WQA Business Operations Report

User’s Guide

This guide describes how to get started with the online
Business Operations Report Site.

View the following pages for illustrated descriptions on how to enter data, view question comparisons and run dynamic reports.

Website: https://biztrends.wqa.org

Questions: biztrends@wqa.org

Information needed to get started

Where can I find the information needed to enter my dealership's data?

Profile

- Company Profile – Dealership Manager
- Busines Mix – Dealership Manager
- Staff Details – Payroll and Human Resources databases

Financial

- Financial statements
- Internal accounting department
- Statement of Assets, Liabilities, and equity
- Statements of Revenues and expenses

Business Operations

- Marketing – Marketing Team
- POE and POU Installations – Dealership Manager
- Sales, Service, & Satisfaction – Dealership Manager

Compensation

- Payroll, Human Resources, and Administrative databases

Employee Benefits

- Human Resources databases
- Company Handbook

About the Program

WQA Business Operations Report

Water Quality Association

Annual Benchmarking Program for Dealers

This valuable tool for dealers provides industry insight into the success of their business and the ability to benchmark their company (in the aggregate) against other dealerships on a variety of key topics, including:

- Profitability and financial strength
- Expenses and operational costs
- Productivity and efficiency
- Compensation for key industry-specific positions
- Employee training and benefits
- Sales, customer satisfaction and retention

"Our water treatment industry comes with so many exciting opportunities dulled on occasion by complex challenges. I have learned the hard way at times by trying to figure it out on my own. Success seems to come more frequently when I reach out to learn from others.

That's why I became excited when I learned the WQA is sending a survey to the dealer group. I want to be aware of the business trends so I can proactively prepare to make necessary adjustments that will help keep our company on the cutting edge. I plan to complete the survey and I look forward to the information in the Report from WQA.

I hope you plan to complete the survey as well."

Doug Ramer, Martin Water Conditioning

About the Online Site

SECURE CONFIDENTIAL TRUSTWORTHY

Secure: The platform, powered by Dynamic Benchmarking, uses industry best encryption to protect your user ID and password. All data submissions and the delivery of results are protected using multiple layers of security and encryption. Your response data is encrypted and protected by SSL when in transit from your browser to the Dynamic Benchmarking databases. You can see this SSL certification by putting your mouse on the lock next to the HTTPS part of the URL.

Confidential: Individual responses are only accessible to the WQA Clean Team and Dynamic Benchmarking Site Manager for the purposes of data review/validation and creation of consolidated reports for multi-location dealerships. The Clean Team is a select group of staff with training in handling sensitive, confidential information.

Responses are released to participants as aggregated data that cannot be traced back to specific companies, facilities, or individuals. To ensure data anonymity, all results are aggregated, and a pre-determined minimum number of responses are required for results to be displayed, even when filters are applied.

Trustworthy: Dynamic Benchmarking stands by their pledge to strive to execute well-researched, tested surveys that use statistically valid survey techniques. Their aggregation methodologies and data analysis are continually tested, reviewed and updated to ensure validity.

Site Help and Supported Browsers

Visit the Support Page (link to support is available in the top right-hand side of the site.

All current browser versions are fully supported as follows *(older versions of browsers may work but will not provide the best experience):*

- Use the recommended browser settings for security and cookie settings.
  - Cookies must be enabled to support the logging in process.
- Chrome/Firefox/Safari – these browsers auto-update so the latest version should be used.
- Internet Explorer 11 - support for IE is going to be phased out when Windows 7 is no longer supported by Microsoft.
- Microsoft Edge – browser that comes with Windows 10.

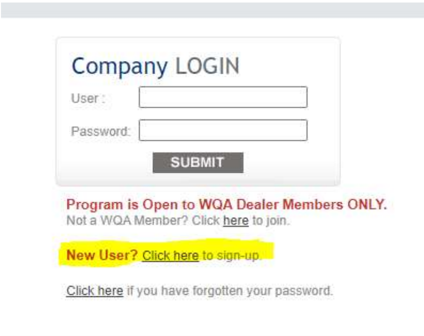
Account Creation (Single and Multi- Location Dealers)

You must create a WQA business operations report account in order to participate.

