**Overcoming the Three Biggest Obstacles in Setting up a Lube Program**

**Presented by: Trevor Shaffer**

Good morning, everybody. Welcome to this week's Redlist webinar. My name is Trevor Shaffer. I am the director of customer experience at Redlist. I've worked at Redlist for over 5 years now. I've held a lot of different positions at the company. I started working in, implementation and project management, and that's kind of been my lane doing that onboarding, for our customers and helping them, with that. So, today, that's gonna be the area that we're gonna focus on for this webinar. We're gonna focus on overcoming the 3 biggest obstacles in setting up a lubrication program. Over the years I've been at Redlist and in my work experience before working at Redlist, I worked on several maintenance teams in the food industry, and in those in that experience and my experience at Redlist, I've come to see.

A few different really, these 3 key different obstacles that prevent our customers and lubrication teams from having a really accurate and really well-done lubrication program. So today, the 3 that we're gonna focus on are going to be, 1st, the organization and sequencing of assets and equipment. 2nd is in the asset identification, and then 3rd, we're gonna look at, ensuring the accuracy of the lubrication management tasks, and with each of these, we're gonna break these down into kind of two sections. One, the problem that we see with most of our customers and what the hang-ups are for each of these, and then we'll look at how Redlist solve those how solves those problems and enables our customers to build and create really effective lubrication programs.

So going into the first one here, the organization and sequencing of assets. The problem that we see with many of our customers and many of the facilities that we work with is that most of these asset lists that we look at or equipment lists that we look at have been put together and maintained by multiple people at a facility throughout the years. You get a new plant manager that comes in, a new lubrication manager, maintenance manager, whomever it might be, and when they come in, they may have their own definition of what an asset is, what a component is, what needs to be maintained, and then how it drops into the list.

At times, we see, you know, finance may interject and you know, based on how costs need to be managed in accounting systems, they kind of have their opinion on how these asset lists need to be organized and set up, and when you have that many different, I guess, cooks in the kitchen, different fingers in the pie, a lot of times people can struggle to truly agree on what an asset or what a piece of equipment truly is and how it should be set up in as part of a lubrication program. This is a critical piece to setting up the lubrication program because if you don't have a clear and concise list of what your assets are, what those individual pieces of equipment are, and what needs to be maintained on each of those, then all the future work that you do in trying to set up the lubrication program just becomes kinda convoluted and confusing there.

So at Redlist, we've come up with a few different solutions to this. The first is just gonna be taking time and making time truly to sit down and to bring in the different interested parties in this asset list to have a conversation around, okay, what truly is an asset? What's a component? What do we want as part of our list? The way Redlist breaks this down is assets or the equipment that needs to be maintained and then the components, and the reason we split these out, a lot of systems, what you'll see is you'll have kind of parent and child assets, and so they all kind of everything looks like an asset.

Maybe you're looking at a conveyor, that's one asset, but then you also have an asset for the motor, for the rollers, for the gearbox of that conveyor. What Redlist does is we handle it a little bit differently. We break it into assets and components. So the asset in this, you know, in that conveyor example, the asset would be the conveyor, and then the components are gonna be the individual pieces of the conveyor that maintenance needs to be performed on. So we would take the electric motor, we would take the gearbox, the rollers, the bearings. Each of those would become components that live underneath or are associated with that asset. Just making it very clear that all of the tasks, all the maintenance that is done on the components of that asset, the cost associated with that, the product usage, all of that is gonna roll up to the conveyor itself, and then we can do reporting whether it's for accounting teams, we can make it very clear what needs to be done as part of that asset.

So the first piece to solving this problem is gonna be having that conversation, taking the time, setting aside time to sit down and really review your asset list. If you're going in and trying to set up a lubrication program, if you skip this step, it's just gonna cause more and more confusion the further you get in the process. We've seen, over the years, you know, helping our customer set up their new programs. I've seen everything from individual bearings called assets, electric motors, gearboxes, up to, you know, entire buildings being called an asset for accounting purposes or whatever it might be. You've got a building with 3 or 4 lines of equipment in it, and they're that whole building is being called an asset, and so when you're when you have that level of variability in your asset list, it does get very confusing to understand what really needs to have maintenance and lubrication tasks applied to it, created on it, and then pushed out to your lubrication teams to get that managed and taken care of.

But once you have that conversation and you come to an agreement on, okay, what are we going to call an asset? What's gonna be a component, then the next step in that is to create clear asset hierarchies, and in Redlist, we call these asset groups, and this feature really does help clarify or kinda put boundaries around that conversation of what is an asset and what's a component and things of like that. So as you can see here, we have a couple of different examples where we have the ability to tag locations buildings, and lines within Redlist, and I can show that quickly here as we look. So we're in Redlist now.

