

Earning Customer Loyalty with Lube Surveys

The webinar will begin in less than 10 minutes.



Earning Customer Loyalty with Lube Surveys

The webinar will begin in less than 5 minutes.



Webinar starting soon; until then...



TEST YOUR KNOWLEDGE

What is the best practice for inventory management?

FIFO

FEFO

IDK



Webinar starting soon; until then...



TEST YOUR KNOWLEDGE

What is the best way to store grease tubes?

Cap down

On its side

Cap up



Webinar starting soon; until then...



TEST YOUR KNOWLEDGE

What does PPE stand for?

Primary Protective
Equipment

Personal Protective
Equipment

Personal Preventive
Equipment



Earning Customer Loyalty with Lube Surveys



Amber Fessler - NLGI CLGS; STLE CLS & OMA-I

- CITGO Senior Sector Manager
- Materials Engineer
- 13 Years of Experience in Lubricants
- STLE Certified
 - Certified Lubrication Specialist
 - Oil Monitoring Analyst I
- NLGI Certified
 - Certified Lubricating Grease Specialist



Want Resources?

2025 HD
Contest

Support
Literature

Social
Media
Toolkit

Webinars

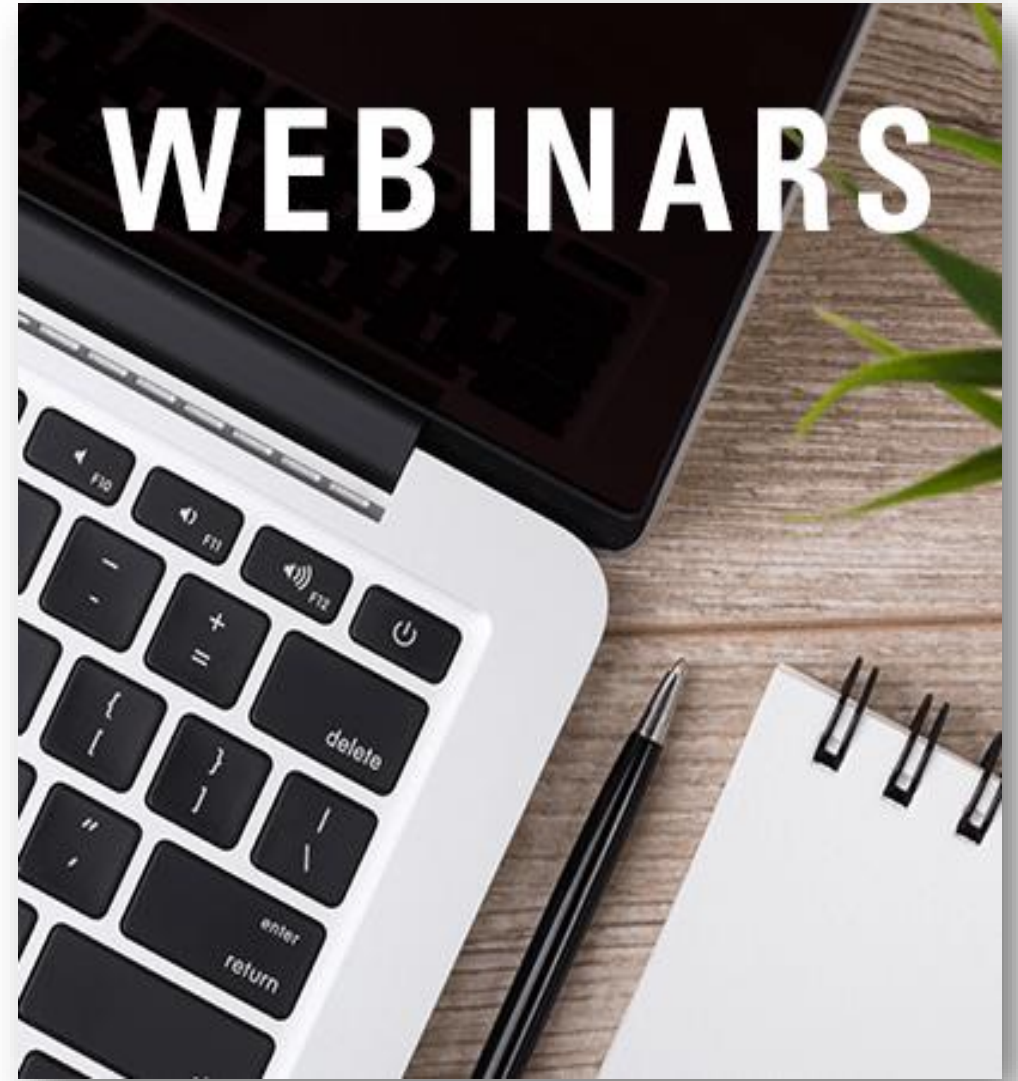
The screenshot shows the CITGO MarketNet website. The header includes the CITGO logo, MarketNet® branding, and a user ID. A navigation menu on the left lists various resources such as 'ABOUT CITGO', 'ACCOUNT MANAGEMENT', 'STANDARD ORDERS', 'NATIONAL ACCOUNTS', 'FREIGHTFREE OPTION', 'SWIFTSHIP PROGRAM', 'PRODUCT INFORMATION', 'LUBES ADVISOR', 'PRODUCT CROSS REFERENCE', 'PLANTS', 'LUBEASSURE', 'MARKETING TOOLBOX', 'TRAINING AND WORKSHOPS', and 'USER PROFILES'. The main content area features a 'LATEST' section with a welcome message and a grid of resource tiles including 'SHOP PRINT STORE', 'GO FOR THE GREEN', '2025 LUBRICANTS PROGRAMS GUIDE', 'CLEARANCE SALE', 'MARKETER COUNCIL INFORMATION', 'AUTOMOTIVE LUBRICANTS PROGRAM', 'Webinars', 'Lubes Advisor', 'Learn About LubeAlert', 'NEW PRODUCTS', 'LubeAssure', 'PRODUCT CROSS REFERENCE', 'SOCIAL MEDIA TOOLKIT', 'GREASE TOOLKIT', '2025 HEAVY-DUTY CONTEST', and 'MARKETNET 2.0 ORDERING PORTAL'. A banner at the bottom promotes the '2025 Lubricants Programs Guide' with a link to view it.