This account is separate from your WQA membership account.

- The survey questions are location specific, and each dealer location needs its own account in the site.

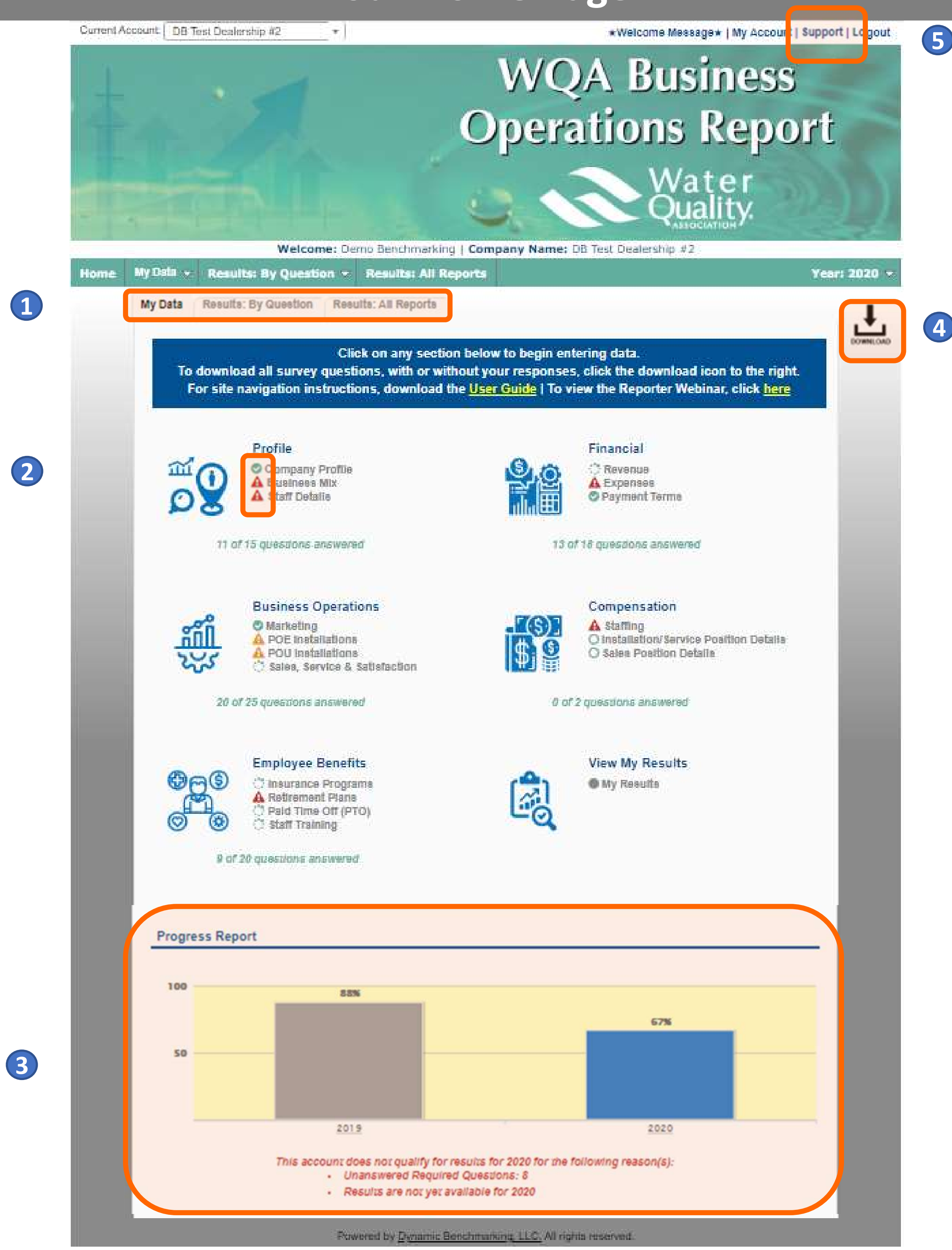
- **Dealerships participating with <u>a single</u> location**:
  - Visit https://biztrends.wqa.org/, click on the option to sign-up, and fill out the form.



