

## Sales to Heavy Duty Fleet Prospects

Brian Cook  
*Sr. National Account Manager*

Steve Bowles  
*Sr. Product Specialist*



## Brian Cook



- Sr. National Account Manager
  - HDEO- on road
  - HDEO- off road
- Sr Account Manager
  - Pennsylvania
- STLE Member
- 10+ year industry experience
- Located Mount Royal, NJ
- Chemical Engineer



## Steven Bowles

- CITGO Sr. Product Specialist
- BS, Zoology
- MS, Environmental Science
- 17 Years Experience in Lubricants
- 16 Years Experience in Laboratory Supervision/Analytical Chemistry
- STLE Certified
  - Certified Lubrication Specialist
  - Oil Monitoring Analyst I



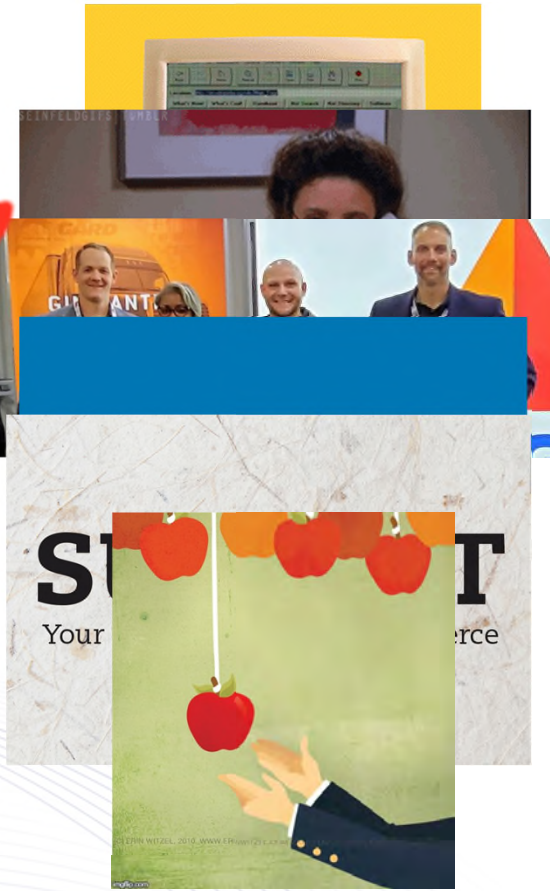


# Heavy Duty Selling



# Step 1 – Identify Prospect

- The Internet
- Cold Call
- Tradeshow
- Network/Customers
- Locals/Chamber of Commerce
- Low Hanging Fruit





# Step 1a - Eagle Eye

## Google Maps Satellite View

- Find more targets
  - Scan lots of land quickly
  - Optimize Call Plan
- Multi-calls one locations
  - XPO, Heartland Express, ABF, Keen Transport, ODFL
- Familiarize with roads
  - Entries and Exits
- Food and Restrooms



# Step 2 - Pre Plan/Home Work

## Do Your Research

- Become an Expert  
Or Create The Illusion
- Asset Count
- Type of Equipment
- Vocation
- Current Material Uses
- OEM Recommended Information



## Step 2a - Weaponize the Information

### Laser Focused

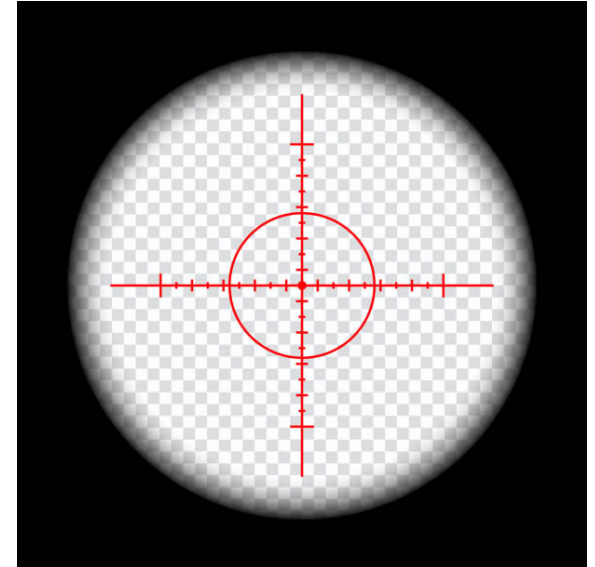
- Asset Count
  - Larger Fleet
    - More Competitive Pricing
    - More Sophisticated Buyer
    - More Research
- Type of Equipment
  - Production Recommendations
    - Age of Fleet
    - OEM Recommendation
    - Climate
- Vocation
  - Fleet Demands
    - How often do you see trucks
    - Amount of hitches
    - Rough ODI Expectations
- Current Material Uses
  - Value Improvements
    - Still using 15W-40 HDEO
    - Still using SAE 50 in transmissions
    - Synthetic 5W-30 HDEO
    - Multi-Purpose grease



