

Module: New Job Start Ups / Turnover

**Lesson #1 Let them hear you ROR! Creating “WOW” Experiences After the Sale is Made**

**After the Sale Success: What is your next move? Do you have a Strategy for Welcoming your new Clients?**

We spend a great deal of time concentrating on before-the-sale marketing: high converting landing pages, extensive lead generation and proper follow-up. And once we get that coveted sale, we feel like popping the digital champagne cork.

But our job isn’t done – and for many savvy marketers, the real work has just begun.

* We talk a lot about ROI. – Return on Investment,
* But what about ROR? -- Return on Relationships?

As long as you deliver a quality product and impeccable customer service, you should already be swelling your ranks with people who know, like and trust you. You ideally want to generate a 20% yield from your relationship portfolio”.

That means within the next 5 years, each one of your customers either conducts another transaction with you or refers someone else who does. If that number sounds too good to be true, look at all the ways you’re impacting your ROR with your customers right now, and how you can maximize it without being pushy or sales-y.

**Expected Lesson Learning Outcome**

* How to enhance the attention paid to the customer after the sale
* How build a solid customer relationship while still growing your sales?
* Every Email / Every Touch Point is an Opportunity
* Improve your follow-up process; making customers feel special, welcomed, and satisfied with their purchase even after the sale is made.
* earn how the smallest gestures can often leave the biggest impact

**Action Steps**

* **Apply GLUE = Giving Little Unexpected Extras**
  + If there is one phrase you should ingrain into all of your support, loyalty, and retention efforts, it’s the concept of giving little unexpected extras. This will become the metaphorical “glue” that will persuade customers to stick around with your businesses; the type of loyalty that every company desires.
* **Reduce buyer’s remorse with a real “Thank You”**
  + One of my biggest gripes in the ecommerce space is the lackluster “Thank You” pages that many companies use. There’s nothing like spending hundreds or thousnds with a business and then receiving a robotic, cold ‘thank you’ like the one below:
* **Add personality to behavioral emails**
  + Your email copy might be just as important as the copy you write on your website — because it will scale to thousands of customers, you must get it right.
  + The use of “behavioral emails,” or automatic emails triggered by a customer action, like a purchase, offer a great opportunity to make a memorable impression.
* **Getting proactive with customer success via content**
* Great support should always be available, even when you are not.
* This allows help content and other forms of education for customer success to offer great utility to customers long after they have started paying for your product.



Module: New Job Start Ups / Turnover

**Lesson #2 Job Turn-Over Process: Bring the Client on Board**

**When we receive a new Contract there are a few things that need to be done.**

**Expected Lesson Learning Outcome**

* Meeting the customer’s expectations, make them glad they chose your company
* Having a significant and positive impact on the job
* Documentation of existing conditions both good and not so good
* Seek out enhancement/extras sales opportunities

**Action Steps**

To effectively manage relationships, managers must meet four requirements:

1. Awareness. Understand both the problem and the opportunity areas.

2. Assessment. Determine where the company now stands, especially in terms of what’s

necessary to achieve the desired results.

3. Accountability. Establish regular reporting on individual relationships, and then on

group relationships, so that these can be weighed against other measures of

performance.

4. Actions. Make decisions and allocations and establish routines and communications

on the basis of their impact on the targeted relationships. Constantly reinforce

awareness and actions.

**STEP #1:** MEET WITH CLIENT AND ESTABLISH EXPECTATIONS

* Conduct a walk through; get clarity of expectations; take good notes & photos
* Determine priorities from their perspective: like entrances, flowers, safety
* Make a to do list for maint. items in order of priority & a list for extras to propose
* Schedule a follow up walk to verify they are happy or if adjustments are needed

**STEP #2:** DOCUMENT THE JOB

* Photo document and even video larger jobs with narrative
* Look for the big things that can hurt the most:
* Trees: weed eater damage, dead and dying plants
* Water: damage to wood, leakage, erosion, hard surface damage
* Safety Issues: slips trips falls

**STEP #3:** WITHIN FIRST 30 DAYS ON THE JOB

* Inspect entire irrigation system & submit suggestions 4 improvement/repair
* Complete the easy “to do” items
* Submit proposals for enhancements
* Meet again w client & review status, level of satisfaction, get priorities clarified

**STEP #4**: WITHIN FIRST 90 DAYS ON THE JOB

* All initial start up items are completed
* Verify client expectations are being met: adjust where needed
* Establish any mid to long term enhancement projects: prioritize and propose

**Desired End Result**

* Client is amazed on how things have changed for the positive
* Client eagerly approves extra work proposals
* Client is now an advocate and becoming a Raving Fan and will refer more work!



