

10 simple steps to a successful clean oil transition

Congratulations on making the move to clean oil. Each transition will be unique in its timing, execution and service requirements. This document provides an overview of the essential steps you'll want to take to ensure a seamless transition.

1. Set the transition plan

A well-thought-out plan helps ensure a successful execution. To the right is an example of a timeline highlighting categories to consider.

2. Select your lubricant

Agree to the specific lubricants needed on site. Remember that a cross-over from one lubricant brand to another is not always the best path. You'll want to:

- Set ISO cleanliness codes by product.
- Clarify ordering procedures and delivery timing (frequency).
- Discuss whether 24-hour emergency services are needed and any protocol changes.

3. Communicate delivery info

Verify the first delivery date, the location of delivery (e.g. Gate #2) and the drop-off protocol. Keep key personnel (e.g. maintenance, operators and procurement) informed of the change.

4. Confirm safety and handling procedures

Provide your delivery agent all PPE/safety certification protocol in advance of first delivery. Be sure to collect Safety Data Sheets (SDS).

5. Prepare lubrication storage equipment

Ensure your tanks and any equipment discussed during your Chevron Best-in-Class (BIC) Assessment are prepared. Here's how:

- Have your supplier begin with deliveries of clean lubricants.
- Periodically check cleanliness levels through the entire lubricant handling process.

Transition plan	Timeframe 1	Timeframe 2	Timeframe 3	Ongoing
Select lubricant	█			
Communicate delivery info				
Confirm safety and handling procedures				
Prepare lubrication storage equipment	█			
Assess the need for services	█	█	█	█
Develop a maintenance program		█	█	█
Get everyone on board	█	█	█	█
Add new product catalog to procurement system	█	█	█	█

Sample transition plan

PRO TIP: A Chevron Best-in-Class (BIC) Assessment can help ensure proper product selection for your equipment and maintenance practices.

PRO TIP: A Chevron BIC Assessment may help complete this step, and SDS are available **online**.

PRO TIP: Have your Chevron representative analyze the cleanliness data from your product handling process and make recommendations to help maintain the cleanliness level.

- Understand change-out procedures by product group. This will help avoid mixing incompatible lubricants.
- Ensure all bulk tanks, top-off containers and fill points are labeled.

6. Assess the need for services

Evaluate the need for services and select the appropriate ones according to your business needs. Some options include:

- Chevron Stay Clean services, such as flushing and varnish mitigation.
- Delivery, such as Tank Monitoring or Keep Full programs.
- Used Oil Analysis (UOA) programs.

7. Develop a maintenance program

Adjust any internal PM/maintenance procedures and update your Used Oil Analysis database with any new criteria.

8. Get everyone on board

The best way to ensure a successful transition is to educate and communicate with the team. Conduct a supplier and product orientation to familiarize all parties.

9. Add new product catalog to procurement system

Ensure all parties are aware of the new package types and size measurements for each product. This will ensure orders are placed and fulfilled correctly.

10. High-five the team

You've made a great choice in choosing Chevron ISOCLEAN[®] Certified Lubricants. But the support doesn't stop. Chevron is here to make your entire experience seamless and successful.

If you have any questions, be sure to contact your Chevron representative at ISOCLEANSupport@chevron.com or 1-866-354-4476.

PRO TIP: A Chevron BIC Assessment will help identify whether top-off, drain and fill, or drain, flush and fill is needed. A technical bulletin may be provided.

PRO TIP: The Chevron SMARTFill Label Program can assist with complete execution, including a lube room chart.

PRO TIP: Chevron ISOCLEAN[®] Certified Lubricant providers offer a range of services to get your storage and equipment in top-notch shape.

PRO TIP: If switching to a Chevron LubeWatch[®] (UOA) provider, call 1-866-354-4476 for steps on how to save your historical data and upload it into the new system.

PRO TIP: Ask your Chevron representative how our Lubrication Specialist team can assist with onboarding and training.

PRO TIP: For a more efficient payment program, ask your supplier about options such as Ariba, EDI and ETF.