



## Module Introduction: New Job Start Ups

**Purpose:** To teach Account Managers to how best bring on new jobs by having a New Job Start Up process

As a result, you will show the client that they have made a great decision in choosing your company to care for their property.

### Module Overview

In this module we will share many ways to get a new job off to great start. We will also share with you ways to build trust and confidence and as a result will bring additional enhancement sales.

### How to Measure Success from this Module with GROW Card Metrics

Review your GROW CARD and with your coach determine where you currently stand/ measure up in the following metrics:

- Customer Retention
- % of Enhancements to Maintenance Ratio or Penetration Rate
- Gross Margin
- Leads for new sales

Now you and your coach can track your progress in improving these metrics as a result of learning this process and practicing the basics we have shared with you in this module.

### Learning Objectives/ Takeaways:

- How to create a "WOW" Experiences After the Sale is Made
- How to deliver a great New Job Start Up that exceeds your client's expectations
- Learn several ways to turn a great New Job Start Up into getting Enhancement Sales

### Goals for New Job Start Up within the First 90 Days

- Client knows they made the right choice
- QC Score to 85 + Irrigation operational condition, weeds and dead / dying plants are gone
- All Start Up Check List Items are completed
- Initial Findings Report Prepared
- Master Game Plan Mapped out and reviewed with client: Using SLMP Principles
- All maintenance tasks both routine and non-routine have been scheduled
- Proposals ae prepared and either presented already or will be presented
- Client Survey has been completed
- Client Profile is in place along with company mapping /Org Chart
- Emergency Procedures in Place

# New Job Start Up Lessons

**Lesson #1: The Pre-Job Start Up Protocol**

**Lesson #2: Meet and Greet: Cover the Basics**

**Lesson #3: Job Review Inspection / Documentation**

**Lesson #4: ID the BIG Four: Safety, Security, Liability and Asset Protection**

**Lesson #5: Establish the Starting Quality Counts! Score**

**Lesson #6: Game Plan for First 30 – 60 - 90 days**

**Lesson #7: Discover Enhancement Opportunities**

**Lesson #8: Tips for Turning Start Ups into Enhancement Sales**

# Module: New Job Start Ups

## Lesson #1 The Pre-New Job Start Up Protocol

### Lesson Purpose:

This lesson is to make you aware that even before the job starts there are several key areas that if not dealt with prior to the start up there could be some costly consequences.

Here are some key areas that need to be addressed and resolved prior to starting a job.

### Negotiations: Big Issues vs Small Details

BEFORE you start a new job make sure there are no BIG unresolved issues. Often, it's full speed ahead or "hey we'll figure that out later". If it's a BIG issue stop the train and get it resolved. If it's a very minor issue proceed to starting the job up. Example of Big Issue: is the initial clean up an extra or part of the maintenance? If the place is a BIG mess, get this resolved before starting. If startup costs are minor, then start it up. BIG ISSUE STOP and Resolve/ Negotiate BEFORE Starting the job; SMALL issue proceed

### Agreement Contract/ PO/ Work Order in Place with Specifications and Signed

It's always a good idea to have something in writing that describes the work to be done (specifications), the price to be paid and when it is to be paid. Have this document in writing and signed by authorized folks.

### Certificate of Insurance in Place / Sub-Contractors Certificate of Insurance

Most companies/ customers will require these be in place before you start work.

### Clear Expectations Spelled Out and Agreed On

Make sure you have this covered. What is expected and when should your client expect it. Make certain you and your client have a CLEAR understanding and agreement on what is included as part of your maintenance service and what will be performed as an extra charge above and beyond the monthly fee.

### Start Date and Teams Scheduled and Prepped: Site Map – Job Sequencing

COMMUNICATE with your team and make sure everyone is ready and forewarned of the new job. What date do we start on and what day(s) do we service the job? Whenever possible, get a Site Map if not available make one. Set up the job with your Job Sequencing process right from day one.

### Consider Irrigation, Tree work, Spray Apps, Enhancement Team to be Scheduled if Needed

Know what other resources will be needed to get off to a great start and get these scheduled in as well.

### Intro Letter / Welcome Aboard Sent and Received by Client

Have a welcome aboard letter ready and sent to client that lists all contact info, basics on what to expect during start up, on -going communication and "touch points" etc.

### Job File/ Number

Start a job file (either electronic or physical) that will keep all of the documentation, contract / agreement, certificates of insurance, correspondence, extra work proposals etc. in one location for easy reference. Assign the job a job number to help track time spent on this specific job.

