

How Best to “Influence the Spec”

To be successful, the specifications writer must be patient enough to earn the customer’s trust and skillful enough to reflect that relationship within the realities of the marketplace.

As important influencing customer specifications are, it is also extremely difficult to get them done. This is a topic near and dear to my heart, having presented at numerous trainings and at ValvTechnologies’ International Technical Conference and User’s Group (ITC) in 2018. ABMA President **Scott Lynch** recently invited me to speak at the annual ABMA conference after attending ITC and sitting in on this presentation.

The presentation covered key points one must first be made aware of prior to entering the specification writing world. To gain the most from this type of journey, a unique blend of professional and personal attributes are required, as well as a laser-focused commitment in achieving the ultimate customer spec writing collaboration goal. When approaching an influencing the spec undertaking, defining the roles the influencer will play, as well as having a clear understanding of the marketplace and the ability to be creative is mandatory.

To be successful, the specification writer must understand that spec writing projects are marathons, not sprints. These projects do not typically move quickly and commitment to the process — earning the customer’s trust and ultimately becoming a trusted advisor, is critical. It cannot be emphasized enough that a venture of this magnitude — developing, managing and succeeding at influencing specifications — requires tenacity and thick skin.

As one attempts to develop a specification initiative with a targeted customer, research and data collection is vital so one can best validate one’s case with examples. The scenario used in this specific session of the ABMA conference began by addressing today’s industrial technologies and how they have changed dramatically over the years. Whether it is power generation such as turbine/boiler technology, oil and gas (upstream/downstream),



chemical, etc., it is only sensible that the components within those system designs advance as well. This is ultra-critical for optimum performance to be gained out of major equipment technologies that is continually advancing in design. Thus, making influencing the spec an important and worthwhile investment for end users, OEMs, EPCs, licensors, etc.

Another example presented at the conference was taken from ValvTechnologies’ own spec writing collaborations with various OEMs/EPCs. It included performance evaluations of traditional valve types used in isolation applications that are permitted to leak upon initial installation due to their designed Class V/VI leakage class ratings. The results were compared to the latest and most advanced isolation valve application technologies, severe service zero-leakage solutions offered by ValvTechnologies. The basis for the research was the rigorous operating conditions of today’s advanced turbine/boiler technology designs.

By Laura Mikovich
ValvTechnologies
Houston TX

Based in Erie PA, the author is global account executive at ValvTechnologies, a designer and manufacturer of metal-seated, zero-leakage, severe service valve solutions for industrial applications. Ms. Mikovich presented on this topic at the American Boiler Manufacturers Association fall conference in Tulsa OK.

The high-pressures and extreme thermal cycling, along with daily plant start-ups, causes traditional isolation valves to leak, resulting in safety concerns, poor performance and great financial loss. Coupled with these concerns for the OEM/EPC's are the commercial contractual issues relating to performance guarantees, late deliveries and increased financial liability risks. The bottom line correlates directly to keeping the steam in the systems.

Thoughtful decision-making

This study demonstrated how the old can hinder the performance of the new, which validated the critical need of ValvTechnologies' zero-leakage metal-seated valve solution in these severe service isolation valve applications. In collaboration with ValvTechnologies, several OEM's/EPCs concluded on upgrading their valve specifications, consisting of the removal of the leakage-prone traditional isolation valves and replacing them with ValvTechnologies' zero-leakage ball valve design.

Although, the example in this influencing the spec collaboration closed successfully, the final decisions made by the customer's center of excellence's and engineering design review boards to upgrade these specifications were

not made lightly. Due to the amount of research involved, the project that originally had a six-month estimated timeline, ultimately took nearly four years to complete. Again, echoing the notion that spec writing is a marathon not a sprint.

The corroborating data and added details of the example shared at the conference helped to illustrate for the ABMA audience a high-level view of special techniques, little known by those who may not yet have experienced an influencing the spec endeavor of their own.

Another key aspect discussed at the conference, is having the personality necessary for this type of effort. One who's persistence, stamina and determination makes up his/her very core. It is a common misconception that when it comes to most sales pursuits, outside sales professionals are all cut from the same cloth. However, influencing the spec is on a higher tier that could be best described as requiring the same successful outside sales professional attributes, but on extreme levels!

Creativity meets flexibility

An additional characteristic described in the presentation was the power of imagination through the virtue of creativity. Intuitively knowing that rolling with the changes is imperative to a positive outcome, understanding that the strategy developed today will be different tomorrow. Often the reason is that customer contacts, priorities, objectives, resources and even the marketplace are in constant flux, making imagination a primary element in developing the flexibility needed to overcome these challenging obstacles. The ability to maneuver is imperative in achieving a productive outcome as there will always be significant obstacles to circumvent.

The processes that follow vary from one influencing the spec initiative to another and a great deal of content goes into each. The presentation outlined fundamental summaries, such as:

- 1) Strategy implementation plans;
- 2) Managing expectations (yours and your customers);
- 3) Scheduling meetings;
- 4) Monitoring milestones;
- 5) Directing next steps;
- 6) Defining/distributing action item points (for both you and your customer);
- 7) Eliminating obstacles;
- 8) Maintaining a steady rhythmic flow in continually advancing the project forward.

All in all, it really goes back to the beginning and that is the importance and value influencing the spec really is to the industrial marketplace. With the natural evolution of technological discoveries and the advanced equipment designs that derive from it, a landscape emerges that is ripe for the cultivation and development of influencing the spec initiatives. In conclusion of the presentation at the ABMA conference, it's important to note that influencing the spec opportunities rarely create themselves. Instead, it requires a pioneering undertaking like no other. **HPAC**