

The company that understands market research develops a competitive advantage.



Relief is spelled r-e-s-e-a-r-c-h

To run a successful landscape or lawn service company, you must know what your customers want. This knowledge drives your business; it's the base upon which you grow and build.

The company that understands market research develops a competitive advantage, especially in the Green Industry where so little market research is conducted. There are two types of market research: primary, original research that currently doesn't exist, and secondary, existing research that may or may not be accessible to the public.

Any company with a desire to know more about customers' needs and wants should perform market research. Different methodologies include surveys, focus groups and one-on-one interviews for examples. Each offers valuable information when properly used.

Before beginning the process, however, consider working with someone who has experience in gathering customer/market data. While the process is not rocket science, it does require someone with experience in properly designing, collecting and interpreting it. Understanding what the data is saying — so that it can be used strategically — is critical to the process.

There are many sources available for secondary research that has already been collected and is available to you:

Government patents — This data discloses potential technological information.

Competitors' annual reports — If the company is publicly traded, the SEC requires that they post their annual report. Annual reports will usually divulge research and development, technological and strategic plans.

Competitors' employment ads — These

may suggest a geographic, technological or marketing direction.

Professional associations — Keep informed of the many resources available from groups such as ALCA, ANLA, PLCAA and HRI (Horticultural Research Institute). Also check your local and state associations.

Government agencies — Under the 1966 Freedom of Information Act, federal agencies must provide requested documents to tax paying citizens. Did you know a listing of all landscape contractors in your state is available by calling your State Department of Economic Development?

Newspaper and magazine reports — A number of Green Industry business magazines regularly highlight trends and identify the industry players.

Remember that market research focuses on understanding customers. It's therefore essential that marketing research be:

- ▶ systematic, planned, well organized and with a definable goal,
- ▶ objective and free of bias, and
- ▶ useful and decision-based.

Too many people are confused about research, and too few take full advantage of the marketing information it can provide. Decide what problem you'd like to solve, or which opportunity you'd like to accept, and hire someone to help and finish your research. The sooner you complete your project, the sooner you can improve your competitive advantage and gain a more lucrative share of your market.

—The author is a partner in KehoeGuido, a strategic consulting firm specializing in the Green Industry that provides strategy, operational, financial, sales, marketing and research assistance to Green Industry professionals. Contact her at 818/800-0135 or jguido@kehoeguido.com.

Your research action plan

- ▶ Formulate the problem or the opportunity you'd like to seize
- ▶ Determine information needs and sources
- ▶ Select the research technique and the research professional
- ▶ Design the sample
- ▶ Process and analyze the data

industry almanac

NEWS YOU CAN USE

Leadership Jam fuels hi-octane networking

BY RON HALL /
EDITOR-IN-CHIEF

CHARLOTTE, NC — NASCAR Race Week here pulsates with noise, commerce and color. Faces are red with excitement. There's whooping. Back slapping. Spirited conversation. And new friends.

Whoa, partner. We haven't even gotten to the race yet. That up-your-tailpipe extravaganza (with the winner taking home a cool \$1 million in front of 180,000 frenzied fans) blasted off later.

The hi-octane energy I'm referring to actually began 13 hours before the race. Sixty landscape and lawn service professionals met in an airy conference room at the American headquarters of Green Industry equipment supplier Husqvarna. These enthusiastic business owners had earned the right to gather for this final round of networking and brainstorming as the result of sending their supervisors, foremen, or managers to one of the JP Horizons Inc. programs known as Leadership

Jams. Husqvarna and *Landscape Management* magazine are the co-sponsors of Leadership Jams. The program has the endorsement of the Associated Landscape Contractors of America (ALCA).

The morning began with consultant Jim Paluch of JP Horizons, Inc. (www.jp-horizons.com) "energizing" the landscapers plus several key people from Husqvarna and ALCA (www.alca.org).

Settled around several rows of round tables, the business owners and guests networked in a rapid-fire exchange of ideas



Clockwise from top left: Bruce Moore and Mike Leuders check out a model store at Husqvarna's headquarters. President David Zerfoss (left) chats with NASCAR team owner Joe Gibbs. Michael Hatcher (left) and Husky's Mark Michaels.



and business experiences. Topics included:

- ▶ creating a compelling vision that inspires the team,
- ▶ defining processes that develop leadership skills of key people in a company,
- ▶ providing consistent and innovative training that enhances technical skills and personal growth, and
- ▶ creating a focus on sales through a commitment to customer service.

