



ONBOARDING PLAYBOOK

Sales Consultant

Team Archotech

Conroe TX

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1. Purpose, Scope, and What “Good” Looks Like

This handbook hands over the Arcotech Sales Consultant role as it is actually performed in the field: a technical problem-solver who protects customer drilling performance and Arcotech’s reputation by making correct product-fit decisions, documenting reality in Salesforce, and orchestrating fast response when tools underperform or fail. Your job is not to “sell parts.” Your job is to keep rigs turning the bit by matching power section geometry, elastomer, and fit to real downhole conditions—and by being the person who answers with facts when the phone rings at 02:00.

Success in this role is measurable. Customers keep calling you first when something goes wrong. Engineering trusts your escalations because they contain complete data. The shop and logistics teams prioritize your requests because you are precise, honest, and easy to work with. Salesforce contains defensible run history tied to API numbers and serial numbers, not vague stories tied to rig nicknames.

Important Note: In this business, “memory” is not a system. If it is not in Salesforce, it did not happen. If it is not tied to the correct API number and motor serial number, it is worse than missing—it poisons the dataset and eventually causes the next failure.

This document is written as an operating manual. Read it once end-to-end, then use it as a reference during live work.

2. Role Overview: Where You Sit Between Lab and Dirt

You are the middle layer between Arcotech’s R&D/chemistry capability and the rig floor reality. Internally, you translate field conditions into engineering variables (temperature, mud chemistry, operating parameters, wear patterns). Externally, you translate engineering constraints into decisions a company man and directional driller will accept at the doghouse table.

Your authority is real but bounded. You can discount within defined levels, you can refuse a configuration that will fail, and you can initiate escalations that trigger engineering and QC response. The role is high-stakes because the cost of being wrong is not a returned part—it is rig downtime, NPT, and reputational damage that lasts years.

The rhythm of the job is field-driven. Expect early mornings, late evenings, and after-hours monitoring. The work is not evenly distributed; it spikes when a rig is in a hot lateral with high torque demand, aggressive mud, and a tight fit.

3. Daily Operating Rhythm (Field Reality)

Start your day by anchoring on active assets, not on accounts. Your mental model must be “serial number first.” Rigs change, crews rotate, lease names get renamed, but the serial number is the asset you are responsible for and the only stable anchor for run history.

A typical day begins before sunrise with texts and photos from night shift crews. Use that window to identify which wells are at highest risk (high temperature, oil-based mud, heavy solids, high differential pressure, high DLS sections). When you arrive in Conroe, walk the shop floor early. Talk to the reline team and the foreman (notably Big Mike) and look at incoming

stators and wear patterns. That physical evidence will teach you more than any spreadsheet and will keep your recommendations grounded.

The middle of the day is quoting, inventory checks, curve generation, and customer calls. Expect to spend time in the truck traveling to Houston's Energy Corridor or flying to Midland. The end of the day is follow-ups, Salesforce hygiene, and preparing for the next morning's rig reports.

Insider Tip: Your most reliable "dashboard" for shipment risk is the 16:00 Conroe shop walkthrough. If a stator that must ship tonight is not on the cooling rack by late afternoon, the shipment is already slipping—act immediately and control the narrative before the customer discovers it.

Close each day by ensuring Salesforce reflects reality for every active run you touched. The role becomes unmanageable when you "catch up later." Later does not happen.

4. Tools and Systems You Must Be Fluent In

You will use many tools, but three categories matter operationally: documentation, modeling, and field proof.

- **Salesforce (customized for oilfield operations):** mobile-first logging, asset/run history, competitive intel, billing/AFE correctness, and internal visibility.
- **Arcotech proprietary modeling / "digital twin" software:** performance curve generation with temperature and fluid effects, redlines, and export-to-PDF reporting.
- **Field proof sources:** rig EDR systems (e.g., Pason, RigCloud, TOTCO), mud reports, photos, and physical teardown inspection observations.

Your "always available" field kit is not optional. Keep spec sheets and fit charts physically accessible in the truck. They are how you win arguments on location without sounding theoretical.

