**90-Day Data Revolution: Level Up Your Lubrication Routes with Redlist Digital Forms**

Presented by: Dallen Davenport

Well, thanks everybody for joining me today. My name is Dale and Davenport and I am the marketing director here at Redlist. have had the great opportunity of rubbing shoulders with several reliability engineers, NDT professionals, truck shops, and maintenance teams go into different types of mills just seeing so many different ways and how people are improving well. I guess you could say enhancing their lubrication management have a process, so I am excited to talk about what we have planned today. Obviously, before we dive into that, just maybe also a little bit more about me.

I growing up, I was surrounded by heavy equipment and my upbringing. I had a lot of my family members in the construction space and also in farming, so there was a lot of that type of in my younger years doing a lot of the maintenance. So I was drawn to Red List because I could see very easily the impact that it can make and I'm also now seeing it in in these other spaces for the industrial space and the mining space and so on. So I can sort of myself lucky over the last 8 plus years to have been able to go out and see how the world is built. Right. And be able to see how everyone is tackling the different challenges that they face. So I'm really excited too for the topic that specifically as you all know is just to discuss this 90-day revolution of leveling up your lubrication routes regardless of digital forms.

And today's webinar, we're going to talk about the difference between what it means to get started with that, considering how to improve your Lube routes. Also, maybe we'll share some examples today of some companies that have gone through this process already. Maybe what that looked like at the beginning, where that and now today and how they're operating currently and just the in the way that they've been able to enrich the quality of the data they collect and not only just completing their Lube routes. So that's a really big piece here that we want to hit on later on too.

We're going to, we're going to discuss how and show in the Red List platform how not just having a route that I'm completing is enough anymore these days and how in addition to what I'm completing, I can be capturing insightful and very clear data that can drive our improvement forward in the for the future. So as I just mentioned, a big thing. We want to really drive on not just completing routes, compliance is really important. We all know, but we also want to collect the right data and take action on that data.

And so there's a lot that comes into getting started. So we want to just kind of outline how we're going to talk about just some good principles to consider and think about when identifying goals over the next 90 days. I specifically picked 90 days because it's really good to have a time frame to give yourself to say, hey, these are goals that I want to do in this shorter term. If we give ourselves time more time than 90 days, a lot of times it's a lot easier for us to put it on the back burner. Forget about it until the last minute and we decided, OK, I got to do this. So we're going to talk about putting, putting on that mindset of setting goals that you can achieve.

Now, whatever state you're in, we'll also talk about just how completing routes really just isn't enough anymore these days, making sure that your routes are giving you quality insights and really seeing that the folks who are out on the floor, the Lube techs that are completing those routes that they really are your eyes and ears and they can be empowered to give you so much more. We'll also talk about what different things; what different data can be collected. So they're, they're obviously in a previous webinar, we've talked about how sensors can give you that data. We've also talked about how people can manually just create a work request.

Today, we're going to talk a lot about the power of digital coupling. You know your inspections inside of your route to get the most bang for your buck. And then lastly, we'll talk about the ability to analyze trends, whether that be from a route compliance standpoint or any other metrics you really care about that fit into your packaging up those 90-day goals. All right. Interesting fact, even though it's, you know, not any news to anybody but not all machines are created equal. So whether you've been in an operation for years or whether you're in a startup plant or mine, it's good.

Either way, to reassess the current state of your assets in order to get the goals that you want accomplished over the next 90 days, and it's possible that after years of doing the same thing if you really kind of been in a pattern it that you may have some assumptions that you may want to reconsider in question and say, have we really been thinking this the right way. So making sure that we understand this first piece, you know that not everything is created equal, making sure that we can call out assumptions that maybe we're making in our brain that we've had for years and kind of going with the reassessment of how things are going.