Future Webinars

June 23: Succeeding with Landfill Products

July 28: Extending Oil Drains Safely with Balanced Formulations

Aug 25: Building Your Industrial Expertise



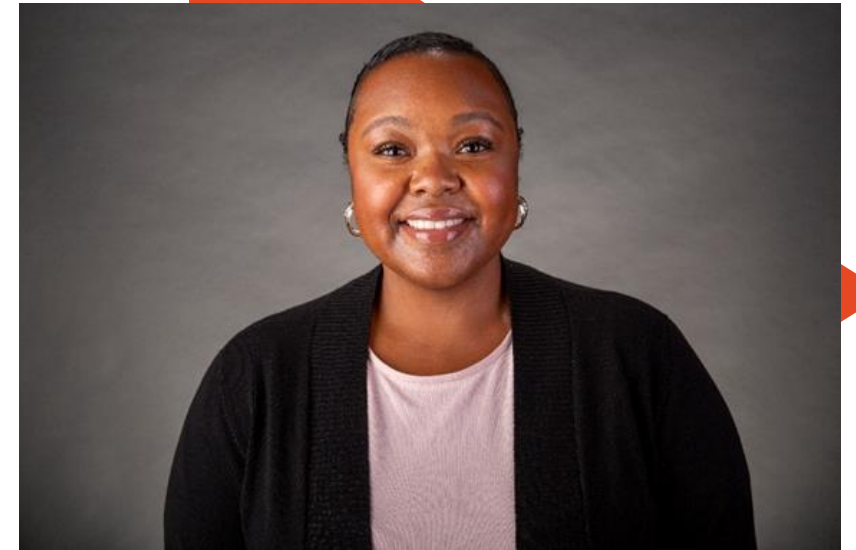
David Turner – NLGI CLGS, STLE CLS & OMA-I