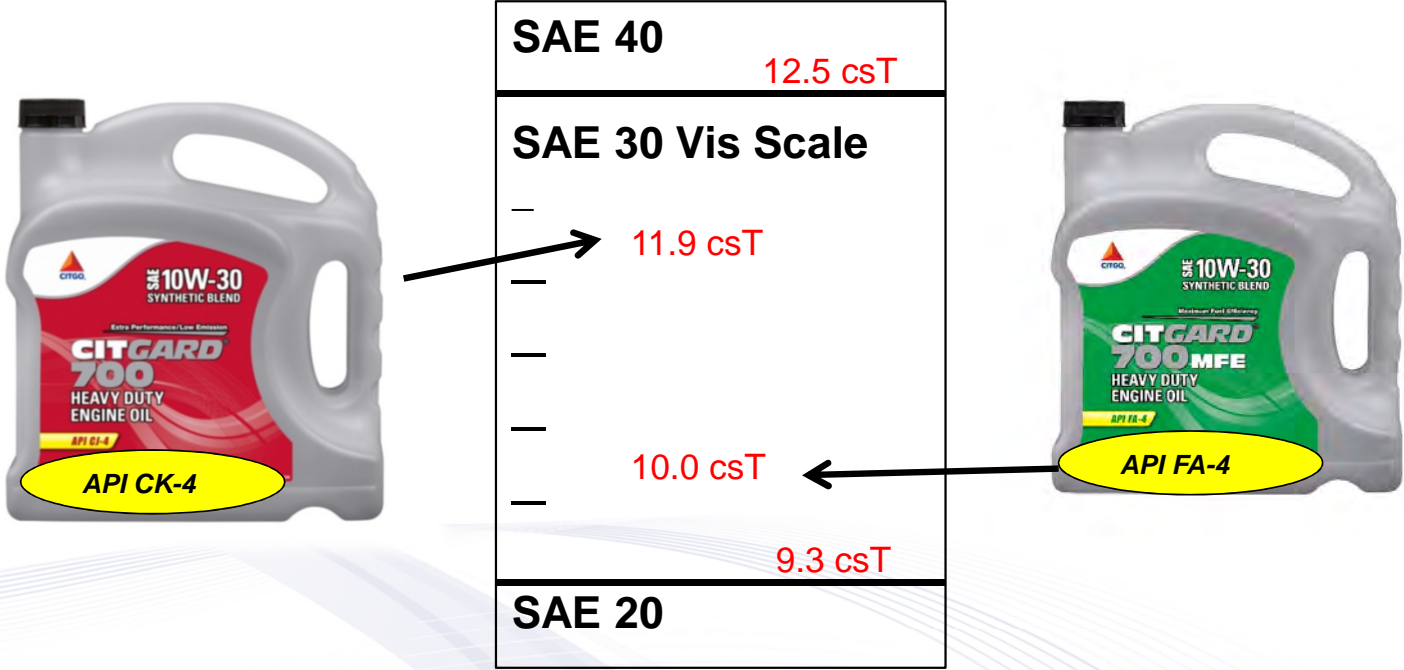


## Step 2b - Get Target in your Sights

- Asset Count
  - Target 25-500 power units
  - Don't be afraid to call on big fleets.
- Type of Equipment
  - Age of Fleet- Newer fleet: lower viscosity recommendations 10W-30, FA-4, 5W-30
  - OEM Recommendation- Factory Fill Viscosity
  - Climate- Cold Cranking issues SynDurance 5W-40 and 5W-30



# CK-4 vs FA-4



# OEM Recommendations

OEM	2010+ Factory Fill Oil	2016+ Factory Fill Oil
Cummins	CES 20081 10W-30 ✓	CES 20086/87 10W-30 and FA-4 ✓
Detroit Diesel	DFS 93K218 10W-30 ✓	DFS 93K222/223 10W-30 FA-4 ✓
Mack	Mack EO-O PP 10W-30 ✓	Mack EOS-4.5 10W-30 ✓
Volvo	Volvo VDS-4 10W-30 ✓	Volvo VDS-4.5 10W-30 ✓
Caterpillar	✓ ECF 3 10W-30 and 15W-40	✓ API CK-4 10W-30 and 15W-40
Navistar	API CJ-4 10W-30 ✓	API CK-4 / FA-4 10W-30 and FA-4 ✓
PACCAR	API CJ-4 10W-30 ✓	API CK-4 10W-30 ✓
GM (Duramax 6.6L)	API CJ-4 10W-30 ✓	API CK-4 10W-30 ✓
Ford (Power Stroke 6.7L)	WSS M2C171-E 10W-30 ✓	WSS M2C171-F1 10W-30 ✓

OEM's recommend CK-4  
few suggest FA-4 today

All OEMs using 10W-30  
Factory fill



# Climate Viscosity Recommendations

## Temperature Ranges

- 15W-40 from 14°F:120°F
- 10W-30 Down to -4°F:120°F
- 5W-40 Down to -13°F:120°F
- **Keep in mind the trucks don't stay in one place**

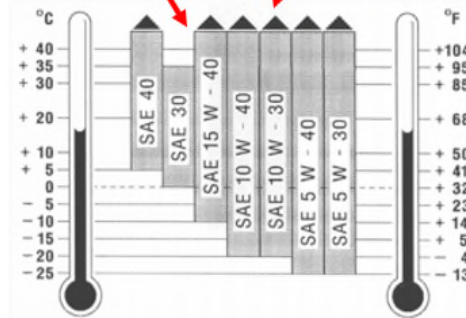
### OEM SERVICE BULLETINS Viscosity Recommendations

+14F to +120F

DDC-SVC-BRO-0001

-20F to + 120F

### Lubricating Oil, Fuel, and Filters



### OEM Viscosity Recommendations

Viscosity recommendations are included in most OEM service bulletins. Examples taken from the leading OEMs are enclosed for your information.

#### CATERPILLAR®

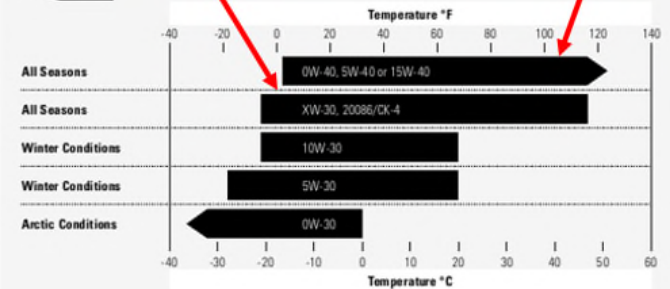
Cat Diesel Engines Lubricant Viscosities for Ambient Temperatures

Compartment or System	Oil Type & Performance Requirements	Oil Viscosities	°C		°F	
			MIN	MAX	MIN	MAX
Engine Crankcase for all Direct Injection (DI) Engines	Cat DED Cold Weather (API CJ-4)	SAE 0W-40	-40	40	-40	104
	Cat DED-ULS SYN (API CJ-4)	SAE 5W-40	-30	50	-22	122
	Cat DED-ULS (API CJ-4)	SAE 10W-30	-18	40	0	104
	Cat DED (API CI-4/CI-4 PLUS)	SAE 10W-40	-10	50	14	122

#### Cummins®

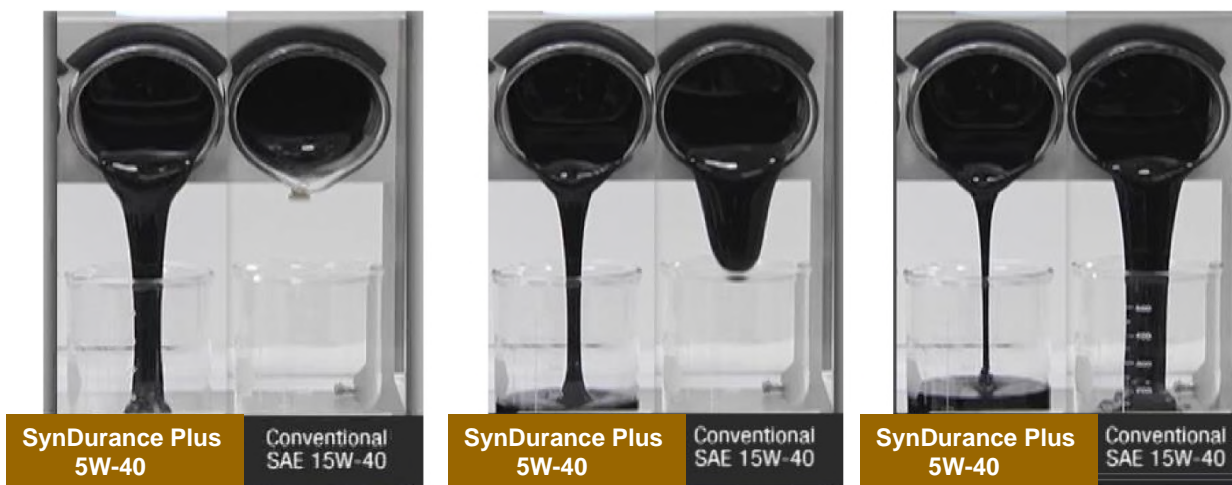
-10F to +120F

+5F to +120F



# Low Temperature Pump-ability Comparison

How much wear occurs waiting on 15W-40?