I'm gonna come over here to our asset section. I'm just gonna jump into here and take a look at our asset groups, and our asset groups allow us to set up a hierarchy of assets. So rather than having your buildings and components and assets all tagged as assets in the system and treated the same way, we allow you to break that out, and in here, you can set up you know, maybe I've got my entire steel mill set up in here, and then I can nest underneath that the different areas that are a part of that steel mill. So for example, here we've got system number one. I come in, we've got our receiving, our milling, our press, our filtration.

So we can take those assets, that asset group, that's system one, and maybe this system one, is nested under building a right, and then I've got system one under that. As part of system one, I have these different groups of assets, and then when I can nest this further, I can have a list of my assets that are actually a part of that receiving pod in that receiving area, a part of system one. So by doing this, what it does is it allows us to have a very clear hierarchy of what is where, what's associated with it, but then allowing us to maintain the asset level of being the key piece of this so we're not confusing and mixing in asset groups or lines of buildings as individual assets.

We're keeping assets on the equipment level, but then providing the ability to nest them and organize them in a hierarchy that that makes sense. It will make this information easy to find and easy to report on for accounting purposes or whatever it might be. The next thing we're able to do with these assets and with these asset groups is we're able to sequence these assets and these asset groups. You can see that here. We're able to do a quick click and drag and move these assets around, and we can even do that up here on the group level. Why this becomes important is in Redlist, we provide the ability to sequence routes based on the sequence of an asset or a sequence of groups.

So sequencing routes become a big piece in organizing a lubrication program, and typically, that can be a very complicated task because you've got, you know, a list of your equipment, a list of the components on that, and then a list of tasks that need to be done, and if you're just doing a quick import of that data, it can be very tedious to, you know, drag and drop individual tasks into their correct order. So what we've done at Redlist is we've created the ability to sequence your asset groups. So if I'm creating a route for my system one, I can set this up and set these different groups here in the correct order. So I wanna make sure I hit my lubricators and they go out.

I want them to hit the milling section first then receiving then my press and then by filtration. I can set that here, and then within each of these groups, I can sequence the assets in the order that they show in that area or in that line, and then what that does is it will take when I go and I generate my routes off of this information or off of this area, it's going to put all of my tasks in the correct sequence order. So if I've got 5 or 6 tasks, you know, greasing bearings, checking the gearbox oil level, whatever it might be for each of these discharge screws that I have here, don't have to go in and manually sequence all the tasks there.

I can just sequence my assets, and then those tasks in this route will show in that order. So, again, making sure we take time to organize the assets and get them properly sequenced is gonna save a significant amount of time at the backend of setting up a lubrication program by eliminating a lot of the time energy, and effort it takes to properly sequence the tasks that that the lubricators are gonna be performing on their routes.

So that's the organization and one, of those assets. Again, this critical foundational piece, we gotta get that done first, make sure everyone's on the same page with what an asset is, what a component is, make sure our hierarchies are set and everyone's in agreement on that, and then making sure that those are properly sequenced. If you get that done properly, it's gonna set us up for success further on down the road, in setting up an effective lubrication program.

The next piece here that we're gonna dive into is gonna be asset identification. So the issue we see at a lot of facilities when we go out into their facility is there's insufficient tagging or identification of their assets and their equipment. Without this proper identification, the lubricators going out into LUBTEKs, going out into the facility to perform these tasks are flying a little bit blind, and they may be just working off of, you know, a lot of people we work with. They've got lubricators that have been working for them for 5, 10, 15, 20 years, and so they just know the equipment, so they know where to go. But the issue with this is as that information is passed down from lubricator to lubricator, naturally, items, tasks, components, assets are gonna be missed as a maybe there's you have a lubricator that is retiring and moving on and he's training the new lubricator coming in, he may not pass down all the assets that need to be hit, and so if things aren't properly tagged throughout the facility, there's no way for the for new lubricators or for, you know, existing lubricators to make sure that they're hitting each of these assets that they're completing all of the tasks that need to be done on those on that piece of equipment as well.

So Redlist, what we've done is we've created we have QR codes and NFC tags that we can apply as part of our lubrication setup. These tags are attached directly to the equipment, and then they're associated with an asset, in your organized asset list, and then they can be scanned at any time to access the required and recommended lubrication tasks and information. This and information can include everything from the frequency that the task needs to be performed, the products that need to be used, the volumes of these products. But what this does is it just makes it very simple and easy for lubricators to walk through the facility. So walk up and scan a tag and know exactly what needs to be done rather than just relying on tribal knowledge or whatever it might be.

