

STATE OF THE MARKET: SNOW LABOR

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IN PARTNERSHIP WITH

Lawn & Landscape



INSIDE

Executive letter, **PG. 30**

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BUILT TO BACK YOU UP

Your time is the most valuable resource you have – both personally and professionally.

At BOSS Snowplow, we continue to focus on products, technologies and services that make the most of your time by increasing productivity.

We're building innovative partnerships, expanding our facilities to increase production, and investing in the education of our dealers and professional snow and ice contractors.

We know that if we build the best products and support them after the sale, it will make your businesses more productive and easier to manage.

Thanks for the work you and your teams do to restore order.

— Mark Klossner



Mark Klossner
VP, Director of Marketing,
BOSS Products

A large advertisement for BOSS Snowplow. At the top, the BOSS SNOWPLOW logo is in a white box. Below it, the text "DON'T JUST SCRAPE BY. CLEAN UP." is written in large, bold, white letters. The background is a red sky with falling snow. In the foreground, a BOSS Snowrator machine is clearing a path through a snowy city street. A worker in a yellow safety vest and green helmet is operating the machine. The city skyline is visible in the background.

BOSS
SNOWPLOW

**DON'T JUST SCRAPE BY.
CLEAN UP.**

SNOWRATOR®

DON'T JUST STAY IN BUSINESS, BUILD YOUR BUSINESS.



LABOR SAVER

The Snowrator never calls in sick. End your shoveling labor headaches!



TIME SAVER

Brine, spread and plow at the same time to maximize on-the-job productivity and profitability.



MONEY MAKER

Maximize on-the-job profitability and reduce labor costs.

See the Snowrator difference at snowratorsaves.com.

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FLURRY OF ACTIVITY

Snow and ice management professionals are facing the same labor pressures as landscapers but with the added variable of more reliance on the weather dictating how the business will do.

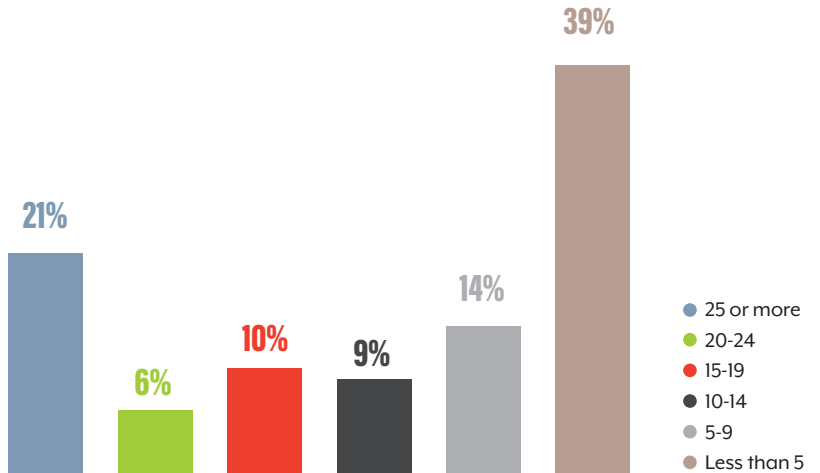
Labor continues to be a challenge for snow and ice management professionals who took the State of the Snow Labor Market survey, but some results do show improvement. While only 50% are confident they will be fully staffed before the first billable snow and ice event, that number is up 3 percentage points compared to last year's survey. One other area of hope is how the market looks since COVID-19 caused chaos. Last year, 80% said the labor market is worse than March of 2020 when COVID-19 restrictions began, versus 68% this year.

