

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



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

Profile

- Company Profile – Dealership Manager
- Business 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

WQA Business Operations Report



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

Company LOGIN

User :

Password:

SUBMIT

Program is Open to WQA Dealer Members ONLY.
Not a WQA Member? Click [here](#) to join.

New User? [Click here](#) to sign-up.

[Click here](#) if you have forgotten your password.

- **Dealerships participating with multiple 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.

Current Account: Test Dealership #1

Test Dealership #1

Test Dealership #3 - Required

Welcome Message | My Account | Support | Logout

WQA Business Operations Report

Water Quality ASSOCIATION

Welcome: Test Benchmarking | Company Name: Test Dealership #1

Home My Data Results: By Question Results: All Reports Year: 2019

My Data Results: By Question Results: All Reports

Click on any section below to begin entering data.
To download all survey questions, with or without your responses, click the download icon to the right.
For site navigation instructions, download the [User Guide](#) | To view the Reporter Webinar, click [here](#)

DOWNLOAD

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

Your Home Page

The screenshot shows the 'WQA Business Operations Report' home page. At the top, there is a navigation bar with 'Current Account: DB Test Dealership #2', 'Welcome Message', 'My Account', and 'Support | Logout'. The main header features the title 'WQA Business Operations Report' and the 'Water Quality Association' logo. Below this is a green toolbar with 'Home', 'My Data', 'Results: By Question', 'Results: All Reports', and 'Year: 2020'. A blue banner instructs users to click on sections to begin entering data and provides links for a user guide and a reporter webinar. The main content area is divided into six sections: Profile, Financial, Business Operations, Compensation, Employee Benefits, and View My Results. Each section lists subcategories with status icons (green checkmarks for completed, red triangles for missing, and blue circles for active). A 'Progress Report' section at the bottom shows a bar chart comparing completion rates for 2019 (88%) and 2020 (67%). A note below the chart explains that the 2020 results are incomplete due to unanswered questions and unavailability of data.

1 My Data Results: By Question Results: All Reports

2 Profile
Company Profile
Business Mix
Staff Details
11 of 15 questions answered

Financial
Revenue
Expenses
Payment Terms
13 of 16 questions answered

3 Business Operations
Marketing
POE Installations
POU Installations
Sales, Service & Satisfaction
20 of 25 questions answered

Compensation
Staffing
Installation/Service Position Details
Sales Position Details
0 of 2 questions answered

4 Employee Benefits
Insurance Programs
Retirement Plans
Paid Time Off (PTO)
Staff Training
9 of 20 questions answered

View My Results
My Results

5 DOWNLOAD

Progress Report

Year	Completion Rate
2019	88%
2020	67%

This account does not qualify for results for 2020 for the following reason(s):

- Unanswered Required Questions: 8
- Results are not yet available for 2020

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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.

★Welcome Message★ | **My Account** | Support | Logout

My Account

All users must accept the [Terms of Use](#) and [set Communication Preferences](#) with first log-in. And you can manage other account settings on this page. If you have any questions, contact [WQA Business Operations Report Support at biztrends@wqa.org](#)

Your Info

Name: Demo Benchmarking
User Name: test
Email: support@dynemidbenchmarking.com

Account Address

Name: Test Account
Address: Address
City: City
State: AL
Zip: 12345
Country: United States

Users

Account Administrators are responsible for managing access to their benchmarking accounts. They can add, delete and manage users. All others, contact an Administrator from the list below for assistance. User Roles and Permissions are:

- **Administrator:** An administrator can add and edit users. Administrators can enter data and view results.
- **Read-Write User:** A read-write user can enter data and view results. Read-write users cannot add or edit users in the account.
- **Read-Only User:** A read-only user cannot enter or edit data. They can view data in the account and can view results.
- **Write-Only User:** A write-only user can enter or edit data only. They cannot view results.

IMPORTANT: When adding new users to your account, we recommend using the individual's company email as their Login Username.

First Name	Last Name	Email Address	User Level
Demo	Benchmarking	support@dynemidbenchmarking.com	Administrator
test	Benchmarking	support@biztrends.com	Administrator

Password

Change Your Password / Set Your Secret Question
Passwords must include: lowercase, uppercase, number, and non-alphanumeric characters, and must be at least eight (8) characters long.

