Lubrication Management Pitfalls:
A Comprehensive Discussion
Presented by: Dallen Davenport

Okay. Thank you, everybody. We're going to get started. I'm going to make sure that I'm you know, just let a few more people in here in a second, but I think we should be good.

All right. K. Well, thank you so much everybody for hopping in today. My name is Dallen Davenport and today, the topic is going be kinda more of a mini webinar session, more of a discussion on a few there are probably several scenarios that each of you deal with when it comes to dealing with, you know, improving and enhancing your lubrication management processes and how to or even how to begin, and maybe you're further down the line but are, you know, just facing different challenges. So we're just gonna narrow it down to a few topics today, but the topic today is just a more just you could say brief slash mini comprehensive discussion on some of the key pitfalls that that we can be aware of that we may want to consider implementing in our day to day, and before we do that, just a little bit about myself.

I am Dallen Davenport. I have been here with Redlist now for a little over, 8 years. I've had lots of wonderful experiences, being able having the opportunity to rub shoulders with people who are a lot more experienced and a lot smarter than I am, but being able to go on-site to several of these places across, you know, several countries and states, it's been a privilege and gives you a lot of insight of how the problems that we face are very similar and no matter what region of the world you may find yourself in, and so my goal today, excuse me is to just briefly intro you know, do a quick introduction on maybe a little bit about Redlist.

Also, just top hopping into some of these topics about some of the things that will improve and contribute to your lubrication management processes with leadership approaches, you know, data analytics. Redlist has powerful tools for you to measure your success, and then also just things to consider in terms of the lubrication that you use today, maybe things that could be changed for how you would implement what you apply to your equipment in the future, and then you know, we'll leave some time for the end. But I imagine like I said, we'll probably take no more than, you know, 20 to 30 minutes on this mini-webinar. So just to kick off, you know, if we're talking about some things that are you know, we want to be aware of, a huge thing that that I will say, you know, people have shared, this isn't, you know, obviously just from my perspective, but that a lot of people have shared with me is the importance of having the right strategy and leadership or even just having the right personnel in place to begin with to kick off your lubrication management strategy.

Maybe you're finding yourself in a shared situation that I've seen where your teams are smaller these days, but your workload is heavier, and so it's just about trying to decide what it is that can be accomplished in the short term as well as in the long term for your team. So, also to put in a plug, you know, we are excited. Part of just what we're talking about today could be kind of a brief introduction to some of the topics that Redlist will be releasing soon. You know, in the foreseeable future, I could say, I

can't say exactly one, yet, but we'll be having an e-booklet, and we have an amazing author who helped us with this project, and we'll be excited to release that book to you in in the future.

So please stay tuned to that, and we'll we'd love to keep you in the loop. So, you're here today. You're interested in seeing how you can improve, and so we wanna make sure that we can, you know, reward you for being those people who are part of our audience. So, just one other thing here that I wanna say is, you know, when we're talking about leadership, you know, a lot of a lot of the questions that need to be asked are what are the outcomes that we want to achieve? If we were to picture in our minds the end goal, what is success for us, and it could be, you know, in in a specific time frame, maybe for 2024 or in the next 5 years.

You know? What is that target that we are aiming for, and then ask yourself if, you know, what are the things that that we need to learn and know, and also who are the people that need to be involved for us to move forward to accomplish that goal? I'll also add that when setting a goal, you know, there's a lot that goes into it. It's not it's not only just having a body count. It is saying, do we have the right people and also the right structures in place to help us measure if we're going to reach this outcome, which I'll talk about in one, little bit, as well as do we have the do we have the right systems in place that are going to support us for training?

Are we going to be able to help people see that there's truly a reward for them, not just the company, and also, very importantly, safety? In this strategy, as leaders, it's critical to make sure that the approach that we take moving forward is a safe one and also one that will, foster an environment that helps performance improve, but not obviously at the expense of your team's safety, and so just things to think about there is ask your asking yourself, you know, who you know, first of all, you know, what are the what's that outcome, but who are the right people, and there's a great book that I love. It's called who not what, and I, you know, I highly recommend it.

It applies to all areas in in personal life, in the business realm that that teaches you before you just start running and figure and decide what you're going to do, ask yourself if you have the right people and who those people are that are gonna help take you to that next level. There's also a framework by the well-known investor and author, Ray Dalio. He has many books, but one of my favorites is the book called Principles, and he introduces a specific framework. When thinking about the outcomes you want and the goals you want to set, there are so many out there. One of these resounds with me because as you set a goal, there is a very quick step before getting excited and saying, this is my goal, and here's what I'm going to do.

There's kind of this cycle that you should take yourself and your team through to take a real self-heart-to-heart evaluation to say, well, what are the problems or risks that we will face in order you know, as we start going down that path? Are there certain things that we do procedurally at our facility today that might inhibit accomplishing this goal that we've set? Are there are we lacking the people? Do we even have the right systems in place? Do we have the right vendors? Right? Are we buying from the right people? You know, all of these things that you can identify ahead of time of what those risks may be, and then diagnosing possibly what you can do, you know, self-prescribing and saying, well, okay.

