

INDUSTRIAL POWER

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UPDATE

BEST INSTALLATION AUDITING EARNS REPEAT CUSTOMERS

A successful installation audit begins long before the day of the inspection, according to dealers with a proven track record.

"To be successful, you have to know what the customer wants, what he's building and spend a lot of time in discussions with him beforehand," says Ev Bowen, service manager for Altorfer Inc., Cedar Rapids, Iowa. "That's what we do — we perform to a list of the OEM's needs and wants that we put together at the beginning of the project."

Bowen says sales engineers begin the process for Altorfer. "They do an outstanding job by sitting down with the OEMs and evaluating the horsepower and complete engine needs. There is a lot of research to make sure the engine works with the product. Each customer needs something different. You have to alter the basic setup to make it do whatever they want."

Greg Larson, OEM business unit manager for the Power

Systems Division of Ziegler Power Systems in Minneapolis, Minn., agrees that listening to the customer and providing engine expertise at the outset are extremely important. Inside engineers help customers throughout the design process.

"In effect, we're performing a continuous audit as the OEM develops his product with our engine. For instance, we assist with the engine specification and associated components. In the end, the audit is just a validation and documentation process, not a redesign."

After lengthy discussions with an OEM, an in-house project manager is assigned to procure the necessary parts from both Caterpillar and vendors, and oversee their timely delivery.



"We've got to be sure the parts fit the application and that they will be here when we need them," Bowen says.

Getting Your Hands Dirty

Rick Delmonico, a sales engineer with Larson's team, makes a point of staying involved with the OEM during the

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installation. "In the initial sales presentations, I wear a coat and tie. But after the sale, I put on a pair of coveralls, go to the shop and work with the guys on the floor. I pull on wires, check hoses or whatever needs to be done. It helps. If the guys on the floor don't like working with your product, there's not much chance that the OEM's design team will use it again next time."

Delmonico also makes sure the OEM has the Caterpillar installation guidelines booklet. "The Cat installation information that we provide to OEMs is essential. It covers everything from front to back in detail."

Despite extensive communication between a dealer and an OEM, it is realistic to expect some installations to hit rough spots, particularly when the OEM is a new customer or is using a new engine model.

Problem Solving Opportunities

"The likelihood of our customers getting it right the first time without some infringement on our Caterpillar design standards is remote," Larson says. "If we have an OEM engineer dealing with a new engine, we're definitely going to have some issues surface."

Bowen believes such cases are opportunities disguised as headaches. He recalls dealing with one new customer in particular.

"At the very beginning, it was bad. The OEM ignored our input.

For example, the framing was wrong for the mounting of the engine he ordered, so we had to significantly modify the frame. We gave him drawings to show where the feet were mounted on the engine, so it would fit the frame. We showed him how to create space for the clutch he needed for his pumps. We diagramed it all. It was a long process to get everything to conform; it was a lot of work by the people here. That's how it



started, but now—years later—that time and effort has paid off because he's a customer worth a large number of sales."

Efforts to prepare for an installation audit can have a big impact, Bowen says, and should be seen in that light. "We've worked around the clock so the OEM could ship something the next day. Sometimes you have to go above and beyond the call of duty, but the OEMs will remember what you did

just so they could meet their customers' demands."

Performing the Audit

When conducting the actual audit, Larson says, "We use Caterpillar installation guidelines for our audit criteria and try to follow them as closely as possible. They cover all the major parameters for cooling packages, induction exhaust packages, electrical feeds, etc. We also use general 'best practices' principles based on our experience. For example, we might need to isolate the radiator to eliminate vibrations."

An engine start-up during the installation audit could well be the second such test of the equipment. Both Bowen and Larson say they routinely test the engine while it is still at the dealership, then again at the OEM facility. Both dealerships will sometimes test the engine a third time at the end-user's location if the site is local and if the OEM approves of the additional inspection.

Larson encourages dealers to praise OEMs that have successfully installed Cat engines. "We try to tell the customers when they've done a great job. They are receptive to that." He notes that he has seen OEM sales literature boasting that their products contain Caterpillar engines (with Cat approval) for the particular application. "Obviously, they know it's a selling point for them."

If the installation audit is the

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conclusion of a prototype or “pilot” phase, a successful conclusion can signal easier times ahead for the dealer and the OEM. Says Bowen, “Once the OEM knows the equipment works and the process works, it can put its machines into production. Everyone’s comfortable that we’ve got it right.”

A dealer’s sometimes extraordinary efforts can be viewed as an investment in a repeat customer. Says Bowen,

“If we make them happy by keeping their livelihood going, they’re going to keep our livelihood going by buying more product from us.”

Delmonico adds, “People buy from people they know and trust. If you stick with them, they’ll keep buying. We’re still selling the dealership and Caterpillar even during the final meeting with the OEM.” ▲

NEW PRESENTATIONS AVAILABLE FROM EMC

Several new presentations on Caterpillar products and related issues are available online from the Electronic Media Center (EMC). The new presentations, in PowerPoint and .PDF formats, cover the following subjects:

Air-to-air Aftercooling (ATAAC)– Includes emissions regulations and their effect on the Caterpillar product line, diagrams for comparing ATAAC to JWAC, the benefits of ATAAC, ATAAC installation options, and the information needed to size a charge air cooler.

3126B – Contains product plans, specifications, available ratings, performance data, notes on features and benefits, and comparisons with competitive engines.

C9 – Offers product plans, specifications, available ratings, performance data, notes on features and benefits, and comparisons with competitive engines.

EPA Regulations – Discusses the impact of EPA regulations on the Caterpillar product line and the launch of the C9 and 3126B. The Equipment Flexibility Program also is covered.

Access the EMC site at <http://www.emc.moss.cat.com>. Once there, click the “Sales Support” button, then the “Documents” button, then the “Category” button and finally “Presentations.” The available files are excellent tools for internal or customer presentations. ▲

TIPS TOWARD SUCCESSFUL AUDITS

- Consider the installation audit the final step in a process that begins the day you first walk into the customer’s office.
- Stay involved with the OEM’s design and implementation teams throughout the project.
- Be sure the engine and its accessory components meet all applicable standards of both Caterpillar and the OEM.
- Help ensure prompt, high-quality service by having sales engineers, design engineers and technicians qualified to conduct installation audits.
- Use the Caterpillar audit guidelines. Also, share Cat’s OEM installation instructions with your customer early in the process.
- Understand that OEMs working with Caterpillar engines for the first time are likely to infringe on design standards. Help them work through any difficulties to strengthen the relationship.
- Go the extra mile for the OEMs. They will remember the people they can count on.