Terms of Use

All users must accept the **Terms of Use** and **Cookie Policy**. The Terms of Use contains a Privacy Policy that reflects the high standards established by the General Data Protection Regulation (GDPR), a set of laws passed in the European Union. Select "Read More" for the full document.

- **Terms of Use Overview:** Any data entered by you is accurate to the best of your ability and you will not hold Dynemid Benchmarking or the sponsor of the benchmarking platform accountable for decisions made based on the benchmarking data. Dynemid Benchmarking and/or the sponsor of the platform sends announcement emails as part of the benchmarking service. By accepting the Terms of Use, you agree to receiving these emails.
- **Privacy Policy Overview:** Dynemid Benchmarking respects your personal data. We have never and will never sell it to third parties.
- **Cookie Policy Overview:** Dynemid Benchmarking uses cookies only for creating a nice user experience.

Yes, I accept the Terms of Use and Cookie Policy
Terms of Use must be accepted.

After accepting the Terms of Use and setting your email preferences above, click here to return Home.

Users with Administrator user level permissions can add, delete and manage users who have access to the benchmarking account.

Users

User Name	Email Address	User Level
test	sandbox@thehares.com	Administrator

Add / Edit / Delete Users

Select User: <new user> ▼

First Name:

Last Name:

Login Username:







Email Address:


User Level: Administrator ▼

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.



Employee Benefits

-  Insurance Programs
-  Retirement Plans
-  Paid Time Off (PTO)
-  Staff Training

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 *.



» Total Staff - FTEs 


Enter your total employed staff in full-time equivalents (FTEs) - this data will be used to calculate revenue/expense details per FTE.

[Details](#)

- 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.

» If you indicated "Other", please specify. n/a

- 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.

» Average Tenure for Staff in Position 

Enter the average tenure for all staff in this position (in years).

- 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.

Example

[Copy Prior Year Data](#)

Overview

Profile: Overview

The page at <https://keystoexcellence.schoolnutrition.org> says: ×

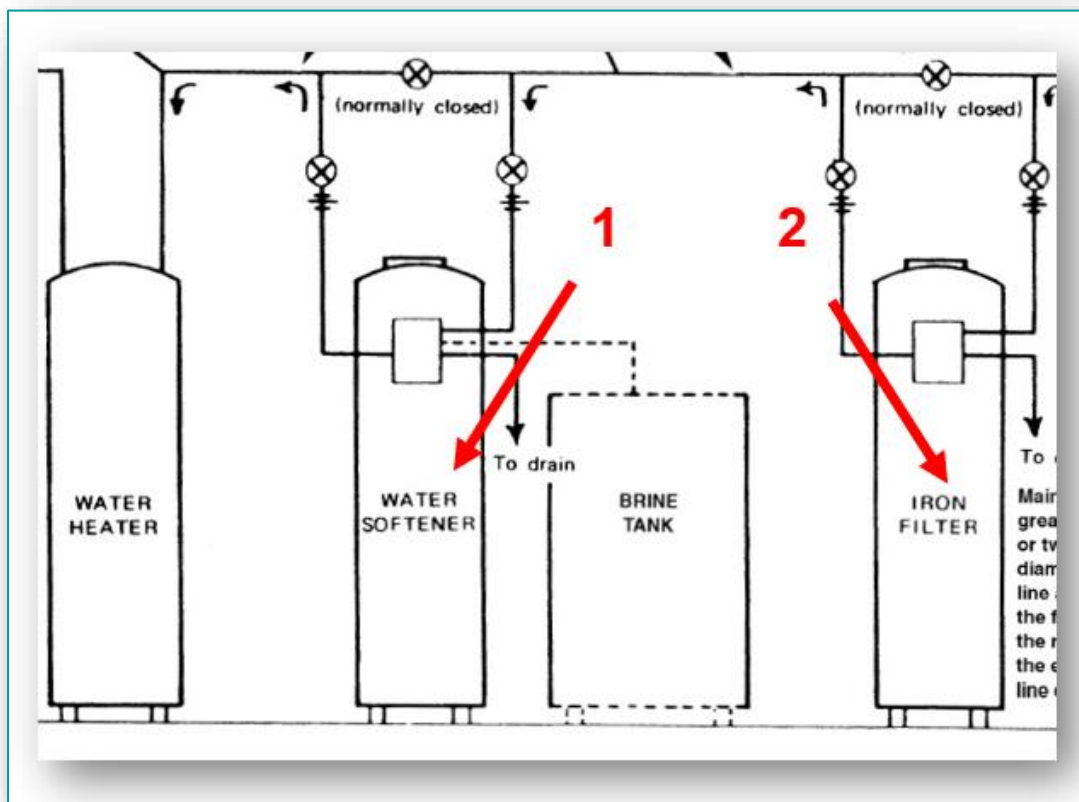
Copied 3 answer(s) from the prior year.