All right, so let's dive into kind of the first section here. I identify goals, so I think when we're thinking of goals, let's just talk about this question that is here on the slide. What is the asset or what are my assets most prone to right? So when considering, how do I improve my program? In my lubrication management program, especially the data that I want to collect, it's really good to ask questions about the things that you know, you need to keep track of it. For example, it may be environmental concerns. You may be located in a northern region where it's freezing temperatures. You may be down in the southern region, where there's an abundance of humidity and water damage that could happen or you're out in the middle of a desert, and in that desert, we all know there's a lot of wind, dry air, dirt, you know? Yeah, lot of potential for contamination. So thinking about that and also knowing that it's good to look at what the OEM recommends, but make sure that you're also seeing the situation that you're in for those environmental concerns, utilization will move on to the next topic here.

So another thing you want to look at is how frequently are certain assets being run versus others. That's something to be aware of if you if currently all of your routes are pretty generic and spread out evenly so that you think the workload is even that might be something you want to ask yourself when thinking about setting goals and saying do. I need to actually give more focus and maybe more space and time for my loop lubrication engineering or sorry my loop text to complete the work properly versus maybe treating everything the same and then obviously historical incidents you know; we knew you know if you've done a good job at tracking in the past? What assets have been prematurely, failing more often than others or you know just knowing that in the past certain things leak more than other things, you know, those types of aspects are really important to consider in that full breadth of not just saying you know what I'm I need to, I need to just think forward and set some crazy goal. That's unrealistic.

It's good to look at the past and say, well, what has happened and how can I make sure I take that into consideration for what I want to do for the future? So as far as, uh, kind of another question to ask when identifying goals is what is the current state of my most critical assets? Again, not all assets are created equal, but it is good to look at those most critical ones and ask some questions. So maybe a very basic question is Do my assets have the correct products? Are they? Am I putting the right greases or lubricants in there? Am I putting the right filters in there?

You know, some in some sense a mixed bag can also lead to less predictive outcomes. So it's a good thing to consider. Uh, do some assets prematurely fail more than more frequently than others? You know it's. I know we just talked about this a little bit, but one thing to consider is you know we all, we all know that there are problem children. We love all of our children the same, but some need more love than others. So it's just making sure that you're paying attention to that piece.

And then another thing to assess and just get into the mindset of when setting goals is, well, where do I spend the most time and money today? You know, some assets could be down for days and not really impact the production at the facility as much as maybe some assets that are down for just an hour. It could be draining, draining the Piggy Bank, so it's good to take that consideration and say, OK, well, you know, if they're if one of these, if some of these do go down for a short period of time and it's an even, then it's more costly. How do I make sure that I can keep those assets going and put them at a higher priority?

And then not only looking at the current state of your assets but also thinking forward. So what? What does it look like if these assets that I'm thinking about the most, what is the current ideal state that I would like or what is not current? Sorry, what is the ideal state that I would like those assets to be in? So obviously you know, we want to shoot for realistic goals again. We want to keep this contained in a 90-day period, but you can still work towards that vision and say what? What would things look like if yeah, it was working as I was as I would like it to, and a really good question too at the beginning is to ask yourself what is possible right there?

Are there are even though there are a lot of things we can't control, there is still a percentage of things that we can control and focus on that are possible. And so it's good to just make sure that that question is asked and think about how you can work backward to getting to that real possibility that you can influence and drive forward.

Also, another question for the ideal state is saying, well, in this future state, what data should we collect to better inform us that we're on the right track? Essentially, in this ideal state, if things are going well, I should be able to measure how things are going. I should be able to more clearly see the impact that these changes are making and then how frequently should we collect that data.

So making sure that you know again back to some of these more critical assets, maybe I need to do a pulse check more frequently on some of these assets versus others just to make sure that we can drive better reliability. And I want to share a quick success story here. I'm going to probably pull it up onto the screen, but I won't read through the whole thing, but I will put we can post this in the notes later or share this with the group, but I want to just share really quickly a summary about the facility that is in they were in the pulp and paper base, they actually uh create a particle board and they have a really fascinating operation, but just a quick intro they after having a half-century in just tree logging and raw materials, they decided that they wanted to go into more of the particle wood space on some of their facilities.

