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CONSULTING REPORT

by

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Executive summary.

The purpose of this report is to assist the Timothy J. Kent Landscape Co. in increasing efficiency with business practices. On Monday, September 29, 2014 Barb Nangle met with Tim Kent, owner, and Patty the office manager, as well as the landscape crew to solicit suggestions for increasing efficiency.

Enclosed is a summary of the suggestions provided by the crew, as well as suggestions made by Barb Nangle based on her business experience. The report is broken down into three parts. Part I lists the five top-level priorities recommended to the company, as well as the goals those priorities aim toward. Part II lists the second tier priorities suggested to the company, though they are presented in no particular order. Part III lists suggested services that can be provided by Barb Nangle Consulting if desired.

The top five priorities suggested are 1). schedule supervisors to arrive earlier than crew to meet with Tim and Patty and to prepare for the day, 2). revise paperwork such that it increases communication, 3). integrate CLIP software and QuickBooks, 4). create block schedules for Tim so that important matters are dealt with on a regularly scheduled basis, and 5) hire or promote an operations manager to remove Tim from many of the day-today business tasks to free him up for more customer support and business building.

The main goals toward which the top priorities aim are: increasing communication, efficiency and professionalism; delegating some responsibility to supervisors; increasing Patty's time spent on higher level tasks; generating repeat business; growing business; decreasing Tim's stress; streamlining business practices; and increasing profit. The second tier priorities have to do with marketing, increasing efficiency and communication.

Part I: Top Level Priorities Suggested.

1. Schedule all supervisors to arrive at 7:00 to meet with Tim and Patty 7:00-7:30 every day to prepare for the day.

7:00-7:30 Tim and Patty meet with supervisors

7:30-7:45 supervisors prepare daily paperwork for all today's jobs

7:45 crew arrives, meet with Tim, Patty and supervisors about today's jobs

8:00 hit the road

GOALS: INCREASE COMMUNICATION AND EFFICIENCY; RELINQUISH SOME RESPONSIBILITY FROM TIM TO SUPERVISORS This can begin immediately.

2. Revamp paperwork (beginning with most frequently used forms).

* must be comprehensive enough to communicate all relevant info between

- office and field staff
- company and customers
- company and vendors

* consistent formatting to maintain professional look, including logo and contact info

GOALS: INCREASE COMMUNICATION, EFFICIENCY AND PROFESSIONALISM This can begin as soon as I get edits on Daily Work Form from you and Patty, additional forms soon to follow.

3. Integrate CLIP and Quickbooks

- sub-priority 1: upgrade to CLIPxe so you have the ability to go mobile
- sub-priority 2: purchase mobile technology for supervisors (and possibly staff) to use CLIP in the field

GOALS: INCREASE PATTY'S TIME SPENT ON HIGHER LEVEL TASKS; INCREASE COMMUNICATION, EFFICIENCY AND PROFESSIONALISM This can likely begin next week.

4. Create a schedule for Tim so that he spends some time every day on business management (knowing that at times it will not work). These should be scheduled at the same time every day and then moved if necessary. Schedule around those times whenever possible.

- * 30 minutes daily spent with Patty specifically discussing billing
- * 1 hour daily specifically for estimates
- * 1 hour daily for follow up with important customers (if nothing comes up for these bread-and-butter customers, seek them out)
- * 15 minutes daily dedicated to business planning and the implementation of those plans

GOALS: INCREASE COMMUNICATION, EFFICIENCY AND PROFESSIONALISM; GENERATE REPEAT BUSINESS; GROW BUSINESS; DECREASE TIM'S STRESS This can be done within the next week.

5. Hire (or promote) an operations manager. This person should at least be able to:

- * create and implement business systems
- * create and enforce company policies and procedures
- * monitor all business practices for efficiency
- * handle all recruitment, hiring, training and HR matters
- * estimate jobs when Tim is not available
- * create inventory control procedures as well as equipment maintenance schedules
- * oversee office and field staff's day-to-day operations
- * create marketing campaign and implement it
- * create incentive programs for employees and customers and then monitor them for effectiveness
- * be Tim's "right hand" and step in whenever Tim is not available

GOALS: INCREASE EFFICIENCY AND PROFESSIONALISM; STREAMLINE BUSINESS PRACTICES; GENERATE REPEAT BUSINESS; GROW BUSINESS; INCREASE PROFIT; DECREASE TIM'S STRESS This will take 4-8 weeks, depending on whether someone is hired from within or not. I would love to consult further on this if you decide to go in this direction (at my usual fee of \$0 per hour!).