Please review the data and click 'Save' to save.

Example

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



Under Counter Filter



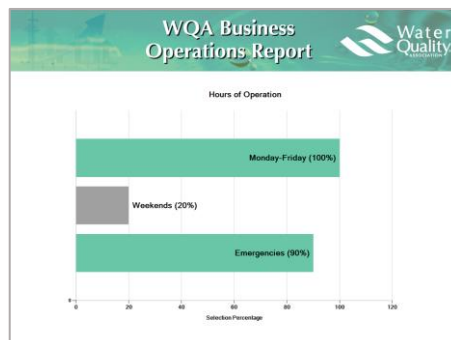
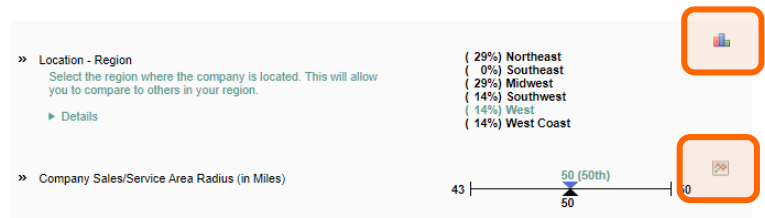
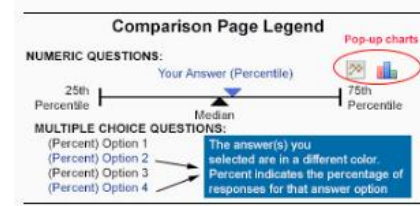
Countertop Filter

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.

The screenshot displays a filter configuration window. At the top, there is a header with the word "Example" and an "Edit" button. Below this, the filter type is set to "Numeric Filter" and the value is "Any". The main configuration area shows a slider for a numeric filter ranging from 0 to 50M. Below the slider, there are three options for a multiple select filter: "Any", "Answer 1", and "Answer 2", with "Answer 1" and "Answer 2" checked. At the bottom, there is a "Single Select Filter" dropdown menu set to "Any". In the top right corner of the configuration area, there are "Done" and "Clear" buttons. The "Edit" button in the top right of the overall window is also highlighted with an orange box.

- **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.

The screenshot shows a filter configuration window with the word "Example" in the background. At the top right, there are three buttons: "Edit", "Save As Favorite...", and "(Filter Help)". The "Save As Favorite..." button is highlighted with an orange box.

- 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.

Site Filters

To protect data anonymity, results require a minimum of five (5) responses 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 Employees
 - 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. 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. Annual Gross Revenue
 - This revenue includes income from all sources, before any expenses or taxes.
 - This filter will let dealers compare their performance to dealers who have a similar revenue to their company.
8. Company has WQA Certified Professionals on Staff
 - This filter can be used to see what potential impact having certified professionals on staff may have on a company.

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	25th	Median	75th	"N" # of Cos	Reporting Data
	Response	Percentile	Percentile	50th Percentile	Percentile	
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%	\$1,019,949	\$1,389,511	\$2,250,000	6
All Other Revenue	\$2,500,000	-	\$1,448,065	\$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	\$1,450,000	80%	\$538,250	\$1,391,696	\$2,620,848	6
Employee Benefit Expenses	\$380,000	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.