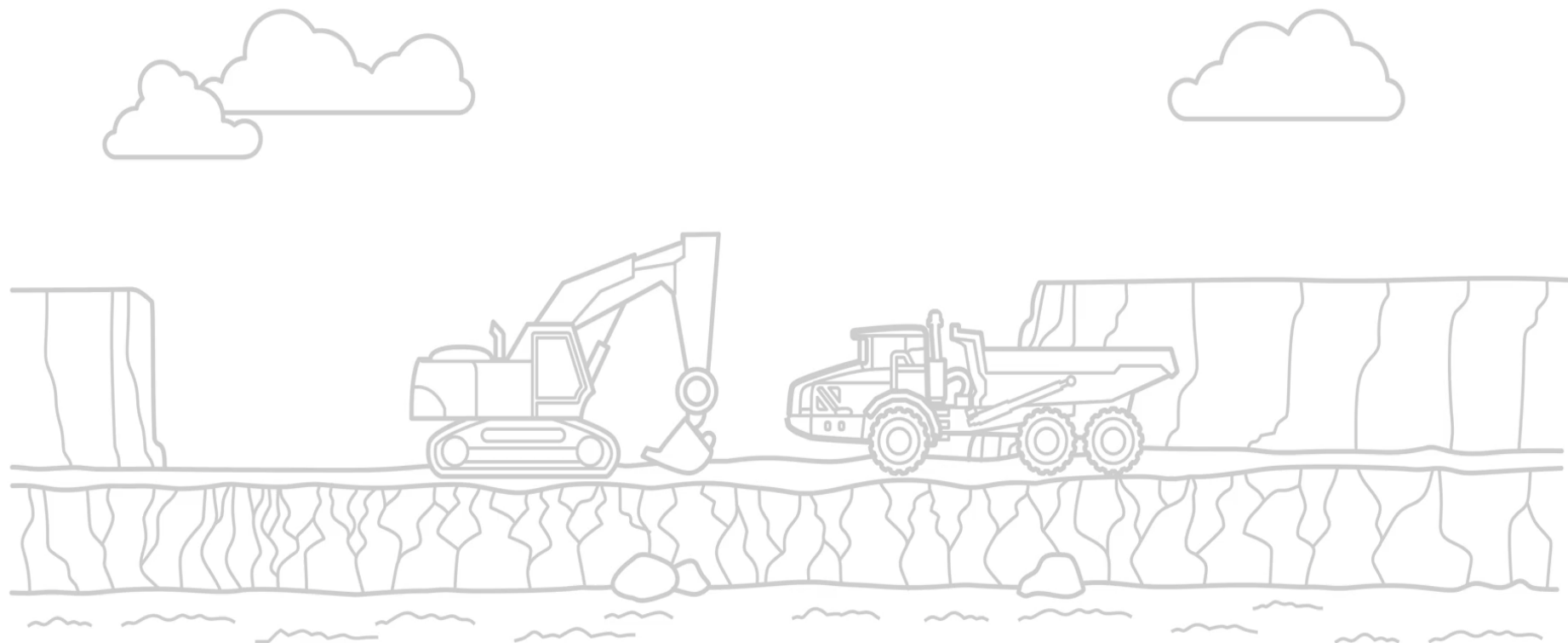
- CITGO Senior Sector Manager
- Chemical Engineer
- 40+ Years Experience in Lubricants
- Active in STLE, NLGI, and ASTM



Erica McDonald

- CITGO Lubricants Product Manager
- B.S. Integrative Biology with a minor in Chemistry
- 14 Years of Experience in Lubricants
 - Sr. Product Specialist – Fluid Technology
 - QC/QA Laboratory Experience





AGENDA

WHAT IS A LUBE SURVEY?



