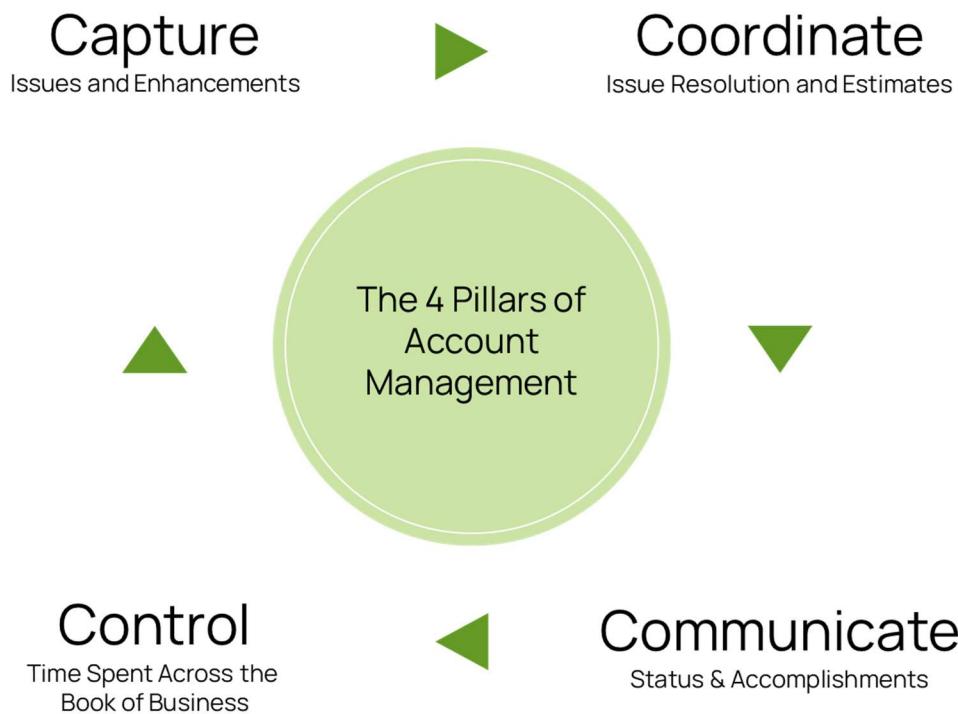


The 4 Pillars of Account Management



Unlock the Profit Potential of your Account Management Team.

This paper discusses the 4 critical focus areas of Account Management in Commercial Landscaping Service Companies. It begins with an analysis of the opportunity in terms of business benefit that most companies can realize from improving their Account Management processes. It then discusses Best Practices in each area that either improve Efficiency or Effectiveness.

Account Manager Best Practices: The 4 Pillars of Account Management

Creating and sustaining a commercial landscaping service company is objectively difficult, growing one is harder. According to the US Bureau of Labor Statistics, approximately 50% of such businesses shut down within the first 5 years, and given the operational, financial, and seasonal challenges unique to the Landscaping field, some estimates range as high as 70%. About half of all Landscaping companies have less than \$1M in revenues and only about a quarter exceed \$4M.

Creating a viable landscaping company generally requires continuous success in all four of the following categories:

- Attracting, retaining, and motivating great employees.
- Balancing quality with cost and efficiency in a way that aligns with the types of customers served.
- Winning new customers at a rate that allows for sustained revenue or growth, despite inevitable churn.
- Fostering customer loyalty to reduce turnover and increase revenue from existing customers.

It is impossible to avoid focusing on the first three. You need employees, a service to deliver, and customers to meet the basic definition of being in business. Unsurprisingly, these three categories have historically received significant attention. Consultants specialize in them, best practices are established, and technologies exist to support related business processes. It is typical for viable companies to be competent in these areas; great companies excel at them.



The fourth category, fostering customer loyalty, is not ignored, but it is less developed across the industry. It is the reason Customer Account Managers exist. However, it has not generally received the same level of focus and investment.

This comes at a great cost. According to the [Lawn and Landscape 2024 State of the Industry Report](#), 49% of Landscaping companies have less than \$1M in revenues and only 24% exceed \$4M. This is so even with the significant consolidation happening in the industry where 44% of owners report having been approached about selling their business in the last year.