So they started a new facility up and in 2020, uh, to just make sure they could further vertically integrate their business into these other areas of the pulp and paper space and wood products. So as they got started, they realized that there was a big need to take care of their bearings. They were a new facility. They weren't really even, you know, fully compliant, on attacking and completing all of their routes. And they've really noticed a lot of issues without reading the whole novel too. But can I get to the punch line?

A lot of their bearings were actually lighting on fire and things were getting heating up the time, and so for them, they decided that they needed to change things. They needed to start it, you know, reassessing again, looking at what goals they should be setting for the near future and hope to benefit the long term and so, uh, they, you know, as far as action items go, they went through and did a full assessment of the of their main lines. Again, I'm going to highlight they didn't. They didn't go look at everything right away. They went to the most critical pieces of their operation, mapped everything out, charted it, and made sure that they, you know, had a good understanding of the current state of things. And then they went forward to deciding, OK, what type of data do we want to collect and how do we change our routes?

And they were able to really revamp their program to actually be simpler and more focused and honed in on the spread of how the labor should be taken care of, but also ultimately this one focus of helping the track, the temperature levels of the bearings. And they were able to really start a trend, you know, watching trends as it wasn't anything new that they were asking the loop text to do as far as going out and doing the route, they just needed them to capture additional data points, which is what is the temperature currently, right. And they could record that. And so on. The impact of or you could say that impactful outcome of this project is they were actually this company was able to be even more aware and mindful of their route compliance and they're actually now at 100% compliance with their routes which is part of the part A of this puzzle is the completion piece.

But in addition to that, they were able to use the temperature trends to actually prevent failures, and prevent these fires. Literally, these fires and they, you know, here is a little quote that I really like, the plant engineers said prior to Redlist a good production run was 200 cubic meters of material per day. Now we can produce up to 800 cubic meters on a good day, and so they described that before Redlist it was just still like without that data. It was like trying to climb up a crazy, uphill battle to get these changes to happen, but as they were able to show these trends and say, hey, these are what temperature levels are looking like, it's going to get risky. They were able to collaborate more with operations and make some tweaks and how they work together and getting, you know, getting the routes completed more on time and also preventing these premature failures. That was a fun story that I just wanted to share there.

The next thing I want to kind of hop into is actually dived into showing how this can be managed inside of the Redlist platform. Not just because we do have we do have routes, but I want to show specifically how you can leverage the data collection piece with these inspection forms to really benefit even more with your operations. In some sense, if you've heard the term habit stacking, if you're if your team is already in the habit of going out and doing routes, even if it's on paper today, but you're considering moving into digital solution, it's really just that they're already in the habit of going out regularly and it's just that extra step to getting a little further in capturing the data that you care most about and one other quick story there is I was out at a refinery out in the South and they actually were sharing with me some of their routes and the examples of how they structured their PMS and the conversation was actually really quick.

They said here's an example of this route, and really the only thing that said was complete PM such and such. There was no other instruction, no other detail, and no data to capture, and they were desperate to make sure that they are desperate to go from this very generic one page. That said, do this PM to actually start to get some insights, and so it's really something that I'm passionate about. I really think that this part of the tool especially is going to be something that you have a lot of control over and so I want to dive in and showcase that with everybody.

So I'm going to pull this up here, and if everybody can see I am, I'm going to share a little bit here inside of the web application and then I'm actually going to go through our mobile application. So for those who are out actually completing the routes, what does that look like? How do I complete it?

Step one though, I want to actually dive into what you know just how simple it is to set up. Maybe some of these forms, so if I were to set a goal and I'd say, you know what, umm, I have a lot of water damage. I have. I have water getting into, you know, polluting the, you know, or contaminating my, my reservoirs inside of my gearboxes or it's just washing away these areas. But it's making me have to, you know, I'm getting worried that I'm going to have rust damage as well, and things could be failing.

So let's just use that case here so I can go into my forms tool and I'm gonna click manage. Then I'm going to go, and I'm gonna actually go create a new form template. So what I'm showing right now is you don't have to call up anybody from a software development team and say, hey, I need you to build this for me. You can actually use our training resources to go ahead and build out this quick data collection inspection, so we could just call this a water damage report. I'll just probably give it the same title. A description here probably is just like what's the purpose of this? So I could just say or any. Uh, water contamination? And take pictures.