5. Operative Processes

5.1 Salesforce as the System of Record (Non-Negotiables)

Salesforce is not admin work; it is the company's memory and your legal defense. Log calls immediately—ideally before you start the truck—because the details that protect you are the first to disappear after two more phone calls and a two-hour drive.

The minimum standard is that every meaningful rig interaction results in a Salesforce entry tied to the correct well and the correct asset. Treat the API number as the primary key. Well names change; API numbers do not.

After each rig call or site visit, update the record while the facts are fresh. At a minimum, capture the well identity, where they are in the hole, what fluid they are pumping, how hard they are running the motor, and which serial number is actually downhole.

Important Note: The fastest way to destroy Arcotech's reliability claims is "ghost hours." If you clone yesterday's report and forget to update hours, mud weight, or differential pressure, you are not just making a clerical error—you are corrupting the dataset engineering uses to design the next tool.

5.2 Required Salesforce fields (field discipline standard)

Use these as your baseline. Do not treat them as optional.

- Well API number (primary identifier)
- Well name (secondary; helpful for humans, not for data integrity)
- Current depth and well section (vertical / curve / lateral)
- Mud system type (WBM/OBM), mud weight, and key mud properties as available (viscosity, chlorides, OWR for invert)
- Bottom-hole temperature (measured or best estimate; update when reality differs from plan)
- Flow rate (GPM), differential pressure, rotating vs sliding hours, circulating vs drilling hours
- Motor serial number and stator fit (and rotor sizing if tracked)
- Failure code picklist (including "pull-to-green" when it comes out working)
- Field Notes (color of fluid, chunking on shakers, LCM events, unusual vibrations)
- Expected TD / expected pull date (drives shop scheduling and inventory planning)

- Competitive Intel (competitor presence, pricing pressure, trial tools)
- Billing address and AFE number (invoice survival)
- Key contacts and roles (including night pusher / night DD cell numbers)

5.3 Mobile logging routine (fast, repeatable, defensible)

In the field, speed and accuracy beat elegance. Use voice-to-text with a structured script so the app captures the variables consistently. Use a noise-canceling headset (e.g., BlueParrott) because rig noise will corrupt dictation.

A proven routine is to log the call as you leave the trailer—before you drive—using a “radio check” style. Speak in short, explicit phrases and end with a verbal marker so you know you completed the thought.

Insider Tip: Offline sync failures are common in the Permian. Before you hit save on a long Field Notes entry, take a screenshot of the text. If the app drops the entry in a dead zone, you still have the content and can re-enter it on Wi-Fi.

5.4 Common Salesforce failure modes and how to prevent them

The most dangerous errors are predictable and preventable if you assume fatigue will happen.

- **Clone trap:** Cloning yesterday’s report and only changing depth creates ghost hours and wrong mud properties. Enforce a “no-repeat rule” for mud weight, hours, and differential pressure: re-enter them every time, even if unchanged.
- **Offline sync conflicts:** The app may appear to save but later discard. Screenshot critical notes before saving; verify sync when service returns.
- **Logging what you were told instead of what the rig shows:** Company men and DDs may understate abuse. Cross-check with EDR traces when stakes are high.

Transition from Salesforce discipline into technical work by treating each entry as the input set for modeling, quoting, and escalation.

5.5 Performance Curves: From Modeling to Customer-Ready PDF

Performance curves are the “proof document” for drilling engineers. They are also a promise. Generate them with the same seriousness you would apply to a contract, because customers will operate based on what you send.

Start with the exact power section geometry (e.g., 7/8 5.0 stage, 6/5 8, etc.). Then replace the baseline “water at room temperature” assumptions with the real world: mud type, mud weight, bottom-hole temperature, and expected operating window. Temperature and chemistry change elastomer swell, which changes interference fit, which changes torque and RPM.

Build the curve to reflect reality, not optimism. If you know the rig’s pumps are tired or their achievable flow is lower than claimed, model conservatively. Add redlines for maximum recommended differential pressure and stall pressure based on the *swollen* elastomer condition, not the surface condition.

