proved that my wife, Bridgid, and I were not the slowest-moving animals in the El Yunque National Rainforest.



Above: Iggy the iguana struts his stuff. Left: Yogi, our tour director, dons his rainforest version of Disney's mouse ears while holding a "pee pee flower" (African tulip).

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