A common theme that Operators report that can explain these growth challenges is being able to communicate differentiated value to the market and their customers. Among the 3-year concerns that scored higher than 3 out of 5 in the 2024 survey, all in the top 10, were:

- Low margin
- Low ball competitors
- Difficulty raising prices
- Customers cutting back or canceling services

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Every one of these challenges falls directly into the domain of the Customer Account Manager and their role in fostering loyalty and growing business with existing accounts. As a result, for most companies, the greatest opportunity to achieve the rare distinction of being profitable, fast growing, and high-value lies in improving Account Management practices.

Account Managers and Business Success

Account Managers, for the purpose of this discussion and by common industry definition, are the employees designated to act as the primary point of contact between their assigned existing customers and the company. They are responsible for growing business with these customers and cultivating loyalty by ensuring issues with service delivery are identified and resolved. In some companies, this also includes managing daily work assignments to service crews.

For most companies, increasing the efficiency and effectiveness of Account Managers offers the greatest opportunity for improved profit, growth, and valuation.

Why Account Management Matters

Kevin Kehoe, Landscaping Industry Consultant and Co-Founder of Aspire Software, famously wrote a series of articles starting with "[The Secret to a \\$3M Account Manager](#)", published in Landscape Management Magazine. In these articles he proposed ways to achieve this goal and shared macro-level data pertinent to account management collected via Aspire Software. This data helps illuminate the magnitude of the opportunity that improving account management processes represents. Three key findings:

- A typical U.S. landscape maintenance account is worth approximately \$14,000 per year. This varies little by region or company.
- An average Account Manager manages about 65 properties or roughly \$1M/year. The way that Account Managers currently spend their time suggests that with efficiency improvements this could be doubled reducing both company costs and increasing Account Manager's income.
- Customers typically purchase 3–4 enhancements annually, averaging \$2,400 each. Adding just one more boosts revenue by roughly 10% per customer.

Renewing an existing, satisfied customer comes at little or no cost, whereas acquiring a new one is expensive; marketing, sales, contracts, onboarding, and training crews. Many companies report it takes 6–10 months to break even.

Account Managers tend to be among a company's higher compensated full-time employees. This alone means that improving the efficiency of Account Management practices and allowing them to manage more accounts has an immediate impact on the bottom line

Investors and acquirers value not just revenue and growth, but also customer retention. All other things being equal, high-retention companies command higher valuations.

There is Opportunity for Transformative Improvement

In his articles, Kehoe detailed time spent by Account Managers by type of work. He reported that Account Managers spend up to 60% of their time on administrative tasks and internal coordination, leaving only 40% for customer-facing, value-generating activities such as site visits, enhancement proposals, and relationship-building.

Further, our research finds that how they spend their time is often inefficient. When budget cycles dictate, property managers will ask for estimates on enhancements, which can create an urgent project for unprepared Account Managers. When Account Managers conduct site visits, the process of documenting and taking pictures of Issues and for Enhancements then creating customer communications can be cumbersome and time consuming.

60%

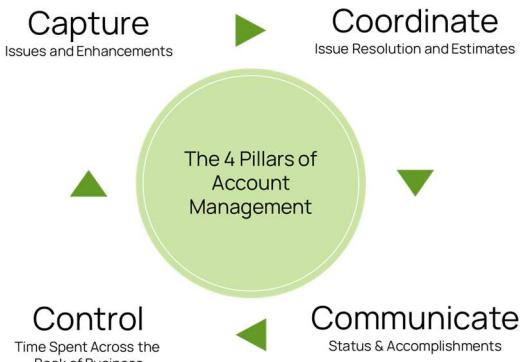
*Time Spent by
Account Managers
on non-customer-
facing tasks*

Scaling with Excellence – the 4 Pillars of Account Management

This paper identifies four areas of best practices that, if embraced, enable Account Managers to manage more accounts, reduce customer turnover through better communication, and sell more enhancements. These are the **4 Pillars of Account Management**. Excellence and efficiency in these areas can significantly increase a company's profitability, growth, and value.

The 4 Pillars:

1. **Capture** property information during site visits: Issues, Enhancements, and Highlights.
2. **Coordinate** internally: ensure timely issue resolution and enhancement execution.
3. **Communicate** with customers: status, opportunities, and accomplishments.
4. **Control** time spent across the book-of business: ensure no account is neglected.



