Site visits, surveys and inspections in the wake of Covid-19 restrictions.

The long term impact of the Covid-19 pandemic is looking to be widespread and lingering. With the repercussions of lock down, social distancing and furloughing staff likely to affect every industry in very different and unexpected ways.

My focus, as a technical sales engineer at Ajax Equipment, is in the bulk solids handling sector and how the Covid pandemic may effect bespoke machine manufacturing once restrictions are eased. It may force us to look at different ways of gathering information from clients. There will no doubt be difficulties faced if a site visit is unavoidable. There will have to be precautions for FAT's/machinery inspections at supplier's premises.

From a personal point of view, despite nationwide furloughing, enquiries are still flowing in at Ajax Equipment at a steady pace. Which shows that many of our customers have pivoted well to a more home based work force.

None of our customers have requested site visits over the last few weeks and all of the information gathering required to specify machines has been done virtually by phone/email/teleconference.

There is going to be a point in the future where this will change and a technical site survey will be essential on an enquiry.

The Differences

To differentiate between an office based sales visit and technical site survey.

An Office Based Sales Visit:-

Visiting an office and having a meeting with the client with a view to having a conversation about a process requirement or process issue.

Although a face to face office based sales visit is a good way to extract information for an enquiry, with the two way flow of information the most efficient in this setting. I don't consider this to be essential to the process of developing a technical spec on a machine. I can predict these will be widely restricted by companies in the foreseeable future, even after general lockdown is lifted. These will most likely be replaced with web video calls.

A Technical Site Survey:-

Visiting a factory with a view to take measurements, inspect existing machinery, fault find industrial processes.

I believe it is an essential visit and I personally feel this is unavoidable but still may be difficult to conduct months after lockdown is eased.

Difficulties with a technical site survey in the future could range from:-

- **As stupid as it sounds.** Getting on site in the first place. It may be difficult for you and your contact on site to arrange a survey due to company wide restrictions, no matter how essential you and your contact deem the visit. Just convincing a parent company that your visit is essential to specifying a machine I feel may become difficult and more drawn out.

- **As simple as it sounds.** Communication while on the factory floor. This is difficult at the best of times, with many loud processes and ear protection prevalent on many sites. Add to this a possible face covering requirement, conducting technical site visits could become very difficult. I can see this being very frustrating, being someone who already struggles to hear people speak on a noisy factory floor. And that's without a face covering obscuring their lips and muffling their voice.

- **As dystopian as it sounds.** Introduction of something like a “Free from Covid-19 ID pass”. Now this one is a bit out there but I can see it happening in some industries

(pharma, food). An ID that confirms that you have been vaccinated of Covid and are certified clear of the virus. I can't see this one being widespread but it could be introduced in some of the more strictly regulated industries.

My main concern with increased virtual passing of information and restrictions on site visits, is that the information passed could be wrong or misconstrued. Clients who may not have the technical skills conducting site surveys themselves. Passing across dimensional and process information that is erroneous or misleading. This would lead to problems and delays further along the project.

Technology has come a long way to improving the virtual passing of information with screen sharing and stability of video conferencing but when it comes to technical site surveys personally there is no replacing having your feet on the factory floor, head in the process (figuratively speaking), exchanging information in person with the client.

Machine Factory Acceptance Tests

In regards to machine FATs/inspections at machinery suppliers premises, I believe it's a joint decision between the company and it's customer as to whether an "in person" machine FAT/Inspection is 100% necessary. Photos and an in depth FAT document may suffice.

We (Ajax) have had good success in the past conducting FATs as part of a video call where we have shown the customer different elements of the machine via video, communicating and conducting an FAT totally through this medium. I can see this maybe becoming more

common as more and more manufacturers ramp back up into full production but fears are still prevalent regarding social distancing.

If a on site FAT is unavoidable the hosting party should have all the necessary precautions in place and implement a procedure that protects both the employees of the hosting party and any visitor present for the inspection.