3 seconds

7 seconds

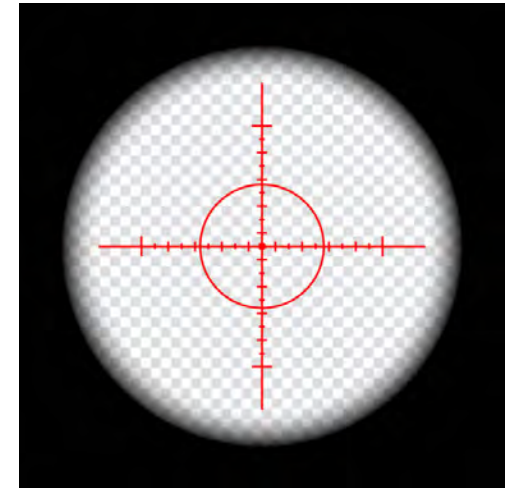
11 seconds

- ❖ Cold box testing at -22°F (-30°C) of used oil demonstrates the superior flow characteristics of SynDurance Plus Synthetic 5W-40
- ❖ It takes 6X longer for a 15W-40 to deliver the oil into engine @ 32°F compared to SynDurance Plus 5W-40
- ❖ SynDurance Plus provides an additional -35°F of oil flow compared to a SAE 15W-40 engine oil which is only good down to +15°F compared to 5W-40 @ -25°F

## Step 2b Cont - Get Target in your Sights

- Vocation

- How often do you see trucks
  - How much service is done on road?
  - Is extending Oil Drain Interval (ODI) valuable to fleets maintenance program
  - Over The Road (OTR), Regional, Local
- Amount of hitches
  - More Hitches needs better grease for 5<sup>th</sup> wheels
- Rough ODI Expectations
  - Based on fuel economy
  - Weight of haul, idle time, geography big impacts



- Current Material Uses

- Still using 15W-40 - fuel economy improvements
- Still using SAE 50 in transmissions - fuel economy improvements
- Synthetic 5W-30 - Interested in efficiency gains
- Multi-Purpose grease - maybe not aware of efficiency/quality gains





## CITGARD is ON ROAD

- Pilot Flying J
  - CITGARD 700 10W-30
  - CITGARD 600 15W-40



- Fleet Pride
  - CITGARD 600 15W-40



# Where do I find all this info?



**Know the Facts about Fuel Efficiency**

Severity Grade	API	SE Naming	Viscosity
SAE 15W-40	CF-4	SAE 15W-40	SAE 15W-40
SAE 15W-50	CF-4	SAE 15W-50	SAE 15W-50
SAE 20W-50	CF-4	SAE 20W-50	SAE 20W-50

**Original Equipment Manufacturer (OEM) Viscosity Recommendations**

**CATERPILLAR**  
 CAT Diesel Engine Oil (WLD) Viscosities for Ambient Temperatures\*  
 \*CAT Diesel Engine Oil (WLD) Viscosities for Ambient Temperatures\*

Competition or Equivalent	Oil Type & Performance Requirements	Oil Viscosities			
		Min	Max	Min	Max
SAE 15W-40	SAE 15W-40	15	40	15	40
SAE 15W-50	SAE 15W-50	15	50	15	50
SAE 20W-50	SAE 20W-50	20	50	20	50

**MACK**

Temperature °F	SAE 15W-40	SAE 15W-50	SAE 20W-50
40	15	15	15
100	15	15	15
200	15	15	15
300	15	15	15
400	15	15	15
500	15	15	15
600	15	15	15
700	15	15	15
800	15	15	15
900	15	15	15
1000	15	15	15

**IMPROVED OXIDATION CONTROL WITH CITIGARD 7100**

**ECONOMY IMPROVEMENT**

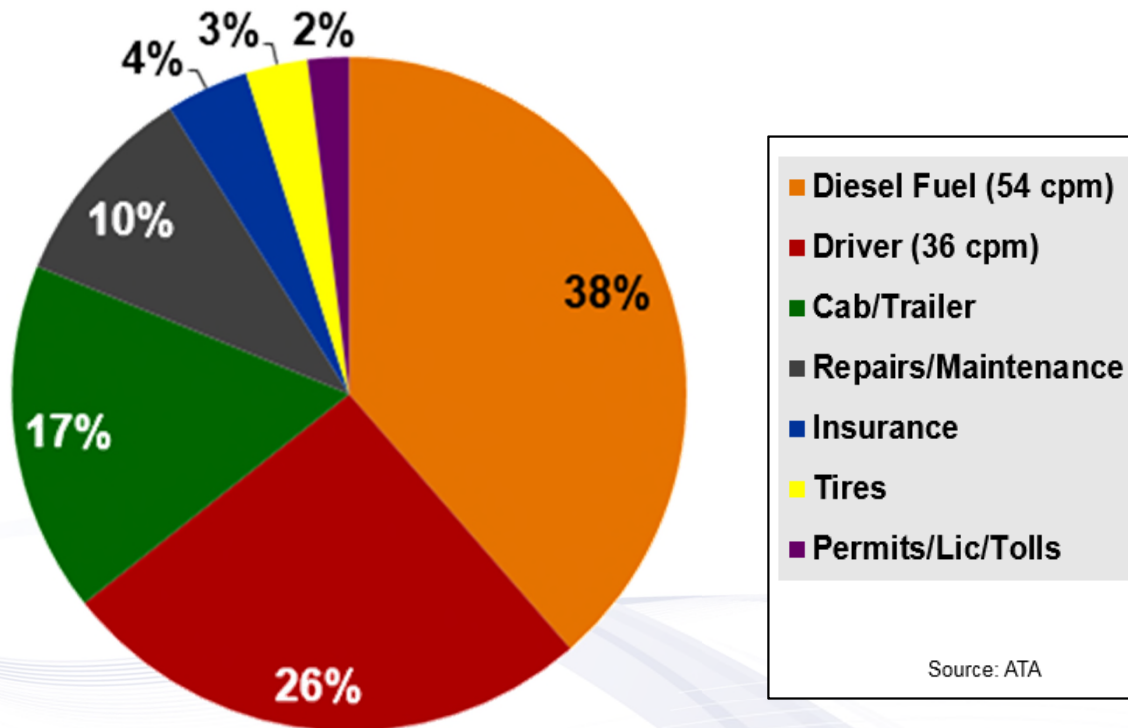
\*OEM endorsement and subject to update. Check recent data at the time of publication. Always consult your OEM service literature for official recommendations.