Once the curve is correct, package it professionally. Export a formal PDF with Arcotech branding, the relevant configuration and identifiers, and operating-limit disclaimers. Upload the PDF to the correct Salesforce record so anyone can retrieve it if you are in a dead zone.

Important Note: Never send a phone screenshot as the official curve. It looks unprofessional, it loses metadata, and it becomes impossible to defend later when someone claims they were “never told” the limits.

5.6 Using offset data to win trust

Do not rely on theory alone. Overlay the modeled curve with offset run data from similar wells in the same county/basin when available. Use it to explain where the “sweet spot” is in practice (e.g., theoretical 1,000 PSI differential vs observed best performance at 800 PSI in that formation). This is where you differentiate from big-box vendors.

5.7 Product Fit: Elastomer, Geometry, and Rotor Sizing Decisions

Product-fit is the core technical responsibility. Treat it as a gatekeeping process: if temperature and mud chemistry are wrong, everything downstream becomes damage control.

Begin every fit conversation with two questions: predicted bottom-hole temperature and mud system type. Then expand into the details that actually kill elastomers: aniline point (for OBM),

chlorides, solids/sand content, H₂S/CO₂ presence, and additive events (LCM, lubricants, friction reducers).

Temperature drives compound selection and fit strategy. Below ~250°F, standard nitrile/HNBR may be acceptable. As temperatures approach 300°F and beyond, move into high-performance elastomers (RD202 / VantageTech series) and adjust fit to account for thermal swell. High temperature often requires a looser fit or undersized rotor so the tool becomes “right” downhole after swelling.

Mud chemistry can be as destructive as heat. Low aniline point OBM behaves like a solvent and can soften rubber. High chlorides can embrittle rubber. H₂S requires sour-service-rated elastomers—do not compromise.

Dynamic fit is the combined effect of temperature and chemistry over time. When a customer introduces a new synthetic mud or additive package, request a sample and involve the lab for soak testing when feasible. A 48-hour soak test can prevent a multi-day NPT event.

Insider Tip: Do not accept the well plan temperature at face value in hot laterals. Add a realistic margin (often 15–20°F) for frictional heating and localized conditions. Build fit for the temperature you expect to see, not the temperature the spreadsheet claims.

5.8 Geometry vs DLS: the “long motor in a tight curve” trap

Directional plans can be mathematically correct and operationally impossible. High-lobe, long power sections (e.g., 9/10) can be too long to survive high dogleg severity. If the housing must bend through aggressive DLS, internal rotor/stator contact increases and destroys elastomer. Override the spreadsheet and recommend a shorter geometry that can physically make the turn.

5.9 Reading Mud Reports Like a Failure Analyst (Not Like a Salesperson)

Most people glance at mud weight and stop. Do not. Mud is a chemical and abrasive environment that directly attacks elastomer and drives wear.

Scan oil-based mud reports for:

- **Aniline point of base oil:** low values indicate aromatic, solvent-like behavior that can soften nitrile bonds and reduce life.

- **Chlorides:** spikes can embrittle rubber and correlate with cracking and torque fluctuations.
- **Solids content (especially fine sand):** high sand turns the motor into a sandblaster; expect rapid seal loss and abrasive tracking.
- **Additives and events:** LCM pills (walnut shells, fibers, CaCO_3) can jam the motor; lubricants/friction reducers can cause chemical swell.

When you see heavy LCM or a sudden chemistry shift, call the rig immediately. Your goal is not to be right later; it is to prevent the next hour from becoming the failure hour.

5.10 Pre-Run “Pre-Flight” Checks at the Rig

When the motor is about to go in the hole, verify the surface constraints that can make a correct tool look like a failure.

Start with the mud pumps. Ask for pop-off valve settings and baseline circulating pressure. If the rig has only 500 PSI of headroom before pop-off, a high-torque motor that needs 800–1,000 PSI differential cannot perform. Do not allow the rig to blame the motor for a rig limitation.