Another piece of this asset identification that becomes very critical is and you'll see this in in the next slide that we go to, but when it comes to auditing the equipment and making sure that we have the correct information here, we have the correct tasks outlined, products to be used, volumes to be used. If we don't have proper asset identification or asset tagging done ahead of time, it really slows down that process. So it's our teams come out and they're walking through the facility with your teams to audit the equipment, make sure we got everything in there and set up correctly, and to it, it just makes it very difficult to do that if we don't have good tagging as part of that process.

So I'll walk you through quickly here how to set up tagging, how we can link our tags to equipment in Redlist, and then the information that then is available to our teams by, or to your teams by doing this tagging. So I'm gonna jump over to my phone here. Give me one second. So I'm pulling up my Redlist app here, and then you'll notice down in the bottom right corner, we have that little blue scan button there. So I tap on that it's going to bring up my scanner, and what I have is I have a QR code here, and these QR codes are what can be attached to any of the pieces of equipment that you have.

You can zip-tie them to that equipment. We recommend coming up with consistent locations for these tags so that lubricators can easily find them. Typically, we see our customers attach them to the, you know, know, to the disconnect box or you know, right next to the to the motor on the supply to the motor. But just put it in a consistent area so that people don't have to walk around the equipment trying to find these tags. Once I've got these tags set up, I can go ahead and scan that tag, and what it'll do is it's gonna open up the asset that is associated with that tag, and if I do one thing here if I unlink that QR code, so this is a blank QR code that I am associating for the first time.

I can begin selecting that scanner, and scan that tag. It's gonna say this tag is not associated. I'm gonna go ahead and hit the link to the asset. I can search for the asset that I want to associate it with. Say I wanna do it to that role stand, and I can link it to that role stand, and now anytime this tag is scanned, it's gonna pull up this information for me. So at this point, I can see, you know, a photo of the asset. This one's got, you know, the 3D drawings in there, but you can add a real photo of it. I can see the routes or the work orders that need to be performed on this.

I can tap on that and see a list of the tasks that need to be done. Like here, we've got some oil samples that need to be collected that are overdue. I can come in and I can capture vibration readings or temperature readings on this asset as well. But it just allows me to quickly find and identify this information by having the assets properly tagged and properly identified. So without this information, again, it becomes very difficult for lubricators to truly know if they have if they're at the right piece of equipment. A lot of times as we're walking around with customers, people refer to equipment by a bunch of different names, and so if we don't have proper identification and make it very clear as to what each piece of equipment is, there can be a lot of confusion generated there, and then even with knowing what a piece of equipment is, the lubricators may not know exactly what needs to be done.

You know, as I said, with that tribal knowledge being passed down, they may have only learned 4 of the 6 tasks that need to be done or whatever it might be. Whereas what this allows them to do is it gives them all very clear information being able to scan that tag, look, and see everything that needs to be performed for that particular piece of equipment. Jumping back over to the slideshow here. Going into the going into the 3rd.

The third obstacle to setting up an accurate lubrication program, we're looking at lubrication tasks task accuracy. Now what we see, at most of our customers is that a lot of this has to do with the limitations put on them by their existing systems, whether that's a large ERP system like an SAP or a JDE, and most times even smaller. CMMS, you know, computerized maintenance management systems. When they create work orders or routes, they only allow a single asset to be associated with a work order. So what you'll see is this is where, again, creating your asset list and making it accurate is important because what we see a lot of times is, you know, very, very broad task instructions.

Let's say, you know, go lubricate roll mill number one, but there are no details on how many bearings are there, how many motors, gearboxes are there, or even broader, you know, go lubricate everything on line one, and again, that's just gonna open up to confusion, missed lubrication tasks, and ultimately, equipment failures because bearings are getting missed because gearboxes are going unchecked, and so this is AAA big issue we see, and a lot of this is just it's forced on customers by the limitations of their the systems that that they're using. At Redlist, we have the ability to, first of all, have the ability to do one thing that makes us unique rather than having a single asset for a work order, we have the ability to put multiple assets onto a single work order.

So rather than saying, you know, go perform all the lubrication on line one, I can have a route that says weekly line one lubrication. But then underneath that, I can have let's say there are 10 assets that make up line one, I can have tasks for each of those, assets and what needs to be performed. So if I need to on asset number one, I need to grease the bearings. I need to, you know, level check on the gearbox and grease the motor bearings. I can have 3 tasks for that asset number one on the entire route. So not only are my lubricators knowing, okay, today, I need to go lubricate line one. They know, okay, there's 10 assets on line one, and on each of those assets, there's 3 tasks that I need to perform and without all the details and information there.