Part II: Second Tier Priorities Suggested.

These items are presented in no particular order of priority.

Marketing Priorities.

Spring mailing. Before the spring season starts, send out a mailing to existing customers to remind them of all the services you offer in addition to spring cleaning. Provide them a way to respond to a checklist of common services requested in the spring, along with a place to indicate an additional requests they may have. Provide a business reply envelope as well as a place on your web site for them to respond to questions.

Incentive program. Provide incentives to existing customers to refer people to your company and reward them when their referral becomes a customer. Determine the reward based on how long the new referral remains a customer (e.g., they get a discount as long as that person stays on) as well as on how much the new customer spends. Provide discounted services as the primary means of rewarding customer referrals.

Provide rewards to employees who bring on new customers or who up-sell to existing customers. Rewards should primarily be in the form of bonuses that are a percentage of sales. Be sure to tie incentives to their behavior so there is a clear understanding among employees about how to get such bonuses. One incentive might be to create a partnership with a Chiropractor so that your employees get a discount if they use their office. You might also consider gift certificates from that Chiropractor as an employee incentive.

Create a seasonal newsletter. This can be done electronically and/or via U.S. mail. You want your customers to think “Tim Kent” when they think of landscaping matters so position yourself as the expert by providing advice for things they should be doing (or having done) around the yard each season. Also provide information about services you provide, suggestions for care of plants and trees and interesting information about all things landscaping.

Efficiency priorities.

Job descriptions. Make sure all employees know what their role is as well as the role of all those around them while at the same time making sure everyone understands that there will be times when “all hands on deck” are required due to work load. Make it clear what type of responsibility one has to take on to get promoted to supervisor. Make sure supervisors are clear about the boundaries of their authority and the scope of their work so nothing gets left undone due to lack of clarity.

Bucket System. Bring back the color coded bucket system with matching tools for various jobs. Make it the responsibility of supervisors to inventory all buckets before leaving a job site so that no tools get left behind. Supervisors should also inventory tools at day’s end so that any missing or broken tools can be replaced before the morning shift starts. This will ensure that all crews

have the tools they need at all times and no one “borrows” tools from another crew when theirs are missing. Provide an inventory of tools available only to supervisors for this purpose.

Create a regular maintenance schedule for tools and equipment. A database with all tools and equipment listed should be created that also lists the maintenance schedule for each item (if applicable). This will ensure that tools and equipment last longer. This information can be plugged into a calendar.

Strengths-based job assignments. People excel at tasks they enjoy and are good at so make sure all supervisors know who likes to do and is good at what. This also makes for a happier crew. If no one likes a particular job, be sure to rotate responsibility for that job.

High school intern office assistance. Recruit high school intern(s) from tech school landscape program to assist Patty in the office with data entry, filing and other entry-level tasks.

Revise remaining paperwork. All paperwork should have a consistent, professional look and should enhance communication within the company. Be sure to solicit feedback from staff about suggested paperwork changes.

Communication Priorities

Communication devices. Provide smart phones or tablets to supervisors and/or crew members to facilitate communication about customers and jobs. If you continue to use CLIP be sure to upgrade to CLIPxe which has mobile capabilities. This will also enable you to better monitor time on the job by crew members.

Scheduling. Be sure to indicate when spraying has been done for customers so that they are not put on the schedule for mowing until after 24 hours of spraying. Enter this information into a centralized database such as CLIP.

Centralized record for dumped materials. Create a board in the office where the unused magnet board is where records can be kept about materials that are dumped there and then how they are distributed and should be charged to customers.

Mailboxes. Create mailboxes for all staff so that information can be disseminated without personal interaction being necessary. This will cut down on Patty’s needing to speak to each staff person when paperwork questions arise or when information needs to be passed along.

Part III: Services available through Barb Nangle Consulting.

- Spring marketing mailing assistance with content and wording, as well as the logistics of the mailing.
- Incentive program ideas and structure.
- Newsletter creation and idea generation.

- Creation of a checklist or survey for determining who is good at what as well as what additional responsibilities employees might want to take on
- Research tech school landscape programs to determine if there are student interns available and interested in office work.
- Revision of additional forms.