

Time Is the Currency of the Future

CRYSTAL BALL REPORT #27

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Professional Landcare Network

Time Is the Currency of the Future

Crystal Ball Report #27

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Introduction

Welcome to the Future

“The driver must stay in control of the vehicle. The human brain is a much better computer than anything we can build to deal with adaptive situations.” — Ford Motor Co., October 1995

Imagine you work for Jetson’s Landscaping. You’re a foreman, and the reason you qualified for the job was because you graduated with an artificial intelligence master’s degree in business administration and a triple doctorate in horticulture, advanced technologies, and finance from Harvard University. You love your job because technology and innovation have helped you take it to the next level. You install smart plants that can be scanned and diagnosed instantly for problems. Your crew members use hover utility crafts that allow them to glide across jobsites edging, pruning, and trimming with laser-powered tools for precise work. Clippings are disposed of using a disintegrator that reduces piles of green waste in minutes, and that environmentally friendly, safe byproduct can be used to run your equipment. As a foreman, you can leave the job in midstream and continue to watch your crews in action via a wristwatch-sized visual camera that enables you to use GPS positioning to see if crews are placing plants in the right place, finishing jobs on schedule, and taking breaks in a timely fashion. You can even tell whether clients’ plants, also equipped with GPS identification tags, need water or fertilization and whether workers wearing wristwatch monitors need hydration. This tool can also show you in a moment’s glance exactly how much money is being made each day by the hour and exactly where you’re losing money. You feel secure in your job because your position is key to company management since you can monitor multiple crews at once while visiting and promoting to clients — essentially helping the owner work *on* the business versus *in* it.

Welcome to a typical landscape company in 2020. Seem unreasonable? Predicting the future doesn’t have to feel like a guessing game. If you want some proof that it’s valid, take an unbiased look at science fiction. For instance, in his book *From the Earth to the Moon*, Jules Verne anticipated very accurately the shape, dimension, escape speed, and orbital velocity of spaceflight — 100 years before it happened. But to most landscape contractors, a future like the one described above seems a long way off and science fiction seems only that — fiction. Even five years can seem like an eternity when dealing with the day-to-day pressures of running a profitable business. Think about it, there isn’t a landscape owner today who doesn’t stop what he’s doing to put out daily fires — whether it be finding a replacement worker to substitute for one who didn’t show up, dealing with an irate client who misunderstood what was to be done on their property, or scrambling to find plant material at the last minute for an installation job on which someone forgot to place a nursery order. In fact, most landscape business owners today are so consumed by these daily business challenges as they erupt, that they put aside their best intentions to plan for the year, or even an upcoming season, to settle the day’s disputes, only to face exhaustion by evening when they finally have free time to get to important business paperwork. A quick night’s sleep and the whole scenario begins again the next day.

Statistics prove it. U.S. Department of Commerce figures show that more than 40 percent of small businesses fail within the first year, and the U.S. Small Business Administration estimates that only one in four small businesses are still operating five years after startup. The main reason for this, according to Small Business Administration District Director Bernard Paprocki, is inadequate planning. In addition to poor planning, another big reason companies have trouble creating their future is that they don’t know where they want to go. Consider the case of Kodak, suggests *Fast Company*’s Scott Kirsner, “Although the company’s mission is to increase both the use of images in general and the relevance of images in people’s daily lives, you have to read 40 percent of Kodak’s 140-word mission statement before you come across the word ‘image.’” He continues, “Fail to say what your real mission must be, and you in effect deny what gives the company meaning to those who work for it.”

And though advances in technology enable machinery to run on its own — for instance, most cars today come standard with cruise control, speeding up and slowing down for you as you coast along — is this really how you want your business to run? Cars today can even sense objects approaching, warning the driver when they get too near. But is that too late? Maybe not for an automobile, but it could be for your business. Even the Ford Motor Co. admits that “the human brain is a much better computer than anything we can build to deal with adaptive situations.”

Part of planning for your business future includes understanding where the future might take the industry. Consider your business model in 2020. If it’s your model of today plus 13 years, that’s dangerous planning. In dreaming about 2020, you have to change your fundamental model about what the world might look like.

That was the job of the Professional Landcare Network’s (PLANET) Crystal Ball Committee. In November 2006, 18 landscape industry representatives got together for four days to discuss what the industry might be like in 2020, including new opportunities contractors may have as well as new threats for which contractors should be prepared. The result is this business guide, the goal of which is to prepare you for the next 13 years of business — a roadmap you can use to steer your business in any direction you like.

How This Book is Organized

This book is divided into five parts for easy and immediate use:

- Chapter 1 shares why landscape and lawn care companies need to plan for the future. You will learn the most important benefits of strategic planning, supported by recent studies that show how planning assists small businesses in maintaining success and becoming profitable, defying statistics.
- Chapter 2 shows landscape and lawn care contractors how today’s business world has changed, specifically looking at technology, customers, labor, and services.
- Chapter 3 details threats to the industry’s future, including government intervention, labor shortages, lack of professionalism, and competition from large companies and big box stores.
- Chapter 4 discusses the opportunities landscape business owners will have in 2020. This section will highlight how these opportunities were determined based on today’s changing business world as well as the industry’s largest predicted threats.
- Chapter 5 includes recommendations the Crystal Ball Committee has for landscape and lawn care companies, PLANET and other industry associations, universities and educators, and suppliers and manufacturers, based on the information discussed. This chapter also includes recommended reading materials relevant to this topic.

Chapter 1: Why Plan?

This book focuses on the future — not today. As you sit with a pile of papers on your desk that need to be filed, invoices that need to go out, employees who need to be hired, clients who need their lawns and shrubs trimmed, and potential customers to whom you need to visit and present proposals, you may be wondering why thinking about the future — namely 13 years into the future — is so important.

The biggest reason forecasting and peering into your crystal ball of business is vital is because it enables you to better plan. Research shows that companies that plan produce dramatically better results than those that avoid planning. If you already have a business plan, taking a peek at all that's possible in 2020 can enable you to alter your strategy to more appropriately match these visions. If you don't already have a business plan, looking into the future can help you realize the importance of preparing one for your company.

What is the Purpose of a Business Plan?

According to Tom Oyler, a green industry business consultant with the Wilson-Oyler Group, Maitland, Florida, and a member of this report's committee, a business plan is a management tool, not simply a plan for doing business. Its purpose is to help management set objectives and track progress toward these objectives.

“When properly conceived and implemented, the business plan becomes a key document for managing and controlling a business,” Oyler says. “It describes in detail the entrepreneurial concept of the business, the market situation, the company's goals to be achieved, and the resources needed to accomplish the goals set forth in the plan. A business plan, with a clear articulation of objectives greatly contributes to efficiency and effectiveness and is an invaluable tool for helping a company stay on track and avoid the many distractions that can derail an organization.”

In addition to this general rule, there are six specific benefits business plans offer, according to Gaebler Ventures, a venture capital firm based in Chicago, Illinois:

1. **Business Plan as Reality Check.** The process of putting a business plan together, including the thought you put in before you begin to write it, forces you to take an objective, critical, unemotional look at your business project in its entirety.
2. **Business Plan as Performance Tool.** Your written business plan is an operating tool which, when properly used, will help you manage your business and work effectively toward its success. Your business plan will allow you to set realistic goals and objectives for your company's performance, and, if maintained, will also provide a basis for evaluating and controlling the company's performance in the future.
3. **Business Plan as Message Sender.** The completed business plan communicates your company's ideas and messages to employees, outside directors, lenders, and potential investors. A business plan helps you do that in an organized, credible manner. Also, the process of planning helps you determine if your vision is realistic, and tells you what you need to do in order to achieve it.

4. **Business Plan as Motivational Tool.** The development of your business plan is one of the best ways for you to communicate how well you understand your business and describe your business vision. Without proper planning, getting all of your employees reading off of the same page of your business book and generating energy through high levels of teamwork can become unfeasible. Motivating people when they do not know where they are going or what they are trying to achieve can be impossible.
5. **Business Plan as Management Development Tool.** Putting together your business plan will help you develop as a manager because it can give you practice in thinking and figuring out problems about competitive conditions, promotional opportunities, and situations that are or may be beneficial or harmful to your business.
6. **Business Plan as Road Map.** Your business plan, once it is completed, will give you and your employees goals and direction: a roadmap to follow in guiding your business through good and bad times.

Who's Planning Now?

In a Wells Fargo/Gallup Small Business Index 2007 survey of business owners, 66 percent of respondents report setting clear goals and objectives for their businesses each year. Of those who prepare an annual plan, only 32 percent say they develop a formal plan. Interestingly, the survey found that those who have owned their businesses for fewer than five years are more likely to establish clear goals or objectives for the coming year than those who have owned their businesses longer (78 percent versus 63 percent). About 70 percent of those who set annual goals and objectives report meeting or exceeding their goals.

If business planning is so important, why do only half of small businesses actually do it? Because, to the landscape entrepreneur, much of this truly sounds like a bore. After all, many enterprising contractors are drawn into starting their own landscape businesses by the possibilities of working in the outdoors, making money, and being their own bosses. But the long hours, hard work, and responsibilities of being the boss quickly dispel any preconceived glamour. Profit is the reward for satisfying consumer needs, but it must be earned. Sometimes a new business needs two years before it shows a profit, according to small business organizations.

For some, the satisfaction of owning their own businesses comes from serving their communities. They take pride in serving their neighbors and giving them quality work they can stand behind. For others, a business offers them a chance to contribute to their employees' financial security.