Then verify bit TFA. Nozzle restriction can create backpressure that overstresses the motor and can contribute to elastomer damage or debonding. Also ask about top drive RPM limits and vibration behavior; combined RPM (top drive + motor) and harmonics can punish bearings and stator rubber. Recommend shock subs when the surface system is known to be abusive.

Close the pre-flight by aligning expectations: confirm operating redlines and ensure the decision-makers understand the consequences of exceeding them.

5.11 Quoting Workflow: Pricing as Risk Management

Quoting is not “price sheet work.” It is a structured risk decision that must reflect environment, expected wear, and commercial strategy.

Begin in Salesforce CPQ, but start with the well profile. Low-risk wells can follow standard pricing. High-risk wells (hot, heavy OBM, abrasive formations, long laterals) require environmental risk multipliers because the cost to Arcotech is real: premium elastomer, custom rotor sizing, and higher probability of expensive relines.

Structure quotes to manage procurement psychology without sacrificing margin. Provide two options when appropriate:

- **Option A:** lower day rate with standard repair billing (customer carries damage risk).
- **Option B:** higher day rate with damage waiver/performance tier (predictable cost for the rig; protects relationship and reduces invoice fights).

Use discount authority correctly (see next section). Do not “buy” work that will destroy margin unless leadership agrees and the utilization/strategic case supports it.

5.12 Discount Authority and Approval Levels

Arcotech discounting is tiered to protect margins that fund R&D and premium elastomer development.

- **Level One (self-approve):** up to 10% discount on standard rentals or reline jobs.
- **Level Two (manager approval):** 11%–20% requires regional sales manager sign-off with justification documented.
- **Level Three (executive approval):** >20% requires VP of Sales / GM approval with a formal business case (12-month spend, utilization, strategic value).

Service credits and “no charge” runs are a special category. You may classify a run as warranty only when QC and the shop foreman verify a manufacturing defect (e.g., debonding due to process failure) rather than out-of-spec operation.

Important Note: Never approve deep discounts or service credits to stop someone from yelling. In the oilfield, yelling is often a negotiation tactic and a blame-shift. Use data, EDR traces, and teardown evidence before you concede cost.

6. Incident Response & Escalation (Rig Down, Underperformance, Failures)

6.1 First Response When the 02:00 Call Comes In

Your first 30 minutes determine whether the account stays stable or becomes a competitor opportunity. Control your own process.

In the first minutes, collect facts, not opinions. Get the API number, depth, BHT, time of event, standpipe pressure before/after, and whether rubber is coming over the shakers. Then verify digitally: pull EDR traces for the last hours and look for patterns that distinguish swelling/interference creep from repeated stall spikes.

Move quickly into logistics. Identify the backup tool and confirm its fit matches the environment. Mobilize hotshot trucking with GPS coordinates, not lease names. Then call the company man with a concrete plan and ETA, not vague reassurance.

Insider Tip: Do not call the rig phone to “investigate” during night shift unless necessary. Use calibrated texts to the night DD/toolpusher framed as questions about surface equipment. It reduces defensiveness while signaling you are watching the traces.

6.2 NPT Playbook (First Hour)

When a power section failure causes downtime, treat it as a coordinated recovery mission.

First, determine where the tool is physically located (downhole depth dictates your time window). If they must trip 12–14 hours to surface, you have a logistics window to stage replacement iron before they are waiting on you. If it failed shallow, you are already late and must execute emergency protocols.

Bypass normal freight during NPT. Use hotshot drivers who can reach lease roads reliably. Pay the premium; it is negligible compared to rig downtime.

Control the narrative with a factual incident notification email to the operator’s drilling engineer and operations manager. State what happened, what is being done, and the ETA. Do not speculate on cause until teardown evidence exists.

Mobilize teardown capacity in Conroe early. Clear the bench, charge inspection equipment, and alert engineering/QC that an NPT tool is inbound.

7. Teardown & Failure Interpretation (How to Read the Tool Like a Forensic Report)

When failed tools return to Conroe, participate in teardown with the shop team. The wear pattern is evidence. Learn to distinguish failure modes and to avoid common misreads.