— Brian Horn, editor, *Lawn & Landscape*

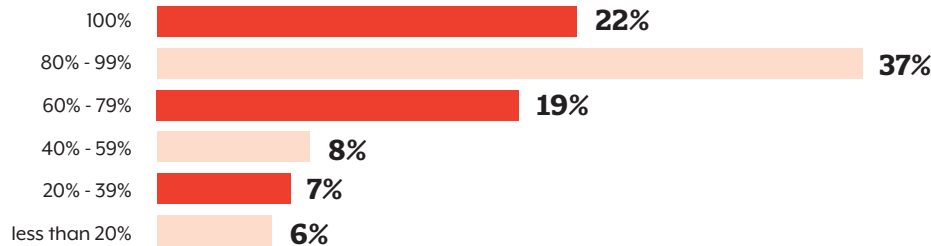
*These results are from more than 100 respondents. Not all percentages add up to 100% due to rounding.

PHOTO COURTESY OF BOSS

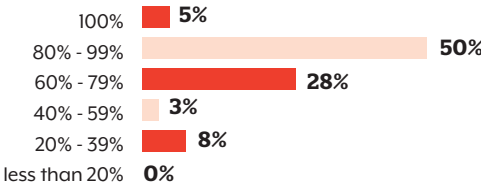
How many hourly employees do you have for snow and ice services?



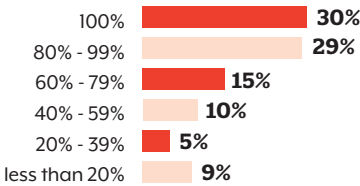
What is the average retention rate for hourly employees in your snow and ice management operation in the last 12 months?



MORE THAN \$500,000
IN SNOW AND ICE REVENUE



LESS THAN \$500,000
IN SNOW AND ICE REVENUE





Do you have an employee recruiting and retention strategy in place for your snow and ice management operations?

YES

36%

NO

64%

MORE THAN \$500,000 IN SNOW AND ICE REVENUE

54%

YES

46%

NO

LESS THAN \$500,000 IN SNOW AND ICE REVENUE

28%

YES

72%

NO

On a scale from 1 to 10 *with 10 being excellent, how successful are you at ...

	1	2	3	4	5	6	7	8	9	10
RECRUITING	6%	5%	7%	6%	19%	9%	19%	12%	10%	6%
ONBOARD	7%	3%	7%	5%	13%	11%	18%	18%	9%	11%
TRAINING	3%	2%	2%	2%	14%	10%	19%	19%	14%	15%
RETENTION	3%	3%	3%	2%	6%	13%	13%	22%	19%	16%

Rate the following about your organization's ...

	1	2	3	4	5	6	7	8	9	10
TOTAL REWARDS PACKAGE	6%	3%	5%	5%	10%	13%	14%	11%	18%	14%
CULTURE	2%	0%	0%	1%	6%	8%	6%	29%	26%	22%
WORK ENVIRONMENT	0%	0%	0%	0%	4%	5%	7%	27%	29%	28%
ADVANCEMENT OPS	2%	3%	2%	3%	13%	14%	11%	16%	16%	19%



Seasonal snapshot

Snow and ice management professionals are navigating labor issues while preparing for a busy season. **By Jimmy Miller**

ANDREW GRIDER

PRESIDENT, SOUTHERN SUN LANDSCAPING | CAVE SPRING, VIRGINIA

"Sun" may be in the name, but there were plenty of clients last winter for Southern Sun – president Andrew Grider says it was an unprecedented snow season.

"Last year I've ever seen such a high demand for snow removal operations. It gave us the opportunity to pick up a few more contracts, but there was a whole lot that we turned away," Grider says. "It was jaw-dropping. I've never seen anything like it."

Grider adds that his company, which is headquartered near Roanoke, sent trucks up to four hours away from the corporate office to plow snow last season. They removed snow from gas stations at Virginia Beach and did lots in Richmond. It was a busy season.

One problem? It takes about 12 employees for Grider's team to fulfill the work. He thinks he'll have six this year.

"There's less snow contractors around right now, there's less employees to draw from. We're trying to limit our residential side," Grider says, adding he's consolidating accounts this season and trying to avoid as many residential clients, which add significant driving time between homes. "We do more commercial and government as far as the snow side goes."

Grider started this company in 2017, but he noticed labor dwindling significantly after the pandemic began. "People have not returned to the industry," he says, "but I really don't understand it."

