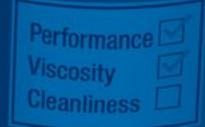


# 3 steps to evaluating a lubricant supplier



## Did you check the third spec?

**You know that OEM performance and viscosity specifications are critical.**

But what about lubricant cleanliness? That third spec can make all the difference.

## Do you really know your application needs?

**Selecting the correct product for your application is critical. Here's what to consider:**

- ✔ Start with a complete site evaluation from your current lubricant supplier, including an analysis of current lubrication practices and performance.
- ✔ Have your lubricant supplier analyze and provide a report on the cleanliness and/or performance levels of your current lubricants.
- ✔ Evaluate current lubricant storage and dispensing practices and advise on opportunities for improvement.
- ✔ Optimize lubricants on-hand to ensure consolidation and standardization are in accordance with specifications.

**What's the right way to choose a lubricant supplier?** Trick question. Selecting a supplier isn't an exact science because what's important to one business may not be important to another.

Finding the right supplier starts with identifying your business requirements, then critically evaluating suppliers' solutions and services against them. Start with these guidelines to gather the information needed to support a strong business relationship with your lubricant supplier.

# 1

## Take stock in-house

Align with internal stakeholders to define your operation's lubricant requirements. Start with the basics, including:

- Intended product application
- Lubricant volume by product and package type (last 12 months)—ask your current lubricant supplier to provide a report
- Package style required for delivery and unit of measure (e.g. gal/liters/lb/kg)
- Tank sizes and location (i.e. delivery address)
- Special delivery instructions (e.g. certifications, security clearances)
- Services required (e.g. keep full, 24/7 tank, used oil analysis, monitoring, equipment, oil analysis trend reporting on equipment, data monitoring)

# 2

## Evaluate suppliers' qualifications

Dig into the qualifications and capabilities of potential suppliers. Considerations might include:

### Delivery requirements

- How are lubricants delivered?
- What are the delivery procedures for handling multiple bulk products?
- What are the flushing procedures?
- What procedures are in place to maintain cleanliness, including air management?
- Is a Certificate of Analysis provided on the cleanliness level at point of delivery?
- Are retains pulled for each product at point of delivery? If so, how long are samples stored?
- What is the lubricant transition process (steps, timelines and handling procedures)?

### Product support and services

#### Monitoring in-service lubricants

- How are in-service lubricants monitored?
- Is a used oil analysis program available?
- Are there any additional capabilities beyond the standard oil analysis program, such as trending, reporting, electronic capabilities, etc.?
- Does the lubricant supplier provide regular reporting on lubricant and equipment performance using your oil analysis? At what level, and what is the cost/value to your business? ROI?
- Is the lubricant supplier providing technical support for the oil analysis program?
- Are routine oil sampling of equipment and product storage available?

#### In-plant services

- What in-plant services are available?
- What type of system cleaning and/or decontamination is available? Directly or outsourced?
- What is the process for transitioning lubricants among equipment reservoirs and storage tanks?
- Are product or technical resources made available by the lubricant supplier?

#### Warranty, issues and payment

- How is product integrity managed?
- What is covered by the product warranty (i.e. parts and labor)?
- How are product issues handled?
- What is the policy if you're dissatisfied with delivery (e.g. dented or leaking drum)?
- Is there a 24-hour emergency line in case of a critical equipment outage during non-work hours? What is the response time?
- Are there any certifications, awards or achievements that set a supplier apart?
- What are the payment terms?
- What is the invoicing procedure?



# 3

## Ask questions about what matters most

Identify suppliers that can make a lasting and meaningful difference to your business operation by keeping your oil clean from the start:

### How do you ensure cleanliness of lubricants at point of delivery?

#### Why it matters

Particles in contaminated lubricants can stop equipment by damaging the individual components that keep equipment running. Insist on lubricants that are certified to meet OEM cleanliness and performance specifications on delivery—without the need for on-site filtration.

### What services do you offer to monitor oil condition?

#### Why it matters

Up to 82% of mechanical wear is due to particle contamination.<sup>1</sup> Oil analysis programs monitor the condition of your oil to identify wear trends. This helps inform a maintenance schedule that can reduce downtime, lower operational costs and help eliminate the risk of catastrophic failure.

### What support do you offer to keep oil clean?

#### Why it matters

Developing corrective actions if contamination levels exceed limits is critical to reaching maximum component life. Maintaining a cleanliness level that meets manufacturer specifications can help keep your equipment running longer.

## The 3 “Be”s of selecting a great supplier

When looking for a lubricant supplier, follow these best practices:

**Be clear:** The more a supplier has to guess, assume or interpret, the harder it is to compare apples to apples. Clearly articulate the details you need to make an informed decision for your business.

**Be realistic:** Your timeline for submissions matters. Set it too short and you risk rushing good suppliers. Set it too far out and suppliers may pursue nearer-term opportunities—or worse, forget about your request.

**Be responsive:** You’re looking for a partner, so be open to supplier feedback and suggestions that would strengthen your program. If you decide to adjust your requirements, be sure to communicate changes to all suppliers to maximize the quality of responses.