A big misconception of the startup businessperson, says Paprocki, is that he thinks he can juggle the many changing roles of running a business — salesperson, accountant, manager, crew member, owner — without too much difficulty. “A lot of people don't realize all that comes with owning a business,” he explains. “As a business owner, you have to be on top of your game 24 hours a day. You can't sit back and think things are going to run themselves because they're not. You have to have a solid plan.”

As Michael Gerber's *The E-Myth* famously touts, an entrepreneur gets into business ownership for the love of the game — not the planning, organizing, delegating, and peering into the business crystal ball. As a result, owners get so wrapped up in the day-to-day that the procrastination that is human nature truly comes out. It's challenging for business owners to put their assumptions on paper and risk that they might be wrong. But if more owners did some form of planning, the 80 percent failure rate of businesses in the first five years would be reduced, according to Darrell Zahorsky, small business information guide for

About.com, part of The New York Times Co. Companies that employ just the strategic section of a business plan have 50 percent more profits and revenue than non-planning businesses, points out Paul Tiffany in his book *Business Plans for Dummies*. Another survey found business planning companies have 63 percent higher revenue growth and 100 percent more profit, Zahorsky says. If that is not enough, he suggests contractors consider the following reasons for business failure:

- Poor management systems
- No overall vision
- Lack of market planning
- Not understanding the competition
- No strategic plan
- No established performance measures
- Inadequate financial planning

All seven of these factors can be addressed and overcome through business planning.

Also, as this report shows in the mere act of outlining the next 13 years versus just one, planning is not a one-time occurrence. As Joseph Talmadge, owner of San Francisco-based delivery services company, SpecialT Delivery, said in his response to the Wells Fargo/Gallup Small Business Index 2007 survey: “Small businesses need to constantly innovate and re-evaluate their business models in order to be successful.”

Chapter 2:

Today's Changing Business World

“The future ain't what it used to be.” — Yogi Berra

Each decade, the information a person acquires doubles. Today, one issue of the *New York Times* has more information than one person learned in a lifetime in 18th Century England. A Happy Birthday card that sings to its recipient has more computing power than existed in the world in 1950, and a quartz wrist watch has more computing power than existed in the world in 1960.

Even normal dialogue has changed along with changing technology. For example, it would have been impossible for a person to have made this statement in 1900: “Let’s take the expressway to the mall so I can charge my penicillin prescription.” The reason being that the expressway, the mall, charge cards, and penicillin didn’t exist — not even by 1950. The same can be said for this statement being made in 1980: “Fax me the specifications for the hard drive used in the first PC shown on your Web page catalogue.” In this case, faxing did not exist in 1980 and a hard drive wasn’t what it is today. Even a PC, though it existed in 1980, wasn’t really that advanced. Finally, Web pages didn’t exist until the mid 1990s.

Think about the Internet changes that have happened in the past 10 years. Changes don’t happen at a reasonable pace anymore because technological advances enable them to happen more swiftly. As the great futurist Yogi Berra once said, “The future ain’t what it used to be.” The rate of change is changing, and technology is a big factor. Think about the speed of a stage coach versus a train, an automobile, or a rocket ship. The world moved through those four technologies alone in less than 150 years.

Demography is another big factor affecting change. The world population is now 6.5 billion people, and is expected to be at least 12.5 billion by the year 2100. It has taken the world millions of years to get this far and now we’re going to do it all over again in just less than 100 years. The implications are phenomenal. According to the U.S. Census Bureau, the U.S. alone has 301 million people today and is expected to have 308 million by 2010 and 335 million by 2020. By 2050, the U.S. population will top 400 million. Many historians say this surge in population marks a major watershed in American history, leaving people with unprecedented challenges and remarkable opportunities.

To accurately predict the future, most experts say we must look to our past, where many of these forecasts are based. As an example, examine this quote: “The budget must be balanced, government indebtedness must be reduced, the arrogant authorities must be moderated and controlled, and people should learn to work again instead of living off of the public dole.” Now, who do you think said it? George W. Bush? Bill Clinton? No. It was Marcus Tullius Cicero, a Roman statesman, lawyer, political theorist, and philosopher who lived from 106 to 43 B.C. The same issues politicians discuss today were topics of conversation hundreds of years ago. If you’re still not convinced, think about these facts: taxes were first imposed in Sumer in 3000 B.C. and Julius Caesar banned all wheeled vehicles from Rome during daylight hours to diminish congestion, dust, and noise pollution in 45 B.C.

If futurists agree on any one prediction, it’s that things will be different in the future. But will they? Let’s find out.

Today's Industry

Now that we've looked at the essential reasons to plan for the future and discussed the rapid rate of change happening in the world as a result of technological advances, let's review the current state of the landscape industry. After all, we have to assess the market of today before we can examine the market of tomorrow just as historians have shown us. To secure the kind of future you want for your business, you must "revel in the paradoxes, contradictions and tensions that define the present," Kirsner agrees.

When the Crystal Ball Committee wrote future-based Crystal Ball Report #9, *Landscape Contracting Today and in the Year 2000*, predicting business in 2000, no true numbers showing the size of the industry existed, but the committee estimated 73,000 firms were in operation. Today, an exact total number of U.S. landscape and lawn care businesses is still nonexistent, but many more researchers have tried to predict this and believe they are getting closer to accuracy. In 2002, The University of Tennessee's Charles Hall, and Alan Hodges and John Haydu, both from The University of Florida, wrote a report titled "Economic Impacts of the Green Industry in the United States." In it, they used U.S. Economic Census and Census of Agriculture data to record the number of establishments, employment, payroll, and sales receipts for various sectors of the green industry. According to this report, in the horticultural services category, 82,683 businesses exist — including 76,458 in landscape services and 6,225 in landscape architectural services. Those businesses employ 551,684 paid employees, and have a total annual payroll of \$12.8 billion and total sales receipts of \$38.8 billion. These are 2002 figures. Today, the landscape industry is at \$52 billion, according to *Lawn & Landscape* magazine research.

When narrowing numbers down to the average contractor doing business today, *Lawn & Landscape* statistics reveal that the typical contracting firm is younger today — 13.5 years old in 2006 versus 17.7 years old in 1999. This same research also shows that landscape and lawn care companies are located across the country, with 50 percent reporting headquarters in the East/Midwest region, 26 percent listing main offices in the West/Southwest region, and the remaining 25 percent claiming the South/Southeast region as their home. Despite the fact that these companies are younger, they are generating more revenue on average today at \$712,374 compared to \$694,300 in 2002. These companies employ an average of eight year-round and seven seasonal employees.

Today's typical landscape contractor offers a wider array of services than in the past. Nearly half of landscape businesses, about 48.7 percent, admit they have become more diverse, offering a greater number of services, while 16.3 percent said they have become more specialized. Contractors mow approximately 100 acres for 53 residential customers and 99 acres for 25 commercial customers. Pesticide and fertilizer services take place on 127 acres for 226 residential customers and 106 acres for 42 commercial customers. Single-family residences account for 66 percent of contractor revenue, followed by commercial/industrial at 23 percent, multi-family structures at 6 percent, and government/institutional and other property types making up the final 5 percent.

Concerning labor, the *Crystal Ball Report #9: Landscape Contracting Today and in the Year 2000*, produced in 1989, predicted that offering labor rates of at least \$7.50 to \$10 per hour plus benefits would be mandatory in order for contractors to maintain an adequate labor force. That prediction has come true. According to *Lawn & Landscape* research, an entry-level (less than five years experience) mower operator earns \$8.30 per hour while an experienced (more than five years experience) mower receives \$10.80 per hour. Entry-level spray technicians on average earn \$8.80 per hour and their experienced counterparts receive \$12.10 per hour. Entry-level construction workers earn \$8.90 per hour, while an experienced worker receives \$12.90 per hour. As for salaried positions, today's landscape business owner/president earns on average \$57,089 annually, a designer/landscape architect brings in \$44,671 each year, a supervisor makes \$38,182, an account manager earns \$36,657, and a foreman is paid \$31,077.

As the average contractor's business make-up, service structure, and pay scale has changed, so has his list of top concerns. In 1997, finding adequate labor was the No.1 concern according to 50.1 percent of contractors. In 1998, labor remained the top concern and the percent of contractors who reported this rose to 56.4. But in 2006, on a scale of one to 10 (one being a minor issue and 10 being a major one), finding adequate labor was only ranked an average of 5.3 per company, dropping it down to the average company's No. 10 concern.

Competing against lowball contractors remained the No. 3 concern from 1997 to 2006. Insurance increased from No. 8 in 1997 to Nos. 4 and 6 in 2006 (workers compensation and health insurance, respectively). In 1997, only 3.9 percent of contractors were concerned about rising insurance costs limiting their growth.

In 2006, PLANET conducted a survey asking members about their current company challenges. The top five concerns on the list were:

1. Increasing Net Costs
2. Increasing Fuel Costs
3. Finding and Hiring Staff
4. Competitively Pricing Work
5. Increasing Materials Costs

A *Lawn & Landscape* magazine study listed the following as the top five business-limiting factors contractors expect to battle in 2007:

1. Increasing Fuel Prices
2. Inflation/Rising Interest Rates
3. Lowball Competitors
4. Workers' Compensation Costs
5. Overworked/Stressed Owners

The Wells Fargo/Gallup Small Business Index Survey shows that current landscape and lawn care company concerns are similar to other small business concerns:

1. Cost of Insurance
2. Taxes
3. Energy Prices
4. Government Regulation
5. Finding Qualified Employees

Enhancing efficiency is the major way many contractors are battling rising costs, and other small businesses outside of landscape contracting are also focusing on productivity improvements. Nearly 63 percent of small business owners say reducing operating expenses is a major objective for 2007, according to the Wells Fargo/Gallup Small Business Index Survey. Reaching more customers is cited by 57 percent as a high priority, followed by more advertising (42 percent), and investment in technology (37 percent). Overall, nine in 10 small business owners who developed a business plan for 2007 say generating stronger revenues is their top priority.