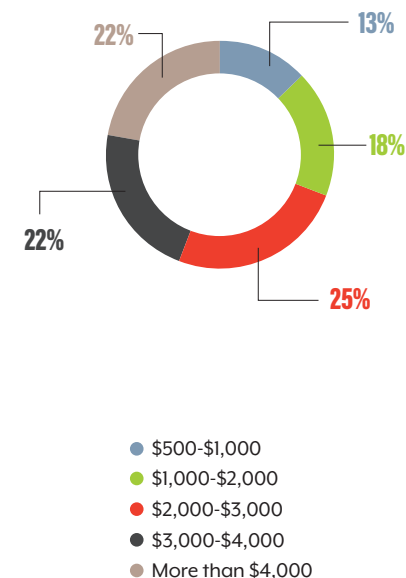
The other problem Grider's faced is supply chain shortages. It's a familiar problem for many in the industry. He's found a supplier who has multiple branches in Virginia, and he's pre-ordered lots of equipment and tools ahead of time this season. That includes anything from hydraulic lines to chemicals.

Grider says he's also invested in larger v-plows and salters, plus they just got a 10-foot pusher box for their skid steer.

"We probably won't see our first snowstorm until end of December, January, but we're already ordering supply ahead of time," Grider says. "When it's two, three in the morning and you have a plow go down, you want to make sure you have the supplies to get that machine up and running quickly."



What does a seasonal contractor cost (e.g., shoveler) you in a typical season?



Continued on page 38



STOP SCRAPING BY

BOSS Snowrator® and SR MAG eliminate labor headaches and increase bottom lines.

Today's snow and ice contractors face more pressure than ever: The constant demand to satisfy customer needs requires contractors to balance labor demands, increasing material costs and the unpredictability of Mother Nature—all while driving a healthy bottom line for their business. More than ever, contractors need specific, right-sized solutions in their fleet.

That's where the BOSS SR MAG and Snowrator® come in—designed to manage snow- and ice-covered walkways quickly and efficiently, SR MAG and Snowrator® are platforms capable of maximizing earning potential while reducing the headaches associated with today's unreliable labor pool—making them an unmatched tool and an unrivaled business solution for contractors.

Designed to clear sidewalks, the SR MAG and Snowrator® provide a reliable solution to maintain high-traffic areas while reducing time, money, materials and manpower required—sometimes up to as much as 30%. Each can be quickly deployed on the job site with a suite of attachments designed specifically for eliminating snow and ice.

With the Snowrator®, contractors can utilize float and active down force, a BOSS-designed 4' hydraulic snowplow and a 20-gallon brine tank as standard options. Plus, Snowrators can take on a range of attachments and accessories including, but not limited to, a 5-gallon bucket mount, an EXACT PATH® 1.5 cubic foot drop spreader and 20-gallon auxiliary tank.

For jobs that require more power, performance and options—contractors can opt for the all-new SR MAG. The SR MAG comes standard with a 26.5 horsepower EFI engine, 690 cold cranking amps and is BOSS' first smart-connected capable product. In addition, the SR MAG can be equipped with a suite of optional attachments including a 4'2" V-XT V-plow, 4' and 5' straight blades, STX48 Snow Thrower, BRX48 Broom, TGS 85 Broadcast Spreader and an EXACT PATH® 1.5 cubic foot drop spreader.

The BOSS SR MAG and Snowrator® maximize on-the-job efficiency and management of materials and manpower, which means contractors can confidently add more sidewalk-heavy customers and grow their bottom lines.



Brian Hominiuk, VP of Foegley Landscape: "The time and money saved has been amazing, because with one Snowrator® we've reduced our salt costs by 30%."

Rafael Diaz, President of Diaz Group LLC: "The Snowrator® is one of the most underrated tools out there ... By adding Snowrators, we've saved 40% in labor costs while improving the quality and consistency of work."

Tom Canete, President/CEO of Canete Landscape Design and Construction: "The Snowrator® has been a game-changer for my business. One Snowrator® easily replaces 3-4 guys shoveling, which has made us more efficient and my bottom line more profitable."