That's the issue, but you can just see some examples here and then, and then I'm gonna come down over into what we call affection. So the affection is just where you can start building out your group of what questions you want the loop tech to ask. So I'm just gonna, but in here asset details and then below is now my first question box and I'm going to go over here and then I'm gonna actually change this from a like read-only question to let's say uh, let's make it a drop-down and I want it to be I want it to populate the list of my list of assets here and it's going to and then we'll just say quit man ID I'll also mention here as well at your facility inside of the form people could actually scan a barcode or QR code that might be tagged on to the asset and that could find it and search it really fast. I won't be setting that up right now. Let's make it required. I have control over some things in here.

I can say what's required and also you know if I need any notifications triggered or if there's any other information I want to link to this question, but that's probably all I'm going to do as far as question one, we're gonna say what is the asset? And I'm gonna keep this really simple and make one other question, maybe two. We'll see and we're going to put in a question here to say that says is there uh water contamination and I can and I change this to be a select button.

So I can actually control and say, uh, we'll say yes, there is water contamination and I can actually also say no and I can color these buttons here so you can see that. Let's also make this question required. Or make a required always and I'm also this I'm gonna set up another rule. I'm gonna say you know what? When this water contamination question is, Mark says yes, I want to require a photo. So that way, uh the Lube tech before they can really complete that task, they just can report that there's water contamination. And I mean if they, I mean, they won't always be able to take a picture, but we'll have this. I just wanted to put this example in here and then obviously I could also put it in if I want. I could also set up an automatic trigger to create a task that can notify somebody, so I could say when that question is marked as yes, I want to have it be sent to my, uh, well, there's a place you can create team boards to be like, send it to my loop, browse board and I want it to. I want to require that they put in the description of the problem. So I think I just, there we go. Fill out that required field. All right, so now I'm set.

I set up these two questions and I'm again, this is something really important. I'll call out that a lot of success comes from capturing the right data that you want to focus on, but also making sure that it's easy to capture. You don't want to ask your loop text to answer a 20-question survey every time they complete their work. This is it.

It's usually going to be tied to a focus, so make sure that you keep that in mind. I do want to do one other thing here. I just need to make sure that my permissions are good, so permissions are great. Think I'm set so I'm just gonna go ahead and those best and then I'll hit save. There you go. That's my first foreign built, so if I had a goal that I wanted to track and just oh you know what, let's do one other thing. Sorry, I wanted to do this too. I wanted to also get notified, so I'm going to say when there's water contamination, thin and notification, and let's send it to. Reliability engineering team and we'll send an email with this with a PDF of this inspection report attached.

So this form can do a lot more than just collect the data. It can actually start notifying the right people of the issue, and this is all so that data can feed into your analytics, but it also can send notifications for your team to say, OK, this is what this is something that came in today and make sure that it's not serious enough if for them to ignore. So if it is serious, they may want to take quicker action on that. OK, let's save that one more time. I've made my inspection and if I want to know I can actually go inside of my settings and in my PM program settings I can actually find the right route that I want and say you know what this is like my monthly gearbox check route.

You know you can be very specific and say that each of these tasks should have this question on it because that is something that I need to start measuring now and I need a baseline there. So again, just make sure that that's something that you can tie into this E. OK, so now I want to uh, you know if you if you're linking this into those tasks, it's tied into the work order. What does that actually look like for a loop tech who's actually completing these routes? I want to dive into that really quickly, so I'm gonna actually stop sharing my computer screen, going to share. My phone screen. Alrighty, hopefully, everybody can see that at the moment, so I am currently logged into the mobile app and if I'm switching gears I'm not.