### Lesson Review/ Takeaways

Remember even BEFORE you are actually on the job there are several KEY areas that need to be covered.

# Module: New Job Start Ups

## Lesson #2: Meet and Greet: Covering the Basics

### Lesson Purpose:

This lesson is to help with a smooth transition from the sales process to the operational process

Here are some key areas to consider to assure a smooth turnover and get the job off to a great start!

### Meet and Greet on the Job with Key Players

Whenever possible, try your best to get a face to face in person meeting as soon after the job starts as possible. This would be even better if this face to face meeting occurs before the job starts. Have all of your key players present.

### Contact Info Both sides: Communication Mode: Emergency Procedures

Gather contact info for both sides if not already done. Establish an Emergency Protocol: Who does what? What should be done? Contact Info. Decide on best communication mode: Text, E-mail, Voice Mail, Phone etc.

### Know their Needs, Priorities, Pains and Expectations

Get a sense of their immediate needs and a sense of their priorities. Learn medium range and long-range goals and expectations.

### What are the Marketing Corridors?

Learn where their critical areas of needed attention are located. These will usually be entrances, corridors, models or spaces to be rented or leased, signage clearance for stores, vehicles, pedestrians, areas that have extra need for trash and debris removal etc.

### Get the lay of the land: Do's and Don'ts, Start Times, Noise Abatement, Upcoming Events

Learn some of the basics of the job. Where should we park, take a break, are there any noise abatement issues, and specific start times or any special conditions or upcoming events. Also know where your client parks and walks into their facility. Learn where their office is located and what their perspective of the job is viewed from to know their daily view of the job.

### Learn about their Customers

Whether it's a HOA Board of Directors or Landscape Committee or a particular homeowner or tenant you should know the how these will all affect your client and how to deal with issues when they occur. Are there any particular people who you will need to know how to deal with? What is the best way to deal with these types?

### Client Company Mapping / Org Chart/ Culture

Learn about your client's organization. Who reports to who? Learn their culture as well. What are their core values? How do they treat each other and their vendors? What are their do's and do not's?

### Start Client Profile

Start collecting info on your client with a client profile. This will really help with building a lasting relationship with your client: See Tool Box for this helpful tool

### Internal: Walk the Job

After you have all of the above in place conduct a walk through with your team to make certain everyone knows the basics of the job. This will definitely pay off and provide a very successful New Job Start Up!

### Lesson Review / Takeaways

Getting a job started off right will require several key areas/ basics be covered right from the beginning. Follow the areas we have given you here will assure a great NEW Job Start Up!

# Module: New Job Start Ups

## Lesson #3: Job Review Inspection - Documentation of the Basics

### Lesson Purpose:

To learn what are most common issues to look for and get documented as an existing condition of the job. These will areas will also help ID enhancement opportunities.

### Overview:

It is critical to identify the existing conditions of job that you will be starting up. Property Managers will change, Property Management Companies will change, and often properties will be sold and new owners will arrive. This is why it is so important to make certain existing conditions be identified and documented. This will protect your company from possible unneeded costly repairs for something you didn't cause, and from possible litigation with injuries or property damage etc. This area of documenting preexisting conditions is so important we will cover this in the next three lessons.

Keep an eye out for the following as these can be costly if they land on your shoulders or paid out of your pocketbook if not documented:

### Irrigation System

Hopefully you have a reasonable idea of the irrigation system's age, condition, if it is automatic or manual and in operational condition before you have started the job. This is a critical area to determine its condition and what will be needed to bring up to an acceptable standard.

### Weed Eating Damage to Trees in Turf

This damage can kill the trees. Don't let someone else's carelessness become your problem. Photo doc this and have a certified arborist report written up if this is excessive. This can be EXTEREMLY COSTLY if the trees need to be replaced.

### Tree Ties and Stakes Girdling and Damaging Trees

This can be equally damaging as weed eater damage. Check all tree ties/ guys and stakes to assure they are not choking/ girdling the trees and the stakes are not rubbing on scaffold branches or trunks

### Broken Items: Windows, Light Bollards, Chips or Stains on Hard Surfaces

Take a close look here to see if there are any issues or previous damage done with mowers, weed eaters, blowers, vehicles etc.

### Grading and Drainage Issues

Keep your eyes open for signs of poor or no drainage. Landscape areas are to be graded away from buildings to assure that water does not seep into them.