- **Dealerships participating <u>with multiple</u> locations**:
  - Contact biztrends@wqa.org for sign-up assistance. We will setup your accounts so all locations can be accessed with a single login.
  - Once logged in, you can select which location you are viewing using the "current account" dropdown at the top left of the screen.

- Need a login for an existing account?
  - Contact us at biztrends@wqa.org.

Your Home Page



1. The survey is divided into 3 sections. "**My Data**" is where you will enter your dealership's data. Results are accessed through the "**My Results: By Question"** and **"My Results: All Reports"** tabs.

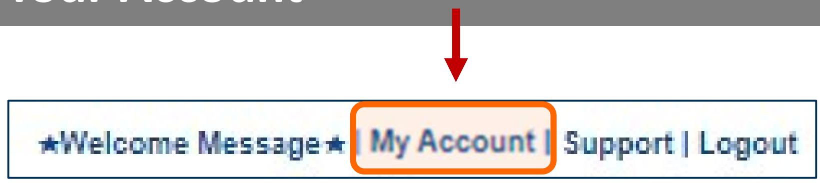
2. Status icons next to each subcategory indicate your progress and warn you when you have missed a required question or when you have a numeric value outside of the expected range.

3. Your overall completion rate can be tracked through the progress graph & messaging at the bottom of the page. The "active" year is in blue – to switch to another year, click on the bar in the progress report or switch years in the green toolbar (above the Download icon).

4. The site will default to the current year available for data entry. To switch to a different year (when multiple years are available), click on the Year dropdowns in the green toolbar to activate a different year.

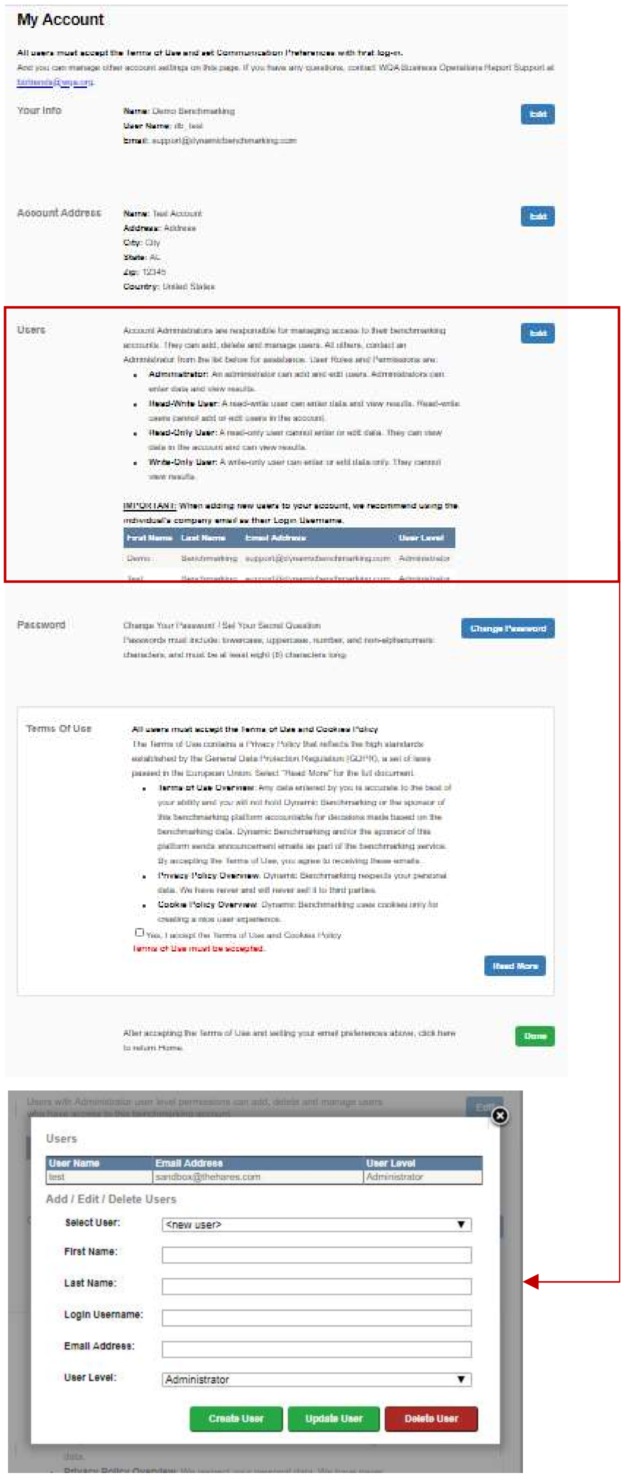
5. Visit the **Support** link to access support documentation and contact information.