I'm not the admin anymore or the reliability engineer managing and setting things up. I'm actually now in the process of going and complete going to go complete a loop route and collect data. When I do that, and obviously I'm not inside of a mail, I mean I guess would be a lot louder if that were the case too. But I am going to just go through as if I were completing these tasks. So you could get a sense of what this looks like, so inside of the mobile app baby, I have this little maintenance menu here at the bottom and I can see that. Uh, you know, inside of here. I'm. I'm on this paper mill inspection route board.

You can have a different board for different teams or different areas of the facility and I do have an open route and it's this paper mill 30-day inspection route. So this is one example of how I can help go into this route that I need to complete. Looks like I'm just getting started and I'm and some of these tasks have been completed already. You can see there's this asset at the top and 123456 tasks for it, but then I could move down to this next task right here and I can say, OK, I'm going to go to the centrifugal pump inspection, so I just this instruction I can see that when I open up the form it will give me some instructions of what I should check.

So I'm at this E asset here and I'm on the task this very top one that I'm holding down on. You'll see it in the bottom right corner and the in this form icon. This is where I can go tap on it and it'll open this inspection right up for me and very quickly it can say, well, what's the status of the component? Right. So this pump like could say pass looks good and then and then I can go ahead and mark that as complete. Looks like it's actually wanting to prove that I'm there, so I'm just going to take a quick picture of this desk.

You can see here that task it now moved into this completed status and I wanted to actually. Now we'll see, it says record pump pressure. So I'm going to tap on this. It looks like this one was already filled out so we'll go down a little further. I'm going to just complete it this way. All right, moving on to the next asset, umm so you can see here I've got this motor inspection. So let's see what I'm supposed to be checking on the motor It looks like the status of a component here is.

If I hit fail, you can actually see that it's going to ask what's the. I'm going to make a new task that is where I can go and put a description and say the motor bearing. Is dried, is dried out. So I can at least report that and it could send a notification off to the team's gonna go and complete that task. Can sorry this is something you don't. This is a setting you don't have to have this, but I'm doing some proof of presence right now, showing that I'm actually there, and then, you know, moving down.

Let's go to. Let's see here. Record the Lube level on the pump. OK, so let's tap on this so you can see that I don't have to have the same checklist for every task. I can really make it specific to say, oh, I'm at this asset and I want to check the temperature level for one of my tasks. I want to check the oil level in this case I'm gonna say uh, it's 3/4 of the way full. It's a. Did you refill the sump back to full? I'll say yes, I did.

And then when you move on and leave that task, you can see those two tasks are marked as complete. So it's really easy for me to say, oh, what do I have left to do on this asset? And you can see them going to go and. Going to pass that inspection, and I'm going to record the pressure on the pump. It's 92 and one other thing I'll mention is as I'm completing these inspections, all of this data is being tied right back to that asset. So that the reporting I can go and see on my different reports my pressure readings, and my temperature readings.

You know if I need to report anything on you know any leaks any type of uh conditions you know, I can all of this data. My lube tech doesn't have to go back and manually now enter this somewhere else into these different spreadsheets reports. They're just completing the route like they should be and all of that is automatically feeding into the right place and so as your kind of see. I can go down this process here and go in the order of completing those tasks as I need sometimes these routes can be very simple with just one task per asset in this case. I'm just wanting to showcase the different ways. You can collect the data here and you know create different tasks for that and so again I can just really customize these forms to capture the data that I need.

And again, word of caution, I know I'm showing a lot of examples, but just make sure that when you set your goal, it's really focused on that specific issue or that thing that when you think of the ideal outcome of what your assets, how they should be operating, you want to make sure that that data is focused on that first. You can. People can get really carried away and collect all the data in the world and maybe they don't know what to do with it. So that's just a recommendation here.

It’s just making sure that when you think about when I'm building out what I'm what data I'm collecting and how I'm setting up those routes, just making sure that it's easy for the team to follow and pick up on and then just stick with it. I would say make sure you stick with it and measure the performance and outcome for it so that those are a few examples there of how I could quickly create a form and then there's a step of linking those into the routes and then obviously what I wanted to highlight too is just for the team. But those who had the concern, like oh, man collecting data, you know, that's so much more work.