### Weeds and Volunteers

Weeds can be costly to remove and get under control. Some weeds are more difficult to control and require multiple measures both manually and chemically to remedy. If there is a significant amount of time/cost needed to treat / remove, consider this as an extra item.

### Life Cycle of Plants: 1,2,3: 1: Juvenile, 2: Established, 3: Declining or Dying / Dead

Get a sense of what plants are in the palette and what life cycle they are currently at. If there are many time-consuming removals of dead plants required, once again, consider and propose as an extra.

### Plant Selection: Editing and or Replacement

In some cases, just removing some of the plants is a good idea. It's not always needed to replace plants.

### Renovation Pruning

Many times plants have been left un checked for years maybe even decades. Document these conditions and provide a game plan and time frame to deal with these or possibly present a resolution as an extra.

### Safety/ Security/ Liability/ Asset Protection:

We will present these areas for consideration in our next lesson.

### Lesson Review/ Key Takeaways

# Module: New Job Start Ups

## Lesson #4: ID the BIG Four: Safety, Security, Liability and Asset Protection

### Lesson Purpose:

One of our key responsibilities as landscape professionals is to serve in our client's best interests and help identify and in some case prevent situations that can be unsafe or costly to remedy.

Your role is to serve as a scout for these 4 areas. Here are some examples of the most common areas.

### Safety: Slips – Trips – Falls

- Root heaving and cracking hard surfaces especially walkways
- Fruit, flower or leaf drop on walking surfaces and plugging drains
- Pedestrian pathways worn into plantings, slopes, parking lot areas
- Holes/ Trenches left open or exposed
- Grading to low or high along walking areas / sidewalks
- Too steep of slopes to be mowed
- Sprinklers too high next to walkways

### Security

- Signs, signals, cameras, lighting blocked by foliage
- Too dense of plant material near potential theft areas: IE ATM Machines, Parking Lot Areas

### Liability

- Lighting not working: Signs and Lights
- Broken or missing signs: Stop Signs etc.
- Hazardous Trees
- Roadway visibility for vehicular traffic and pedestrians
- Debris Dump areas: including Trash bins, back areas
- Playground Debris / Landing Areas / Attachments
- Low hanging limbs: pedestrian passage, bicycles and vehicle traffic
- Unfriendly animals: Coyotes, Gophers, Moles, Racoons, Possum, Snakes, Rabbits, Deer
- Dog and other animal droppings

### Asset Protection

- Trees rubbing on buildings or allowing rodents to access buildings
- Areas where homeless sleep or hang out
- Graffiti Areas
- Truck and Large Vehicle Damage
- Fuel Mod Areas
- Gopher Damage on Slopes
- Vandalism
- Criminal Activity: Theft, Terrorism
- Irrigation overspray on hard surfaces or buildings; water staining windows

### Water: One of natures' most awesome and/ or destructive resources

- Erosion areas - slopes
- Weep Screeds Covered
- Water seeping into buildings
- Water on Hardscapes: Shorten Life Span
- Leaks: Valves, Broken Main Lines, Broken Heads
- Drainage and Drains + V ditches not cleaned out

### Tips and Tactics

- Document with photos and in writing to Client
- Consider outside expertise in non- familiar areas: Certified Arborist, Fire Authority
- Have disclaimer in place/ review with attorney

## Lesson Review and Takeaways

# Module: New Job Start Ups

## Lesson #5: Establish a Starting Quality Counts! Score

### Lesson Purpose:

Learn how a Quality Counts Score can be used for New Job Start Up documentation.

### Overview:

We all have heard or maybe we have proclaimed on many occasions ....

***“you should have seen this job when we started” ....***

By using the Quality Counts scoring process, you can give a quantitative score for the job and identify areas where the job falls short of industry quality standards when you first took over the job.

Here is how to use the Quality Counts Scoring Process for New Job Start Ups for: Documentation of existing conditions with an objective/ quantitative scoring system, setting goals for measurable progress and verifying progress for reaching the Quality Standard “zone” of 85%-90% and more importantly for verifying that your client’s expectations are met.

### Score the Job

Use the Quality Counts Scoring sheet along with the Quality Counts Criteria Guide and score the job in its’ current condition.

### Determine what is needed to bring to minimum standard of 85%+

List the specific areas needing attention and the time required to bring to an acceptable QC score level of 85% +

### ID Top Priorities and Sequencing with Your Client

ID the areas from your QC score that the client perceives as important to them. Be sure to review with them on the sequencing/ order of addressing and resolving these areas and the timing for getting these areas completed.

