

**The Harvest Way**

**“Best in Class”**

**Sample Kit**



Fellow Landscapers and Honorary Harvesters,

Thank you for requesting The Harvest Way “Best in Class” sample kit – your first critical step in organizing your business to make more money.

Simply, the Best in Class program will help you implement proven systems to get over the hump, grow strategically and build an awesome business. With these systems, processes and tools, you can turn your company into a “cash cow” – a profitable landscape firm.

The Harvesters have worked very hard to put together this small sample kit for you we call The Harvest Way “Best in Class.” They developed it based on their combined 100 years of hands-on landscape industry experience. Interested? Read on...

We have divided your company, every landscape company, into 8 sections or “buckets”:

- |                               |                      |
|-------------------------------|----------------------|
| 1. Operations                 | 5. Culture           |
| 2. Business                   | 6. Customers         |
| 3. People                     | 7. Sales & Marketing |
| 4. Financial & Administration | 8. Leadership        |

And we have divided each bucket into three levels based on size and the maturity of your organization: Levels 101, 201, 301.

This systematic approach is your roadmap to success! The specific manuals, methodologies, review forms, quality assessments, team-building and much more will provide your business with the organization, structure and stream-lined approach to achieve your goals.

Give the examples in the sample kit a try in your organization and see how powerful they can be. You will have questions, so give us a call to help explain more fully how our system works.

Helping you, “Harvest Your Potential.”

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***P.S. We have also included the first level in a “career ladder” Training & Certification Program for your people. This is found no where else! Check it out and let us know what you think. The PDF file was included in the folder downloaded from our website.***

## OPERATIONS 101: NEW JOB START-UP CHECKLIST

Job Name: \_\_\_\_\_ Job Number: \_\_\_\_\_

Job Address: \_\_\_\_\_ Start Date: \_\_\_\_\_

Account Manager: \_\_\_\_\_ Foreman: \_\_\_\_\_

### 1) PRIOR TO START OF JOB

- Map of job location (e.g., Map Quest, GPS coordinates)
- Copy of site map (e.g., backflow, controllers, concerns, key office locales)
- Tree inventory (e.g., species, quantity, location, condition of each)
- Job specifications (e.g., turf, slopes, shrubs, irrigation, trees)
- Initial job walk completed (e.g., job quality, safety hazards, client priorities)
- Job estimate based on manpower, square footage, site tasks; gross margin goals established
- Photographic documentation (i.e., 5 photographs per \$1,000 contract value; "before" photos)
- Completed customer registry (e.g., names, phone numbers, e-mails, contact hierarchy)
- Signed contract
- Finalized new Job start-up plan (e.g., rotation map, communication, crew configuration)
- Thank you note sent to appropriate contacts
- Introduction letter sent to appropriate contacts

### 2) OFFICE ADMINISTRATION

- Establish new job file
- Populate job file with all documentation (e.g., contract, client sheet, photographs)
- Scan all documents onto electronic network for back-up and security purposes
- Prepare welcome letter and certificate of insurance
- Ensure three (e.g., owner, Account Manager, Office Manager) personal contacts with client
- Billing procedures, service requests, and customer service processes are finalized

### 3) WITHIN FIRST WEEK ON THE JOB

- First phase (i.e., 30-day priorities) of new job start up plan have been completed
- Functional areas (e.g., chemicals, irrigation, clean-up) are established
- Initial job site safety inspection has been completed
- Weekly routing schedule has been reviewed and revised
- Project Manual (e.g., initial enhancements, plan revisions, rotation map) is developed
- Account Manager and Foreman walk the entire job
- Account Manager contact client on at least two occasions

### 4) WITHIN FIRST MONTH ON THE JOB

- Review Project Manual with multiple client contacts
- Review safety evaluation with multiple client contacts
- Job sequencing is revised to ensure job quality and gross margin goals can be achieved
- Initial walk-through with client occurs
- Proposals, notes, and e-mails are stored in the job file
- Attendance at board meeting, client meeting, or residential meeting is scheduled
- Photographic documentation is collected; "after" photos
- Plan is determined for upcoming seasonal adjustments (e.g., labor, chemicals, color)
- Owner contacts client personally
- Client Relations Management process begins to take shape
- Entire new job start-up process is reviewed to improve efficiency, quality, and value