Chapter 3:

The Industry's Future Threats

“If you’re not failing every now and again, it’s a sign you’re not doing anything very innovative.”
— Woody Allen

Ask yourself this question, “What can I do to destroy my business?” The committee did just that during its four-day retreat as its members were trying to identify the true top threats the industry would have to face in 13 years.

The trick was to think before answering. Obviously, lighting an office fire could destroy a business in a mere few hours, but the goal here was to identify business practices that would gradually and completely decimate the business. The committee focused strictly on items that a company would do to itself versus something externally that would negatively affect a company.

Sure, the practice sounds unusual, but, by forgetting about our need to hold on to today, we were able to think about tomorrow. By discussing the opposite of what a business normally reviews in a strategic planning meeting (i.e. all that can go wrong versus right), not only do employees speak more frankly, offering truer thoughts, but a business also can find out the true fundamentals that make it viable, according to Crystal Ball Committee facilitator Bill Poppei, a finance professor at DePaul University in Chicago, Illinois, and a teacher of futuristic and creative business thinking. In his opinion, putting together a strategic plan for bankruptcy can do a business as much good as putting together a solid three-year business plan. “Making mistakes means taking a step forward,” he says, encouraging companies to highlight their screw-up of the month or quarter at a company meeting to show how things could be done differently and encourage risk. “Having no mistakes means nothing new and that means no future, especially in a time of change. If you give your employees the chance to take some risks, it can make a huge difference for your business.”

Here are some of the answers the committee gave when they asked themselves “What can I do to destroy my business”:

- Send a 25 percent price increase letter to all customers tomorrow.
- Have a manufacturer build a commercial grade mower that homeowners could afford.
- Stop marketing and advertising.
- Violate immigration laws repeatedly, get cited, and accrue penalties so severe that the industry loses labor opportunities and goes bankrupt.
- Ignore activists — let them attack the industry as much as they want, affecting public opinion and regulation, and reducing the size of lawns and communities.
- Ignore customer service and quality work; stop guaranteeing your work.
- Ignore safety.
- Ignore the Clean Water Act; double your water output on your clients’ sites.
- Ignore environmental issues.
- Quit offering benefits to employees.
- Take on a ton of leverage and stop growing.
- Underutilize technology.
- Bill customers twice a month — steal from them.
- Adopt poor cash-flow practices so much so that banks decide the green industry is an undesirable one to support, and they won’t let green industry businesses borrow money.

- Stop training, eliminate HR, quit recruiting, keep present, out-of-date employee policies in place despite a changing workforce, offer early retirement.
- Ignore Department of Transportation rules on the road and suffer huge fines and penalties.
- Become stagnant; ignore market trends.
- Lose focus, lack leadership, stop planning, ignore the true costs of doing business.
- Abandon industry associations.
- Ignore proper equipment and pesticide use; suffer public humiliation from chemical spills and fires and obnoxious behavior on larger equipment that makes local and national news and ruins the industry's reputation.
- Make landscape and lawn care services a commodity.

Now that we've highlighted what can kill a landscape or lawn care business and the green industry, let's talk about who would pick up the work if the industry wasn't in existence. The committee listed the following:

- Homeowners
- Janitorial and cleaning companies
- Private equity companies
- Artificial plants
- The government
- Big box retail stores
- HVAC companies
- Vending companies
- Other regular service contractors
- Green industry laborers banded together to create a startup

Now you know what can ruin your business and who might do the work in your place. This list could also be considered your potential competition, if not your competition already, depending on your market.

In doing this exercise, the committee was able to narrow down specific threats (internal and external) that in the next 13 years could have a serious impact on the green industry. While the focus is obviously on the opportunities (which we'll get to in the next chapter), we couldn't ignore the threats that could prevent a business from taking advantage of these future opportunities.

The major threats the committee highlighted were:

- Lack of labor
- Industry image
- Government intervention
- Commoditization of landscape services
- Lack of research and development
- Intellectual capital coming in and going out
- Supply chain logistics
- Terrorism and war
- Real estate consolidation
- Water supply
- Big box stores and large company competition

While all of these threats can affect each business in some way, shape, or form, many committee members agreed that some of these issues are regional, affecting certain businesses more than others. Therefore, the committee decided to vote on the top four issues that would cause the biggest threat to the average 2020 landscape business and break out into smaller task force groups to brainstorm ways to prevent these threats from impacting landscape and lawn care contractors.

Industry Threat No. 1: Industry Image

Math teachers are nerds, surgeons are arrogant, and only a fool trusts a lawyer. Every industry has its negative stereotype to overcome, and landscape and lawn care professionals are no different. Despite the huge strides the green industry has made to increase professionalism, the image persists of uneducated slackers who can't hold down "real jobs."

This is probably the biggest challenge the green industry must face. It was a factor when *Crystal Ball Report #9: Landscape Contracting Today and in the Year 2000* was written in 1989. Then, image was defined as "what we are perceived to be, not necessarily what we are," and this holds true today. While the green industry's image does seem to be improving extremely slowly in some markets or with companies offering certain services that customers deem more specialized, the landscape market is still defined as an easy-entry business. This means anyone who enjoys working outdoors and is willing to make a minor investment in equipment can start his own landscape business in a weekend. These are the companies that typically don't have uniforms or logoed trucks yet and usually aren't extremely polished with customers. Unfortunately, they contribute to the industry's unprofessional perception.

But these new contractors aren't the only ones to blame. There are also companies of all sizes and with all levels of experience that have employees who don't follow safety rules or are inconsiderate on job sites. When this happens — for instance, crew members littering neighborhoods with yard waste or misusing equipment and scaring neighbors — the news spreads across a community, and doubt and pessimism toward the green industry multiplies along with it.

External forces also contribute to the green industry's negative perception. Consider activists who insist that knowledgeable lawn care technicians spreading pesticides on a lawn are just damaging the environment versus protecting it. These activists are supported by funding and they are insistent on getting their message to the general public to influence change. This can negatively affect the lawn care market's image, particularly if lawn care operators don't stand up for the industry, confidently spreading what they know as fact to offer as an alternative to activists' views. (For more information, see Industry Threat No. 2: Government Intervention on page 13.)

In order for existing and potential customers to think of contractors as professionals, contractors must make every effort possible to look the part: uniforms, safety gear, confident customer dialogue, clean trucks, etc. But image isn't everything.

The committee members selected to discuss this threat emphasized that the green industry must embrace a positive industry message in order to turnaround its image and spread it to people in the same fashion as other industries have — for example, the "Got Milk?" campaign that showcases the value milk brings to a person's health through positive and popular advertising and public relations communication. The committee suggests the green industry message should be one that focuses on how landscape and lawn care businesses are creating and enhancing the quality of life in communities across America via outdoor spaces, increasing the quality of life to clients and employees. The industry positioning line, "The industry of members who create and maintain the QUALITY OF LIFE in communities across America," was introduced in 2007.

While one can't turn the page of a magazine or flip through a television or radio channel without seeing or hearing some reference to milk, the industry has some challenges in raising the funding and getting the support to promote its message. Project EverGreen, an organization founded five years ago with a mission "to raise the awareness of the environmental, economic, and lifestyle benefits of landscapes and promote the significance of those who preserve and enhance green spaces at home, work, and play," has used its resources and green industry alliances to create a national marketing campaign to this effect, but getting to

a level where the messaging is seen in areas beyond trade publications and local newspapers has proved more challenging than originally conceived. Project EverGreen has been in existence for five years and has managed to raise \$1 million for this campaign. In comparison, the “Got Milk?” campaign is a \$40-million venture and the “Pork — the Other White Meat” campaign has a \$20-million backing. Many of these campaigns were begun under federal law, and therefore the industries involved — for instance, dairy farmers in the “Got Milk?” campaign — are forced to pay for the increased advertising, spreading out the cost across the entire market.

To build industry funding for a “Got Green?” advertising campaign, the committee recommends that PLANET and other industry associations get more involved in the effort, urging their members to become more active. While many of them are already involved in Project EverGreen, the committee says a greater attempt is necessary to increase the power and potential of positive industry messaging. To aid this process, the committee recommends that PLANET adopt a one-hour per week programming effort on Home & Garden Television (HGTV), where consumers already turn for their landscaping and home renovation information. Then, PLANET should revamp its Web site, making the show available online, and include a consumer link — one that becomes an interactive hub for green industry facts, stories, information, education, and professional tips.

As this approach improves the industry’s perception to its current and potential clients as well as the general public, the internal or career aspect of the industry’s image also needs to be addressed. The committee suggests this can be done in three parts: certification simplification, educator training, and through PLANET University, a mobile school targeting youth.

Certification Simplification

Currently, there are numerous national and state licenses and certifications a landscape or lawn care contractor can pursue to better themselves and their business image. However, no one certification stands out to the consumer in a way that says a certified company is the one with which to work. No consumer would take his or her child to a doctor who wasn’t certified by the American Medical Association, but yet they’d hire a landscape contractor who wasn’t certified. The goal over the next 13 years would be for the industry to create an umbrella certification with specific guidelines that every company aspires to earn and of which consumers understand the significance. Not only should it be created, but it should be branded and marketed so well that the public accepts it and certification becomes something landscape and lawn care professionals not only want, but also have to have. There will be no option except for certification for tomorrow’s green industry business.