That was an ambitious program for a single morning of brainstorming, but the ideas and suggestions came hot and heavy,

and people were scribbling notes. JP Horizons staff members collected all of the suggestions, and will distribute them to all the participants.

While the landscapers took to the roundtable discussions with unbridled enthusiasm, they attacked Lowe's Motor Speedway with even more gusto, thanks to host Husqvarna (www.husqvarna.com), which made its suite available to landscapers for the Winston Cup race. From garage and pit tours to meeting the drivers, Husqvarna designed an unforgettable JP Horizons event.

For additional information and photos from the special Leadership Jams/Husqvarna event visit LM's Web site at www.landscapemanagement.net.

Snow business — it's 'beautiful'

BY RON HALL /
EDITOR-IN-CHIEF

ERIE, PA — "Beautiful, just beautiful."

Snow king John Allin was describing this past winter's snow season on Lake Erie's far southeastern shore and what it meant to the Allin Companies' bottom line. That's just what 84 guests (most of them landscapers) came to hear — specifically how to make money removing snow and ice.

They came to the right place because Allin is the industry's acknowledged snow removal leader. The 84 visitors were among the 300 people participating in four regional training sessions offered by the Snow & Ice Management Association (SIMA) this spring.

Allin is the founder and longtime President of SIMA. He now splits his time between running his \$2.8 million landscape company, growing his national snow empire and teaching others how to operate



The Allin Companies hosted a spring SIMA seminar. John Allin (inset) explained SMG.

profitable snow/ice management businesses.

SMG on a roll

This exhausting schedule seems to suit Allin, whose ambitions long ago outgrew Erie. His Snow Management Group (SMG), a wholly owned subsidiary of The Allin Companies, operated in 25 states this past winter and generated \$40 million in snow revenues.

Allin says he keeps this saying foremost in his mind: "If you think you can, or if you

think you can't — you're right." Obviously, he thinks he can. That's saying

something for a guy whose first attempt at business was running a pair of pizza shops as a student at Gannon College.

Following a three-hour presentation at a nearby hotel, *Landscape Management* and the other 80 visitors at the SIMA event toured Allin's headquarters and the building across the street that he and his staff are preparing for SMG. There will

be 60 to 65 employees in the new building who will be managing its 24/7 call and nerve center. It'll be ready in June, says Allin.

While Erie, PA, might seem like a strange location for a company with a growing national footprint, it's actually one of the best training grounds in the United States for snow removal. Erie (population 275,000) gets lots of snow every winter.

This past season, 146 inches of snow fell on the city center, but more than 200 inches of snow were measured on the busy higher cor-

ridor on the city's south end due to a 600-ft. rise in elevation from the lakeshore to the heavily developed area surrounding the I-90 interchanges.

"When I see a lot of pavement, that's what excites me," says Allin. "Beautiful."

For more information about snow removal and its opportunities, visit the Web site www.sima.org.



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GreenPartners

Circle 108

People & companies



Reinders Inc. appointed **John Jensen** Territory Manager in

the company's Turf Division.

Rain Bird Corporation promoted **Donn Mann** to Regional Sales Manager for the Midwest region and **Dan Puthuff**

to Regional Sales Manager for the Southwest region.

Chapel Valley Landscape Company promoted **Bill Benoit** to Maryland Regional Manager and **Michael Holland** to Maryland Commercial Sales Manager.

Bayer Environmental



Science promoted **Bryan Gooch** to Program

Manager for the Chipco Professional Products Division.

Seed Research of Oregon hired **Nancy Junk** as a Regional Sales Manager.

The Scotts Company was named "supplier of the year" by Wal-Mart in lawn & garden category.

[CLIPPINGS]

Girard wins big landscape contract

SANFORD, FL — Girard Environmental Services was awarded a five-year, \$3 million-plus landscape contract by the Heathrow Master Association to perform landscape management services throughout the Seminole County community of Heathrow. The Sanford-based firm, which had revenues of more than \$7.6 million last year and projects revenues of more than \$10 million in 2003, currently provides landscape management services throughout Orange, Seminole, Brevard, Lake and Volusia Counties.

TPI takes flight July 22-25

DAYTON, OH — Ohio's Centennial of Flight Celebration is the theme of the Turfgrass Producers International (TPI) Summer Convention & Field Days being held near Dayton, OH, July 22-25. Green Velvet Sod Farms in nearby Bellbrook, OH, is this year's host. Complete conference details are available online at www.TurfGrassSod.org. Click on "Events" to access the information or call TPI at 800/405-8873.