Mechanical chunking is jagged, violent elastomer loss, often near the bottom end, typically tied to stall events and excessive differential pressure. Heat damage/hysteresis presents as cracked, wrinkled "alligator skin" and indicates internal heat generation and inadequate cooling flow or too-tight fit. Abrasive wear shows smooth tracking grooves along lobes and points to high solids and poor solids control. Debonding is the most serious manufacturing-related pattern and requires QC verification.

Do not commit the classic error: blaming rubber alone. Cross-check steel and system components.

- Inspect rotor chrome plating for heat checking or flaking (interference/overheat indicator).
- Inspect bearing assembly condition; blown bearings can cause eccentric rotor motion that destroys stator rubber.
- Inspect external housing for belling/polishing on one side (evidence of severe dogleg and rotation through a bend).

Insider Tip: When a failure "looks like chunking," do not assume mechanical abuse until you rule out chemical swell. Chemical swelling can choke the rotor and create chunking-like damage. Rotor chrome condition and EDR pressure creep patterns often reveal the truth.

Use teardown findings to decide commercial posture: full-price billing for abuse/out-of-spec operation, shared responsibility in gray areas, or warranty/service credit only when manufacturing defect is confirmed.

8. Logistics and Shop Coordination (How You Prevent Late Tools)

8.1 Shipment Slip Early Warning and Save Plan

Manufacturing is constrained by thermodynamics. Stators must cure and cool; you cannot rush it without creating debonding risk. Your job is to detect schedule slip early and execute a save plan.

Use the 16:00 shop floor check. If the tool is not on the cooling rack by late afternoon, assume it will not ship on time. Immediately check forward hubs (Odessa, Carlsbad) for near-fit alternatives, evaluate performance impact, reserve the asset, and proactively call the company man with a plan and revised ETA.

Frame delays as quality protection, not incompetence, and pair the message with an actionable mitigation (backup tool en route).

8.2 How to Work With Dispatch and Warehouse (Relationship + Precision)

Logistics teams respond fastest to people who reduce friction. Treat dispatchers and warehouse staff as operational partners, not as servants.

Provide complete shipping requests: GPS coordinates, gate codes, on-site contact who will sign, and turn-by-turn directions with landmarks. Avoid vague "Rig 42 near Pecos" instructions; they waste time and create delivery failures.

Respect DOT hours-of-service. When a run exceeds legal limits, request team driving or a relay plan rather than demanding illegal driving.

Important Note: The fastest way to lose internal support is to send partial information and then escalate emotionally when the inevitable confusion occurs. Precision is a form of respect—and it gets your iron moving.

8.3 Honest Reline ETAs (Buffer by Design)

Relines are multi-stage processes: burnout, cooling, sandblast, bonding agent, injection, autoclave cure, cooling, inspection, paint, strap, ship. Build a mandatory buffer into customer-facing ETAs because machines fail and QC can reject a pour.

If the shop says "ready at noon Wednesday," communicate "Wednesday midnight" externally unless you have explicit confirmation of slack capacity and no competing priorities. Delivering

early makes you a hero; delivering late makes you a liar.

When priorities conflict, triage based on true operational emergency (rig down vs backup need) and revenue/relationship impact. Communicate the truth directly; do not hide behind vague excuses.

8.4 The Big Mike Interface (Twice Daily, Data-Driven)

Maintain a disciplined relationship with the shop foreman. The shared objective is zero wasted oven time and zero broken promises to the field.

Exchange a live dirty-iron return schedule with tracking details (driver phone, GPS, bill of lading). If a truck stops moving, notify the shop immediately so they can fill oven slots and avoid idle capacity.

In return, demand brutal shop reality: machine issues, staffing gaps, compound batch failures, and true throughput. Use that intelligence to prevent overpromising in the field.

9. Field Communication Standards (How You Win Disputes Without Escalating Conflict)

9.1 Gold-standard client notes (defensible, specific, time-stamped)

Write notes as if they will be read during a dispute. Include who was present, where you were sitting, what screen you referenced, and the exact parameters observed. Document not only what was happening but what you advised and how the customer responded.

