

# The Many Opportunities to Train Our Clients— We Can All be Teachers!

**W**e have many opportunities to teach and train our clients, formally, in a classroom setting, and informally when we come to their sites to do our work. Informal teaching and training can actually occur during all communications with the client — during the initial discussions of a shutdown, during the actual site work stage of the shutdown, during any summary discussions at the end of the shutdown, while the client reads the report of the findings and recommendations, and finally during discussions about how best to implement the report recommendations.

## What Can We Teach and Why Should We Teach It?

We, all of us in the electrical testing industry, are the experts in power systems. That's what we tell our clients and that's why they hire us. Therefore, who better to teach and train our clients? We can teach our clients about their electrical systems. We also can teach them about what we do when we complete our work. We can also re-enforce theory previously obtained but forgotten over time.

In order for us to do work on a site, we need to fully understand its electrical system. The client may not understand it as we do; therefore, we can become teachers.

## Initial Work Discussions

A client approaches us with work to be done — either an existing plant shutdown and maintenance is needed; or new equipment is to be commissioned and energized. “What needs to be completed on my equipment? What can be accomplished in the time allotted?” These are common questions. Regardless of the equipment voltage, configuration, use, criticality, etc., there are always some sorts of limitations presented to us.

The discussions of the work, time requirements, tests to be completed, and restrictions that limit or restrict our work on site are perfect opportunities to teach the client about his electrical system. Usually, the teaching



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is centered on the system's operation — switching, safety, etc., but can also include a general review of what we do, why we do it, and what the benefit is to the plant.

## During the Work

Often, our clients (at least their more interested personnel) learn something from us while we are on site. They observe what we do and ask questions while we work. If there is sufficient time, and if answering the questions doesn't affect the crew's overall efficiency to complete the work, we can answer the questions in a hands-on fashion demonstrating while we work. We can also describe what we are doing on a step-by-step basis and what we are looking for. The client can see the theory in action.

This type of teaching is actually approaching training. The client can learn by seeing what actually happens while the tests are completed instead of just hearing a theoretical explanation of the tests.

## **Summary Discussions After the Work is Complete**

When we finish our work on site, we need to summarize our findings, the outstanding deficiencies, and their respective solutions to the client. Choosing the correct words is important because the client deserves and really requires a clear summary of his electrical system status as we've left it.

The time of day that this summary occurs often provides a challenge, especially if it occurs after an all night shutdown. Our minds and those of our clients could easily be foggy because of lack of sleep. Also, the client may have other things on his mind besides our findings. He may have other responsibilities to his facility to get it back into production.

Regardless, the discussions and explanations can teach the client some of the technical reasons of why certain findings are deficiencies and what are the implications to his electrical system.

## **Recommendations in the Report**

A well written report is essential in explaining the technical reasons for the deficiencies, why certain deficiencies are critical, and why they all need to be rectified. If the language of the report is not clear, the client will misunderstand the true meaning of the explanations. Each of the explanations can also provide a training opportunity for the client. He can now start to look at his equipment with our point of view in mind, and he can eventually start to look at his equipment as a trained tester would.

When discussing how to implement the recommendations of the report, the client can often learn more about the operation of his electrical equipment and his facility's process as a whole. He has to determine what mechanical or process equipment is affected by electrical equipment shutdowns. Also, the client's non-electrical staff now has an opportunity to better learn which portions of the electrical distribution system affect what process equipment.

During these same discussions, we electrical experts have an opportunity to learn the process of the facility. As we can become more familiar with the facility's process, we can complete our maintenance work in a more logistical manner. We can better suggest what the client should do to his electrical system given a certain mechanical shutdown without having the client think about it. We can become more proactive rather than strictly reactive in our service to the client.

## **Formal Training**

We offer formal training to our clients. Their personnel leave the facility floor and come into a classroom setting where specific materials are reviewed. We find this teaching environment is often the best type because the participants are removed from their daily activities and distractions. Therefore, they are able to concentrate on the material being presented. The most common topics of training are electrical hazards, electrical safety, and a review of the operation, application, and maintenance of basic electrical equipment often found in distribution systems. We supplement the theory presented with hands-on demonstrations.

We prefer to offer an entire presentation solely to one particular client's personnel at a time. In this case, we tailor the presented material specific to the equipment installed in the facility so that the participants gain theoretical and practical knowledge of their installed equipment.

## **How to Communicate Effectively**

The key to all of these teaching and training opportunities is to be able to communicate clearly and succinctly in a manner that the client will comprehend.

I believe that verbal communication between two people is actually a four-way intersection, not just a "two way street" as the common cliché states. Four-way because when I'm speaking, someone (hopefully) is listening; and when the other person is talking, I should be listening as best as I can. There's a lot more going on then appears on the surface.

Therefore, in order for me to stand the best chance of being listened to by the client, I need to choose the perspective, words, tones, mannerisms, and gestures that best suit the client. If I'm successful, I'm speaking his subconscious language and he has a better chance of hearing not just the words, but understanding the meaning behind the words.

Furthermore, when the client is speaking to me, I try to do more than just listen. I try to put myself mentally into his state of mind so that I can hear the words from his point of view. I then have a better chance at truly understanding what he is saying. I find that this "perspective hearing" is easier for me the longer I know the client and the better I know his facility's process.

## Unable or Unwilling Participant

Our clients may not even be electrically trained in their formal schooling. This situation presents itself with some particular challenges.

When describing a deficiency to a client, we now have to choose words that not only convey the true problem, but also in a simple enough, nontechnical fashion so that even he can begin to comprehend the true problem. Electricity is especially difficult to explain because electrons cannot be seen; therefore, concepts, by default, are abstract.

Regardless of how well we attempt to train and teach, an unwilling client may simply choose to not want to learn.

There are many opportunities for us to train our clients. It is up to us to choose to want to train them. We are serving our clients better if we choose to teach them at all opportunities. If a client feels that he learns something or finds himself better equipped to complete his job just by engaging our firm, than he will likely think of our firm when the next opportunity presents itself. 🌐

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