PREPARATION WORK



PERFORMING THE SURVEY



REVIEWING & REPORTING

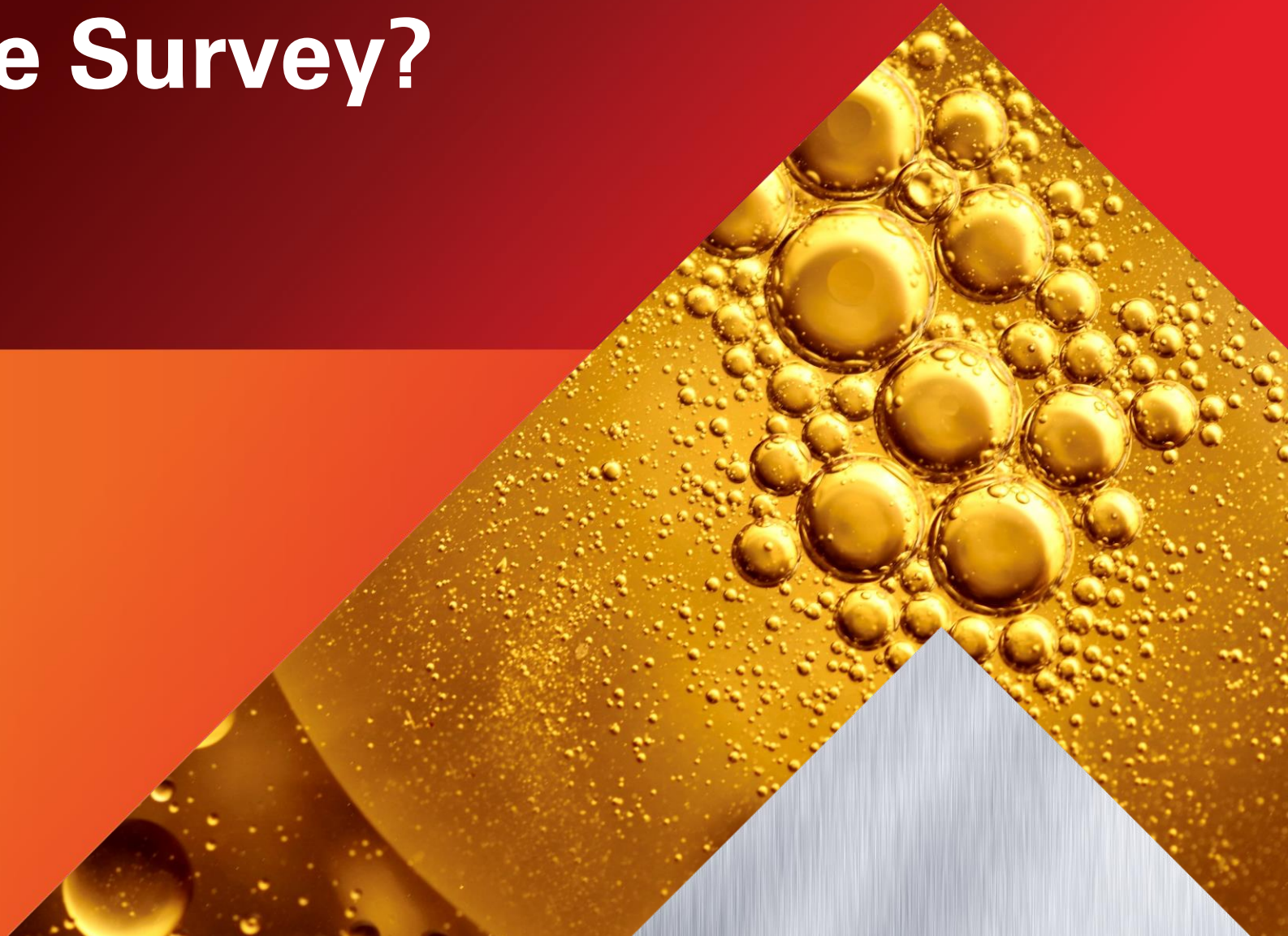


BENEFITS OF A LUBE SURVEY



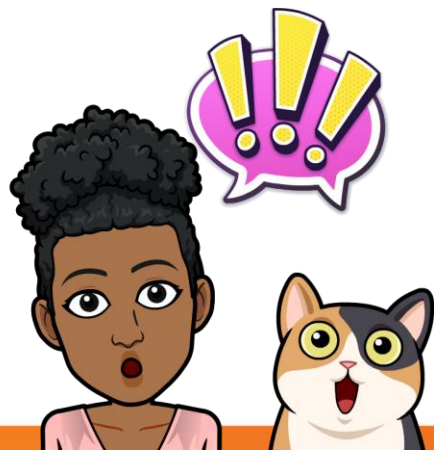
TOOLS & RESOURCES

What is a Lube Survey?



What is a Lube Survey?

- A complete review of lubrication requirements for all equipment at a plant.
- An opportunity to review the type and brand of lubricants



Purpose of a CITGO Lube Survey

- A thorough review of all plant equipment using lubricants
- A review of all lubricated equipment including product requirements and lubrication frequency
- Specific applications for equipment and identification of each point of lubrication
- Review of all current lubricants
- Analysis of safe product consolidation opportunities
- Safety and training needs analysis



Preparation Work



Survey Preparation

Define the Opportunity

- Understand the Business Objective

Develop the Scope of the Project

- Communicate the Commitment

Establish the Expectations

- Needs, Results, Timeline

Coordinate the Project

- Champion the Survey

Survey Pre-Planning Meeting

- Project Review
- Personnel Plan
- Objectives
- Space and Access Requirement
- Date & Time Allocation
- Safety



Preparation Work

1. Ask For Asset Lists
2. Learn The Nomenclature
3. Get The Descriptions
4. Read Maintenance Manuals
5. Request A List Of All Current Lubricants In Use
6. Get Plant Diagrams
7. Divide Up The Work
8. Determine:
 - Time Required
 - Manpower Required
 - Output



OEM Manual Review

Review Data Daily

- Do not Delay – Pre-Plan
- Confirm Plant Assistance

Study Space

- Private/Quiet Space

OEM Manuals

- On-Line
- Most Hard Copy





CITGO Lubricants

Plant Lubrication Survey Chart



Lubrication Specialists	
Customer / Plant / Location	
Maintenance Director	
Plant Survey Administrator	
Date of Survey	

Scope

CITGO Lubricants in cooperation with _____ will engage in a plant, lubrication survey in which the following criteria will be addressed.