We probably expect these problems to come up. Here is how we can handle those. Here's how we'll react to those, and then designing fully that playbook and how you'll go about doing it, and then you go and do it. So. I love this visual too because I think often, maybe even in our own lives, we wanna set a

goal, maybe break down what we're going to do without some additional consideration of what maybe those problems and risks are that we should be honest to ourselves about. Diagnose them. Design a way to overcome those when they do happen, not if they happen, and then move forward, and next, you know, knowing that that they're so now that you've decided on Dallen, you've set these goals, you've identified what those risks are that you may come up against.

There's now this phase to say, okay. You know, if I'm gonna go to the moon, I clearly can't drive my car to the moon. I need the right vehicle to get me to the moon. Right, or you know, where whatever that vehicle may be, and sometimes that vehicle, you know, really can be seen, like we've talked about with the personnel, but also the systems that are in place, and so now that you have your goal and you can work backward from that, it's really important to identify, what are those systems that you need to start looking for and evaluating and start putting together the right questions to your vendors of what that may be, and I'm not only talking about software, though.

You know, red list, you know, being a platform that provides a lubrication management solution, data analytics, all of those amazing things. There's also, you know, systems in place for just how you deal with your vendors or maybe even consolidating the vendors that you have, and so, we'll talk about that as well, and just as you think about it too, you know, these are this is going to make you even better every time as you're talking to these potential suppliers or potential technology vendors. You're gonna know and have a solid view of what questions to ask to achieve your goal and find the right vehicles to get you to the outcomes you desire, and then once you can find those right systems and implement those and have those in place, this is where you can start setting up your data analytics.

What Redlist helps also provide that where you can put in all of the things that you need to do for lubrication rounds to help support your maintenance team, how they're gonna communicate with production, you know, really getting that set up. But then you need to know, well, how is that going? How are we performing at meeting these goals and outcomes in the short term and the long term? So things to consider are, you know, what are what are the things that we really should be measuring? I've been at facilities before where every data point under the sun from you know, is being gathered, and it gets packed into this conglomerate of a dashboard.

But in the end, there may not be a good understanding of what to do with that data, and so it's important to maybe pick your focuses and make sure that they're aligned with your outcome so that you can know, okay, these are the critical things that I'm looking for. Perhaps maybe it's water damage, in your reservoirs or maybe it's temperature levels for your bearings. You know, the, Excuse me. But it's just trying to identify some specific things so that your goals are even better as clear as possible, but that your measurement tools are also just as clear to know how you're doing, and then you know, it gets down to as you measure how you're doing, it's beginning to mesh in and standardize your procedures for lubrication.

This is something that data analytics coupled with the right training will improve over time. It's not something that is going to happen overnight. This isn't something that Redlist sells either. We don't have the magic bottle that that gives you instant success. We're not, you know, not a get-perfect quick scheme, but there is power in using the data that you're now starting to get and this and now deciding, okay. How do we standardize? Maybe I'm at a facility that has 4 buildings and everybody's running in opposite directions using different lubricants. You know, whatever those things are that you can identify, you can begin that process and ensure that, again, that it's aligned with the outcomes you

desire, and this, especially, what I've seen is you people as they've started this process, some really quick wins could be, you know, consolidation of your vendors, and that's that can sometimes can bring an immediate cost to you and also help you get yourself to the right teams.

I like to call them you're, you know, your vendors as kind of your dream Avengers team where you can build those even stronger relationships and commitment to them, and then they as well can help you just have a more simplified approach into what you need to do. As well, other things to consider as you standardize are looking at looking into what those OEM requirements are and making sure that if I have the same machine over here versus over here we are aligned in in how we plan things out. It is common that if you can or it is common that if you get big enough that, you know, your maintenance planner team, you know, may not be on the same page one, how they do certain things just because they don't see each other every day.

So this is just something to consider looking for those opportunities now to standardize, and in return, that's going to simplify how you train, how you continue to run your systems. It's going to clean up the data that you're going to be analyzing and just bring together, you know, that package of having everybody be on the same page from a performance as well as safety standpoint, and a few case studies to show just to kinda talk through that. I apologize. Hit the wrong slide. I just wanna I hope that it's gonna show this. Let me see.

Maybe someone can give me a thumbs-up. Are you able to see this screen here?

Of the case study?

Maybe I'll do this. Maybe I'm gonna just do it. Just to be safe, we're gonna stop sharing and re-share real quick.

Okay. Great. Awesome. Okay. I think this is good. Thank you, Craig, for raising your hand on that. So just to provide a couple of case studies here, you know, this is, this was an example of a mill that was at a corrugated, plant where they were wanting to make sure that they were consistent and standardized in their operations, and so, you know, as far as their strategy was concerned, you know, they were aware of several challenges that they were facing, especially just staying compliant on top of, you know, making sure they were compliant on caring for their assets, completing their lubrication routes on time, and just helping drive the right accountability tools in the process, and just knowing simply, you know, are we getting the what we need to be lubricated, and you know, when it comes down to, you know, some goals like it, this one is probably, I could say, a very common one, and so to overcome, you know, some of these challenges, there was really the question of, do we have, you know, do we have the right people, and it's not always easy to remove the people.