Module: New Job Start Ups / Turnover

**Lesson #3 Job Turn-Over Process: Handing it over to Administration and Production**

**When we receive a new Contract there are a few things that need to be done.**

**Expected Lesson Learning Outcome**

**Action Steps /**

Build a process Map / Flow Chart see below...

* Business Development Manager receives a signed contract.
* They send it to the Corporate Office Manager for Job Start-up Process.
* COM enters the contract information in Master Builder and acquires a new Job #.
* COM will enter the new job in the Recurring Receivables in MB as well.
* Then COM will enter the new number and job name and contract amount on the Billing
* Spreadsheet.
* COM will create a Pro-Rated invoice if the job doesn’t start on the first of the month.
* COM will notify the AM, OM, and BM of the new job number.
* The OM will create new billing folders and begin the process of getting the Project Manual ready. (See Project Manual Guidelines and Process).
* The AM will need to generate a proposal for monthly discretionary spending to include in the Project Manual.
* The Business Development needs to schedule a Pre-walk with the Account Manager and Branch Manager responsible. This needs to be done before starting the new job.
* The Branch Manager is then to schedule a Job Walk after the first 30-days and also schedule a Job Inspection after 90-days, to be attended by the Account Manager.
* Expected Lesson Learning Outcome



Module: New Job Start Ups / Turnover

**Lesson #4 New Job Start-Up Checklist**



|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **LANDSCAPE MANAGEMENT** |  |  |  |  |  |
|  | ***START-UP* -- *CHECKLIST & INITIAL INSPECTION*** |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  | **Property Name:** |  |  | **Date:** |  |  |
|  |  |  |  |  |  |  |
|  | **Property Address:** | **City:** |  |  | **Zip:** |  |
|  |  |  |  |  |  |  |
|  | **Property Contact:** | **Phone:** |  |  |  |  |
|  |  |  |  |  |  |  |
|  | **Account Representative:** | **Supervisor:** | |  |  |  |
|  |  |  |  |  |  |  |
|  | **START – UP CHECKLIST** | **Completed** |  | **Date** |  | **Who** |
|  |  |  |  |  |  |  |
| **1. Administrative – Start-Up:** | |  |  |  |  |  |
|  | **a. Signed Agreement Returned to Central Office.** |  |  |  |  |  |
|  | **b. New Job File Created.** |  |  |  |  |  |
|  | **c. Insurance Certificates Ordered.** |  |  |  |  |  |
|  | **d. Account Set up for Billing.** |  |  |  |  |  |
|  | **e. Client Welcome Information & Letter Sent.** |  |  |  |  |  |
|  | **f. Courtesy Contact – Follow-Up Call after First Week.** |  |  |  |  |  |
|  | **g. Courtesy Contact – Follow-Up Call after Third Week.** |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **2.  Operational – General:** | |  |  |  |  |  |
|  | **a. Start-Up Photographs Taken. (Dated Digital Camera)** |  |  |  |  |  |
|  | **b. Start-Up Walk-Through Meeting Scheduled W/ Client.** |  |  |  |  |  |
|  | **c. Crew Leader / Route Assignment Established.** |  |  |  |  |  |
|  | **d. 30 Day Start-Up Plan Developed and Reviewed.** |  |  |  |  |  |
|  | **e. Regular Site Visits Scheduled. (Two times per month)** |  |  |  |  |  |
|  | **f.  Schedule Spring Clean-Up.** |  |  |  |  |  |
|  | **g.  Schedule Pre-Emergent Weed Control Application.** |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **3. Initial Property Inspection** | |  |  |  |  |  |
|  | **a. Missing Plant Material.** |  |  |  |  |  |
|  | **b. Declining / Failed Plant Material.** |  |  |  |  |  |
|  | **c.  Drainage Problems.** |  |  |  |  |  |
|  | **d.  Weeds in: \_\_\_\_\_ Turf, \_\_\_\_\_ Beds, \_\_\_\_\_ Cracks/Seams.** |  |  |  |  |  |
|  | **e. Insects, Disease, other Obvious Problems.** |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **4. Trees:** |  |  |  |  |  |  |
|  | **a. Mower/Trimmer Damage at Tree Bases.** |  |  |  |  |  |
|  | **b. Low Hanging Branches. (Eye Level)** |  |  |  |  |  |
|  | **c.  Growth Covering Signs, Lights, etc.** |  |  |  |  |  |
|  | **d. Roots: \_\_\_\_\_ Lifting Walks or Pavement. \_\_\_\_\_ Exposed in turf.** |  |  |  |  |  |
|  | **e. Large Dead Wood in: \_\_\_\_\_ Large Trees, \_\_\_\_\_ Small Trees.** |  |  |  |  |  |
|  | **f. Hazard Pruning needed. (to prevent wind /storm damage)** |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **5. Turfgrass:** | |  |  |  |  |  |
|  | **a. Bare areas. (re-sodding or seeding needed)** |  |  |  |  |  |
|  | **b.  Objects on Lawn that need Removal. (stumps, old stakes, etc.)** |  |  |  |  |  |
|  | **c. Low Spots, Holes, or Tripping Hazards.** |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **6. Shrubs, Perennials, & Groundcover:** | |  |  |  |  |  |
|  | **a. Overgrowth onto Walks / Buildings** |  |  |  |  |  |
|  | **b. Growth Covering Signs, Hydrants, Lights, etc.** |  |  |  |  |  |
|  | **c.  Growth that Impares Visibility.** |  |  |  |  |  |
|  | **d. Areas of Neglect or Poor Condition (Over / Under Watering, etc)** |  |  |  |  |  |
|  | **e. Rejuvination Pruning needed.** |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **7. Irrigation System:** | |  |  |  |  |  |
|  | **a. Controller Functioning and Labeled.** |  |  |  |  |  |
|  | **b. Poor / Inadequate Coverage.** |  |  |  |  |  |
|  | **c.  Heads / Valve Boxes Above Grade. (Tripping Hazard)** |  |  |  |  |  |
|  | **d. Valve Box Covers Missing or Broken.** |  |  |  |  |  |
|  | **e.  Wet spots – Caused by Irrigation or Poor Drainage.** |  |  |  |  |  |
|  | **f.  Water Stains on Structures, Walks, etc..** |  |  |  |  |  |
|  | **g.  Backflow Devices in Good Working Condition.** |  |  |  |  |  |