# Fuel Economy → Oil Drain Interval

	Service	API CK-4
<b>Cummins</b>	Light (>7.0 MPG)	75,000 (up to 100,000 with Cummins Oil Guard Program)
	Normal (6.0 – 6.9 MPG)	50,000
	Short Haul (<5.0 – 5.9 MPG)	40,000
	Severe	25,000
<b>Detroit Diesel</b>	Efficient Long Haul (>7.0 MPG )	75,000 (DD15) / 65,000 (DD13)
	Long Haul (>6.0 MPG )	60,000 (DD15) / 55,000 (DD13)
	Short Haul (5.1-5.9 MPG )	45,000 (DD15) / 40,000 (DD13)
	Severe (<5 MPG )	35,000
<b>Mack/ Volvo</b>	Line Haul / Normal Duty (>6 MPG)	60,000**
	Regional Haul / Heavy Duty (>5 MPG)	45,000**
	Heavy Haul / Severe Duty (<5 MPG)	35,000**
<b>Caterpillar</b>		Application Specific
<b>Navistar</b>	Light (> 6.5 MPG)	50,000 (up to 70,000 with oil analysis)
	Moderate (5.5 – 6.5 MPG)	30,000
	Severe (<5.5 MPG)	20,000
<b>PACCAR</b>	On Highway Light, <20% Idle	up to 75,000 with oil analysis
	On Highway Standard, > 20% Idle	50,000
	Vocational/Severe	30,000
<b>GM (Duramax 6.6L)</b>		7,500***
<b>Ford (Powerstroke Diesel)</b>		2,500 – 10,000***



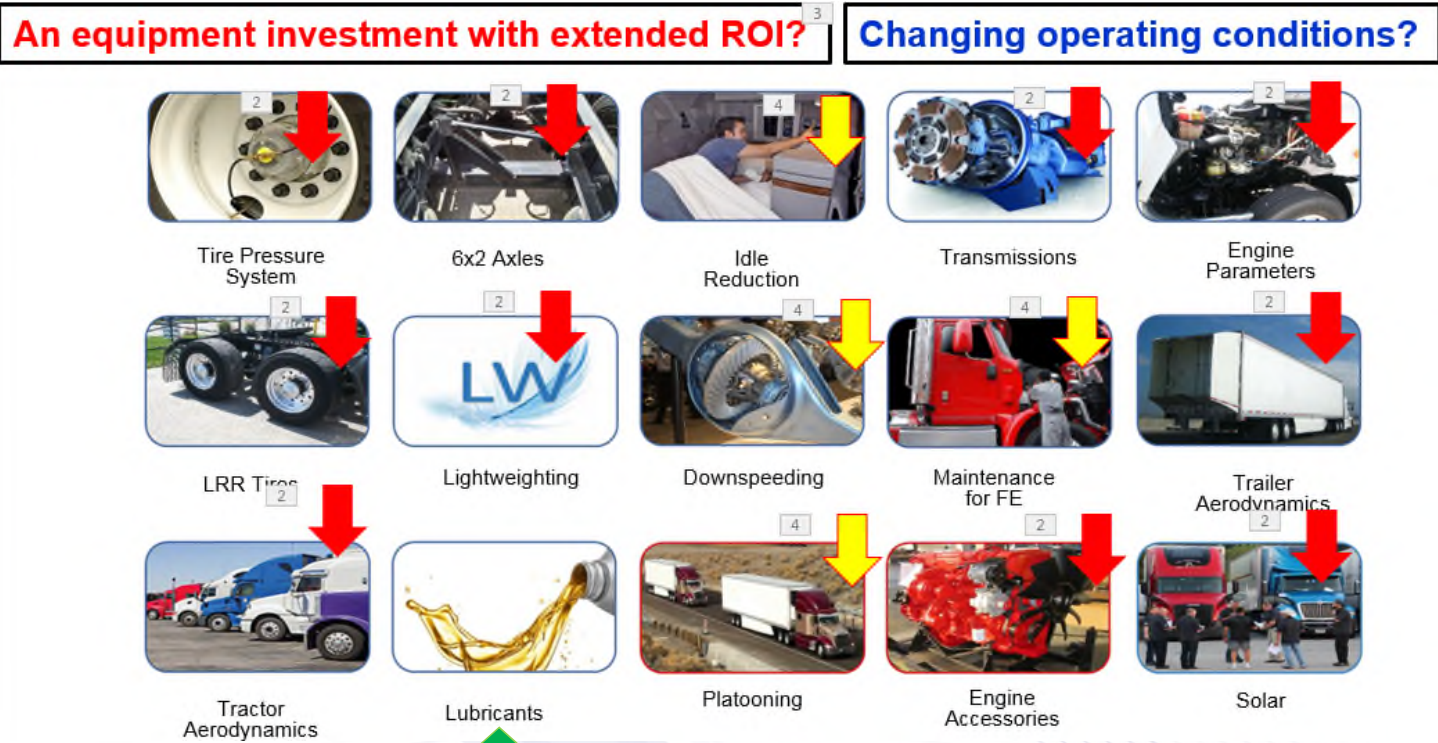
# Fleet Variable Operating Budget



## Efficiency Impacts

- Lubricants 1% of TCO: Repairs and Maintenance
- Fuel Savings is big target to budget impact
- Cost of oil is not big factor
  - Even if customer thinks it is
- **Spend more money on driver Coffee than lubricants annually**

# North American Council/Freight Efficiency



## Step 3 - Get Your Meeting

- Make Contact with Buyer
  - Phone - Do not sell
  - Email - Persistence
  - In Person - Do not sell
- **Qualify the Buyer**
- Set Appointment
  - Location
  - Time
- Build Report and Reciprocity
  - Build Credibility
  - Positive Attitude
  - **Artisan Gourmet Donuts!!! (AGD)**