Managing Your Account



On the “My Account” page, Users can:

- Update your information – name/email.
- Change your password.
- Add/manage account users.
    - Account administrators can add new users as well as manage existing users in your account through the **My Account** link at the top of the home page. The **Users** section of this page will only display if you have administrator permissions for your firm.
    - Add new user contact information and set user permissions:
        - **Administrator**: Company Setup access, as well as read-write permission.
        - **Read-Write User**: Can enter data & access results.
        - **Read-Only User**: Can view results but cannot add or edit data.
        - **Write-Only User**: Can add or edit data but cannot access results.
    - New users will immediately receive an email with their username and log-in instructions. Occasionally these emails are caught by spam filters, so be sure to check spam/junk folders.
- Review the Terms of Use, Privacy Policy, and Cookie Policy.
- Review and select communication preferences.
    - It is recommended you select **Opt-in to marketing email (RECOMMENDED).**
    - This will ensure you receive important site notifications, such as when results are available, and a new year opens for participation.
    - No other marketing emails will be sent.
- Once all updates/edits are complete, simply click **DONE** to continue.



PLEASE NOTE: Automated site emails, including new temporary passwords, are sent from biztrends@wqa.org. Be sure to have all new users add ADD biztrends@wqa.org to their safe senders list to ensure survey emails are not blocked or sent to your junk/spam email folder.

Data Entry Status Icons

Status icons displayed next to each question group indicate your progress.

Indicates all questions have been answered.
No further action needed.

Indicates no questions have been answered.
Begin answering the questions in this question group.

Indicates some questions have been answered.
Continue / finish answering questions in this question group.

Indicates there are unanswered "**required**" questions. Mouse over the red triangle for the "tool tip" statement with more information.
Return to this question group and answer the required questions. Required questions are indicated by the red asterisk (✱). If unanswered, access to comparisons and reports will be denied.

Indicates there is a numeric question with an answer outside of a defined range. Mouse over the yellow triangle for the "tool tip" help statement.
Return to this question group to review (and edit if necessary) your entries for the questions flagged.

Indicates a section that requires no data entry, but has calculated data for your review.

Entering Your Data

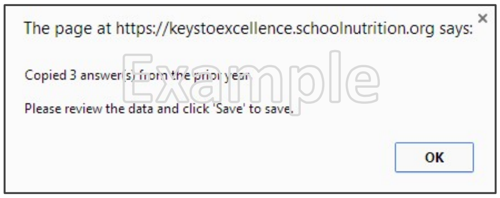
- As you enter data, the entry box turns green, indicating that new data has been provided and must be saved by clicking the **Save** or **Save & Next** button at the bottom of every page.
- To abandon or discard newly entered data, click **Cancel.**

- Any required questions are noted with a large, red asterisk *.

- Some questions have the option of checking **n/a**, indicating that the question does not apply to you. Selecting **n/a** counts towards your overall survey progress.

- Some numeric questions are set with expected answer ranges. If you enter a value outside of the expected range, you will see a warning sign appear. You will be able to save this data, but it will be flagged as being out of the expected range.