A defensible note ties operating conditions to spec sheet limits and records that the customer knowingly exceeded them. It also records physical observations (e.g., shaker evidence, mud appearance) that support later root cause conclusions.

9.2 Using spec sheets to “win” on location

Do not argue opinions. Put the laminated fit chart or spec sheet on the table and explain the physical mechanism: thermal swell closes clearance, interference increases friction, differential pressure spikes cause stall, stall causes chunking, chunking causes trips and downtime. Give consequences, not commands. Let them choose, but ensure the choice is documented.

10. Competitive Intel and Account Protection

Track competitor presence in Salesforce immediately when mentioned. Competitive intel is not gossip; it is early warning that pricing pressure or trial tools are coming. Use it to prepare commercial strategy (options A/B quotes, volume locks, damage waiver positioning) and to alert leadership when a master service agreement risk emerges.

When a customer demands a massive discount, do not concede on the first ask. Buy time, build a business case using run history and utilization, and trade margin for commitments (volume locks, term, scope). Never give away margin without a commercial "hostage" that protects Arcotech.

11. Current Status, Open Points & Handover

This role is operationally stable when three things are true: active assets are tracked by serial number, Salesforce entries are current and accurate, and the shop/logistics interface is predictable. The handover must therefore focus on continuity of asset tracking, customer expectations, and internal relationships.

11.1 What you must hand over on Day 1

Provide the successor with a clear, current picture of the live field portfolio and the internal cadence.

- The **active asset list** (serial numbers) with basin/location, current status (deploying/drilling/demobilizing), and cumulative rotating/sliding hours.
- The **highest-risk wells** (hot laterals, aggressive OBM, high solids, sour service) and the current fit/elastomer strategy for each.
- The **open QRTRs/escalations** with status against the 2-4-24 milestones and the next expected engineering deliverable.
- The **pending shipments and relines** with promised ETAs, buffers applied, and contingency options staged in Odessa/Carlsbad where applicable.
- The **key contacts** per rig (company man, DD, toolpusher, night shift contacts) and any relationship sensitivities.

- The **commercial posture** per account (pricing option preference, discount level used, any volume locks, any recent service credits and why).

11.2 Open points to verify immediately after takeover

Treat these as the first-week audit items. Close gaps before they become failures.

1. Verify Salesforce data integrity for all active runs: API numbers, serial numbers, hours, mud properties, and expected pull dates.
2. Confirm that performance curve PDFs are uploaded to the correct Salesforce records for active opportunities/wells.
3. Review competitor intel fields for accounts under pricing pressure and align with regional manager on strategy.
4. Validate that the shop's dirty-iron return schedule matches reality (driver tracking, arrival times, oven slot planning).
5. Confirm after-hours monitoring coverage for the highest-risk rigs and ensure you can access EDR systems reliably.

Important Note: The most common handover failure is inheriting "clean-looking" Salesforce records that were cloned and never corrected. Assume nothing. Audit the last 7–14 days of entries for each high-risk asset and reconcile against rig reports/EDR where possible.

11.3 Relationship handover (internal and external)

Introduce the successor to Big Mike and the logistics dispatch lead as operational partners, not as names in an org chart. Make the successor's first interactions frictionless: share how you submit shipping requests, what information dispatch expects, and how you communicate delays honestly.

Externally, do not "announce" a handover as a disappearance. Frame it as continuity: the successor is being added to ensure coverage, especially after-hours and during travel. Ensure the successor has the customer's preferred communication style (text vs call), and explicitly transfer any ongoing disputes, sensitive failures, or pricing negotiations.

12. Final Operating Principles (What Keeps You Employed)

Operate as if every recommendation will be tested by physics and every failure will be tested by blame. Ground-truth rig data, document reality immediately, and never trade long-term reputation for a short-term sale. Use the system—Salesforce, curves, QRTR cadence—not as bureaucracy but as the mechanism that keeps rigs drilling and keeps Arcotech positioned as the premium option.

Transition from reading this handbook into action by building your first day around the active asset dashboard, the shop floor walkthrough, and Salesforce hygiene. Everything else becomes easier once those anchors are in place.