Educator Training

Today, few colleges and universities push the benefits of working in the green industry. Certain fields, such as landscape architecture, are considered worthwhile by today’s students, but other titles, such as account manager or supervisor, are not always perceived in the same fashion. Consequently, the industry lacks good foremen, managers, and laborers/horticulturists. The objective here is to make sure educators and administrators are aware of the benefits of working in the green industry so they can drive new students who show an interest into it. Also, since business training, not just horticultural education, is a key aspect of any landscape position, curriculum will be restructured to include this form of instruction and increased online training will be made available. Marketing materials highlighting the entrepreneurial advantages of the green industry will also need to be developed, with the assistance of PLANET, to showcase these viable career opportunities.

PLANET University

In grade school and high school, committee members say children are not taught the importance and relevance of green spaces to society. With a mobile school called PLANET University, the committee recommends the association travel to elementary schools, sharing these facts and illustrating the lucrative and attractive career opportunities the green industry offers. The committee also suggests PLANET provide weekly, one-day training seminars during the summer months on landscape education, targeting 8- to 15-year-old students.

Industry Threat No. 2: Government Intervention

For some time now, the green industry has faced numerous government threats on the local level, from restricting leaf blowers, limiting water, and scrutinizing pesticide use to restricting the use of phosphorus in fertilizers, requiring neighbor notification, and banning products entirely. As a whole, members of the green industry have not been known for their involvement in politics and regulatory interests. Many of the constituents of the industry have chosen their career paths specifically due to the fact that there is a perceived lack of need for such involvement whereas many other professions have for years been very active in both politics and regulatory affairs. Oftentimes, operators of small landscape and lawn care applicator companies are motivated by the independent and autonomous nature of their careers and the thought of involvement in the political process is inherently contradictory to their aspirations.

This theory is supported by the fractured nature of the industry, which is overwhelmingly made up of small businesses whose owners are not closely politically networked by entities, such as robustly funded Political Action Committees that are found in larger, more sophisticated industries that have been banded together for years to preserve their political and regulatory interests. This lack of involvement in the political and regulatory process has created a vulnerability that threatens the future of the green industry as a whole.

But operators can no longer expect industry associations to be their sole representation in politics, and they cannot continue to resist regulation that is eminent as the 21st century continues to unfold. Refusal of accepting these facts and embracing opportunities to influence their direction will result in an unfortunate blindsided attack from regulatory entities external of the green industry whose efforts to control will be restrictive in nature and will be without sensitivity to the needs of contractors and applicators. The best defense for such an attack is an offensive maneuver to create a sense of “self regulation” that is validated by internal and external forces and gains the respect of government, consumers, and the overall social network landscape and lawn care professionals operate within. The question that must be answered is not, “Will we be regulated more extensively than we are today?” but instead, “Will we as an industry have a reactive or proactive stance in creating the regulations that are bound to be put in place during the 21st century?” In order to answer such a question, we must be realistic about the forces at work and the consequences of a reactionary position versus a proactive position.

Furthermore, the committee suggests the industry create a vision of the benefits that will come from self-regulation and communicate those benefits. Creation of such a vision is no small task when the audience you are pitching to is made up predominately of independent thinkers whose preference is to avoid regulation rather than embrace it as an opportunity to influence the future. Existing programs, such as certification, education, and lobbying, are integral components of this movement and must be leveraged as such, but they themselves will not be adequate without a more holistic integration of additional programs that raise awareness among members. Examples of the consequence of not participating in this process need to be gleaned from lessons learned in other industries as well as within this industry at the national, state, and local levels.

When contemplating this thought, ask yourself this simple question, “If I put myself in the shoes of a regulator, am I more likely to prioritize pursuit of an industry that is largely without regulation or would I focus my efforts on an industry that is already self regulated?” Government intervention remains one of the top threats to any industry, the reason being that the political process and regulations touch landscape and lawn care businesses on a day-to-day basis. As a result, the committee recommends that industry associations like PLANET continue to serve its members and the industry by increasing its direct involvement with government officials. This is currently being done through the appointment of government committee chairs and the participation in events like PLANET’s Legislative Day on the Hill. Continuing these positive influences can strengthen the industry’s position. Lobbying for responsible labor legislation and regulation of the tools of the green industry trade that is based on science not emotion provides a tangible return on investment for landscape and lawn care professionals. The industry’s collective voice must be loud, clear, and heard frequently.

Without green industry associations’ direct involvement with the government, other organizations with much less knowledge and experience could determine how the nation’s landscapes are cared for, and the representatives may reduce the industry’s workforce, its ability to market to its customers, and create unnecessary restrictions in many other areas of industry operations.

The committee recommends the industry rely on the power and practicality of a grass roots approach. The fact that the green industry is primarily made up of smaller independently owned companies throughout the country is an advantage to a well-run grass roots approach. If the industry sees the benefit of a grass roots campaign, there are landscape and lawn care companies in every congressman’s jurisdiction, and green industry service providers are in contact with a significant portion of the voting population. Both of these facts prove that an industry working together can make a huge difference. The power of the green industry to influence public opinion and government action is a force that needs to be channeled with a smart grass roots program and can offset the enormous amount of funds required for lobbying purposes.

The committee also recommends that the industry create awareness so there is an understanding of the issues and so landscape and lawn care professionals are motivated to take action. Members of this industry are primarily focused on the day-to-day demands of running their businesses. Efforts need to be made to get them to understand the risks to their livelihood that could be caused by negative government intervention. An awareness program should be developed to motivate the entire industry and help them communicate. Collaboration with the media and public relations efforts can have the most impact. In addition, the committee suggests that some future PLANET programming should be used to provide education on the risks green industry professionals face, as well as the best practices for resisting and preventing negative government intervention.

Industry Threat No. 3: Labor Force

As stated in Chapter 2, the green industry has had problems finding adequate labor for years. In addition to recruiting and hiring quality workers, other recurring challenges include finding middle management personnel, conducting regular training in order to grow each worker’s skills and promotion potential, and dealing with rising health insurance rates.

Also, today, a healthy percentage of green industry companies have grown to rely on Hispanic or H-2B workers as their American labor force dwindled. This was not the case 13 years ago but has become more relevant over the past five years. The committee members feel that 13 years from now, Hispanic or H-2B labor may not be an option due to economic improvements in these workers’ home countries and demographic shifts in the American population. While the industry is focused on fighting immigration law battles now to maintain this workforce, realistically this may only be a short-term battle. The loss of this

workforce is a major threat to the green industry's future, but, as we discuss in Chapter 4, it also forces landscape and lawn care professionals to prepare for who might replace these workers down the road.

Additionally, when dealing with the threat of a shrinking labor force, the committee thinks the industry must reposition and market redefined career opportunities for both first and second career workforce candidates. This repositioning must emphasize the unlimited industry entrepreneurial opportunities, the desirability of the green industry work lifestyle, and the contribution that green industry careers make to the quality of life in communities across America. This marketing must promote these positive career attributes while communicating that green industry careers command high wages for a highly skilled workforce.

The industry must also promote a flexible, redefined workforce that will include workers at all stages of their work lives and in all types of part-time/flexible work arrangements, including working a few days a week, working from home, working half days, and working from remote, out-of-the-area locations. The industry must consider attracting women, young and old, for many of the traditional male jobs. With advances in equipment, the industry will be able to consider employing older workers who have retired from their careers as teachers, government workers, public sector workers, auto workers, etc., and have a desire to work to add to their retirement income.

The industry must create partnering relations with educators and associations to develop appropriate and flexible educational and training programs to prepare the workforce of the future for the advanced skill requirements for marketplace mandated national certification and environmentally appropriate landscape stewardship. Through industry-wide process improvement efforts and equipment advances, including robotic and self-guided equipment, the workforce of 2020 should produce twice the work of 2006 with 50 percent of today's labor. This is a 400 percent increase in labor productivity over a 13-year period.

Industry Threat No. 4: Large Company and Big Box Stores Competition

Currently, the industry is a fragmented one because green industry business owners, for the most part, don't know or reach out to each other — they live in fragmented boxes. But with the speed of information traveling over the Internet not just from state to state but across the world, the committee doesn't see how the industry can remain fragmented in 13 years. The reason being that these improvements in technology and a deeper understanding of human psychology have led to “flatter” organizations that get things done with greater speed than ever before. These new organizations have potential for transparency — an atmosphere in which each work group knows what the other groups are up to, unit heads communicate openly with one another, and every employee understands the organization's mission, its goals, and its strategies.

While the industry remains fragmented, the largest of industry businesses are partnering with home improvement or other well-known consumer brands to gain more funding or better market recognition. For instance, take MSD Capital's (the private investment firm of Michael S. Dell, founder and chairman of Dell Inc.) current majority ownership interest in the \$870 million ValleyCrest Cos. (though the company says the management team retains significant equity ownership), or the \$506 million Brickman Group bringing in new private equity partner, Leonard Green & Partners, who owns slightly less than 50 percent of the company. ValleyCrest has also been seen testing their brand marketing potential in Costco stores in California, offering residential design and installation services through its HomeScapes brand, though this has not been formally announced or taken to all ValleyCrest locations. Similarly, in 2002, Home Depot and ServiceMaster (parent company of TruGreen ChemLawn and TruGreen LandCare) joined forces with the hopes of identifying a way each could help the other drive revenue by testing kiosks touting ServiceMaster's lawn care, landscape, pest control, and other home-oriented services in 28 Home Depot Stores in three cities (Orlando, Memphis, and Sacramento). But the companies decided later in the year that the program yielded positive results but failed to meet expectations. ServiceMaster representatives have said they will continue

to explore other in-store marketing opportunities with a variety of partners in the future because they believe select retail channels remain a strategic fit, but didn't announce any such deal before being bought by Clayton Dubilier & Rice in a cash deal valued at \$4.7 billion in March of 2007.