Pillar 1: Capture Property Information During Site Visits

Site visits represent the most important intersection between the Account Manager, the Property Manager, and the property itself. The more time an Account Manager spends on-site, the greater their ability to influence service quality and strengthen the customer relationship. Yet according to Kehoe's data, most Account Managers currently spend only about 10% of their time on site, highlighting a major opportunity to enhance business outcomes by **both** making visits more efficient, and more importantly reducing administrative work so more time can be spent in the field.

Best Practices: Effectiveness

Time on site is the Account Manager's most valuable opportunity to observe, engage, and influence.

10%

Time Spent by
Account Managers
on Property.

- **Walk the property with the Property Manager whenever possible.** This fosters stronger relationships, reinforces the company's ongoing contributions, and gives direct insight into the customer's priorities.
- **Visit shortly after the service is performed.** This allows for timely identification of issues, often before the customer notices, creating the chance to resolve them proactively.
- **Document in real time.** Details fade quickly. Capturing information immediately ensures accuracy and reduces the risk of lost context.

Capturing Key Property Information

Site visits should consistently identify and document three categories of information: **Issues**, **Enhancements**, and **Highlights**. It is important to capture the right information without trying to capture excess details that may have little or no value. Too little information can mean Issues don't get resolved or Enhancements are not adequately described. Too much information can diminish the benefit of the site visit by making it a note-taking session, and create noise when communicating with the customer.

*With the **Operate Mobile App**, capturing property information is streamlined to a degree that has never been achieved before.*

Issues are service gaps that require correction. Think of them as the quality control layer of account management. Each issue should include:

- A photo
- Location
- Type (Aesthetic, Safety, Functional)
- Brief description
- Urgency (ASAP or next visit)
- Status (Current, Assigned, or Completed)

Enhancements are improvement opportunities outside the standard service contract. These represent new revenue opportunities and are often small but numerous. Each enhancement idea should be initially logged with:

- Photo of the target area
- Location
- Brief description
- Status (Idea, Interested, Designed, Approved, Scheduled, Completed)
- Estimated cost magnitude

Highlights are notable features or observations that aren't issues or enhancements. They may showcase excellent work, raise a question, or prompt future planning. A highlight entry should include:

- Photo
- Location
- Description
- Status (Current or Closed)

Best Practices: Efficiency

The goal is to capture what needs to be captured thoroughly and quickly, while also being present enough to not miss things, and where applicable, have a quality interaction with the customer.

- **Have a plan and use a site map.** A site map helps plan an efficient walkthrough of the property and ensures that no key areas are overlooked. Make the process consistent across properties.
- **Prioritize high-visibility areas.** Focus extra attention on locations with the greatest impact on the customer's perception: entryways, main streets, high-traffic areas, and any places frequently seen by the Property Manager or their top tenants.
- **Let pictures do the talking.** A photo alone often gives an experienced crew lead all they need to understand and resolve an issue. Images paired with location data are essential for documenting Issues, highlighting successes, and seeding Enhancement ideas.
- **Capture what's needed.** Don't over-document. Focus on what's necessary for later use, be it a visit report, issue resolution, or enhancement proposal. Capture with the end use in mind to streamline downstream work. Have a standard template for each that is used consistently.

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Pillar 2: Coordinate Internally to Resolve Issues and Close Enhancements

Even the best property data and customer communication will accomplish little without execution. Issues must be addressed with appropriate urgency. Priority Enhancements must be converted from ideas into paid and executed work. This all hinges on how Account Managers marshal the resources of the company.

The Operate Mobile App, connects AMs to Crews and manages the workflow to completion.

Best Practices: Effectiveness

Build strong internal relationships. Account Managers who build rapport with crews, operations, and design teams are better positioned to influence outcomes and negotiate tradeoffs.

Issues

- **Ensure that Issues are actionable.** Develop a common language with Crew to easily callout the right stuff and the wrong stuff. Include a precise location, a picture and clear instructions as appropriate for what needs to be done. Explain why it matters, and what the customer expects.
- **Route Issues correctly the first time.** Know the process for ensuring issues are assigned to the appropriate crew or service line where applicable in a timely manner.
- **Follow up on Issues until closed.** Don't assume delegation equals completion. Give Crew Leads an easy way to verify completion with photos to avoid time consuming trips to the site for this purpose.

