

In Summary

by Steve D'Antonio

“Steve: Attached please find the reports from the engine survey and oil analysis. I hope they are more intelligible to you than they are to me, because I have no idea how to read them.”

That quote was from a client who recently had his vessel's engines surveyed by two factory-trained mechanics sent from the regional dealer, and it demonstrates a common problem in the marine industry.

In my experience, most marine professionals don't communicate to their customers in easily understood, plain-spoken language that supports their observations, analyses, and reports. I know this because in my work as a consultant for those buying boats or having them built, I constantly deal with information that's virtually useless to those receiving it. I often act as a translator or, worse, the one who identifies errors.

I was among those guilty of not including a summary in my reports until an executive/engineer from the Smithsonian Institution enlightened me several years ago. He had retained me to carry out a series of inspections and recommendations for the Smithsonian's fleet of vessels. After I submitted the first draft report, he responded, “This looks good. However, it needs an executive summary.” I thought, “An executive summary? Why? Everything the reader needs to know is contained in the report.” After talking to him, however, I realized he was right. If my client can't easily understand a report, it's unlikely that I would be hired in the future, and confusing reports are going to lead to questions I would have to spend valuable time answering later.

An executive summary should clearly interpret findings for clients, whose time is also precious, and who may be unable or disinclined to read a detailed report laced with the technical argot of our trade. Excluding it simply invites misunderstanding and frustration, and

could result in a failure to act where action is the desired intent.

The note cited above, accompanying the oil analysis and engine survey reports, was just one of many examples of this type of communications failure. The summary “report” from the engine dealer was literally just a mass of numbers in columns, disgorged directly from the engine's electric control unit, which represented various engine readings, temperatures, pressures, etc. It lacked a simple paragraph or even a single sentence saying something like: “All the readings obtained on the sea trial were within the engine manufacturer's specifications; no action is required or recommended.” Or, “Highlighted observations fall outside the manufacturer's specifications; the following actions are recommended....”

Just as important, the two highly trained, certified mechanics included no personal observations. Were there any defects? Was anything out of the ordinary? Are any changes or upgrades recommended? My own observations for the engines alone included 11 citations, at least three of which—a loose motor mount, exposed block heater wiring (an electrocution risk), and exhaust riser temperatures well above the limit established by the American Boat & Yacht Council standards (a potential burn and fire hazard)—could be deemed critical.

Customers who pay for an expert's analysis, particularly from a factory-trained dealer or technician, are entitled to the benefit of that expert's training and experience, rather than a bare minimum, check-the-boxes, the-computer-says report. Particularly in engine surveys, I expect factory-trained mechanics to identify any details that *violate the engine manufacturer's installation guidelines*. After all, who is better qualified to provide such observations?

Oil analysis reports also fall into this category. To some extent, the lack of detail and an easily understood

summary could be blamed on the lab. Most labs don't cater to laypersons, making it the responsibility of the mechanics or surveyors to either send their samples to a lab that provides useful summaries (they do exist; see “Reading Oil Analysis Reports” on ProBoat.com), or be prepared to interpret the results for the customer. Inevitably, those paying for the analysis will ask, “What does it mean?”

In the above case, other than an invoice, the oil analysis report was sent to the customer without detail or explanation. I immediately noticed two obvious flaws. First, the “unit time” and “lube time” hours were erroneously shown as 0, which essentially told the lab that it was brand new equipment, that it and the oil had never been used. Of course this was a used vessel, with over 800 hours on the clock. The second flaw involved the lab itself, which indicated that all results were “normal,” also a signal that something was amiss. How could “new” zero-hour oil contain *any* contaminants, copper, aluminum, iron, and sodium, some in appreciable quantities, as these samples invariably did? Had the analysis reports been reviewed by a professional in preparation for drafting an executive summary, these errors would have been identified before they reached the customer's eyes.

Ultimately, failure to provide executive summaries is a result of poor training and the ability to get away with it. Those who provide such summaries, however, exhibit the professionalism many boat owners and buyers expect, or at least hope for. **PBB**

About the Author: For many years a full-service yard manager, Steve now works with boat builders and owners and others in the industry as “Steve D'Antonio Marine Consulting.” He is the technical editor of Professional BoatBuilder, and is writing a book on marine systems, to be published by McGraw-Hill International Marine.