- In subsequent years of data entry, select **Copy Prior Year Data** to pull forward your previous year's data. If you have already started data entry, using this option will not overwrite your current saved answers.
- A pop-up box will tell you how many answers were copied from prior year. Click **OK**, return to the page, modify any data as necessary. Then click **Save** at the bottom of the page to save your answers before moving forward.



Instructions for Entering POE Units Installed Data

- POE, or Point of Entry, refers to water treatment applied at the entry of a building or facility for the purpose of reducing contaminants in the water distributed throughout the house or building.

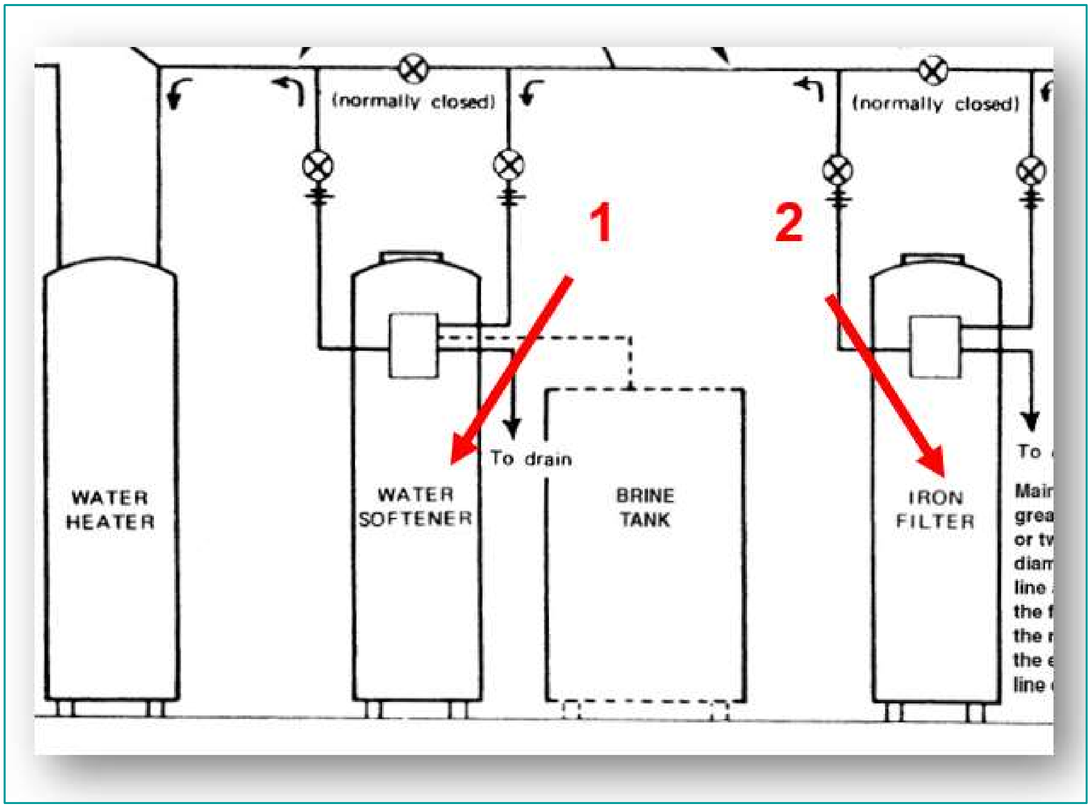
- A treatment train is a sequence of treatment technologies and components necessary to address a water quality problem from source to points of use. It is often a multi-step, multi-component system composed of several different treatment technologies operating in series, where the output water (effluent) of one component is the input water (influent) of the next component.

- For this section, consider each treatment technology a "unit".

- Include any cartridge type units used in a treatment train.

- Exclude all units sold to end user/DIY that were not installed by the dealership.

