



PRODUCT INFORMATION BULLETIN



PIB # 0511.05

May 11, 2005

Series Impact: F187, L177 (And ALL Other Fortis Line of Forklifts)

TO: ALL HYSTER DEALER PRINCIPALS, SALES MANAGERS, & SALES REPRESENTATIVES

FROM: DALE GRINDER – INSIDE SALES MANAGER

SUBJ: Improving Your Fortis™ Demo Success Rate

The purpose of the demonstration is to give the salesperson an opportunity to present their product in the best possible way – in the prospect's operation, to the right people and with specific points to prove.

Several factors can affect the success of a Fortis™ truck, or any other model, demonstration including:

- Understanding the customer's operation and intended use for the forklift.
- Knowing who the decision makers are, their "hot button" issues and how to address them.
- Understanding how to structure the demonstration to address the objectives of the three categories of decision makers.
 - o The Principal (owner, general manager, etc.) – Primarily concerned with making the right investment. This concern is sometimes masked behind an inference that the acquisition will be based on price.
 - o The Maintenance people – Primarily concerned with ease/convenience of keeping the equipment running *within their levels of expertise*. They are skeptical of new technology and resistant to changes that might be beyond their current technical capabilities. In some cases, to "look good" to the Principal, they state interest in reducing costs and improving uptime.
 - o The Operators – Primarily concerned with doing his/her job with as little effort and in as much comfort as possible. They dislike change, once they're accustomed to the forklift they use now, it's hard to persuade them to change.
- Getting a commitment from the customer that all decision makers will attend the demonstration.
- Setting a time, date and agenda that will ensure attendance by all decision makers.
- Scheduling delivery of the correct and properly prepared forklift to ensure an on-time start for the demonstration.
- Knowing who your competitors are and what to include in your demonstration to counter their claims.
- Your preparation to demonstrate and prove the benefits/added value of the customer's "hot button" concerns and features that will benefit/add value to each category of the customer's operation.
- Preparation of the forklift to ensure proper operation during the demonstration. ***Transmission operation and truck set-up can especially affect a Fortis™ truck demonstration.***

TRANSMISSION OPERATION

The powershift transmission oil in Hyster forklifts must meet the performance specifications of Deere and Company Standard JDM J20. This specification was instituted in 1981 along with the launch of the H40-60XL series and an all-new transmission design incorporating compact multi-disc clutch packs and clutch discs with an innovative non-metallic facing material designed to provide smooth inching, controlled power direction changes and cool operation. (*The Fortis™ transmission clutch packs are improved versions of this early design having **20% thicker disc facing material.***)

The JDM J20 oil is compatible with non-metallic disc facing materials and has a viscosity index similar to 30W motor oil designed to “provide superior performance of wet clutches and brakes, with minimal gear wear”, and with low foaming properties, extreme pressure properties, high resistance to temperature breakdown and high lubricity. ***In contrast, Dexron® as used by other forklift manufacturers has a viscosity index similar to 5W motor oil and is not compatible with non-metallic disc facing materials leading to the disintegration of the material over time.***

The H40-65XL transmission had an oil capacity of 9.5 quarts; the S40-65XM had an oil capacity of 11 quarts and the S&H40-70FT has a transmission oil capacity of *21 quarts*. This “large” quantity of “thick” oil results in sluggish Fortis™ truck performance when the transmission oil is cold. To maximize your demo results, we recommend the following.

- ✓ Prior to beginning the Fortis™ truck demonstration, bring the transmission oil to operating temperature – optimally **140 degrees F.**
- ✓ With the drive wheels chocked and park brake set, start the engine, place the transmission in forward or reverse and allow the engine to idle and circulate oil through the transmission for approximately 5 minutes or at least until the engine is a full operating temperature as shown on the instrument panel.
- ✓ Operate the truck until the transmission is at temperature – usually from 1 minute (carrying a load) to 3 minutes (no load). Maximum accelerations to top speed, full auto-decelerations and full speed power reversals will accelerate warm-up.

TRUCK SET-UP

The DuraMatch® transmissions allow adjustments for top speed, acceleration rate, auto-deceleration, power reversal and inch/brake overlap to improve productivity and reduce operating costs according to virtually any operating condition/requirement. These adjustments are accessed by password and set-up through the instrument panel in the Set Travel and Braking area with intensities for each ranging from 1 to 10. Settings for each come from the factory pre-set at the mid-range, which may or may not be applicable to the customer's operating requirements.

In addition, the demonstration truck you're using may also be your dealerships Service Training unit that has settings “all over the place”. Refer to 2200SRM1131 to familiarize yourself with accessing, navigating and setting up functions through the dash display.

Prior to the Fortis™ Advance or Advance+ truck demonstration, adjust the transmission operating characteristics according to the customer's operating and productivity needs. Another consideration is the aggressiveness of the braking set-up. The correct setting may be important in ‘shuttle’ vs. ‘long-run’ applications.

If necessary, be prepared to change settings during the demonstration. Adjustments that could positively or negatively affect the demonstration might be:

- o **Top speed set at 1** – the truck will be slow.
- o **Acceleration rate set at 1** – the truck will get to a (slow) top speed very slowly. *Note: Acceleration rate set at 5 or less can limit draw bar pull capabilities. However with this value set at 9 or 10 the drawbar pull is greatly enhanced. Lack of awareness in this area can be a deal breaker in some applications.*
- o **Auto-Deceleration set at 1** – the rate of deceleration is “soft” compared to a 10 setting that might be considered too intense for handling loose loads. But, a 10 setting provides the minimum rollback rate if “holding” on a ramp or grade with a load on the forks is important.
- o **Power Reversal set at 1** – provides the “softest” direction change with the longest travel distance to a stop and slowest clutch pack lock-up for the least amount of tire spin. This could be appropriate for operation on sealed and smooth surfaces, or when handling “loose” loads. A more intense 10 setting might provide more productivity in a shipping/receiving shuttle application.
- o **Inch/Brake Overlap set at 1** – provides the least amount of inch/brake pedal travel when inching. A 10 setting with a relatively long “pedal throw” might make inexperienced operators more productive.

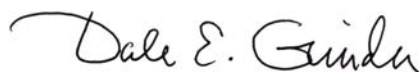
SUMMARY

As taken from a 1964 Hyster Industrial Truck News Selling Tips column by Peter Lewis - Hyster Company Sales Training Manager from 1960-1975. Pete said and I quote; *“Planned right, the customer demonstration can be a thorough, impressive production; without planning, it can become a fiasco.”* Is this your problem?

The suggestions outlined in this bulletin are not NEW! If you have experienced this problem during a demo, we strongly encourage you to make sure you have taken the time to first complete a site survey. This will ensure your understanding of the customer's application needs, as well as providing you with a benchmark that will allow you to set up the truck performance parameters to meet those needs prior to demonstrating the unit.

As always, we appreciate the support of our distribution network and the sales organization. Good Luck and Good Selling!

Sincere Regards,



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