NFL Ravens bail on grass

BALTIMORE, MD — The NFL Baltimore Ravens, who have played on a real grass field since their founding in the mid-1990s, selected the Momentum Turf System for its stadium and practice facility fields. Momentum is a synthetic sand-and-rubber infill system marketed by Sportex. The Ravens will play on its new stadium field for its first home pre-season game versus Buffalo on August 9.

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Circle 109

Boomers want fewer hassles

NAHB study good news to Green Industry

WASHINGTON DC — Hurray for the baby boomers! That's what all of us in the landscape and lawn services industry should be shouting from the rooftops every morning when we hop out of bed. Why?

A recent study by the National Association of Home Builders (www.nahb.org) and Countrywide Home Loans reinforces what many of us have realized for a long time — that baby boomers have lots of spending power and they want a maintenance-free lifestyle. And who best to help them achieve this? Us.

"Baby boomers and older home buyers want a maintenance-free lifestyle, freeing them up to travel, socialize and pursue the active lifestyles they want to lead," says Kent Conine, President of NAHB and a home and apartment builder from Dallas. "At the same time, the study dispels the common perception that seniors prefer to move to traditional warm-weather retirement destinations like their parents did. An overwhelming majority of seniors want to live near their loved ones or in the communities where they've put down roots."

Some of the findings of the study include:

► More than half the builders in the 50-plus market are building single-family detached homes in 2003.

► About half of the builders built 50-plus senior communities in close-in sub-

urbs and one-fourth in outer suburbs.

► About two-thirds of builders reported

that their customers were relocating from the same community or the same state.

► Builders note that customers prefer homes that promote safety and security.

For more info on the study, contact

Donna Reichle at dreichle@nahb.com.

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Circle 110

statistics

INDUSTRY TRENDS BY THE NUMBERS

FASTEST GROWING MARKETS

From first quarter 2002 to first quarter 2003

Markets	Gain
Philadelphia, PA	25.7%
Providence, RI	25.7%
Melbourne-Titusville-Palm Bay, FL	25.4%
Sacramento, CA	25.3%
Trenton, NJ	24.0%

SOURCE: NATIONAL ASSOCIATION OF REALTORS

PRICIEST HOUSING MARKETS

As of first quarter 2003

Markets	Average Price of Home
San Francisco, CA	\$509,000
Anaheim-Santa Ana, CA	\$448,400
Boston, MA	\$413,500
San Diego, CA	\$389,100
Bergen-Passaic, NJ	\$358,300

SOURCE: NATIONAL ASSOCIATION OF REALTORS

IN 5 YEARS, MY ORGANIZATION WILL:

Have more difficult financial times	40.6%
Change its equipment/ product purchasing methods	34.4%
Grow much larger in geographical area (or new branches)	32.8%
Serve new customer groups	32.8%
Recruit differently	32.8%
Grow much larger in revenues	20.3%
Market differently	18.8%
Offer more employee benefits	17.2%
Look for new sources of investment money	10.9%
Advise business advisors or partners	7.8%
Be purchased by a larger organization	3.1%

SOURCE: LANDSCAPE MANAGEMENT'S SOI SURVEY



CONSERVATION AWARENESS STRONG

Region	Plan to conserve water	Believe there is a drought
East	68%	43%
Central	55%	45%
West	79%	65%
Total	64%	49%

SOURCE: ORBIT IRRIGATION

ILLUSTRATION: DAN BEEBY

Survey says...

Q The percentage of unemployed Americans continues to rise. LM's editors wondered if this translates into a greater number of workers available for Green Industry jobs. Here's how you responded to our online survey.

58%		Quantity improving
21%		About the same workers
11%		More good workers
10%		We're desperate

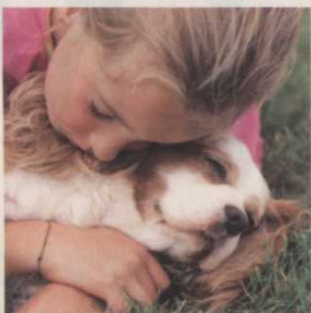
Percentages based on 19 responses

Log onto www.landscapemanagement.net and answer our online survey. We publish the results here monthly.





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Owning a Piece of Mind

Follow these **10 key action steps** and become the 'brand' leader in your market

BY MATT SHOONER

▼ Being recognized for doing quality work is key to building your brand.