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**Lesson #5 COMMUNICATION, QUALITY ASSURANCE and INSPECTION PLAN**

**Action Steps**

**"****COMMUNICATION PLAN, QUALITY ASSURANCE and INSPECTION PROGRAM"**

1. An initial Walk Thru and Comprehensive *Start-up Checklist* to begin the process. This is done at the beginning of each service season
2. A weekly *Landscape Management Report* detailing what was done, when it was done, and who performed the work. This report is completed and submitted by the Crew Leader each time a property is visited.
3. An *Irrigation Service Report* detailing what was done, when it was done, and who performed the work. This report is completed and submitted by the Crew Leader each time an irrigation system is serviced.
4. A *Quality Inspection Form* utilized by the Managing Partner and or Operations manager to perform a bi-monthly site visit. This report is completed and submitted by the Managing Partner and or Operations Manager each a property is inspected.
5. A Monthly or Quarterly Client walk thru (*Client sets Standard*) preformed by the Managing Partner and the Client representative. A *Quality Inspection Form* is completed and submitted by the Managing Partner and or Operations Manager each time a walk thru is conducted.
6. A *Quality Evaluation Score Sheet* utilized to score the properties to be completed on a quarterly basis. This Score sheet is utilized to review crew performance, productivity, and quality delivery. This report is completed and reviewed with the crews by the Managing Partner and or Operations Manager each a property is scored.



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**Lesson #5 30-DAY LANDSCAPE MANAGEMENT INITIAL START UP PLAN**

***30-DAY LANDSCAPE MANAGEMENT***

***INITIAL START UP PLAN***

1. Conduct a complete walk-through site inspection / review with the designated representative.

2. Conduct a complete inventory of the plant material in order to determine the needs for replacements of severely regressed or missing material and submit cost projections for replacements.

3. Conduct a thorough soil analysis, process the results and formulate the exact fertiizer requirements

4. Initiate a program of "detail" weeding of all bed and applicable areas.

5. Apply required fertilizer and pre-emergent weed controls to all applicable turf grass areas and landscape bed areas.

6. Initiate the establishment of consistent and uniform protective maintenance borders around trees, plants, buildings and other obstacles in the landscaped areas.

7. Complete a through Spring Clean-up removing all leaves, trash, twigs, and any other debris that have accumulated during the winter months.

8. Install a uniform layer of Hardwood Double Shredded Bark Mulch to all applicable Landscape bed areas and tree rings.

9. Conduct a complete inventory of the irrigation system and submit recommendations and cost projections for corrections and/or improvements if needed.

10. A complete and comprehensive annual color program will be designed, considering client’s desire, site conditions and seasonal availability. All annuals will be contract grown to assure uniformity and to maximize size and quality. Recommendations and cost projections will then be submitted.