A thorough review of all plant equipment using lubricants.

An OEM-based review of all lubricant equipment approvals including products and lubrication frequency.

Specific applications for equipment and identification of each point of lubrication.

Review of all current lubricants, production date, and useful shelf-life review.

Analysis of Safe Product Consolidation Opportunities

Safety and Training Needs Analysis

Survey Plan

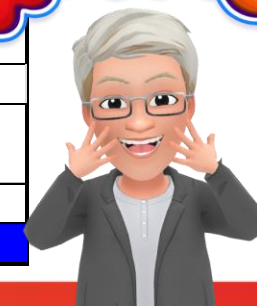
Survey Pre-Plan Meeting			CITGO Personnel	
Survey Date(s)			Marketer Personel	
Survey Report			Plant Personel	

Checklist

	Pre-Plan Complete		Scheduled with Plant		Survey Forms Printed
	Safety Review		Request for OEM Manuals		Review Scope and Expectations
	PPE Review and Procurement		Sample Bottles Procured		Report Complete

Signatures

CITGO Representative		Authorized Plant Representative	



Survey Team Safety

Personal Protection Equipment (PPE)

- Steel-Toe Shoes or Boots
- Hard Hat
- Safety Glasses
- Hearing Protection
- Clothing
 - Gloves
 - Fire Resistant Clothing
- Fall protection
- Respirator

Safety Data Sheets (SDS)

- Review Product Storage, Handling and Usage
- Review SDS

Plant Specific Safety Training



A blue-tinted photograph of two male workers wearing safety glasses and high-visibility vests. They are standing in an industrial setting, looking at a clipboard held by the worker on the left. The worker on the right is holding a blue hard hat.

Equipment

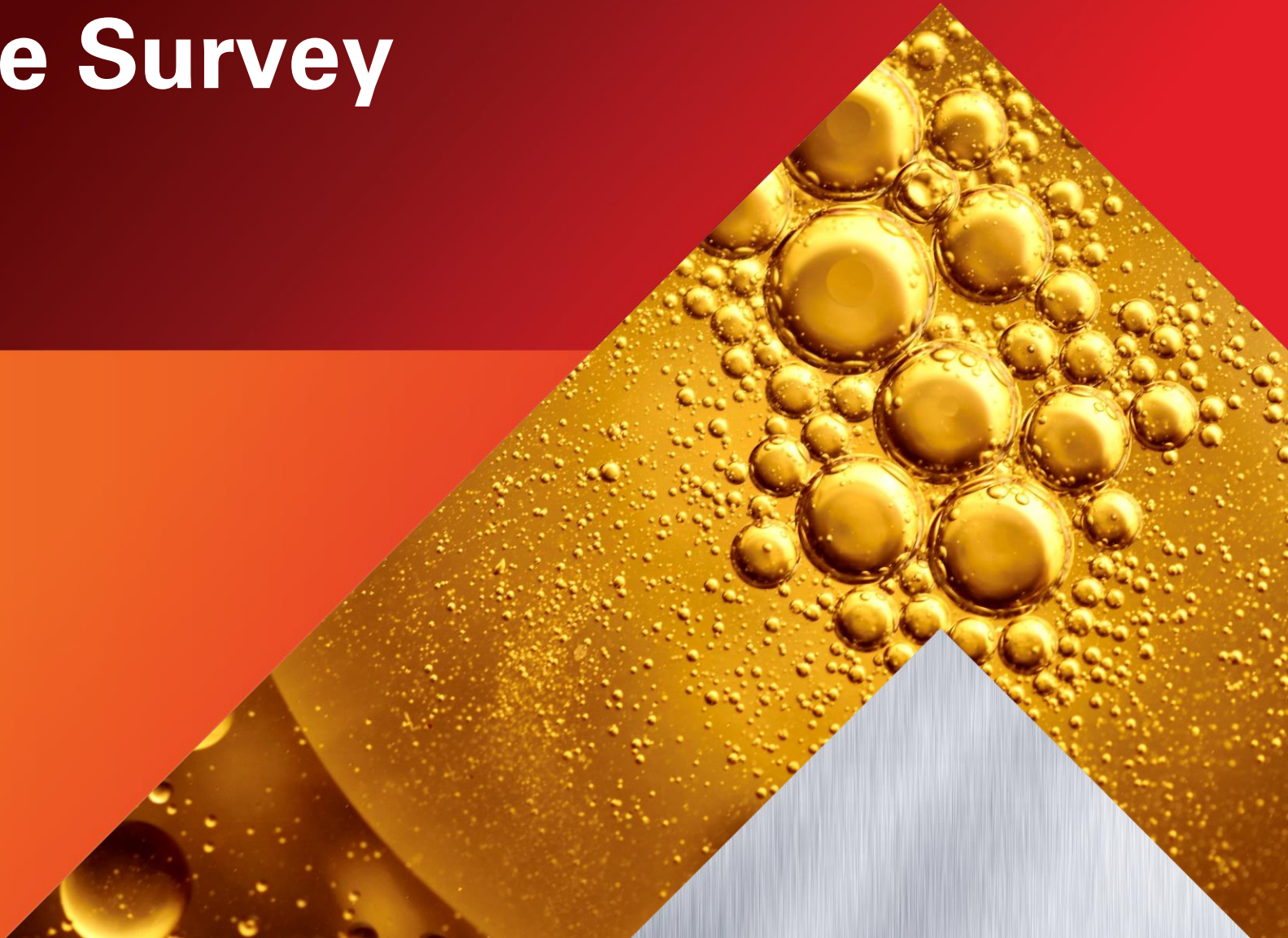
- Flashlight
- Multi-Tool
- Tape Measure
- Sampling Eqpt. (16oz.)
- De-Greaser
- Rags
- Clip-Case
- Protective Coveralls
- Camera