Enhancements

- **Make approved Enhancements back office ready.** When an Enhancement has been Budgeted and verbally approved by the customer, make sure you have the information that the design and estimation teams will need to get their proposal right the first time. Expand on the details, provide pictures of the location and the precise location. Provide color on what the customer is hoping to achieve.
- **Verify completed Enhancements.** Once completed, ensure enhancements meet expectations. Walk the site post-install. Verify quality.

Best Practices: Efficiency

Time spent coordinating is a critical part of the job, but too often it can consume a disproportionate amount of Account Manager's time. A combination of efficient practices and use of tools that integrate with work management systems represents perhaps the greatest opportunity to free Account Managers to focus more on the customer and benefitting the business.

- **Integrate with Work Management systems.** Use mobile applications that integrate with cumbersome back-end systems not designed for use by Account Managers to task work and track status. If tasking and status updates can be performed more seamlessly with other Account Manager activities like Issue Capture and Customer Communications, time spent in the office can be greatly reduced.
- **Address Issues with the right degree of urgency.** It generally makes sense to have a "correct on next visit" by default policy and for this to be understood by the client. Handle more urgent issues as an exception. That said, be diligent about addressing them. The best kind of issue is one that the Account Manager discovers and resolves before the customer ever sees it, then shares as proof of proactive service.
- **Qualify Enhancements carefully.** Don't spend too much time or engage company resources for design and pricing until approval has been attained. Manage scheduling, execution and status using the same mechanisms used for assigning work related to issues.

It generally makes sense to have a "correct on next visit" by default policy.

Pillar 3: Communicate Effectively with Customers

Communication is the most visible part of Account Management and often the most decisive in terms of success. It's the lens through which your customers perceive your service quality, responsiveness, and value. Even when operations are running smoothly, weak or inconsistent communication can erode customer trust. Strong communication can build loyalty, create upsell opportunities, and prevent minor issues from escalating into lost accounts.

Even when operations are running smoothly, weak or inconsistent communication can erode customer trust.

The Operate Customer Portal provides 24x7 access to status and progress.

Great Account Managers understand that they're not just delivering landscaping services, they're delivering peace of mind, reliability, and progress. In a crowded marketplace, customers are often comparing vendors who all deliver a similar core service. Communication is where differentiation happens. Account Managers who communicate proactively, clearly, and strategically create confidence and loyalty.

Best Practices: Effectiveness

To truly engage the customer and build loyalty, communication must be relevant, timely, and relationship-driven.

Communicating about Issues

- **Set expectations.** Be an expert on what your service program will deliver. Be able to articulate to customers how your program will make their landscape better. Align customer expectations with the realities of your service program early and often. Be upfront with clients about what your service program defines as Issues and will fix and what it won't from the beginning.
- **Proactively communicate Issues.** Demonstrate commitment to delivering on the service promises made. Let them know about Issues and the plan to correct them. No one is perfect and clients understand that. Being transparent will build trust.
- **Use visuals.** Photos are invaluable. A single well-annotated photo can tell the story of a resolved issue, an opportunity for improvement, or a job well done far better than paragraphs of text.

- **Contextualize your updates.** Don't just say what happened, say why. "*We replaced five shrubs at the pool entrance*" becomes "*We replaced aging shrubs at the pool entrance to maintain curb appeal for this high-visibility area.*"

Communicating about Enhancements

- **Bundle enhancements for impact.** Rather than proposing one-off upgrades around the property, present a grouped set of enhancements that improve a specific area. A large improvement in a visible area delivers more obvious value than scattered smaller improvements at the same cost. Property and building entrances, model unit, signage, heavily used roadways or social gathering areas should all be prioritized. Also be very alert to safety and security issues that can be resolved by enhancements and bring those to the fore in discussions.
- **Follow the Budget Cycle.** There are typically two times per year to focus on Enhancement opportunity communication and sales. The first is when your customer is creating their budget for the coming year. You should make yourself a part of their regular budgeting process. The second is toward the end of the year when left over Capex dollars need to be spent. Know these dates for each customer and raise the topic beforehand.
- **Show progress over time.** Maintain a visual and narrative history of the improvements that Enhancements and the service have had on the property. "Here's what your property looked like when we started. Here's what it looks like now." This is especially important when property managers change.