## **BUSINESS 101: BASIC BUSINESS PLAN**

### **1) CURRENT REALITY**

- What does “here” look like?
  - Draft an organizational chart of what your company’s reporting relationships look like today.
    - Include names, position titles, and salaries for every employee at and above Foreman.
  - Calculate the revenue stream for each of the company’s major business functions.
    - Maintenance contracts, extras, irrigation, trees, construction, design-build, etc.
  - Calculate the gross margin for each of those revenue streams.
  - Calculate the overall gross margin for the entire company.
  - For maintenance, also conduct a market analysis by organizing all maintenance jobs by market type (e.g., HOA, residential, commercial), size of contract, annual gross margin, and tenure.

### **2) DESIRED DESTINY**

- What does “there” look like?
  - Draft an organizational chart of what your desired company should look like in three years.
    - Include names, position titles, and salaries for every employee at and above Foreman.
  - Calculate the desired revenue stream for each of the company’s major business functions.
    - Maintenance contract value, extras, irrigation, trees, construction, design-build, etc.
  - Calculate the desired gross margin for each of those revenue streams.
  - Calculate the desired overall gross margin for the entire company.
  - The desired overall gross margin for the company should be between 45% and 50%.

### **3) ACTION PLAN**

- What do we need to do to get from “here” to “there” within the following eight areas?
  - Marketing and Sales
  - Operations
  - People
  - Customer
  - Culture
  - Leadership
  - Financial and Administration
  - Business
- Rank the eight categories in order of importance to reach your desired destiny.
- Specify priorities for each action item by timeline.
  - Short-term: Within 90 days
  - Mid-term: Within one year
  - Long-term: Between one and three years
- Assign employees to lead each of the action items.

### **4) FOLLOW-UP**

- Revisit each action item each month by examining its progress, status, or difficulty.
- Revise the action plan as necessary to achieve the desired destiny in order to get “there.”

## PEOPLE 101:10-15 REPORT

Take 10 minutes to fill out this form and then take 15 minutes to review it with your coach.

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Coach's Name: \_\_\_\_\_

1. Overall, my morale for the past week (month, quarter) is: \_\_\_\_\_

(1="Poor," 2="Below Average," 3="Average," 4="Above Average," 5="Outstanding")

The reasons for my morale being at this level are:

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

2. The most important things I learned this week (month, quarter) were:

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

3. Here are some recommendations I have to improve the company:

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

For the next week (month, quarter), the following action items will be taken:

- d. \_\_\_\_\_
- e. \_\_\_\_\_
- f. \_\_\_\_\_

The date, time, and location of our next meeting will be: \_\_\_\_\_

## FINANCIAL AND ADM.101: TARGETED GROSS MARGINS

### 1) DEFINITION OF GROSS MARGIN

- Total Revenue less Direct Costs (i.e., Direct Costs = Labor plus burden and materials)
- Total Revenue less Direct Costs = Gross Margin

### 2) THE GOAL

- 50% Gross Margin
  - A minimum Gross Margin of 50% is expected from total combined revenue generated from all sources including maintenance, extras (enhancements) tree care, irrigation etc.

