9 inputs determine the right system monitoring.

A distributor-facing pre-quote checklist. If the customer answers most of these at the first call, the second call is the quote.

01

What's driving this, energy audit, ISO 8573-1 compliance audit, leak survey, or continuous monitoring?

The driver determines the instrument set, and the instrument set determines the price band. Energy audit → flow meter + leak detector. ISO 8573-1 audit → analyzer set scoped to the parameters in the compliance finding. Leak survey → handheld detector (audit-service or tool sale). Continuous monitoring → fixed transmitters wired to the plant historian. Get this question answered first and the rest of the conversation scopes itself.

02

What's the inlet pressure and flow range at the install point?

Every instrument has a pressure rating and a flow range. **Thermal mass meters need 15-20 pipe diameters of straight pipe upstream; pressure sensors need to be rated 1.5x the system's maximum spike pressure with safety margin; dew-point sensors need to span the installed dryer's rated output with room to spare.** Quoting an instrument without the install-point conditions is the most common source of returns at this product category.

03

Does the customer have an existing PLC, SCADA, or plant historian to log into?

If yes, the integration path is 4-20 mA or, for modern PLCs: IO-Link / Modbus, and the readings land in a system the customer already reviews. If no, the customer needs a **standalone data logger or local display** bundled with the instrument; an instrument without a logging path is half a tool. This question commonly turns a single- instrument quote into a complete monitoring-program scope.

04

For dew-point installs, what dryer technology is being verified (refrigerated, desiccant, membrane)?

The dryer technology sets the required measurement range. **A refrigerated-grade meter on a desiccant install reads at the floor of its range with degraded accuracy** and produces no useful trend. A desiccant-grade meter on a refrigerated install is more instrument than the application calls for. Match the sensor to the dryer.

05

For ISO 8573-1 installs, which compliance regime, which target class, and which parameters are in scope?

FDA 21 CFR 211, GFSI / SQF / BRC, USP <797>/<800>, ISO 14644, NFPA 99 : each has its own purity requirements. **Many customers need only two of three parameters instrumented** (particle + water for food contact; water + oil for pharma on desiccant). Scope to the compliance driver; selling all three when only two are required is overscope and slows the deal.

06

For leak-detector audits, what's the customer's industrial electric rate?

The detector's dollar-figure output is calculated from the customer's $/kWh rate. Without the rate, the leak report produces CFM figures but not the dollar number that drives the repair decision. **Get the rate from the utility bill before the walk-through** and configure the detector's cost conversion accordingly: the dollar figure is what closes the repair PO.

07

For pressure-sensor installs, is this status indication, filter differential, or control-loop feedback?

Each job sizes a different sensor. Status indication can be a basic gauge or economy electronic sensor. **Filter differential is the highest-payback application** and benefits from a documented change-out threshold (typically 8-10 PSI for coalescing). Control- loop feedback requires 4-20 mA or IO-Link into the customer's controller, sized to the controller's input card spec.

08

What's the calibration program, annual, semi-annual, or undocumented?

Audit-grade instruments are only audit-grade if the calibration is current. Quote the calibration program alongside the instrument from day one: annual for most applications, semi-annual for pharma, every 3-5 years for non-audited pressure sensors. Customers who buy the instrument without a calibration program are buying a year of compliance and then a problem.

09

Is this a single-instrument install or the wedge into a multi-point monitoring program?

Most "I need one instrument" conversations turn into 3-6 instruments within 12 months: flow at the header, leak detector for the survey, dew point at the dryer, pressure at every filter. **Scope the conversation to the program, not the single install**, and the customer's monitoring spend lands with SPC instead of getting distributed across whoever happens to be quoting the next stage.