The Crystal Ball Committee is convinced these dealings could represent a huge market shift in the industry. Dell could systemize the industry by bringing in the latest computer technology, and this could trickle down from the largest companies to the smallest. Though public money coming into the industry, as in this example, is seen as a positive, it also boosts the industry's "sex appeal," meaning more entrepreneurship and involvement that could boost competition. The green industry's next competitive threat could be companies like ValleyCrest that are not run by landscape contractors, but by the Michael Dells of the world.

The second part of this threat is companies known as the big box stores (i.e. Home Depot, Lowe's, etc.). The companies obviously see the investment potential in the green industry as they've explored these options. The potential threats are four-fold. First, if Home Depot Supply Centers, aimed at the professional contractor, were to improve (sales of this segment of their business more than doubled to \$3.5 billion in 2006, helped by acquisitions), the stores could carry more commercial equipment and ultimately drive business away from commercial dealers. This, in turn, would force equipment manufacturers and suppliers to discontinue supporting the industry since, in essence, the industry would have stopped supporting them.

Second, Home Depot has noted that it still sees home services as an opportunity for growth and that it's continually seeking strategic partners in this area. Home Depot stores already offer a range of home services through their At-Home Services brand, such as installing cabinets, flooring, and windows, so one could argue that it wouldn't be too challenging to add landscape and lawn care services to the mix. In fact, some Home Depot stores offer exterior hardscape services already. While Americans spend \$970 billion a year on home repairs and improvements, Home Depot gets less than 10 percent of that. But the Do-It-For-Me (what Home Depot is calling the service business) grew 21.4 percent in 2005, and the company is continuing to seek a piece of that growth. Also, Home Depot is a well-known brand and, as such, has the marketing dollars to support a service strategy. In 2007, the company is spending approximately \$2.2 billion on its five key priorities: associate engagement with customers, including recruitment of master trade specialists; product excitement; product availability; improving the shopping environment; and "Own the Pro," an initiative on which the company will spend \$415 million toward making it the No. 1 destination for contractors with loyalty incentives, volume discounts, and credit and direct ship programs.

A third part of this big box stores threat could be Home Depot's sheer size and influence with the banking world. On this scale, Home Depot could go to the nation's largest developers, showing them they have the services to build and also maintain their properties, not to mention offer all of this at an extreme financial advantage to the developer, maybe as much as one or two percentage points less than traditional financing. Mid- to large-size independent landscape and lawn care firms wouldn't be able to compete on that level, driving them away from commercial work and to residential work. The domino effect would continue as these medium-size companies stole residential business from the smaller mom-and-pop businesses. The entire circle of activity has the potential to drastically drive consolidation in the industry.

The fourth and final part of this threat is that as Home Depot and Lowe's improve their customer education in the Do-It-Yourself arena, consumers may stop using professional contractors for their landscape projects. In 2005, 91 million of American households (83 percent) reported participating in some kind of do-it-yourself indoor and outdoor lawn and garden activities, according to the National Gardening Association. This was an increase of 11 percent over 2004 or 9 million households, the greatest single-year rise reported in the previous five years.

While these numbers could scare any contractor into thinking customers may resort to this, one must consider some basic facts on consumers' decision-making skills, using politics as an example. In any election, there are generally 20 percent of people who are on each side of the debate — 20 percent will only vote Democrat and 20 percent will only vote Republican. The middle 60 percent — the majority — will always seek education, researching both sides, before making a final decision. In the landscape world, it can be said that 20 percent of consumers will always be Do-It-Yourselfers, 20 percent will always hire contractors to do the work and 60 percent may go either way, based on the project and their specific situation at the time. That being said, this third part of the threat may not affect businesses too greatly over the next 13 years as statistics on consumer behaviors have remained steady for years, and there's no major shift to show that this would change drastically any time soon.

To combat these competitive threats from large company and big box stores, the committee recommends the following strategies.

1. Have industry associations begin collecting quarterly “public” business reports to look for trends in business direction and monitor future acquisition potential. This process could be handled similar to how government regulation committee chairs distribute legislation updates to industry association members, but instead of having one person be in charge of this, a committee could be created, made up of landscape and lawn care contractors from different regions across the country, who can begin monitoring these changes at the street level, making inquiries to determine what services are being offered or added in various business segments.
2. Have an industry association representing a mass of contractors, such as PLANET, partner with these competitive threat companies. The benefits of this would include boosting association membership, sharing education and training, promoting the use of association members and certified contractors over a broader range of consumers, receiving additional sponsorship backing and endorsement opportunities, leveraging consumer traffic and communication, and obtaining government intervention help and involvement from these bigger partners.
3. Adopt a differentiation strategy, where landscape and lawn care contractors continue to market to the higher end customer, one that the big box store does not typically represent, showcasing a professional and certified image and offering a higher level of service.
4. Boycott them. While this strategy was discussed, the committee did not see this as a direction for the short-term; rather they saw it as counterproductive. There is no upside to fighting the 800-pound gorilla.

Chapter 4:

Opportunities for the Future

“The currency of the future, the key issue that must concern the seller, is the customer’s time.”

— George Gilder, Forbes, April 6, 1998

Before presenting the future-based business opportunities that the committee brainstormed, you will need to do what we did and get your mind in the right place. So, first, instead of imagining your business in 2020, envision something that’s not so close to home. Visualize what a hotel stay might be like in 13 years.

When you walk into the lobby, there’s no need to stop at the front desk because a computer scanned you and your belongings as you entered and has already checked you in. A robot approaches ready to carry your luggage to your room. As you ascend the elevator to your floor, the room is electronically preparing itself to meet your individual specifications. When you approach the door, a scanner recognizing you lets you in — no need to fumble with a door key. When you walk in, the room is set to your preferred lighting and temperature settings, your favorite music is playing in the background, and your chosen scent fills the room. Your day’s agenda appears on the television screen and if you want coffee, all you need to do is state your request aloud and it will arrive.

While much of this vision was dreamed up in an instant, not much of it is impossible, considering 13 years into the future. Robots, scanners, and monitors already exist. Using regular visitor cards, grocery stores already track your repeat purchases and favorite items. So, who’s to say this vision can never become reality? No one.

Now let’s look to the typical landscape and lawn care business. The committee assessed potential future opportunities under four specific categories — customers, office space, equipment and plant material, and labor — presenting a glimpse of today and how that may progress into 2020, including the reasons the committee sees these predictions as highly probable.

Customers

With the relative abundance of material goods available, the new scarcity is one’s own lifespan limit — time. In relative terms, two weeks to an 8-year-old seems like an infinite amount of time, but for an older person, time always seems to fly by. The reason? Their perspective on time is different.

Your customers see time the same way as you do, they don’t have enough of it. Historically, companies waste a customer’s time as if it was a free good. But for customers, landscape and lawn care professionals are not significantly relevant to their time. In today’s society, both parents in a home work and two-day weekends usually don’t offer enough time to take care of all that needs to be done inside and outside of a home.

Also, today’s customers can demand more from service companies because they are making the biggest impact on the economy today. And it’s not just any customer that is responsible for this economic stronghold — it’s the baby boomers. Baby boomers today represent 28 percent of the U.S. population. Using the years 1946 through 1964, baby boomers are between 42- and 60-years old (in 2006). They not only represent the vast majority of the workforce, but they are also the upper end of the automobile market, Baby Boomer Headquarters reveals.

Another finding supporting the fact that baby boomers contribute significantly to today's economy is research showing that today's average American family is better off than the family of 30 years ago, meaning they can afford to outsource their outdoor work. In October 2006, just after the U.S. population crossed the 300-million mark, *Forbes.com* posted an article comparing the average family from 1967 to the average family today. The average couple's \$46,326 in annual income is 32 percent more than their mid-1960s counterparts, even when adjusted for inflation, and 13 percent more than those at the median in the economic boom year of 1985. The typical American household has a net worth of \$465,970, up 83 percent from 1965, 60 percent from 1985, and 35 percent from 1995.

The fact is that the average family of today is doing very well, *Forbes* reveals. The man of the house makes 25 percent more than his father did 30 years ago, even after accounting for inflation. The woman of the home is a lot more likely to work in the professional ranks than her mom was, and is paid about three times as much. And though she still makes only 77 percent of what her male counterparts earn, this is up from 33 percent in 1965. They dote on the same number of children (two), but waited longer to have them, until both careers were well under way. They also pay less tax to the federal government and have 8 percent more purchasing power than they did 20 years ago, including 5.7 percent more than they had just 10 years ago.

A near quadrupling of the Gross Domestic Product since 1967 means that today's Americans share \$12.5 trillion in wealth, or \$41,579 per capita, compared to the \$3.8 trillion, or \$18,951 per capita, enjoyed by 200 million people back then. The richest people today are also much wealthier than this group from 1967, and that puts pressure on the average American family to spend money and get what their idols are getting, *Forbes* reports. For instance, the \$19 million that Wal-Mart Chief Executive Lee Scott earned in 2005 was 410 times what the average American family made, as opposed to the \$469,000 a year earned by Exxon's Ken Jamieson in 1975, which was only 40 times more. And those who worshiped Joe Namath in the 1960s could at least identify with the \$142,000 a year he made (\$848,000 in today's dollars). But how many can identify with the \$87 million Tiger Woods earned in 2005? Not only are the elite making much more today, the rise of cable television and the Internet assures that everyone knows about it.

In the next 13 years, many feel baby boomers will still be a key part of the economy, but just in a very different way. As baby boomers age, any diehard do-it-yourselfers (DIY) in this group may quickly transition to green industry company customers because they lose interest in this activity, don't have the energy to keep it up, or simply are tired of doing it themselves.