So one of the re one of the things they needed to overcome was just the resistance in general of implementing change and new technology, and so they were, they were able to identify a feature and spin it in the right way to say, hey. In the Redlist platform, we allow you to, as technicians, prove that you truly were physically present to complete your lubrication rounds. That way people will get off of your back if something has a failure and they wanna go on a witch hunt and start pointing fingers, you're protected, and so instead of looking at technology as an adversarial thing, they were able to get their team on board and know that this these systems can actually protect them and also guide them to doing

things more efficiently, and so one of the things, you know, as they started, they were able to, you know, the person I'll just read the quote here.

One of their managers said without a tool like Redlist that manages lubrication programs down to the point that it has proof of presence and the ability to easily audit the process, your lubrication programs are not going to be as consistent as they need to be. Your lubrication is not consistent, then reliability is not going to be consistent either, and so, you know, in the end, they were able to, you know, see that they were way faster in being able to audit how things were going and achieve that that outcome of asset compliance and being on time with completing their work, but also helping provide training and make adjustments for the for those who are struggling to achieve the goal of staying compliant, and another case study that I, enjoy, I'll just pull up here as well, is, this one was a plant that was dealing with a lot of bearing failures, and so for them, for you know, being compliant was is key.

For them though, specifically, they wanted to drive down their belly their bearing failures. They were having some happen on almost a weekly basis. So they wanted to drive that down tremendously as that was contributing to a major cost on their production but also just eating up a lot of time for their maintenance, and so where this action item section, you know, they set up their strategy to and decided that the system that they would implement would be the Redlist platform, and so they were able to actually go on site with the red list team and together audit all of the lubrication points that existed at the plant. They were able to also decide on, you know, what those right lubricants should be, and in front and really standardized, you know, the right lubricant at the right frequencies and also in in the on the right assets, and this this in the end helped them consolidate what they were doing as far as what lubricants to manage, but also this this helped them organize their you could call it playbook of how they would go about attacking the route completion plan, and so in the end, you know, the impact was that they were able to achieve a 100 percent compliance, and they had also noticed that for all of the assets that they had charted in the plant, I think there were there were some that they said they still needed to set up, but the majority, I think it was over 23100 lubrication points, They were they noticed that those failures were beginning to drop drastically, and even today, just as a quick update, I recently spoke with this company, and they shared with me that everything that was charted and has been built into the system, has actually not failed since, since that time, and so that's been really exciting and encouraging.

But in the end, you know, it didn't all come overnight. It didn't happen overnight. They needed to make sure that they had the, you know, the right strategy, make sure the right people were in place. They put a goal together, and now, you know, two to 3 years down the road, this is they're seeing that they're able to now focus their efforts on the next, you know, the next shift in their Dallen. Maintaining compliance, but carrying their time over into more, you know, additional impacts for their company, and so just let me make sure that I flip back to my PowerPoint here. But, yeah, so this is just part of the discussion that I wanted to share today.

Just obviously, several things could be talked about, especially down to a technical level. But it's, you know, it's key for your team to make sure that you can have the, you know, that beginning piece in place, setting up yourself for long-term success, and having the right tools, systems, and measurement pieces along with consolidating your data to be more standardized in the end, and that brings it down to, like, our mini webinar today. We'll probably pull more topics from, you know, maybe this discussion down the road. I hope you have enjoyed your time. I would love to, provide any time, you know, provide

an opportunity for questions at the end now or otherwise, we'd love to stay in touch and share more of our resources with you in the future. So we'll turn the time over to anyone if they have any questions now.

Thank you, Tom. I appreciate it. Maybe just as a quick bonus here, just because I know, we had a few minutes to spare. I just wanted to share quickly with everybody something that may give a visual example of what some of these reports could look like. You can kinda see here that this is an example of a route compliance dashboard. This is very powerful for teams to know what did not get done in a certain period down to saying, oh, well, this is a route that has overdue tasks in this time, tells me how many assets were overdue on it, how many tasks sorry.

Yeah, and how many tasks combined were needed to be done, and then as I drill down, I can see the list of what those are so that I can say, oh, yeah. Well, it's maybe normal that we didn't get those yet. They're not as critical, or you go, yeah, that hydraulic unit, we do not want that to have any problems, you from a compliance standpoint. But other things to measure could also be, you know, your oil analysis or leak detection. So this is where you can start knowing what a system is like. Redlist can help come you know, bring together really powerful insights for you to say, how are we doing, and from there, you know, the game plan you may have started on may continue to evolve, and that's okay.

Because you've started to now have perspective, and that's really what we hope to, convey today that a strategy that that is powerful and clear can help you start to then have the perspective of what to do for the future. But, yeah, really appreciate you all. Thank you for coming today for our mini webinar, and we will talk soon, and we will see you next time. Thank you so much.