- In this example, the treatment train consists of an iron filter and water softener. **This counts as 2 units installed.**



Instructions for Entering POU Units Installed Data

- POU, or Point of Use refers to water treatment applied to a single tap or water treatment not connected to the plumbing system and is commonly used to treat water for drinking and cooking only.
- Consider each treatment product installed a unit.
- Exclude all units sold to end user/DIY that were not installed by the dealership.
- Below are common examples of POU products. **Each would count as 1 unit.**

Reverse Osmosis System

Countertop Filter

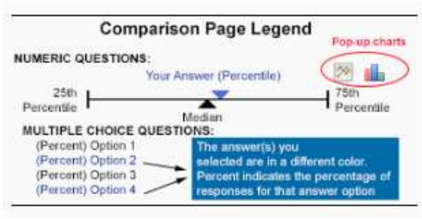
Under Counter Filter

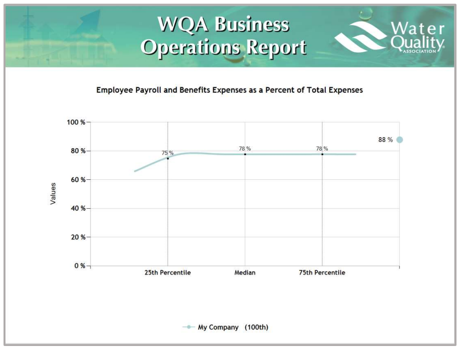
Accessing Results (when released)

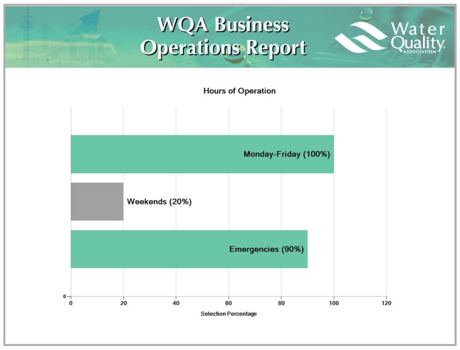
- Results are available in two formats – question-by-question comparisons and personal, dynamic reports.
  - **Results: By Question**: Accessed from the 2nd tab on your home page, question-by-question comparisons allow you to see how you compare to other participants for every question in the survey.
  - **Results: All Reports**: Accessed from the 3rd tab on your home page, personalized, dynamic reports provide you with a collection of results information presented in either chart or table format.
- To ensure data anonymity, all results are displayed in the aggregate and a minimum of 5 data points is required, even when filters are applied.
  - Numeric results are presented in quartiles, values that divide a list of numbers into quarters:
    - 25th Percentile/first quartile: 25% of the data fall below this percentile.
    - 50th Percentile/median: The median represents the middle number where 50% of answers are lower and 50% are higher.
    - 75th Percentile/third quartile: 75% of the data fall below this percentile.
  - Multiple Choice results are reported with the percentage of answers associated with each response option for that question.
  - Unless a chart is presenting multiple pieces of data (such as in a pie chart), your responses will be represented in a different color.

Results: By Question Comparisons

- From the **Results: By Question** tab, click on any question group or sub-group to begin viewing comparisons.
- Click on the icon to the right of each comparison result to view the data in a chart, which can then be saved as either PDF or PPT.