# Drive the Area



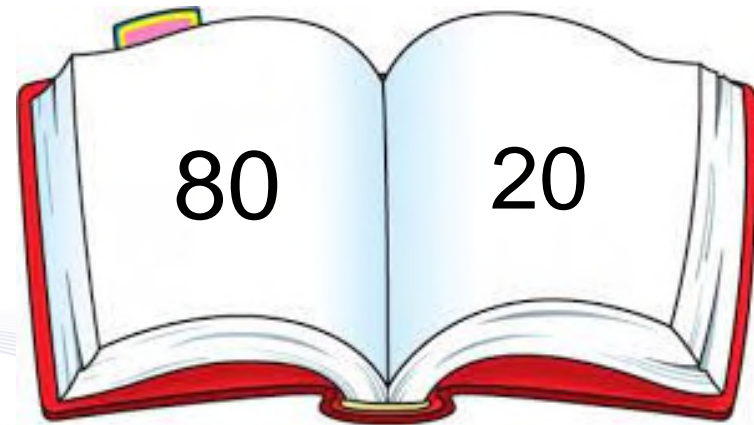
# Prepare to Build Credibility and Trust

**Credibility**- Knowledge you bring to the table

- Done with your Homework
- Traveling Tool Box- Pre Call

**Trust**- Relationship

- Time
- Do what you say you're going to do



## What do we talk about first?

- Personal
  - Friends
  - Family
  - Hobbies
  - Volunteering



It's a People Business





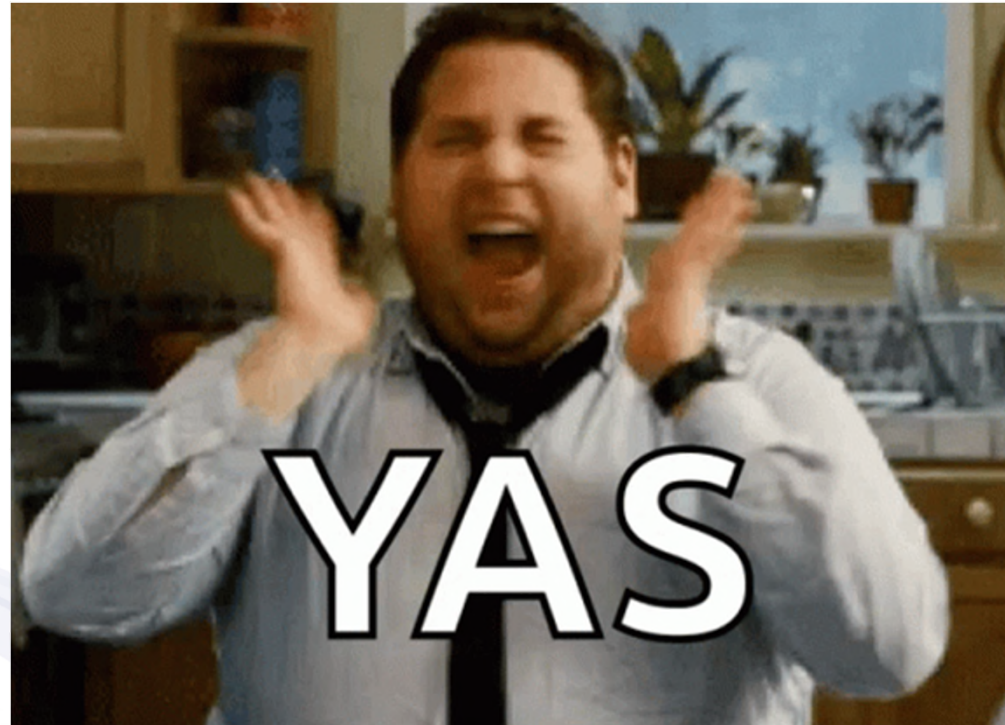
Whiz Bang  
Idea



Double Oil  
Drain  
Fuel Economy  
Savings

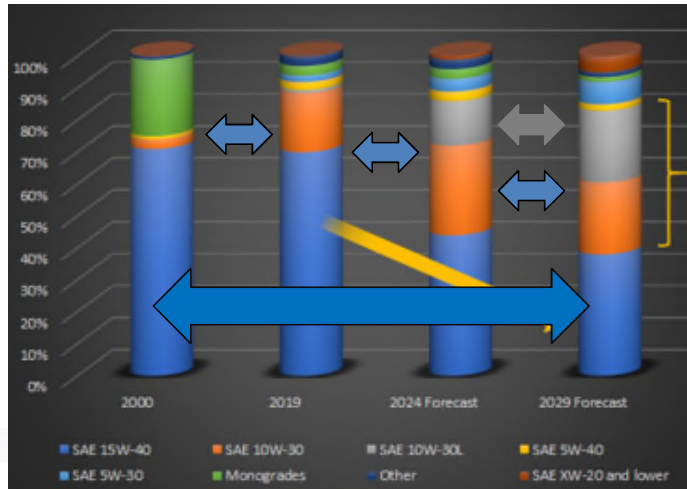


## Step 4 - Time to Sell



# Lower Viscosity is Coming

Courtesy: Infineum USA



API FA-4 and CK-4 (Late 2016)

- Good to at least 2024 likely beyond

I like my 15W-40

- 10W-30 Predominant Grade

Why?