### 3) CALCULATING GROSS MARGIN MARK-UP

- Desired Gross Margin of 45%: Divide Direct Costs by .55
- Desired Gross Margin of 50%: Divide Direct Costs by .50
- Desired Gross Margin of 55%: Divide Direct Costs by .45

### 4) DESIRED GROSS MARGIN FOR MAINTENANCE JOBS: MINIMUM STANDARD BY MONTHLY CONTRACT SIZE

- Greater than \$20,000: Gross Margin between 38% - 40% (never go below 35% Gross Margin)
- Between \$10,000 - \$20,000: Gross Margin between 40% - 42%
- Between \$7,500 - \$10,000: Gross Margin between 42% - 45%
- Between \$5,000 - \$7,500: Gross Margin between 45% - 50%
- Between \$2,500 - \$5,000: Gross Margin between 50% - 55%
- Between \$1,000 - \$2,500: Gross Margin between 55% - 57%
- Less than \$1,000: Gross Margin at or above 57%
- Note: No jobs less than \$500 unless immediately adjacent to existing work earning Gross Margin of at least 60%

### 5) DESIRED GROSS MARGIN FOR ENHANCEMENTS

- Extras: 50%-55%; minimum of 45% Gross Margin on all extras
- Irrigation: 55%-60%
- Sub Contracts: Minimum of 20% Gross Margin (Divide costs by .80)

### 6) DESIRED GROSS MARGIN FOR TREE CARE

- Between 55% - 60%

## CULTURE 101: CORE VALUES PROCESS

- Review the words on the list found below and eliminate all but 20.
- Gain consensus of the most popular 20 words that apply to your company.
- Then send the list around again to eliminate half of the words; now you have 10.
- Then send the 10 around to eliminate half of them again to arrive at the final 5.
- With the final 5, create a short paragraph using all 5 words.
- These are the words, or values, that you want your company to represent, commit to becoming, and hold each other accountable to, as you move forward together.
- Assign each of them a definition, so everyone will understand them in the same way.

Accomplishment	Freedom	Privacy
Accountability	Friendship	Problem Solving
Accuracy	Fun	Profit
Achievement	Global View	Progress
Adventure	Goal Oriented	Prosperity
All for One/One for All	Good Will	Punctuality
Balance	Goodness	Quality of Work
Beauty	Gratitude	Regularity
Calm	Growth	Resourcefulness
Capitalistic	Hard Work	Respect
Challenge	Harmony	Responsiveness
Change	Honesty	Results-oriented
Cleanliness	Independence	Romance
Collaboration	Inner Peace	Rule of Law
Commitment	Innovation	Safety
Communication	Integrity	Security
Community	Joy	Self-giving
Competence	Justice	Self-reliance
Competition	Knowledge	Service
Concern for Others	Leadership	Simplicity
Content over Form	Love	Skill
Continuous Improvement	Loyalty	Speed
Cooperation	Maximum Utilization	Spirit in Life
Coordination	Meaning	Stability
Creativity	Merit	Standardization
Customer Satisfaction	Money	Status
Decisiveness	Non-violence	Strength
Delight of Being	Openness	Success
Democracy	Orderliness	Systemization
Discipline	Peace	Teamwork
Discovery	Patriotism	Timeliness
Ease of Use	Perfection	Tolerance
Efficiency	Personal Growth	Tradition
Equality	Pleasure	Tranquility
Excellence	Peace	Trust
Fairness	Positive Attitude	Truth
Faith	Power	Unity
Family	Practicality	Variety
Flair	Preservation	Wisdom

## CLIENT 101: CLIENT PROFILE

Client Name: \_\_\_\_\_ Date: \_\_\_\_\_

1. Overall, the client's current satisfaction level with the service we provide is: \_\_\_\_\_

(1="Poor," 2="Below Average," 3="Average," 4="Above Average," 5="Outstanding")

2. In specific, what do we have to do get a rating of "5" on the next evaluation?

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3. What are some particular service preferences this client has mentioned?

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4. What are some particular service complaints this client has mentioned?

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5. What is this client's education background? \_\_\_\_\_

6. When is this client's birthday? \_\_\_\_\_

7. If married, what is the name of the client's spouse? \_\_\_\_\_

8. If married, what is the client's wedding anniversary date? \_\_\_\_\_

9. What are the names and ages of the client's children?

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10. What are the types, breeds, and names of the client's pets?

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11. What are some of this client's hobbies (e.g., activities, movies, vacation locations)?

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12. What are some of this client's personal qualities (e.g., politics, religion, social clubs)?