Property and building entrances, model unit, signage, heavily used roadways or social gathering areas should all be prioritized.

General Communication

- **Know the customer.** Know what's important to them, what they value. Know their pet peeves and how they define a successful client/vendor relationship. Why they weren't happy with the last company and why they hired you.
- **Personalize communication.** Use the customer's name. Reference their specific goals. Remember the little things (e.g., they just installed a new fence or had a special event coming up). These details signal care and attentiveness.
- **Use consistent formatting.** Standardized formats for common updates ensure no key information is missed as customers know where to find what they are looking for.
- **Align communications with customer expectations.** Some customers want a weekly email; others prefer quarterly summaries. Be consistent.
- **Use communication to build trust.** A clear, honest message about a delay paired with a plan to fix it is more powerful than vague reassurance.

Best Practices: Efficiency

Efficiency in communication is about minimizing time spent while maximizing clarity and relevance.

- **Automate the routine.** Status reports, issue updates, and scheduled service summaries should be generated directly from field documentation. Manual assembly of reports from notes and phone pics is both time-consuming and error-prone. Tools that integrate pictures, location data, and status can cut report creation time by 80% or more. This is one of the most significant opportunities to increase time spent in the field, on-site and with customers.
- **Maintain an Enhancement Catalog.** Always have an organized list of Enhancement options available in response to inquiries. When enhancement ideas are captured consistently, it becomes easy to revisit and bundle them at the right time. This is critical because Enhancement proposal requests driven by budgeting and end of year left over capex spending will typically come from a large proportion of customers at the same time.
- **Invest time and effort in Enhancements appropriately.** Spend time and effort based on the likelihood of them being funded in the near term. Basic Enhancements only need high level descriptions and ballpark pricing. Get agreement on a budget before estimating the work and investing in providing more details.

Tools that integrate pictures, location data, and status can cut report creation time by 80% or more.

Pillar 4: Control Time Spent by Prioritizing Across the Book-of-Business

Account Managers deliver value not just by managing accounts effectively, but also by managing a large portfolio without letting anyone slip through the cracks, and providing the right degree of attention to each account.

Best Practices: Effectiveness

- **Keep a portfolio level view of attention paid.** Some customers will be more demanding, and an Account Manager cannot control the rate of Issues and Enhancement opportunities each customer generates. To ensure that no customers are inadvertently neglected, maintain a Portfolio level record of customers showing things like last visit, last contact, and agreed upon intervals.
- **Set expectations and align your attention with expectations.** Things like the frequency of site visits, status updates and Enhancement discussions should be the subject of explicit agreements with the customer.
- **Factor Strategic Importance to the Business.** Beyond agreed terms, it is critical to be cognizant of accounts by revenue, importance, and risk level. Is this a large or marquis account? Are they highly visible? Have there been issues in the recent past or are they receiving a lot of attention from competitors? Have a mechanism for highlighting accounts that merit heightened attention for these reasons and make sure they get it.

The Operate Account Manager Portal shows a Book-of-Business level view and highlights properties requiring attention.

Best Practices: Efficiency

- **Use software tools or account planning templates.** Keep track of visits, contacts, and the status of the customer and relationships. Emphasize making it easy to identify customers that have not been interacted with recently, who have recently experienced Issues or who are strategically important.
- **Set a cadence and stick to it.** Monthly contact for top-tier accounts, quarterly for mid-tier, etc.

Conclusion: Account Management as Strategic Driver of Retention, Profit and Growth

It is not easy for a commercial landscaping company to establish differentiated value enough to allow for the premium pricing, account growth and high customer retention that will fuel growth into the top tiers of the industry. The companies that win are those that excel not only in field operations but also in relationship management. Most companies already invest in sales, operations, and recruiting. Often, the biggest untapped opportunity lies in better managing the customers they already have and ensuring that they not only receive excellent service, but know it.

The 4 Pillars of Account Management: Capturing, Communicating, Coordinating, and Controlling are not abstract ideals. With the right tools and discipline, they are actionable strategies that drive retention, profitability, and long-term growth.

The Operate Platform automates and accelerates all aspects of the 4 Pillars of Account Management. If you would like to learn more you can [book a demo](https://www.operate.ai) at www.operate.ai and see it for yourself.