Then there is Generation X, the children of the baby boomers, or anyone born from 1965 to 1981. This generation is known for its use and experience with technology. While technology, such as e-mail and the Internet, has saved them time, this generation seems to have filled that time with other things, such as work and hobbies, some of which include the excessive use of this advanced technology. There is a much greater need for green industry businesses in this generation because the demand for leisure and available time has become incredibly stressed with 82 percent of households being dual-income today, where both the husband and wife are working. Another piece of good news for the green industry is that this generation doesn't seem as interested in DIY projects as the baby boomers, meaning more work for landscape and lawn care professionals. But this generation is also harder to work with. While baby boomers like face-to-face contact, Generation X-ers would prefer to e-mail information back and forth, wasting as little time as possible. Because of the Internet, they are also more knowledgeable than their counterparts in previous generations, so they ask more questions and are pickier about final results.

According to the committee, these changing demographics in the typical landscape and lawn care firm's customer base may present the following opportunities:

Addicts Anonymous

To be a successful company of the future, a green industry business must limit the time it takes to work with customers and become more strategically relevant to customers in order to move up their value chain. One way to do this is through addiction — give small add-on services away until the customer grows used to them and then charge for them a short time later. The concept is being used currently with GM's OnStar technology, which the company spent \$2.5 billion creating only to give it away for two years. But as customers got used to having a directional aide readily available to them, they started to see the need to pay for the service in order to maintain its presence. The idea is to make your business so convenient that it becomes very valuable to customers, particularly if there's a threat of it going away.

Another way to addict customers to landscape and lawn care businesses is to feed them information and education. Gardening is still considered the No. 1 hobby in America, according to the National Gardening Association, so consumers are consistently seeking knowledge on the topic. A green industry business can use a tool it already has — its Web site — to feed potential customers this knowledge and draw them in as regular visitors. Then when they're ready to hire someone to do a landscape project, they will think of the company that's been educating them. However, Poppei points out that landscape and lawn care companies' current Web sites have to improve in order to make this happen. To illustrate this point, Poppei reviewed and critiqued committee members' own Web sites. Some of his improvement tips include:

- The business' name and address should be at the bottom of every page so people know what company they are dealing with and where they are located. Include a map on the site highlighting the service area. Companies that serve multiple locations can have an informational section where visitors can click on a state or region and discover the landscape and lawn care issues associated with that area.
- Have downloadable photos of finished jobs not only to view but also to be available as desktop backgrounds on consumers' home computers. Make sure a company logo is in the corner so it's a constant reminder who created this landscape and a marketing tool for anyone looking at this potential customer's screen.
- Write the "About Us" page in first person — not third. Owners should convince customers to put their landscape jobs in their hands. Don't be afraid to share personal background information to which customers can relate, i.e. that you have four children, plan to continue to invest in this business and will do anything to make the customer experience worthwhile. Make sure text is well-written and edited.
- Include some basic pricing information — be proud of these figures. Poppei shares verbiage one company uses: "When you get a bid from us, it will be the highest price you'll receive. If that's a problem, here are our competitors' Web sites. But if you don't mind paying a higher price, we will guarantee the lowest cost because we will offer you the most incredible quality." If you fight about your price, you're commoditized, Poppei points out. If you don't, you're showing there's value in your services.
- Have your company guarantee and customer testimonials accessible via buttons on the home page — it's respectable and builds trust.
- Include staff pictures — people-focused companies should emphasize this fact. Include employee testimonials in the "Career Opportunities" section — only 10 percent of companies today have employee testimonials on their Web pages, Poppei says. "When you read about people who love their jobs, that recruits employees, as well as customers," he adds. Include a place where potential employees can download and send their resumes.
- Think of the home page as an incredible come-on. Share the company's purpose here. Cater the site to the seasons, showing photos of changing landscape backgrounds.

- Instead of a mission statement, write a haiku to which customers can relate and use to visualize their future projects and how your company views these outdoor spaces. Some examples from Poppei include:

Trees, flowers, shrubs, grass
Artistry with living things
We make dreams come true.

Flowing cool water
Brick paths curve through greenery
Our design, your dream.

Outside your window
Nature in all its splendor
We do paradise.

Health Care as a Service Opportunity

Two markets show the most potential moving forward in business — women over the age of 45 and baby boomers. These two groups, in industry consultant Judy Guido’s opinion, make up the wealthiest people in the world today, meaning they have the highest expendable income. So, naturally, looking to these two groups as potential customers over the next 13 years is crucial.

Baby boomers are currently caring for their aging parents — the depression babies. The ratio is two to one. But as baby boomers age, Generation X-ers and the next generation, known as the Boomlet (those born after 1982), will be providing the care. Here, the ratio drops to one to one. Since green industry companies’ crews are already visiting customers’ homes once a week, depending on the services they offer, the committee feels this is an excellent chance to jump on the opportunity of health care, which may be in short supply considering the rapid number of boomers that will need this sort of attention — not daily care but minor weekly or biweekly health checkups. Contractors can hire a special crew with relevant experience for this task. In addition to this, contractors can create interior wellness centers to improve the health of aging customers, as plants and serene settings are known to do. In fact, as nursing homes and senior centers increase in number and attendance, this also increases the need for interior and exterior green spaces on these properties, which landscape and lawn care contractors can provide.

Contractors should think of themselves as people caring versus just plant caring. Though it’s a different business, the committee doesn’t see it as an entire separation from what a typical landscape or lawn care company does. Plant health can translate to people health, and customers will pay more for this service because it’s higher on their value chain.

Going Green

Similar to the health care concept, many customers today are intrigued by the “green” buzzword of late, something that is expected to continue. The green movement is a lifestyle choice that is also impacting politics, advocating environmentalism and sustainability, from finding alternatives to withering resources to preserving natural spaces.

To take advantage of customers embracing this movement, contractors can create a position called a total environmental manager. While the definition and types of landscapes may change, the committee believes the demand for landscaping will not decrease because consumers will still crave the beauty of nature.

They will just want to do so knowing they are preserving the environment around them and wasting little resources. So customers can hire this environmental manager to help them lead a greener life while keeping their property values up. After all, the company that cares for their exterior and interior green spaces should also be able to aid them in their quest for a greener tomorrow.

The Concierge Concept

Again, because landscape and lawn care professionals are on customers' properties regularly, this presents another opportunity, that of the customer concierge. This means that anything a customer needs taken care of at their home — from taking care of their pets to monitoring security while they are on vacation to cleaning their pools — could be taken care of by the landscape or lawn care contractor. This way, the contractor becomes a more valuable asset to the customer. Contractors will know what customers need from basic surveys or from technology, which is bound to continue improving in order to provide more in-depth customer information.

Office Space

Imagine office space designed to maximize communication, interaction, and creativity, while accommodating noisy collaborative work and private concentrated work. According to *Fast Company* magazine, the office will no longer be one place — it will be all places — schools, offices, homes, hotels, trucks, and more. All places will have office attributes in order for there to be little difference between these spaces. *Fast Company* predicts the fundamentals of life, including fun, learning, work, living, and visiting, will be involved in every space. “The world is faster than ever. Companies are flatter and more dispersed. Customers are more impatient. Yet when it comes to finding, acquiring, and outfitting office space, most organizations do it the same old way,” *Fast Company's* Chuck Salter states. “But having a great location will become more relevant than ever.”

These improvements may be ideal for the future landscape and lawn care contractor because he or she is normally not in an office setting while at work. The contractor can work from the truck, driving from property to property, maintaining customer relationships, and upselling services at a much quicker pace and with much less effort. One movement driving this is that paper will disappear — all files will be stored electronically. Payroll will become more seamless; timesheets will be filled out and filed electronically. After customers agree to services, payments will be billed and deducted from checking accounts automatically.

Additionally, and this is the big opportunity of the changing office, a landscape or lawn care contractor can expand the service area in unlimited ways. He or she can become global automatically by outfitting any employee with a global-office network. The new digital technologies, and the continued advancement of them, makes it possible for a business to be both big and small, breaking up even the biggest company into a massive number of smaller, cohesive units. The contractor can have satellite offices, which can be bought or rented, convenient to employees' homes. Staff and crew meetings could be conducted by computer or phone. Having a service area that stretches out beyond a 30-mile radius, even beyond city or state borders, possibly even country borders, will become possible with certain services. As *Fast Company* magazine points out, “the power of globalization is not about leveraging economies of scale. It's about leveraging economies of knowledge and coordination, figuring out how not to reinvent the wheel everywhere you do business, how to benefit from knowledge created and knowledge shared. For the time being, the U.S. is where we are creating the most knowledge about how to compete in the future, how to market in the future, and how to use the Internet to reshape entire industries.”

Equipment and Plant Material

Blower bans at all hours. Emissions and noise restrictions. Product and equipment use limitations. The committee does not think these business-limiting factors will go away in the future. However, they do think equipment and products will continue to improve to an extent where these limitations will no longer affect the typical landscape and lawn care contractor's day-to-day business as much as today.

For instance, equipment will be built to run quieter, in addition to being equipped with noise-cancellation devices. No ear protection will be required. Gardeners who love the sounds of the birds chirping will be willing to work for a contractor because they no longer chase away these peaceful sounds with whirring, ear-piercing engines. Also, work will be able to be done at all times, not just during noise-permitting hours, widening the labor group and customer potential and boosting productivity.