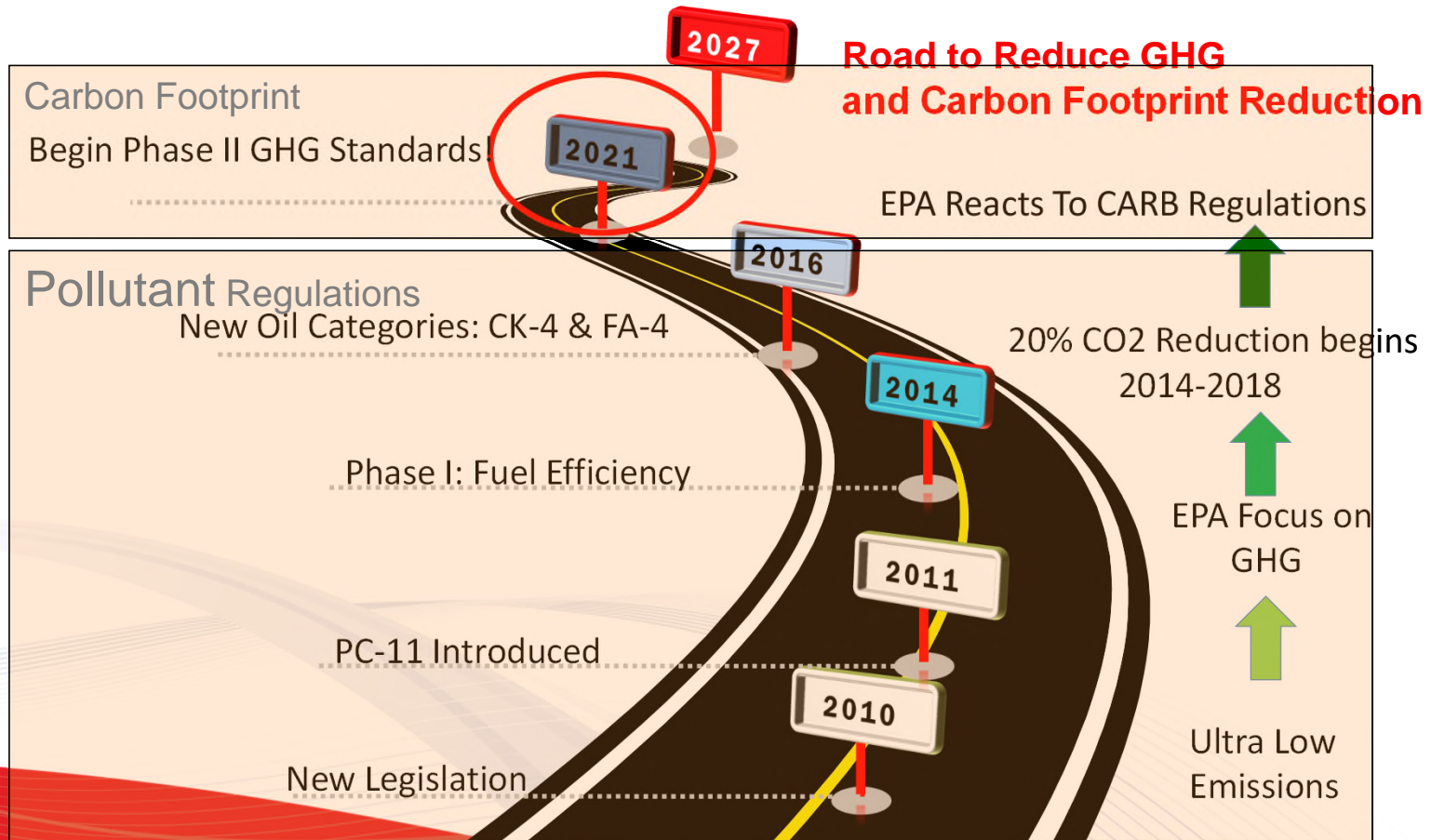
10W-30s represent at least 1.5% efficiency gains vs Conventional 15W-40s helping OEMs meet Phase 2 Requirements

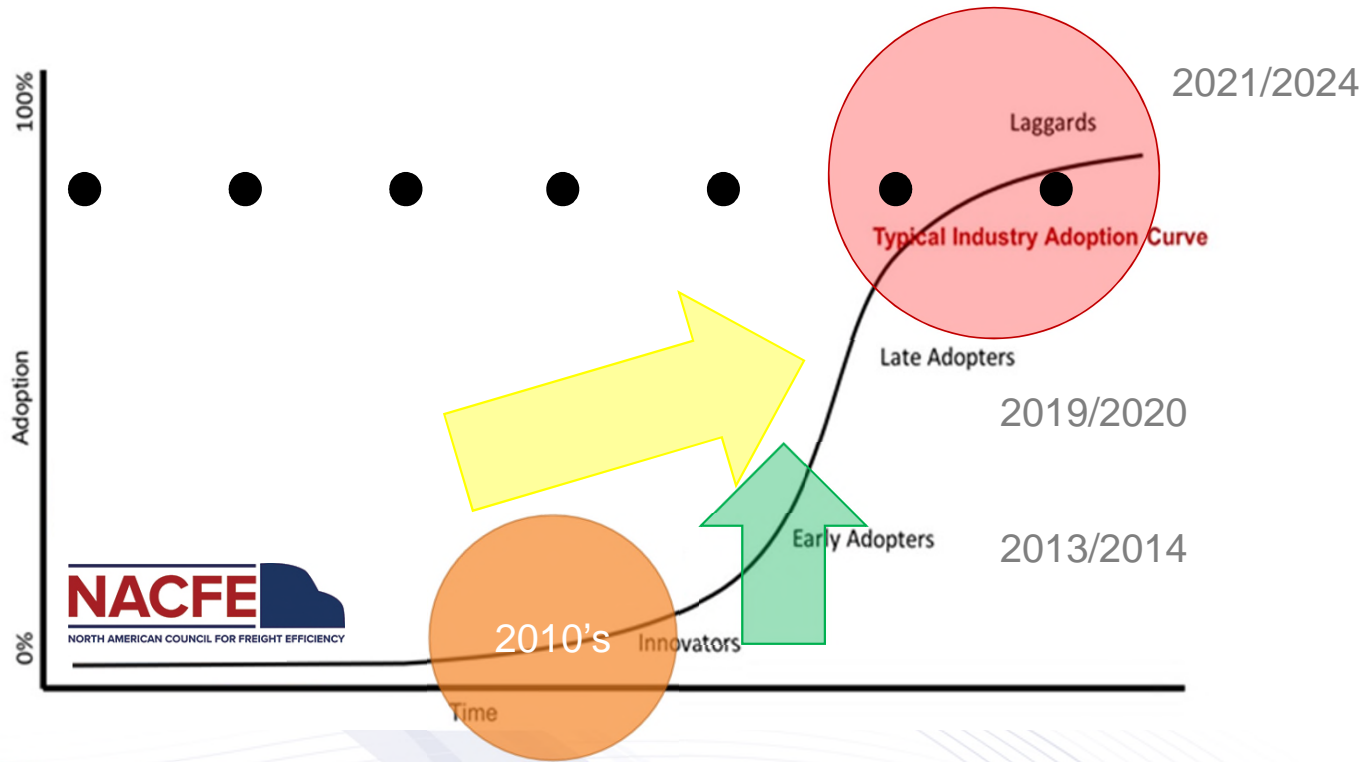
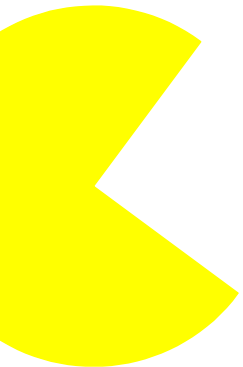
XW-30's FA-4 Represent 2.5% or better vs Conventional 15W-40s

Keeping some of this in the back pocket for certification likely in 2024 engines and beyond