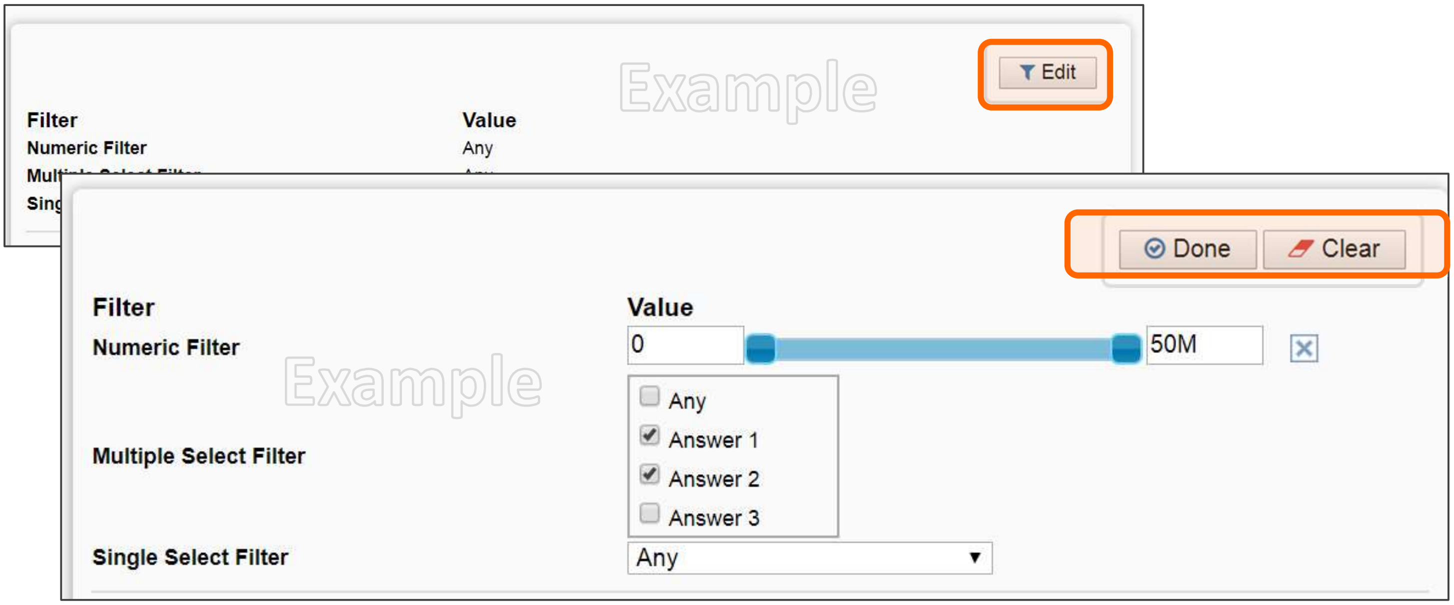


The above images are examples of the types of charts and graphs available. They do not reflect actual results. They are shown for demonstration purposes only.

Using Filters

Filters allow you to drill down and compare your answers to a subset of respondents. All results continue to be aggregated with a minimum of 5 data points, even when filters are applied.

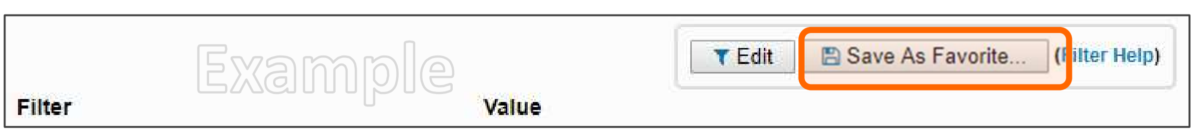
- Click **Edit** to activate the filters.



  - **Numeric filters**: Click **Add** to activate sliders.

    Use slide bar to set a numeric range by moving the blue squares or enter a number in boxes.
  - **Single-select filters (if available)**: Choose one answer from the drop-down menu.
  - **Multi-select filters (if available)**: Check the items you wish to include.
  - **NOTE**: **Any** indicates that the filter is **NOT** applied. To include all accounts that answered the question, select the full range of data in a numeric filter and select check all answer options in a multiple-choice filter.

- Watch the filter message change as you select filters. A warning message will display when you have filtered too far to return results.
- If your filters do not return enough responses, change your filter settings by:
  - Widening the range of a numeric filter.
  - Turning off a numeric filter by clicking the **X**.
  - Returning a multiple-choice filter to **Any**.
  - Click **Clear** to start over and select different filter options.
- When you have the filter settings you desire, click **Done** to close the filter area.



- Once you have found a filter setting that works for you, save it as a filter favorite to easily use again.
- Filters will carry forward onto subsequent compare pages as well as the reports page, until they are cleared.

Using Filters

Overview of Filters

In order to protect data anonymity, results require a minimum of five (5) responses in order to display. Applying multiple filters may give an error message that there are not enough responses to display results. If this happens, please widen the range or turn off some filters.