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13. Are there any special notes or comments about this client?

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## SALES AND MARKETING 101: CLIENT SELECTION CRITERIA

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- 1. FINANCIALLY STABLE: Fiscally healthy; pays on time.
- 2. VALUE DRIVEN: Understands what we bring to the table and that price is not the primary decision factor; recognizes the importance of the landscape to their business.
- 3. IMPROVEMENT: Understands the importance of investing in the project to increase value.
- 4. PERFORMANCE BASED: Not a “body count” type of mentality; focuses on results not methodology.
- 5. LOYALTY: Stable relationships with contractors; doesn’t change contractors often.
- 6. LONG RANGE COMMITMENT: Willing to commit to a multi-year contract.
- 7. REALISTIC EXPECTATIONS: Understands landscape maintenance reality; does not call random, unnecessary, and frequent fire drills. Specifications are reasonable and can be met.
- 8. WIN-WIN ATTITUDE: Values partnerships that promote a mutually-beneficial, long-term relationship; is collaborative and respectful of others.
- 9. POTENTIAL: Related to additional properties that may require landscape service.
- 10. REFERENCE: Will serve as a good reference and testimonial; is likely to refer other clients to our company.
- 11. SIZE: Not less than \$1,000 per month; unless it is on the site of an existing job.
- 12. LOCATION: Job location is within the targeted geographic area. Size of the job may override the distance to the job site.
- 13. MARKET TYPE: Fits within our preferred client market-(i.e., owner operated).
- 14. RELATIONSHIP: Currently doing business with a sister company; positive experience with the sister company.

## LEADERSHIP 101: CONDUCTING A SUCCESSFUL MEETING

We all know that time is one of our most valued resources; a resource that must be managed efficiently to help us reach our goals. We also know that meetings occur frequently in organizations, yet are seldom conducted efficiently and thus are typically viewed as a waste of time. The guidelines listed below are intended to improve meeting efficiency.

### 1. BEFORE THE MEETING

- Determine the desired outcome the meeting must produce.
- Develop a tailored agenda that will direct focus onto the desired outcome.
- Invite only those attendees directly related to the meeting outcome.
- Solicit comments or questions from attendees prior to the meeting.
- Identify the location, start time, and end time of the meeting.
- Send the agenda to the meeting attendees at least three days before the meeting.
- Practice how you will conduct the meeting, at least one day before it begins.
- Ensure resources (e.g., hand-outs, laptop, data) are ready before the meeting begins.

### 2. STARTING THE MEETING

- Start the meeting on time; never be late.
- Welcome the attendees and thank them for their participation.
- Review the agenda and state the desired outcome, before addressing the first item.
- Establish meeting norms (e.g., turn off cell phones, confidentiality, don't interrupt, no side conversations, parking lot issues, roles and expectations, conflict resolution).
- Assign someone to take notes (e.g., topics, decisions, action items, completion dates).

### 3. CONDUCTING THE MEETING

- Manage participation (e.g., encourage input, prevent anyone from being too dominant).
- Use active listening skills (e.g., open-ended questions, clarify, rephrase, body language).
- Ask for different points of view; promote creativity, not status quo thinking.
- Record ideas, notes, and the action list on a flip chart or computer with a screen.
- Keep the focus on the agenda topics, not the people or parking lot items.
- Summarize the content and assignments before moving to the next agenda item.
- Periodically comment that you value the attendees' ideas, opinions, and questions.
- Help the group reach conclusions and achieve consensus decision making.
- Make sure the meeting achieves the desired outcome.

### 4. ENDING THE MEETING

- Restate conclusions, accountabilities, action items and dates, and follow-up procedures.
- If necessary, determine the next meeting date, time, and location.
- Thank the attendees for their time and participation.
- End the meeting on time.

### 5. AFTER THE MEETING

- Evaluate the meeting (e.g., what went well, what might have been done differently?).
- Draft and distribute the meeting minutes to the attendees within one day of the meeting.
- Share results with others who need to know what occurred.