# HD FUTURE-Regulations





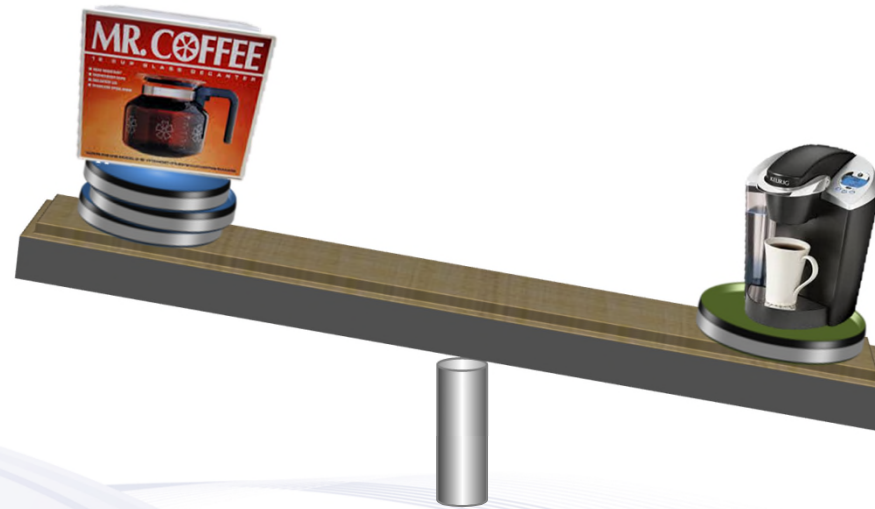
# What is Viscosity Fear Syndrome



READ MY LIPS.....  
10W-30s are too thin



# Be the Change



Costs up to 50% more... So why do people use it

**Time and Convenience**

## Why?



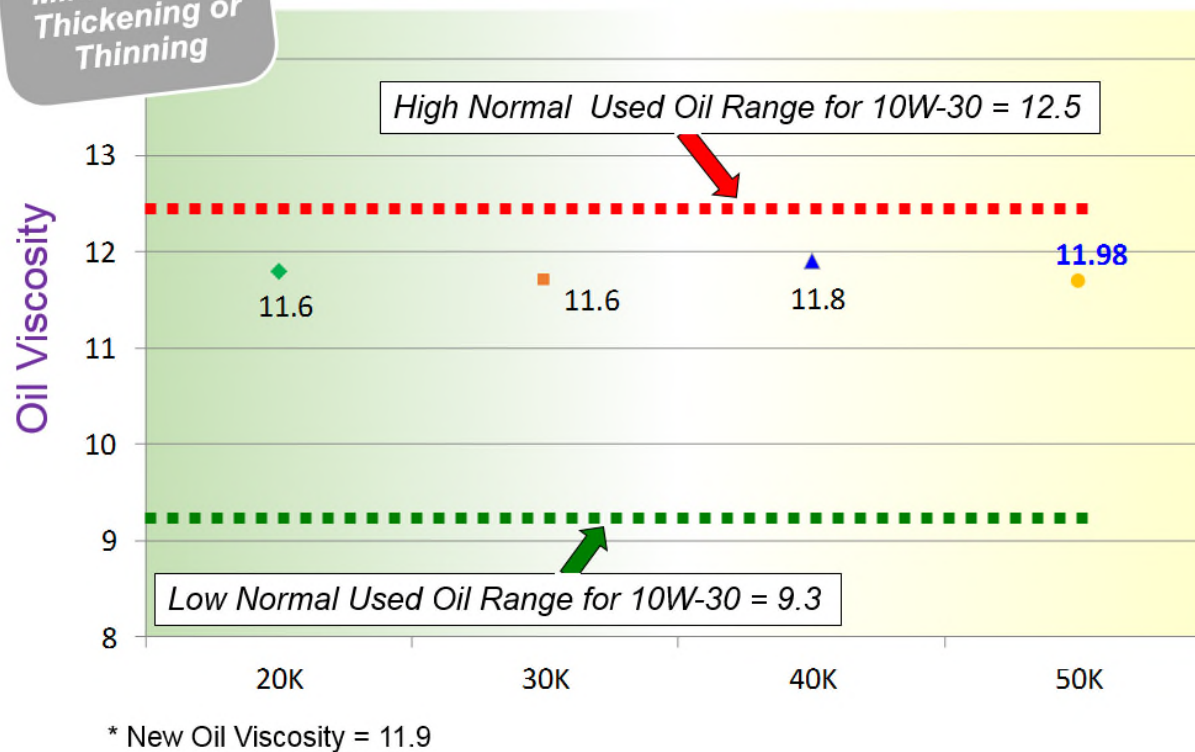
*"If I had asked people what they wanted, they would have said faster horses."*  
Henry Ford



# All 10W-30s Created Equal?

Shear Stable  
Viscosity  
Minimizes Oil  
Thickening or  
Thinning

## CITGARD 700 10W-30 Stay in Grade Viscosity Retention @ 50,000 Miles





# World Class Athlete



-VS-



# Efficiency Losses




## Efficiency Losses

ENGINE OIL IS  
NO DIFFERENT





# Utilize Marketing Tools









**YOUR EFFICIENCY IS OUR MISSION.**

**CITGO Lubricants**  
89 subscribers

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Thumbnail	Video Title	Views	Time
	CITGARD - Proven by the Driven	140 views	1:01
	CITGARD 700 and Ragan Partner to Unveil Dale Jarre...	147 views	0:49
	CITGARD 700 and Ragan Unveil Dale Jarrett Tribute f...	180 views	0:49
	The CITGO Process - Customized Solutions For...	121 views	1:47
	CITGO Lubricants: 10W-30 vs. 15W-40 Engine Oil	2.3K views	1:48
	Engine Teardown: Indiana Western Express Puts...	553 views	4:54

# Step 5 - Constantly Deliver Value

## Before and After Sales Call

- Acquire New Customers
- Retain Current Customers



# Heavy Duty Products

Steven Bowles





# Heavy Duty Product Line

## CITGARD Motor Oils

- CITGARD 600 Conventional
- CITGARD 700 Synthetic Blend
- CITGARD CNG/LNG Synthetic Blend
- CITGARD SynDurance Plus Full Synthetic

## Available Viscosity

- 10W-30, 15W-40
- 10W-30, 15W-40, 10W-30 FA-4
- 10W-30, 15W-40
- 5W-30, 5W-40



# Heavy Duty Engine Oils

## CITGARD 600 Conventional

Engine Oils Multi-Viscosity Grade use superior technology to protect current and older model low-emissions engines equipped with exhaust after-treatment systems and other new design features. These products exceed the API CK-4 heavy duty requirements as well as existing API CJ-4 and earlier categories (SAE 10W-30 and SAE 15W-40). Recommended for use in heavy-duty service in commercial trucks, agricultural equipment, construction equipment, stationary engines, and other diesel-fueled engine applications. Permits year-round use by offering improved low temperature start ability with full lubrication at high operating temperatures.

- **Specifications/Approvals**
- API CK-4, CJ-4, CI-4 Plus, CI-4, CH-4
- API SN (15W-40 Only)
- Volvo/Mack/Renault - VDS-4.5/EOS-4.5/RLD-3
- Ford WSS-M2C171-F1
- Cummins CES 20086
- Detroit Diesel 93K222



# Heavy Duty Engine Oils

## CITGARD 700 Synthetic Blend

Engine Oils deliver the performance needed for newer engine designs while improving performance in older engines. Engineered with a proprietary additive technology that protects engines running at higher operating temperatures and fuel injection pressures, while meeting tighter wear limits and lower emission requirements. SAE 10W-30 viscosity grade assists in attaining the new Phase II fuel efficiency standards by improving fuel economy, increasing cold start up lubrication, and providing superior engine durability.