The way we get that information in is we've got two different ways to do that. 1st is our remote onboarding assistance. So we have remote teams, here at Redlist that will go through your equipment manuals and will pull out all of the manufacturer's recommended lubrication tasks. So we can pull those in, go through the greasing schedules, go through the recommended maintenance, and pull all that information out for you so that you and your teams don't need to spend the time and the hours that it takes to do that. We can also do this if you've got good information in an existing system and you and you're just switching over, we can also work through that as well.

Review that information, massage it, make sure it is set up properly, that's got all the correct information in it, and then we can go ahead and put that into your Redlist account. The last one, that last piece here is the on-site lubrication audit. So we have teams that go to our customer's facilities. We can come on-site and spend anywhere from 3 days to a week to two weeks, whatever it needs to be, and we can walk the facility with your teams. We can help with identifying assets, tagging those assets, and then auditing the equipment. So we can stand there with your team, look at a conveyor, and say, okay. Hey. This conveyor has got an electric motor.

It's got the gearbox. It's got rollers. It's got our bearings. We wanna make sure all of those get added to this conveyor, then we look at one, and say, okay, what tasks need to be performed on each of those components. Like gearbox, we wanna do a level check and refill every month, and then we wanna do a drain and you know, a drain and fill every year, every two years, whatever it might be, and all of that can be done through our mobile app. So typically, this experience of an on-site lubrication audit with some of the traditional methods that are out there, these on-site audits take months at times, and it's a lot of guys walking around with clipboards making notes, that they then have to go spend another two weeks taking that information and putting in the spreadsheets or putting it into a report that they can then send to you as their customer with their recommendations, or they've got a spreadsheet and they're trying to fill that out as they go.

At Redlist, we've taken that entire process and built it directly into our mobile app so you can walk around with just a cell phone or a tablet. You can and you can capture all this information as you're walking around. You can capture the assets, the asset hierarchies, and the sequence. You can capture the components on each of the assets. You can capture the tasks that need to be performed on each of those. Take photos of everything so that if you've got a bearing that's hidden up behind a piece of guarding that is getting missed repeatedly, you can make sure that you take a photo of that bearing and highlight it, attach that directly to the task.

So when your lubricator walks up and you scan the tag, he sees, hey, I need to make sure that I'm greasing the drive side bearing. Like, I have no idea where that is. He can tap on it, see the photo, and he knows, oh, hey, that's up behind this piece of guarding. I'm gonna need to lock this piece of equipment out before I can do it, or it's up behind this piece of guarding, but I've got a remote grease circle over here on this support that I can go hit that'll grease that. So we can capture all that information, and that can again happen very quickly over a period of days, maybe a week or two rather than what is traditionally taken, you know, a month or two of on-site work plus another month or two of remote work before you ever see any results from a typical lubrication charting or lubrication audit activity.

But that's gonna be kind of the last key obstacle here that that needs to be overcome is making sure that that that that information is accurate. If we don't spend the time to go through the manuals, if we don't spend the time to do the audit and get that information in there accurately, then our lubrication program is really no good because if we're not making sure that we're hitting every bearing, every gearbox, every roller, then we're still gonna have those equipment failures that are gonna lead to downtime, that are gonna lead to increased costs for our facility and reduced uptime of those machines.

And that's where we're there in conclusion. I mean, that's kind of the key piece to all of this is we are we're trying to do we're trying to set up accurate and effective lubrication programs so that we can avoid those avoid downtime so that we can avoid getting you to know, having plant managers, you know, pointing the finger at our lubrication teams anytime an issue happens. If we have a good lubrication program where we're tracking exactly what's being done, who's doing it, and when they're doing it, then those conversations can very quickly become more productive conversations around, hey. You know, we got all the lubrication done. Let's look at it. Is there an engineering issue here?

Is there an operations issue? What are the true issues that are causing these downtime issues rather than, you know, typically what we see is, you know, anytime something fails, fingers get pointed at lubrication teams because it's kind of the easy one to point fingers at a lot of times? Because most of the facilities that we work with, don't have well built and well maintained and well-managed lubrication programs because they are they are they they're fairly difficult to set up. They're not necessarily difficult, but they take time, and we read this. We understand that a lot of times, our customers don't necessarily have the time to go through equipment manuals or to walk around and perform their own loop charting or loop audit of the equipment. So we provide those services. We can take that work on, take that out of your hands, and then we can provide you with an accurate and well-built lubrication program so that you can avoid the downtime that is caused by lubrication issues.

Before we, wrap up today, are there any questions that any of you have for me?

K. Well, if there are no questions, we appreciate your time. Thank you for, making time to join this webinar today, and as always, if you have any questions or you want to learn more, please, visit our website at getredlist.com and reach out to our sales team. They'd be happy to walk you through, show you a demo, and give you a little bit more in-depth look at how Redlist helps, its customers manage, maintain, and set up, effective lubrication management programs. Thank you.