We really want it to just feel like, hey, I'm already completing these routes, just capture, just ask a couple more questions, answering customer, couple more questions for me. OK, I'm moving back over to. Light. Here. Let me just get that switched. OK. So yeah, I really appreciate everybody kind of walking through this demo with me and some of these principles. I hope that for your teams you can start to consider maybe simple goals at first, but say what is it that I want to hold myself accountable for in these next 90 days? And also if you do have questions later after this about maybe further how could I massage this into what I'm doing already in my daily day-to-day operations?

That'd be great, but I do want to open up a few more minutes. I've I have Ray here with me. Who, if any, questions I've been flowing in, she'll let me know too, but happy too. Take a few minutes too if anyone wants to feed any input on the chat, we'll talk through a few of those. OK, no problem. And again, we'll send out this info.

We'll send out any information that you need after this as well, and if you do have any questions specific to. Redlist as well? Or just any other uh approaches that we have in helping your team get going and get set up. We really want to help make sure that you guys can take the right next step into leveling up your data collection and not just completing routes, but collecting the right data that will drive your team to greater success. Oh, sorry.

We do have a question on that Dallen. How easy is it to set up some KPIs? Perfect. Perfect. That's a great question. So let's take a look at this. I'm going to hop back into the platform. Actually, a great question Chris, just need to make sure I can get the right window open here. Yeah. OK. So a few things I want to say about that. So for KPI, the very first thing obviously that you want to make sure you're collecting the right KPIs is setting up the data collection pieces, right? So if you're interested in trending your overall temperature levels, then you're going to want to set up those forms. Or if you have sensors, you could do both to say that you know on these assets I want to be reporting my temperature levels there. So that was the first piece is getting that going.

But then when we talk about actually showing those KPIs in our dashboards, you know, we do have under our reports tool, UMM we have, you know different reports that already had plugged into here. Let me just go to. I'll just go to one of these here while that loads, our reporting tool is used, and we leverage Microsoft Power BI. So one thing that we do that our team helps support is once your team decides, hey, this is the type of data that I'm collecting, we can help load up into this table or into the tool. You're kind of your basic template of that report, and so we did.

You would need some help with Redlist to at least get that first template in, but then when once it is in here you depending on your permissions you do have the ability over here on the top right corner. Not everybody can see this, but for security reasons, if you have access, you can click this pencil icon and there is a little bit of training our team can give you. But if you want, you can actually select. Well, a dashboard is several reports kind of baked into this one single consolidated view and you can click into this and this is a place where you would actually be able to manipulate how the data is visualized. Is it like a pie chart, right?

Is it gonna be or do I actually want it to be a bar chart? That's kind of stacked columns, you know I can adjust those visuals. You can also see here umm, when we give you access to the report. There is also. There are also different fields on the right side that show up from the table of the data that we collect and the reason why our team kind of helps get that started is because we could. We could recommend you know some template forms that we see a lot of people use, but a lot of times you want to manipulate it your own way and so it creates this table that we would help link to and then over here, once we bring in all those fields that you've built, uh, then you can you actually leverage and you can plug those into different you know different areas to calculate you know on this specific report like what's my X axis, what's my Y axis and maybe I want a legend for this and you can pull these different fields in there and start kind of changing and manipulating those visuals.

So umm so definitely. Uh, I would say there's a joint effort with our team on getting that going, but it's a pretty quick process. Once the forms that you've built are established and you say, OK, these are the ones I want to use and then it's just some training with our team and saying, OK, well, here's how you can change, you know the like where the fields go and help visualize those in the right way. So a little bit of coaching from our team, but not anything that you can't do. Great question, Chris.

Any other questions? Great. Did we get any help there? OK. Umm yeah, so just it was a great question actually, because I did want to talk about the reporting piece. So hopefully you can see here like hey if the data is coming in you can you can visualize it and share these reports with your team. So really appreciate everybody's time. Thank you so much for joining today and we will be continuing this and doing more demo webinars. So you can be more familiar with the capabilities that Redlist has to offer, so feel free to contact us for further questions and we'll see you next time. Thanks so much.