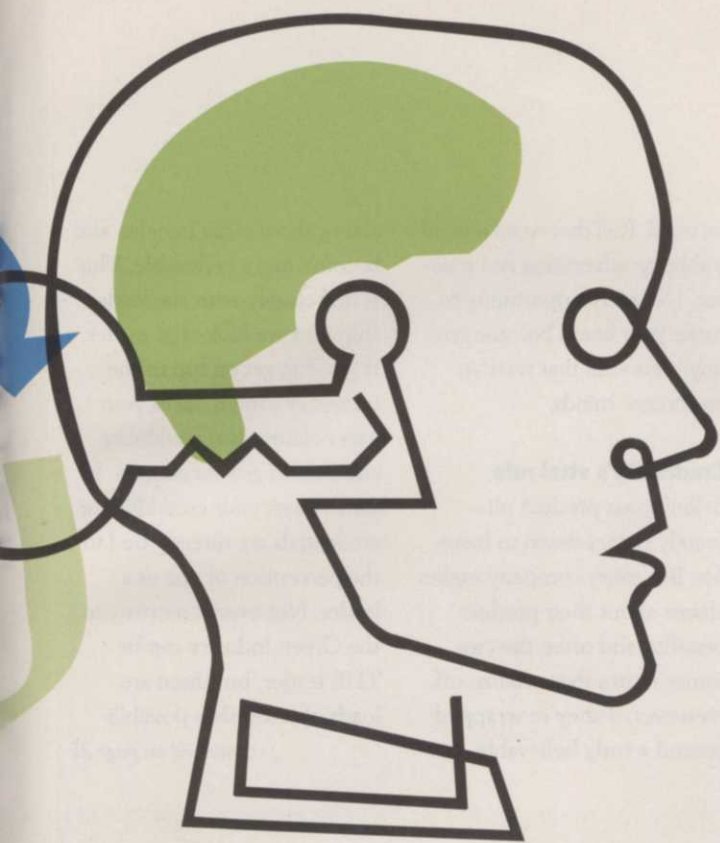
Y

our product is your brand. Whether you offer specific products or perform services, what you sell is your brand.

Brand building occurs in the mind of customers. The strength or weakness of your brand depends on the perception you're able to build of your product — your brand — in the customer's mind. A strong brand is easily recognized, more readily accepted and has a much better shot at success.

One good example of the power of a strong brand is Evian bottled water. We all know that just about everyone in North America can get good, clean water from a tap, but at one point recently, on a per-liter basis, Evian bottled water commanded prices 20% higher than Budweiser and 40% higher than Borden's milk.

Creating and maintaining a brand involves many elements. In fact, the power and success of your brand are ultimately the result of everything you do in the process of delivering your product. But for this article, we'll focus on the following critical areas:



- ▶ The power of publicity
- ▶ The role of advertising
- ▶ The value of "owning" a word
- ▶ The importance of credibility
- ▶ The role of quality in the equation
- ▶ How competition helps to build your brand

As the title of this article suggests, the more you stand apart from your competition in the consumer mind, the more powerful your brand becomes. This article will provide 10 specific keys to increasing your "mind share," your market share and your brand strength.

Publicity power

Publicity isn't advertising — it's news about you and your brand. When you make news, you get media coverage. Always remember that what others say about you is far more powerful than what you say

yourself. Strong brands are built more from publicity than advertising. Of course, the ideal way to make the news is to be the first in a whole new category, like:

- ▶ Band-Aid, the first adhesive bandage
- ▶ Heineken, the first imported beer
- ▶ Jell-O, the first gelatin dessert
- ▶ Xerox, the first plain-paper copier, or
- ▶ Chem-Lawn, the first national lawn care company.

We're not all in a position to create a new product category, but we can all make the news and generate an immense amount of publicity for our brands. The goal is to achieve brand leadership in your category and markets.

Key #1. On your own or with help from an outside source, de-

tail all of the interesting and unusual facts about your business. What makes you different? What sets you apart? What are you especially adept at or have expertise in? Make a list. It'll be part of the foundation of getting your brand into the news.

Key #2. Create a schedule for doing high-visibility, high-profile, pro-bono (free) work. Choose projects that will have wide community appeal, like renovating an inner city playground or providing annuals, planting and care for certain high-traffic medians in town. Time your activity for maximum exposure, like around Earth Day or Arbor Day. This is an investment, but one which will directly build your brand.

Key #3. Create case studies or feature stories about your most interesting projects. Get professional photographs and record all of the significant steps and players in the project.