TO LEARN MORE ABOUT THE BOSS SNOWRATOR® AND SR MAG, VISIT BOSSPLOW.COM OR SCAN THE QR CODE.



SNOWRATOR®

DON'T JUST STAY IN BUSINESS, BUILD YOUR BUSINESS.



LABOR SAVER

The Snowrator never calls in sick. End your shoveling labor headaches!



TASKMASTER

The Snowrator can do it all, from plowing to spreading to brining. It always gets the job done right.



MONEY MAKER

Maximize on-the-job profitability and reduce labor costs.

See the Snowrator difference at snowratorsaves.com.

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MICHAEL CRNKOVIC

PRESIDENT, FRESH CUT PROS,
MINOOKA, ILLINOIS

MICHAEL CRNKOVIC believes packaging his snow work with his landscaping work has helped him find a good number of clients.

He admits that he's only been in the snow industry for a few years, and that his team at Fresh Cut Pros is first and foremost a landscaper company. They earn roughly \$120,000 in snow revenue a year, which amounts to 20% of their total revenue, and four or five employees work full time during the season.

Crnkovic says he's stabilized a cash flow throughout the whole year by instituting a 12-month payment plan, where they're essentially wrapping snow into the landscaping work over the summer. For clients who just want snow, they pay one flat rate for the year and that includes 10 services with a one-inch trigger on those, plus a per-push sale on anything after that.

It's helped build a reliable, steady client base that he can return to repeatedly even amidst price increases. This year, Crnkovic says they've raised prices, and though they haven't received all their bids back yet, his customer service team has said there's been no pushback yet.

"We find this increases the value of each client," Crnkovic says. "I'm sure smaller companies will do the per-service deal, but I believe that is a disadvantageous business model for sustainability and growth."

One of the reasons Fresh Cut Pros went to that model was because clients weren't paying on time. Commercial clients paid particularly slowly, he says. He says he's seen some companies that do solely commercial work, but they don't have money to spend. Without any cash to use, stocking up for the season can get dicey. Fresh Cut Pros is currently about a 50-50 snow client breakdown between residential and commercial, though landscaping now heavily leans more residential.

"We can't be cash broke waiting on a huge check from a commercial account going into the spring season," he says.



Are your key employees being actively recruited by your competitors?

YES

52%

NO

48%

Continued from page 35

HEATHER LINEHAN

CHIEF OPERATING OFFICER, LINEHAN LANDSCAPING AND PROPERTY MAINTENANCE
SALEM, NEW HAMPSHIRE

Heather Linehan is investing heavily in her team.

At Linehan Landscaping and Property Maintenance, she's started offering higher hourly wages than ever and significant bonuses. Linehan created a full snack bar and laid out cots for employees to rest between shifts clearing snow. She'll even make hot soup and oatmeal while the workers let their boots dry for a bit.

And all of that's in part because labor has been a significant concern. Snow removal makes up 50% of their annual revenue, and each storm they've needed upwards of 60 people. They used to have lots of workers come on as 1099s, but in the last two years, Linehan has noticed a dramatic decline, especially among those shoveling. That, coupled with a 60% increase in salt prices, have made doing business really hard.

"If they can come back and have a warm place to sleep for a few hours," Linehan says, "you can get another shift out of them."

The good news is that Linehan believes they've crafted a high-quality service that allows them to service 100 commercial clients in two towns that are basically connected by one long road. The bad news is that finding enough help to complete all that work is going to be quite the chore.

Linehan runs the business with her husband, and both have stressed already about filling 60 employees for this winter. They've debated what's caused this decrease in help



from the labor market — they've thought that maybe the pandemic was to blame.

"I think a lot of people tie it to the pandemic because that's an easy out though," Linehan says. "But if you really look at the way the world is changing, it's hard to get people who want to do manual labor. I think as a society, kids aren't pushed to get out and earn a living. We've lost sight of how successful of a career you can have in a trade, which is disappointing."

