

# Sales & Marketing III: Outline and Application of the Assessment and Recommendation Process for Existing Elevator Systems

National Association of Elevator Contractors



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# About this Study Guide

This guide is intended to supplement your individualized Skillsoft learning by providing materials and examples specific to the vertical transport industry.

The learning objective of this section is for the student to be able to determine the variables and measures XYZ Elevator Company would use to assess an existing elevator system and to make recommendations based on assessment for construction, modernization, and service.

The section contains a list of variables and measures, an example of a current elevator system, the assessment results for the existing system, and recommendations for construction and modernization.

Information included in this study guide is intended for educational purposes only. Check with your company for specific guidelines.

# List of Variables and Measures to Assess Elevator Systems

VARIABLE	MEASURE
Performance factors	NEII standards and performance criteria for existing elevators
Age and condition of equipment	Date of purchase, repair history
Compliance with oversight regulations, codes and agencies	Documentation of testing, registration and inspection by the local authorities having jurisdiction
Needs of the client	Current and future usage of existing system, expansion or modification of building or operations
Lost revenues from shut down	Estimate from client of days lost times cost per day and/or service interruption/convenience factor/
AHJ code enforcement agency regulations	Specific to each state and region and will guide services and construction.
Current maintenance agreement	Contract terms which may prohibit XYZ elevator company from providing service and/or construction

## Example of Assessment of Existing Elevator System and Resulting Recommendations

### Situation of existing elevator system

XYZ Elevator Company has a maintenance agreement with a building owner (BO) for a freight elevator. The elevator shuts down monthly due to equipment failures. The BO requests an assessment of the elevator system and recommendations as he is planning to increase his operation. What comprises the assessment and what are the possible opportunities of the assessment?

### Outcome of assessment

VARIABLE	ASSESSMENT OUTCOME
Performance factors	Meets minimal NEII standards and performance criteria for existing elevators
Age and condition of equipment	The equipment is old but not obsolete and the condition of the equipment is fair
Compliance with oversight regulations, codes and agencies	Has Documentation of up to date testing, registration and inspection by the local authorities having jurisdiction
Needs of the client	BO is expanding operations and production in same building
Lost revenues from shut down	The cost of lost productivity due to shut downs is rising and impacting bottom line.
AHJ code enforcement agency regulations	State and local codes would permit modernization and expansion of the elevator system in the same building
Current maintenance agreement	Held by XYZ elevator company and therefore present no barrier to providing service.

### Recommendations

The XYZ Company recommends the construction of a second freight elevator to function while the first is being modernized. This will provide double capacity and no loss of revenue during the construction of the second elevator and modernization of the first. An additional gain is the service contract.