- **Specifications/Approvals**

- API CK-4, CJ-4, CI-4 Plus, CI-4, CH-4
- API SN (15W-40 Only)
- Volvo/Mack/Renault - VDS-4.5/EOS-4.5/RLD-3
- Ford WSS-M2C171-F1
- Cummins CES 20086
- Detroit Diesel 93K222
- CAT ECF-3
- Daimler MB 228.31
- ACEA E9, E7
- MAN M3775
- MTU Category 2.1
- Deutz DQC III-18 LA
- Allison TES 439 (15W-40 only)
- JASO DH-2



# Heavy Duty Engine Oils

## CITGARD 700 MFE Synthetic Blend

A new generation engine oil for FA-4 compliant engines; supports the Phase II fuel efficiency standards driving the need for even more fuel-efficient heavy duty engine oils, while delivering excellent wear protection and engine durability. Formulated with proprietary additive technology that protects engines running at higher operating temperatures and higher fuel injection pressures, while meeting tighter wear limits and lower emission requirements. Provides additional fuel economy compared to API CK-4 10W-30 engine oils.

- **Specifications/Approvals**
- API FA-4
- Cummins CES 20087
- Detroit Diesel 93K223



# Heavy Duty Engine Oils

## CITGARD CNG/LNG

Engine Oil is specially formulated for natural gas (CNG/LNG), diesel and gasoline fueled engines. It is available in SAE 15W-40 and 10W-30 viscosity grades. CITGARD CNG/LNG Engine Oil utilizes CONVERGE Engine Oil Technology which provides multi-fueled vehicles with optimum performance capability without compromising overall performance.

- **Specifications/Approvals**
- API CK-4/SN
- Caterpillar ECF-3
- Cummins CES 20092 & CES 20086
- Detroit Diesel DFS 93K222
- Volvo/Mack/Renault - VDS-4.5/EOS-4.5/RLD-3



# Heavy Duty Engine Oils

## CITGARD SynDurance Plus Synthetic

Advanced fuel efficiency formula delivers maximum fuel economy, extreme cold temperature performance and superior engine durability. A careful balance of synthetic base oil components and a shear stable viscosity modifier ensures that heavily loaded engine parts have protective oil films. Field tested for over a million miles with engine teardown inspections. The results indicate superior wear protection and oil consumption control, as compared to premium SAE 15W-40 viscosity grade oils.



- **Specifications/Approvals**
- API CK-4, CJ-4, CI-4 Plus, CI-4, CH-4
- API SN (5W-40 Only)
- Volvo/Mack/Renault - VDS-4.5/EOS-4.5/RLD-3
- Ford WSS-M2C171-F1
- Cummins CES 20086
- Detroit Diesel 93K222
- CAT ECF-3
- Daimler MB 228.31
- ACEA E9, E7
- MAN M3775
- MTU Category 2.1 (5W-40) only
- Deutz DQC III-18 LA
- Allison TES 439 (5W-40) only
- JASO DH-2



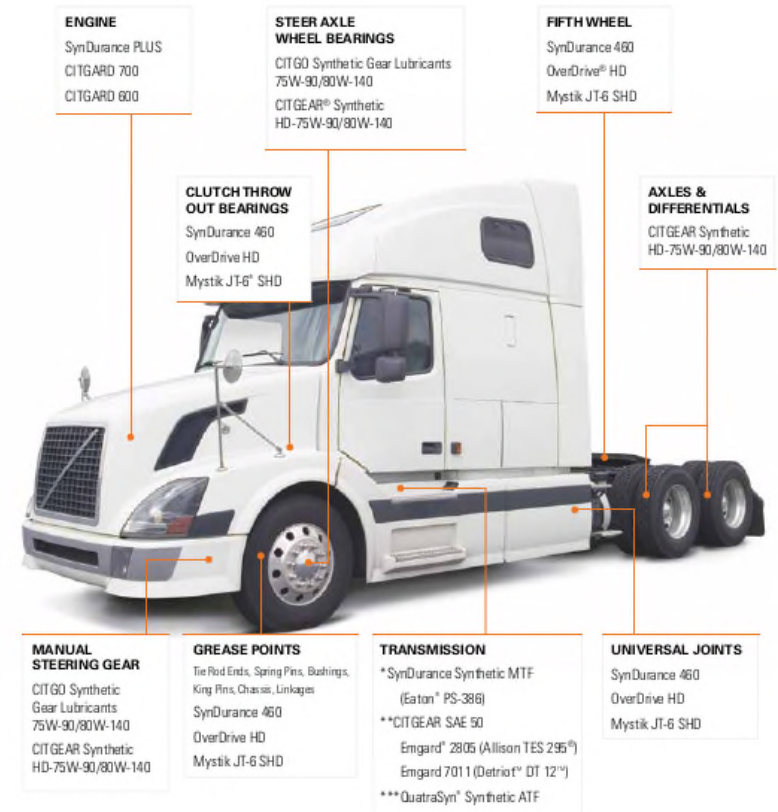
# Ancillary/Driveline

## Gear Oils

- SynDurance Synthetic Gear Lubricants
  - OEM Approved
- CITGEAR Synthetic Gear Lubricants
  - SFU
  - 1/3 Price

## Trans Fluids

- SynDurance 668 ATF
  - Allison TES 668
- SynDurance Synthetic MTF
  - Eaton PS 386
- CITGARD DriveShift (now available)
  - mDrive/I-Shift/DT12
  - SFU
- QuatraSyn
  - Suitable for Use Allison TES 295
- EMGARD 7011
  - DT12



# Ancillary/Grease

## Grease

- Mystik JT6 SHD 460 #2
  - Extended Drain Interval Grease
- Lithoplex RT #2
  - Red and Tacky
  - Widely Adopted
- Lithoplex MP
  - Lithium Complex
  - Market Competitive
- Lithoplex CM & HM
  - Caterpillar
  - CM 3% Moly
  - HM 5% Moly



## Questions

- Please post your questions using the Q&A function.



## How to Contact Us

- Lubes Answer Line
- 800-248-4684
  - 8:00 AM - 12:00 PM, 1:00 PM – 5:00 PM CT
  - Monday through Friday
- [lubeshelp@citgo.com](mailto:lubeshelp@citgo.com)
  - Available 24/7

## Future Webinars

October 1, 2021

Stationary Natural Gas Engine Oils

November 12, 2021

Automatic Transmission Fluids

November 19, 2021

Clarion Environmental Lubricants

December 3, 2021

ISO Cleanliness Requirements

December 17, 2021

Railroad Industry Products