That's not to say Linehan isn't trying to make life easier or better for those employees. They're equipping every shoveling van with snow radars and power brooms. And she's trying to make life easier on management, too: Linehan invested in a liquid brine system that should see a return on investment in two years or less. That reduces the need to go buy a bunch of salt and it's better for the environment, she says.

But when things get tough this winter, Linehan's husband is planning to hop in a truck with another high-ranking employee to complete some work. He's always worked on a "float truck" to help if they're stuck or broken down, but now, that truck's helping plow driveways.

"He hasn't had to do that in 15 years," Linehan says.

"But if you really look at the way the world is changing, it's hard to get people who want to do manual labor."

— HEATHER LINEHAN

MAIN PHOTO COURTESY OF BOSS / HEADSHOT COURTESY OF LINEHAN LANDSCAPING AND PROPERTY MAINTENANCE

PHOTO COURTESY OF MICHAEL CRNKOVIC

WILLIAM MOORE

PRESIDENT, EXECUTIVE PROPERTY MAINTENANCE | PLYMOUTH, MICHIGAN

Supply chain issues have meant corners of William Moore's shop are filled with drums of fuel. Shelves are now fully stocked with things like tires and hoses.

Ordinarily for Executive Property Maintenance, Moore or his team would just run out or call a supplier and his equipment would arrive the next day. Now, shortages have meant pre-planning as much as possible is crucial.

"(Supply chain) is a huge pressure; it's a huge problem," Moore says. "You just need to try and keep a good relationship with your supplier because that's important right now."

Snow revenue makes up 60% of Executive's total revenue, and in peak snow season, Moore's hovering around 45 to 55 employees.

Luckily, he says he hasn't struggled so much with a harsh labor market like others in the industry.

"I've been blessed with a great core of people," Moore says. "We have folks who have been loyal and show up every day."

Even still, he says the writing was on the wall that it was time to avoid a massive expansion growth because of labor market. Moore says 2008 should've taught companies to run lean. At times, he'll get out there and pitch in to help out crews if they're behind or overworked. His mechanics will do the same thing. Every division has to pitch in.

"Could we use an extra hand? Sure," Moore admits. "But we're getting by with smaller crews. I don't live with that level of angst of, 'oh my gosh, where am I going to find my labor?'"

Moore says that he'd like to expand by 10% at some point, but he knows it's tight right now so they'll manage with what they've got. He says he's seen an uptick in possible clients though because his competitors haven't been able to deliver what they've promised.

Moore says his company doesn't just take on any work, either: They're not advertising in yellow pages and are essentially a referral-based company. The client has to prioritize safety and paying out on time, especially because payroll is high and Moore's pre-buying equipment.

This was a problem during the green season, where Moore dealt with lots of late payments. Most can be sorted out with thorough and upfront communication, he says. They're training clients to sign contracts well in advance — he's heard some companies will sign in November, and that's far too late to plan.

Plus, he's been raising prices on clients. Moore says he recently raised prices 12% across the board. And when fuel was above \$4 a gallon this summer, they ran a 10% surcharge. In the winter, Moore says they may have to do the same. It's a stipulation laid out in the contract.

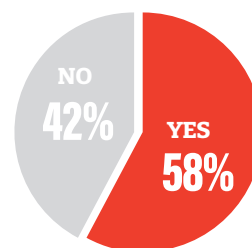
"We decided to move away from some multi-home sites and get rid of some of the ones that just don't see the value in doing the business the right way," Moore says. "And quite frankly, who has the time to chase money all day?"



How would you compare the snow labor market now to before when COVID-19 hit in March of 2020?

Much Better	5%
Slightly better	27%
Slightly worse	33%
Much worse	35%

Are your key employees being actively recruited by other companies (non-snow) in your market?



The author is an associate editor at Lawn & Landscape.

How confident are you that you will be fully staffed by this winter's first billable snow and ice event?

CONFIDENT 50%

UNSURE/NEUTRAL 40%

NOT CONFIDENT 10%