Emissions will be greatly reduced, eliminating this worry, and equipment will become lighter and easier to use so a contractor's employee pool can open to women and seniors. Equipment and trucks will be run on biodiesel fuel or vegetable/waste oil from restaurants. One committee member, Kurt Bland, general manager, Bland Landscaping, Apex, North Carolina, reports already using biodiesel fuel in his trucks to run a more environmentally conscious business, and the impact internally and externally has been positive. Another landscape company, Nanak's Landscaping, Longwood, Florida, has experimented with both solar power and hybrid vehicles to help reduce waste. Recently, Nanak's converted 37 pickup trucks and SUVs the managers use to visit clients that get only 15 miles per gallon to 30 Toyota Scions and seven hybrid Toyota Priuses that get 50 mpg and 30 mpg, respectively. This one change will save the company 15,000 gallons of gas this year, the company predicts. Also, in January 2007, Nanak's converted its office to solar-powered technology. Though the cost of this conversion is generally around \$150,000, the help of a Florida grant and federal tax incentives reduced the cost to \$35,000. Now the company generates its own energy without paying for it from the power company. In fact, it generates so much energy that the power company has been able to buy some of it back from them. While this hasn't paid for the initial investment yet, there is potential here. To advertise its greener operations, Nanak's has updates on its Web site showing how much energy the company is generating and green house gases it is avoiding daily.

As these companies have done, more landscape and lawn care contractors need to embrace environmentally conscious practices. In Bland's opinion, "as contractors, we bring nature and the environment to customers, so we should do a better job of embracing it ourselves. The environment is what we provide customers. We have to do a better job selling our position as environmental stewards. We have to take the lead in being environmental stewards."

To reduce theft and improve operations, equipment will require fingerprint scanners instead of keys. Equipment will also become more customizable — contractors will be able to specify color, and include company name, logo, and contact information. This will further distinguish it from homeowner brands, enabling contractors to show customers they are using special, unattainable equipment to perfect the work on their properties.

As cars can be customized and purchased via the Web, so will equipment. From a logistics standpoint, the committee can't see dealers and distributors maintaining their place in the market, considering all the possibilities the future is likely to bring. If purchasing will become streamlined to the point of less necessary dealer interaction, what about service? The committee predicts equipment will be made to require less service, so that may also decrease the need for dealers in the industry. Manufacturers will have the ability to sell direct and potentially reduce their costs because the middle man will no longer exist.

An example of a machine that would need less service (at a dealership or in a contractor's shop) is the future mower. Instead of blades that contractors need to sharpen regularly, many predict precision lasers will be tomorrow's mowing, trimming, and cutting devices. What about the advent of robot mowers that sense area perimeters and do the work themselves? Two committee members purchased them for research. Currently, they report these machines produce a random pattern and are slow, but do a reasonably good job. But future advancements are expected to perfect this technology.

Not only is equipment expected to change, but so are contractors' soft goods, i.e. plant material. The plant material of the future will be grown with embedded computer chips, similar to pets today that have microchip identifiers. These chips will be programmable and, as a result, will be able to tell the contractor and/or client location details down to GPS coordinates, nutrient and water updates and deficiencies, bloom and growth plans/times, warranty information, and insect/disease problems and recommended solutions.

Plant needs will also tie into irrigation system zones, equipped with sensors that enable areas that require more water to receive it and vice-versa, producing an overall reduction in water use through streamlined systems that emit only the water necessary for plant survival. Similarly, chemical application equipment will be programmed to each client's specific landscape and lawn issues, emitting only the fertilizer and pesticide necessary to control problems and maintain adequate nutrition.

Employees and Labor

Finding and retaining an adequate, quality labor force has always been a landscape and lawn care professionals gripe. And as technology improves and today's children go to college looking to start in a white-collar versus blue-collar career, the labor pool continues to shrink. Today's worker wants a lifestyle, one where work is not something to be planned around. Instead, offerings like flex time and part-time will become vital. Enjoying one's personal life and having a career have become goals that need to be attained simultaneously instead of separately or singly. As *Fast Company* magazine points out, "tension doesn't come from what goes on at work or what goes on at home. It comes from the relationship between work and home. People are fighting to keep work from taking over their lives."

Not only will the average pay continue to increase as the job requires more skill because of advancing technologies, but insurance and benefits will be a given in the future. According to Poppei, saying a company offers insurance will be like a cafeteria advertising the fact that it serves food — it's expected. Attracting employees will be done by touting the many benefits that make a company different versus those that make it the same as other companies.

Because employee time, just like customer time and contractor time, will be limited and more greatly valued, aiding an employee in the increase of time-reducing tasks will be beneficial for future businesses. Many will hire employee concierges that will help save employees time by offering them services that can be done while they are at work and through one resource — the concierge. Services available may include dry cleaning, car repairs, selecting nursing homes, home cleaning, and haircutting.

Considering new positions future landscape and lawn care companies may require, the committee mentioned logisticians and chief financial officers or money managers. These types of workers can help owners who have a lack of business knowledge to stay in the black and maintain profitability.

The other big question the committee pondered was, “Can we double the size of our businesses and reduce our labor force by half?” The concept was not considered novel, in view of advancing technology that reduces the sheer number of people necessary to get a job done, such as a compact utility loader that enables a contractor to reduce the labor needed by 20 to 50 percent. These developments are expected to increase, so naturally, the number of people per crew may decrease.

As mentioned in the equipment and plant material section, lighter and quieter equipment that’s easier to run widens the average contractor’s labor pool to include women and seniors. While this doesn’t necessarily reduce the number of workers, it may create opportunities to add new services without affecting current work. Women and seniors tend to enjoy outdoor work, particularly gardening, and for those who are healthy and do not want to retire, landscaping could be a nice fallback career for them. Since this is a new potential labor pool for an industry that has complained for years about not being able to find adequate labor, it’s landscape and lawn care professionals’ jobs to make their positions fit this new worker segment in order to capture it before other industries do. In addition to adopting lightweight, low-noise equipment, contractors may have to explore other new technologies the future will bring in order to secure these workers. First, some days working outside can present harsh conditions, such as heat, humidity, dust, etc. Thermally insulated suits that keep body temperature down and alert wearers to hydration needs can be worn to reduce these health threats, making the job more bearable and enjoyable. The elimination of any heavy lifting via equipment that is nimble and petite will also help. Genetically, science will also aid this process via the creation of testing to determine person-specific nutritional information that helps people live longer because of their increased good health. Also, unlike teenagers or college students who want landscape jobs in order to earn money, seniors will prefer positions that are exciting and different and offer them flexibility in their hours.

Concerning immigrant labor or temporary seasonal employees obtained via the government’s H-2B program, there is the possibility that this labor pool will disappear in the future, as stated in Chapter 3. The reason being that the economies of these countries (mainly Mexico, from which a majority of immigrant workers come) may improve to the point where people don’t need to come to America to find decent work for decent pay. On the other hand, if H-2B is still a viable program, some feel more members of a Hispanic worker’s family will want to temporarily travel to America to work so the family unit can remain intact during those many months. For instance, the spouses of landscape and lawn care workers may come to the U.S. for other service type jobs, such as janitorial work.

Many committee members felt that the senior worker pool couldn’t replace the H-2B/immigrant labor sector, but the general consensus was: “For every position I fill creatively, that’s one less position I have to fill traditionally.”

Chapter 5: Into the Future

“Your biggest competitor is your own view of the future.” — Anonymous

Recommendations

The committee discussed the future threats and opportunities going into the year 2020, and, as a result, came up with some specific recommendations for various segments of the industry, from green industry professionals and industry manufacturers and suppliers to educational institutions and PLANET or other industry associations.

Recommendations to Green Industry Professionals

- Broaden the HR model for your companies. Make your jobs more appealing and flexible.
- Embrace and utilize technology; leverage the Internet.
- Commit to more intimate relationships with suppliers to create product innovation.
- Make a commitment to intensive, systematic-based training programs.
- Create cultures that accept and accelerate change; be a change agent.
- Increase your relevance to clients; addict them as customers to your company.
- Create a culture that hooks employees so you are the employer of choice.
- Your success will rely on your business acumen. Your knowledge of business management will become more important than your horticultural knowledge.
- To compete, you will need to adhere to higher standards; insist on certification in your company.
- Be involved and influential in your local and national trade associations.
- Increased productivity will be essential to survival.
- Commit to being engaged in the political process with a unified industry voice. Create offensive and defensive strategies. Decrease the words and sharpen the message.
- Create and believe in a superior identity (your industry identity).
- Realize that time is the currency of the future. It will become your most valuable commodity, a key business driver.
- Recognize that your competitive threats will broaden.
- Promote environmental stewardship and own this position in your marketplace.

Recommendations to Industry Manufacturers and Suppliers

- Drive innovation. Convert industry needs into reality.
- Increase collaboration. Participate in the identification of future needs.
- Invest in the industry. This can be done financially, via training and education or by sharing resources.
- Improve supply chain logistics. Create a supply chain driven by customer need; streamline the distribution network.
- Embrace, enhance, and drive technology.
- Create customizable products. Manufacture products on the customer’s terms, i.e. products that can be made with the customer’s logo.
- Increase your value proposition to contractors. Be efficient and provide products at the most cost-competitive price.

Recommendations to Educational Institutions

- Emphasize business-based education; think of business education being equal to horticulture education.
- Work with PLANET to create a curriculum model relative to certification; define some real industry needs.
- Partner with PLANET to market the green industry starting in middle school.
- Develop methods to encourage students to complete their degrees, i.e., increased wages based on completion or employer-paid tuition.
- Ensure there are dynamic instructors. Promote tenure through research.
- Foster appropriate and realistic expectations from employers. Curriculums have to align with the industry. Prepare students to be productive employees.
- Create an industry advisory group.
- Teach communication, customer service, interpersonal skills, and business writing. Green industry jobs are made up of approximately 40 percent client communication, therefore these skills are essential for students to learn early on.
- Provide training models the industry can use.
- Teach environmental appreciation and stewardship.