### Build game plan to bring to standard of 85%+ within 90 days

Once the areas needing addressed are identified and prioritized the sequencing of getting these items resolved can be put into place. Build a game plan with your ops people to get this project to standard within the first 90 days on the project.

### Determine if enhancement is needed or if maintenance will bring to standard

Some of the issues identified may be considered as extras. Estimates and proposals will need to be assembled. Decide on these in a timely manner as the opportunity to get these items will tend to fade away the longer you are on the job.

### Photo Doc

It will hard to take too many pictures during the Start Up phase of a job. You may even consider some drone shots as well. These will help with documentation of existing conditions when you started the job.

### Review with Client to Verify Expectations are Met

At the completion of your initial New Job Start Up Phase of 90 days (usually at the 90 day mark unless it’s a huge job or really a mess to begin with) meet on site if possible with your client to verify all is well with them and that we met or even exceeded their expectations.

### Lesson Review/ Takeaways

Get your client and future clients to “See what this job looked like when we started” by using the Quality Counts Scoring process.

# Module: New Job Start Ups

## Lesson #6: Build a Game Plan for the First 90 days

### Lesson Purpose

To learn how to put a 30-60-90 day New Job Start Up Plan together.

### Lesson Overview

Most all goals will have a game plan to achieve them and that includes your New Job Start Up Plan.

Here are the basics for putting the plan together to achieve the New Job Stat Up Goals.

Start by building a game plan for each 30-day portion of start -up.

### 30-Day Initial Start Up Plan/ Goals

- Inspect entire irrigation system & submit suggestions for improvement/repair
- Walk the job with your client and ID their priorities and points of pain
- Complete the easy "to do" items especially if these are part of Clients priorities
- Conduct a complete walk-through site inspection and give a Quality Counts Score. Review with your client and team members. Decide on priorities and sequencing of "fixes"
- Conduct a complete inventory of the plant material in order to determine the needs for replacements or removals of poorly performing or missing material and submit cost projections for replacements.
- Conduct a thorough soil analysis/ test, formulate the exact fertilizer requirements
- Initiate a program of "detail" weeding of all bed and applicable areas.
- Apply required fertilizer and pre-emergent weed controls to all applicable turf grass areas and landscape bed areas.
- Where applicable, complete a thorough Spring Clean-up removing all leaves, trash, twigs, and any other debris that have accumulated during the winter months.
- Install a uniform layer of mulch to all applicable landscape bed areas and tree rings.
- Where applicable, a seasonal color program will be designed along with cost projections.
- Submit proposals for enhancements
- Meet again with your client & review status, level of satisfaction, get priorities clarified, adjust

### 60- Day Game Plan/ Goals

- Weeds and Dead Plants: Continue with weed and dead plant removal.
- Irrigation: Continue with irrigation system repairs.
- Trees: Remove unneeded guy wires, ties and stakes. Where these are needed be sure to install them correctly

### 90 – Day Game Plan/ Goals

- All weeds are removed; All dead plants are gone; All of the irrigation system is operational
- All safety hazards, security issues, liability areas and ways to provide asset protection are identified with suggestions to remedy.
- All areas have been fertilized a second time where needed
- The Job Scores a 85%+ and meets the minimum Quality Counts Standard
- Client is Satisfied: Conduct Final New Job Start Up walk through and verify expectations are met, provide new job start up survey from third party within first 100 days of startup.
- Build long range 3-5 year game plan with priorities and budgets

### Lesson Review / Takeaways



# Module: New Job Start Ups

## Lesson #7: Discover Enhancement Opportunities

### Lesson Purpose:

To learn what enhancement opportunities are presented during the New Job Start Up process

### Lesson Overview

There will be a bountiful amount of potential enhancement work encountered during the New Job Start Up Process.

Here are some ways to help identify these opportunities:

### Review Start Up Report and Observations

Try to start with areas that if not dealt with could have some serious consequences:

Review your Start Up Report and Observations made when you first took on the job. Start with the BIG Four areas: **Safety, Security, Liability and Asset Protection**

ID specific items or issues that could cause harm or costly repairs if not dealt with in a timely manner. Most these were covered in Lesson #4 in this module.