Key #4. Contact the media: business editors, gardening editors, leisure editors, metro editors, and television and radio news departments. Remember that these people are actively looking for news to report. Alert them to your projects. Be sure to have high-quality photos to provide and give them a well-written fact sheet on all of the special things about your company (from Key #1 above). If you can't get them to come to you, send news releases and photos. Have the news release professionally prepared. The key is to do newsworthy things

and then make sure the media knows all about it. Brand-building publicity will follow.

Advertising's role

As you build your brand and become widely known through publicity, your story will eventually be told and will no longer be news. That's when advertising takes over.

Advertising serves two important functions: to protect your brand from competition and to drive direct sales inquiries. Advertising isn't cheap, but it's essential. By spending enough to protect your leadership role, you make it tough for your competition to break in.

Key #5. Assert your brand leadership in all of your advertising. Claim the leadership of your category and you'll attract more business. Why? Because consumers believe that the leader must be better, and they want to go with a winner. Your leadership claim can be based on many things: oldest company, largest company, most employees, most markets served, or most awards received. Nearly any company can claim that they're the leader. And remember, it's not so important to say what your leadership claim is based on, but simply to claim the role of the leader, over and over again.

"Own" a word

An average adult knows the meaning of around 50,000 words, and there are about 2.5 million registered trademarks.

What do your prospects think when they hear or see your name? We all come up with lists of attributes for our products like quality, price and service. But, because there are so many and they're so widely used by many companies, they become generic and meaningless.

What word does FedEx own? Overnight. How about Mercedes? Prestige. Volvo? Safety.

The point is to narrow your brand's essence to one thought or word that no one else al-

ready owns. This goes against the grain for many business owners because they feel the need to expand rather than narrow their focus to fuel growth. Historically, however, the companies that keep a narrow focus tend to expand their categories and markets rather than just achieve a greater share of a static market.

Key #6. Looking at the list you created in Key #1 and analyzing the essential core competency of your business, reduce your focus to one idea, concept

or word. Roll that word into all publicity, advertising and training. Use every opportunity to make your brand become synonymous with that word in customers' minds.

Credibility's vital role

Selling your product ultimately comes down to benefits. But every company makes claims about their product benefits, and often the customer writes these claims off. However, if they're wrapped around a truly believable

claim, those same benefits also become more believable. This is tied closely with the leadership idea we looked at earlier. If you can get on top in the customer's mind, all of your other claims gain credibility and lead to greater success. In some ways, your credibility or credentials are directly tied to the perception of you as a leader. Not every company in the Green Industry can be THE leader, but there are loads of leadership possibili-

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Building a brand is a big job

If anybody knows anything about branding in the Green Industry, you'd think it would be an 87-year-old firm that's been selected as "best" by the media in its market area.

However, Kyle Natorp, President of the Natorp Companies, Cincinnati, OH, admits that he still wrestles with the concept of "branding" — this in spite of his company's rich history, the honors it has won and its instantly recognizable name.

"We spent two months last winter trying to come up with a brand position," says Kyle, the fourth generation of the family to oversee the firm. "We hired a consultant and spent several months working on the company overall. We're just now focusing on what the Natorp brand means and what it is."

His firm's challenge is both aided and hindered by the

breadth of services it offers. It started out as a landscaping business by William A. Natorp, Kyle's great grandfather, but has grown into a family operation (Kyle's father, Ken, is CEO and his brother, Craig, is Vice President) with locations surrounding the city. Besides offering landscape design/installation, the company manages a wholesale nursery and three retail garden centers. About 10 years ago, it also started providing landscape maintenance, and two years ago bolstered that service with stronger management, better focus and a bigger push into commercial.

"Maintenance has a strong growth potential," says Natorp. "We don't want to do just the mowing but also the horticultural visits, the fertilization, the chemical applications and the snow removal."



Natorp Companies builds its brand with billboards and postcards.

Kyle isn't so concerned that the company name is known; it is. He's more concerned about how it's perceived.

"A brand position is the way you want to be looked at by your customers," he says. "It's not something that you're at right now. It's something that you keep striving for."

In the case of the Natorp Companies, Kyle says management came up with a positioning statement that reflected the company's wide footprint in its market — "We want to be the company that makes the customer a success in the garden or in the landscape."

As part of that, company management is attempting to increase its brand awareness



to what it feels is a growing group of consumers, the "do-it-with-me" crowd. These are people who want professional help with their landscapes, but — either because of cost or the enjoyment they get from doing it — want to do some of the landscaping themselves.

"When it comes to branding, logos, letterheads and uniforms are important," adds Kyle. "But what I think is more important is what our crews do on each and every job."

—Ron Hall