AWT TECHNICAL TRAINING PROGRAM
PROGRAM DESIGN & OPERATION

The Logistics of Water Treatment

New Business Pursuit

PROGRAM DESIGN & OPERATION
DAY 3 AGENDA

1. Technical Sales: Process Quality
2. The Plant Survey
3. The Art & Science of Program Design
4. Water Treatment Mathematics – Practicing Operational & Chemical Calculations
5. Applications & Situational Insights
6. Extra Credit: Field Assignments

Situations that Bridge Technology and Business

1. Technical Problem Discovery – Real or Perceived
2. Program Improvement Opportunities – Business Review Outcome
3. New Process Components, Systems or Locations Added
4. Regulatory or Business Pressure
5. New Account Pursuit – The Most Comprehensive

Water Treatment Sales

- Using a Quality Management Approach

- Follow a 12-Step Process
  - Ensures the program you design meets, or exceeds, the customers expectations
  - Launches your program with a confirmed design and purpose

12 unique QM Process Steps.

Number	Process Step	Actions
1	Initial Request for Proposal	Following Sales Actions; Relationship Development
2	Plant Survey	Collect Technical Information; Determine Program Needs
3	Program Design	Product Selection; Calculations and Client Needs Review/Assessment
4	Design Review Preparation	Internal Document – Organize Plan, Approach, and Set Budget.
5	Design Review Meeting	Meet with Client to Confirm Scope of Work, and to ensure Design fulfills expressed program needs.
6	Prepare Proposal	Generate and Submit
7	Customer Acceptance	New Client Added to Portfolio
8	Contract Review	Review and Confirm Business Arrangement Details with Client
9	New Client Input	Add New Client to Your Internal System
10	Instruction Manual	Documents Program for Plant Personnel
11	Program Start-Up & Training	Use Instruction Manual to Train
12	Program Validation	Service Visits Confirm Design Changes

But we will focus our attention on Process steps 2 – 5.

Important Validation/Confirmation Steps

- STEP 5 – Design Review Meeting
- STEP 8 – Contract Review
- STEP 12 – Program Design is Validated

Data Extraction & Needs Assessment Steps

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THE PLANT SURVEY

How to Obtain the Information Needed to Write New Business and to Quote/Manage a Quality Water Treatment program

Surveying to Win Business

Extracting and Using Plant Information

Plant Survey & Needs Assessment

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Surveying Versus Competition

1. The Real Objectives of a Plant Survey
2. Effective Questioning: allows the client to express concerns
3. Position Technical information: to solve problems
4. Creativity: find gaps with the Current Program and can Add Value with yours

A Strong Survey Produces

1. The Prospect's Budget
2. Competitor Deficiencies
3. Areas for Improvement
4. Three-way Confirmation
5. Scope of Work
6. Ammunition you need to sell the account!

Steps of the Survey Process

1. Obtain Equipment Data
2. Obtain Water and Utility Flows
3. Evaluate Water Chemistries
4. Determine Health & Safety Gaps
5. Obtain Historical Trends and Results
6. Understand Current Program: Both Field Administration & Business Management

Three-way Confirmation to Nail the Budget Accurately

1. Equipment Sizing – Calculate Usage based on Survey Data and Equipment Type/Size/Loading
2. Utility Flows – Obtain at least one year's water usage from all open systems (make-up, steam flows, fuel usage, and bleed).
3. Chemical Usage – Determine current chemical feed rates, drum/product throughput, from logs and operating personnel and/or ask for budget!

Become A Detective: Hints & Suggestions

1. Test/interpret system waters yourself
2. Review operator logs and service reports
3. Take pictures – they're worth a lot. Inspect!
4. Form a bond –stretch the process out a few more steps
5. Be Open Minded & Naturally Curious

Goals of Survey

1. Document All Equipment, Systems & Operation
2. Identify Load Conditions
3. Document Current Treatment Regimen and Products, plus Dosage Insights
4. Gain an Understanding of History
5. Obtain and Test Water Samples
6. Find Technical and/or Business Issues underway

PROGRAM DESIGN

The Art and Science of Water Treatment

*Problem Solving
*Program Improvements
*Product Selection & Pricing

Program Design Steps

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Program Design: The Output of the Program Design Step is the Review Meeting (Do Not Miss This Important Opportunity!)

1. Review Your Approach before Writing a Proposal
2. Confirm Your Design Meets the Customer's Expectations
3. The Meeting Becomes an Opportunity to Demonstrate Competence & Build Rapport
4. Determine Project Budget!

Design Requirements & Tools

1. Documented Survey Results
2. Confirmed Needs Assessment
3. Comprehensive Water Analyses
4. Pictures and Drawings
5. Historical Overview
6. Product/Price Lists by Category & Dosage (Calculations Software, etc.)

Program Design Steps

1. Analyze the Water Supplies
2. Establish Annual Water/Utility Flows
3. Evaluate Current Circumstances
4. Create an (Alternate) Strategy
5. Choose Your Products and their Delivery Mechanism/Application Approach
6. Run Calculations and Annual Costs
7. Consolidate & Document Your Design
   - Worksheet
   - DR Meeting Planner

Chemical Program Selection

1. Select Products based on system type and your revised design
2. Decisions include product form (liquid, solid, granular), concentrations, and type/chemistry
3. Make Calculations for annual use
4. Confirm number of shipping containers – use container weights and volume which you plan to deliver to site
5. For delivery purposes, document/confirm pathway from Loading Dock through the plant

Don’t Forget…

1. Select Your Feed Equipment, Testing Apparatus, Parts and Reagents
2. Define and Budget for Laboratory Services
3. Define Labor hours using trip frequency, routing, travel and site time
4. Finally – Document the Design and Prepare Q&A for the Meeting