Recommendations to PLANET and Other Industry Associations

- Collaborate with other green industry associations to unify your message. This will reduce industry fragmentation and create stronger legislative ties.
- Help create policing to avoid government intervention. Develop American Medical Association-like standards so certification becomes the standard and cannot be questioned.
- Reevaluate current certification programs. Ensure there is a maximum of two certification designations with market relevance and critical mass.
- Reach out to the educational system; share best practices. Create an education package for teachers, counselors, and parents so they can see the potential careers within the green industry. Link education with the industry.
- Bring PLANET to the consumer. Reach out to members' customers by getting more involved (i.e., hosting a show on HGTV).
- Embrace technology.
- Increase research and development.
- Match the PLANET vision to all types of members and better communicate it.
- Adopt a buying group mentality for innovation. Get a critical mass together to influence change/buying decisions and reduce product prices.
- Create enough critical mass with the purpose of driving technological change. Contractors can't drive improvements to the end product if they don't form a powerful, large group that has some clout.
- Have the PLANET Web site become the top source for green industry information for contractors, consumers, members, and students. The association Web site is a necessary connection for members and consumers to look to as a resource. PLANET's Web site should be the first one to come up when anyone searches the Internet for information about the green industry. Create four or five sections that drive members to the site.
- Develop an innovation mindset. This can be done by holding an annual innovation fair or creating breakout sessions at conferences that focus on innovation.
- Become more global. Create a virtual GIC or Breakfast with Champions. Have conferences around the world. Work with international associations.
- Develop proprietary products.
- Be the one-stop shop for contractors. Have a benefits package for contractor member employees and be conduits for technology, providing everything the contractor needs.
- Create a stronger legislative presence. Employ legislative and government leadership.

“Change is inevitable, growth is optional.” — Anonymous

Summary Recommendations and Thoughts from Jim McCutcheon, CLP

I have always loved this quote for its simple wisdom yet brutal truth. I have uttered these words so many times in my own company that some people think of it as our mantra. Unfortunately, many people do not like it because they do not like the dreaded word — “Change.”

Many people in my company say that we “change too much.” Why can’t we just “leave things alone for a while?” My answer is simple — our customers, competitors, marketplace, economy, technology, and our own wants and desires are changing everyday. If we don’t evolve to meet those needs, someone else will and we won’t be around. I also ask them if they would like to go back to a 10-inch, black-and-white TV with four channels and no remote ... I didn’t think so.

The last time the Crystal Ball Committee peered into the future to take an overall look at our industry was in 1989. Crystal Ball Report #9 was titled “Landscape Contracting Today and in the Year 2000.” I can assure you that that committee (one of which was with us this time) struggled, just as we did, to fully grasp the concept of change and to creatively look into the future. In reading Crystal Ball Report #9, you will see that the committee was more right than wrong with their predictions. They also challenged the status quo of the late 1980s green industry.

You may or may not agree with the conclusions in this report. If you don’t disagree with some, then we probably did not push hard enough in our thinking. I am sure there are things that we got right, got wrong, or totally missed. However, if our track record holds true, that we will be more right than wrong, what does that mean for our industry and, more importantly, your business?

Whatever you think, change is coming and you can either ride that train to prosperity or you can be run over and left in a heap. Challenge yourself and your people to think differently and not only to accept, but also to embrace change. I assure you that come 2020, the companies and people that do will be the leaders and the winners of our industry.

I want to personally thank all of my co-chairs, committee members, the Ariens Company, and the leadership and members of PLANET for allowing me the honor of being the Chair of this committee. I also want to thank Tom Lied for his vision in creating this committee more than 30 years ago, his leadership each year and his trust to allow the next generation to carry on with his vision. This man has ridden the train his entire life. Will you?

Reading List and Resources

The World is Flat by Thomas L. Friedman

Blink by Malcolm Gladwell

Crystal Ball Report #9: Landscape Contracting Today and in the Year 2000 by PLANET

Economic Impacts of the Green Industry in the United States by Charles Hall, Alan Hodges, and John Haydu

Crystal Ball History

By Thomas O. Lied, CCLP

Early in 1970, a group of ALCA (now PLANET) members gathered and agreed that the young, energetic landscape industry should become more proactive in determining its future. They believed that if landscape contractors could accurately predict future opportunities and roadblocks, they could plan to maximize opportunities, minimize problems, increase profitability and productivity, and more effectively deliver quality service to their clients.

The group, named the Crystal Ball Committee, decided to gather forward-looking contractors, suppliers, and outside experts in an annual topic-specific brainstorming session. The results of each discussion were published in a report and shared with all ALCA members.

For the first few years, the group met at ALCA's annual meeting. The one-day meetings proved to be too short to cover the topics to the extent necessary. The committee agreed that it needed three or four days of uninterrupted brainstorming to bring a discussion to a productive conclusion. Group members committed to a Wednesday through Sunday meeting at Tom and Carol Lied's rustic cabin in Wisconsin's north woods. They worked together, made their own meals, and enjoyed their time together. The discussion started at 8 a.m., lasted until noon, broke until 1:30 p.m., and continued until 5:30 p.m., after which the group had dinner together.

Though the group's base came from ALCA membership, the committee decided that their visions should cover the entire industry. It further decided that ALCA should be viewed as a dynamic tool to help serve the industry and that the group members must believe in the project strongly enough to fund their own expenses. The chair of the committee wrote the group's early reports.

The first report, *Landscape Contracting: Today and Tomorrow*, attempted to predict the future by understanding the past and present. The report, which was well received by the landscape community, predicted many roadblocks and opportunities and suggested topics for the following reports. Since then, the committee has discussed *Management and the Landscape Contractor*, *The Changing, Challenging Role of the Chief Executive Officer*, *Quality and the Landscape Contractor*, and *Lean Management for the Green Industry*, along with many other subjects. In each report, committee members attempted to reach conclusions and share industry war stories. Each report recommended specific activities for contractors, ALCA and other associations, suppliers, and educational institutions.

Only modest changes have been made to the committee over the years. Regular members tend to stay with the project for several years. There is a long list of Crystal Ball Committee alums, and there is also a long waiting list of people eager to join the committee. Just recently, the Ariens Company began sponsoring the committee's work. Jim McCutcheon, CLP, is the current committee chair and his co-chairs are Connie Hom, CLP, Kurt Kluznik, CCLP, and Steve Pattie, CLP.

Crystal Ball Facts, Figures, and Accomplishments

- To date, there have been 26 four-day meetings of the Crystal Ball Committee.
- There have been an average of eight regular members at each meeting along with three divisional representatives and the PLANET CEO, along with an outside consultant and professional writer at most meetings.
- The committee's regular members have completed approximately 200 trips and spent a net aggregate of 1,000 days at these meetings.

Conservative estimate of out-of-pocket expenses:

200 trips — travel and personal expenses @ \$400 each	=	\$80,000
25 years of preparation and communication	=	\$25,000
100 days of meeting site donated @ \$50	=	\$5,000
Conservative total out-of-pocket expenses	=	\$110,000

Value of members' time:

1,000 days of regular members' time @ \$500/day	=	\$500,000
300 days of divisional representatives' time @ \$500/day	=	\$150,000
20 reports written or edited by members @ \$50/hour	=	\$1,000,000
Total 1,000 hours @ \$50/hour	=	\$50,000
Total value of members' time	=	\$700,000

So, an investment of \$810,000 over 25 years averages to about \$32,500 of value donated per year by PLANET volunteers.

Has it been worth it? Those who are regulars obviously think so. The top 20 Crystal Ball accomplishments include:

Accomplishments

1. The Crystal Ball Committee has been a source of PLANET executive talent.
2. At times, it has assisted PLANET's officers to better understand the industry.
3. PLANET's executive staff has benefited from knowledge gained at Crystal Ball meetings.
4. One year, at the request of the board, the committee focused on ALCA growth and development in order to anticipate future association needs.
5. The ALCA Management workshops developed because the Crystal Ball Reports focused attention on the need for management training.
6. The industry has a sense of history to build upon.
7. The industry has become a recognized professional career destination.
8. The industry woke up to the quality movement and its value.
9. Our schools and universities model some of their education on Crystal Ball concepts.
10. Hundreds of firm owners and managers have claimed direct benefit from concepts in the reports.
11. Each report has presented recommendations to PLANET for future projects.
12. The green industry certification movement is a direct result of Crystal Ball ideas and suggestions.
13. Thousands of bankers, attorneys, accountants, and consultants know more about the green industry and its potential because members shared the reports with them.
14. Several internationally known management consultants have complimented the reports and the continuity of Crystal Ball projects. Several have said that the project has no known equal in business.
15. The industry has grown from one of "mom and pop" organizations into an industry whose firms are candidates for buyout by strong investors.

16. The permanent members of the Crystal Ball Committee believe that the learning experience at the meetings is so meaningful that they continue to invest time and dollars because it's worth it.
17. PLANET members rate the Crystal Ball Reports high in their reviews of the value of the association.
18. The reports have accurately predicted various events important to our industry, such as the labor shortage being experienced throughout most parts of the country. Some PLANET members have prepared for these events and capitalized on the opportunity they presented or prepared for resulting problems.
19. At least 10 industries other than the green industry use the reports to assess their activity and future.
20. A significant number of green industry professionals have shared with Crystal Ball Committee members the fact that they personally grew and profited from the ideas presented in the Crystal Ball Reports.

Notes



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