1. Location – Region
   - Region where the company is located.
   - Allows dealers to only compare their company to others in the same region.
2. Service Area Regulatory, Permitting and Licensing Requirements (Check all that apply)
   - Service area is the radius (in miles) in which the company conducts business.
   - This filter allows dealers to only compare themselves against dealers with similar regulatory requirements as themselves, such as those that require plumbing permits for equipment installations.
3. Dealership has Bottled Water Business (Yes/No)
   - A dealer having a bottled water business could impact many areas of their business, such as revenue, so this filter allows dealers to choose whether or not they want those dealers included in their comparison.
4. Total Staff – FTEs
   - This is the total full-time equivalents (FTEs) of staff employed at the company.
   - Allows dealers to compare themselves against dealers who are a similar size.
5. Installer/Service Tech FTEs
   - This is the total full-time equivalents (FTEs) of staff in this position.
   - Similar to above, allows dealers to compare themselves against dealers with a similar number of installer/service techs.
6. Total sales rep FTEs
   - This is the total full-time equivalents (FTEs) of staff in this position.
   - Similar to above, allows dealers to compare themselves against dealers with a similar number of sales representatives.
7. Total system and installation sales revenue
   - This revenue includes total billable revenue for the entire system, including labor, parts, and installation.
   - This filter will let dealers compare their performance to dealers who have a similar sales revenue as themselves.
8. Annual Hours Worked per FTE
   - This is the total hours worked per year per full-time equivalent.
   - Having this filter will allow dealers to compare their performance to other dealers who define an FTE the same way they do.
9. Business Mix – # of Residential Customers
   - This is the number of residential customers serviced by the company.
   - This filter will let dealers filter by number of residential customers, as that is expected to be the most common customer type in the survey.
10. Advertising/Marketing Expenses
    - This is the amount spent on advertising and marketing expenses in a year.
    - Dealers may wish to use this filter to compare their sales to other dealers who spend a similar amount on advertising and marketing.

Personalized, Dynamic Reports (when released)

- From your reports tab**,** click on a report name to download your personalized report.
    - **PowerPoint** reports contain a full slide deck of results in charts and graphs.

- **Excel** reports display results in spreadsheet/tabular format.

WQA Business Operations Report

DB Water Filters (Demo) Private & Confidential	WQA Business Operations Trend Report My Company's Response	Percentile	25th Percentile	Median 50th Percentile	75th Percentile	"N" # of Cos Reporting Data
Revenue						
Annual Gross Revenue	$7,500,000	100%	$2,019,388	$3,481,031	$4,865,515	6
EBITDA (Earnings Before Interest, Taxes, Depreciation, and Amortization)	$5,000,000	-	-	-	-	
Total System and Installation Sales	$5,000,000	100%	[illegible]	$1,389,511	$2,250,000	6
All Other Revenue	$2,500,000	[illegible]	$1,048,065	$1,346,130	$2,250,000	6
Expenses						
Total Annual Expenses (including Cost of Goods Sold)	$3,800,000	80%	$1,315,518	$1,630,096	$3,300,000	6
Total Capital Expenses	$20,000	-	-	-	-	
Employee Payroll Expenses	[illegible]	80%	$538,250	$1,391,696	$2,620,848	6
Employee Benefit Expenses	[illegible]	80%	$21,211	$71,652	$306,768	6
Advertising/Marketing Expenses	$125,000	75%	$21,075	$82,530	$125,000	6
Facility Expenses	$125,000	75%	$47,682	$91,200	$125,000	5
Vehicle Use Expenses	$135,000	50%	$80,436	$135,000	$135,000	5
Inbound Freight Expenses	$50,000	-	-	-	-	
Other General/Administrative Operating Expenses	$30,000	-	-	-	-	
Bad Debt Expenses	-	-	-	-	-	
Payment Terms						
Percent of annual revenue that is received in Cash (not financed)	45%	0%	90%	99%	100%	5
Percent of annual revenue that is financed by Company or Outside Vendo	55%	-	-	-	-	

- Use filters to get the most out of your results.
- Filters applied to question by question comparisons will carry forward into reports until they are cleared.