Here are a few examples of what to look for:

#### Safety: Slips – Trips – Falls

- Root heaving and cracking hard surfaces especially walkways
- Fruit, flower or leaf drop on walking surfaces and plugging drains
- Pedestrian pathways worn into plantings, slopes, parking lot areas
- Holes/ Trenches left open or exposed

#### Security

- Signs, signals, cameras, lighting blocked by foliage
- Too dense of plant material near potential theft areas: IE ATM Machines, Parking Lot Areas

#### Liability

- Lighting not working: Signs and Lights
- Broken or missing signs: Stop Signs etc.
- Hazardous Trees
- Roadway visibility for vehicular traffic and pedestrians

#### Asset Protection

- Trees rubbing on buildings or allowing rodents to access buildings
- Gopher Damage on Slopes
- Irrigation overspray on hard surfaces or buildings; water staining windows
- Water seeping into buildings

### Review Quality Counts Scores

The Quality Counts program helps identify areas needing attention as well. It also helps prioritize items needing to be corrected in order to bring the project up to horticultural and industry standards of performance. Examples would include: Weed control, irrigation repair/ renovation, fertilization, new plantings needed, trees to be pruned, renovation of overgrown plant material, seasonal color plantings to name but a few.

### Meet with Client to Determine their Priorities

Armed with all of this information and with good photos to illustrate what areas are in need you should be able to put a game plan together with your client to bring the job up to speed and keep the project in good condition. Learn their priorities and help them build the game plan.

### Lessons Review / Takeaways

# Module: New Job Start Ups

## Lesson #8: Tips for Turning Start Ups into Enhancement Sales

### Lesson Purpose

How to go about turning a GREAT New Job Start Up into Great Enhancement Sales Opportunities

### Lesson Overview

New Job Start Ups offer one of the best opportunities for you and your organization to shine to your clients. In most cases the jobs you will be taking on fall short in many areas and that's one of the primary reasons your company was awarded the job! It's now time to show them the reason they picked you .... You are the expert... "Help me make my problems, pains and poor landscape condition go away!"

Here are some simple tips to approach this great opportunity for Enhancement Sales

### Have a get this landscape up to its fullest potential "Battle Cry!"

If you adopt this theme for where you would like to take this job you will be in good shape:

Start with: **Here is where we started:** Give examples, show before photos, share the original Quality Counts Scores, provide a list of their pain points that were encountered at the start of the job

Next move to: **Here is where we are now:** Give Examples, show before and after photos, give status on QC score, list the pain points that were identified and the ones that have been resolved so far

And finally: **Here is where we want to be:** Now paint a picture of the future of the potential of the job, maybe have some Landscape Architect drawings done showing some future landscape renovations, keep on sharing where we are headed and what the benefits will be when we get closer to arrival.

### Use the SLMP: Sustainable Landscape Management Program Principles

This program will help prioritize projects and help with plant selection that is better suited for the site. See the Library Tools for the SLMP process.

### Relate to ROI: Return on Investment and the Benefits to their business or property

If you can show a payback within 2-3 years most people would love to invest into this type of return. Example: Water savings, labor savings or less plant replacements needed by using the right plant material to begin with

### Get them educated and strive for consensus driven decisions

The more they learn and understand the benefits of landscape enhancements the easier it will be to get them to agree on taking action. Example: Well-kept landscapes help with selling homes or attracts tenants that are willing to pay more for well-kept landscapes

### Have Phases with Priorities and Budgets

If the overall enhancement / landscape renovation project is a very large cost then consider breaking the overall project into phases. Prioritize these phases and provide budgets so they can be incorporated into your client's budget process.

### Find the Pain – Solve Don't sell

Focus on your clients' points of pain first as they will be more receptive to approve the project. Think in terms of solving their pain rather than selling them upgrades. Spend more time solving than selling. This method works fantastically!

### Lesson Review / Takeaways

# Module: New Job Start Ups Overview

Thank you for joining us for this training module on New Job Start Ups.

As an Account Manager, you will be involved with many New Job Start Ups in your career.

If handled in a positive professional manner these start -ups will have a very positive affect on your goals as an Account Manager

We have given you many good tips here on how best to get a new job started up!

Now Ask Yourselves:

What are some of the key takeaways that you will now use as part of your New Job Start Up process?

How will you go about converting the New Job Start Up process into Enhancement Sales?

What are your clients biggest pain points and how will you go about solving these?

Also remember that there a many tools in the AM Library that will help you with New Job Start Ups

Here is a list of Tools for this Module: New Job Start Ups

- New Client Welcome Letter
- Start Up Check list
- Rotation Map
- Safety Check List
- SLMP: Sustainable Landscape Management Program
- Client Profile
- Client Mapping/ Org Chart
- New Job Start Up Client Survey

Once again thank you for joining us for this training module: New Job Start Ups!