An orange-tinted photograph of a warehouse interior. In the background, a yellow forklift is visible, and the floor is covered with stacks of cardboard boxes.

Current Product Inventory

- Review Current Products
- Determine Product Age
 - Shelf-life
- Develop Product Update Plan
 - How to Remove Outdated Products
- Cross-Reference
 - Do NOT Depend on Current Product Usage

Performing the Survey



Get the Ball Rolling

Use Internal Support

Precision Notes and Store
in Order

Use Photography as
Support

CITGO Lubricant Survey
Chart

Performing the Survey

Identify the Equipment

- Look for OEM Designations

Note Lube Related Points

- Filters and Breather Condition

Identify ALL Points of Lubrication

- Sight Glasses
- Reservoirs
- Zerk Fittings
- Oil Cups
- Automatic Lubrication





CITGO Petroleum Corporation Plant Lubrication Survey Chart



Plant / Location		Department		Date	
Dept. Maintenance Supervisor		Personnel			

Equipment / Make / Model / Application	Lubrication Method	Frequency	Current Product	Rec'd. Product	Change Procedure

Application				Frequency			
ALL	Air Line Lubricator	CC	Compression Cup	AY	Annually / Yearly	H	Hourly / Hours ____
ALS	Automatic Lube System	CIRC	Circulator	BA	By Analysis	M	Monthly / Months ____
AML	Air Mist Lubricator	GG	Grease Gun	PCK	Physical Check	W	Weekly / Weeks ____
B	Brush	OC	Oil Cup	D	Daily / Days ____	ML	Maintain Level
RES	Reservoir	O	Other	S	Shift	OEM	OEM Rec'd.

Reviewing & Reporting



Product Review & Reporting



Be Specific and Be Correct

- Do NOT Assume

Report any Concerns

- Be Honest and Straightforward

Provide the Recommended Course of Action

- Specific Process for Product Change
- Provide Possible Consolidation Options

Provide Approved Report

- CITGO Technology Review and Stamp of Approval

Results Meeting

A photograph of a meeting in progress. In the foreground, a woman with long dark hair, wearing a red top, is seated and looking down at a notebook, holding a pen. Behind her, a man in a light-colored shirt is also looking down. To the right, another man in a blue shirt is visible, looking towards the right side of the frame. The background is bright and out of focus, suggesting a window or a well-lit room. The overall atmosphere is professional and focused.

Schedule Meeting

- Decision-Makers Present

Provide Bound Hard Copy & Flash Drive

- Provide an Executive Summary
- Make Point to Compliment Positive Practices
- Review Areas of Concern

Develop a Plan to Implement

- How do we move forward?
- Timeline Covenant Critical

When to Request a Lube Survey

1

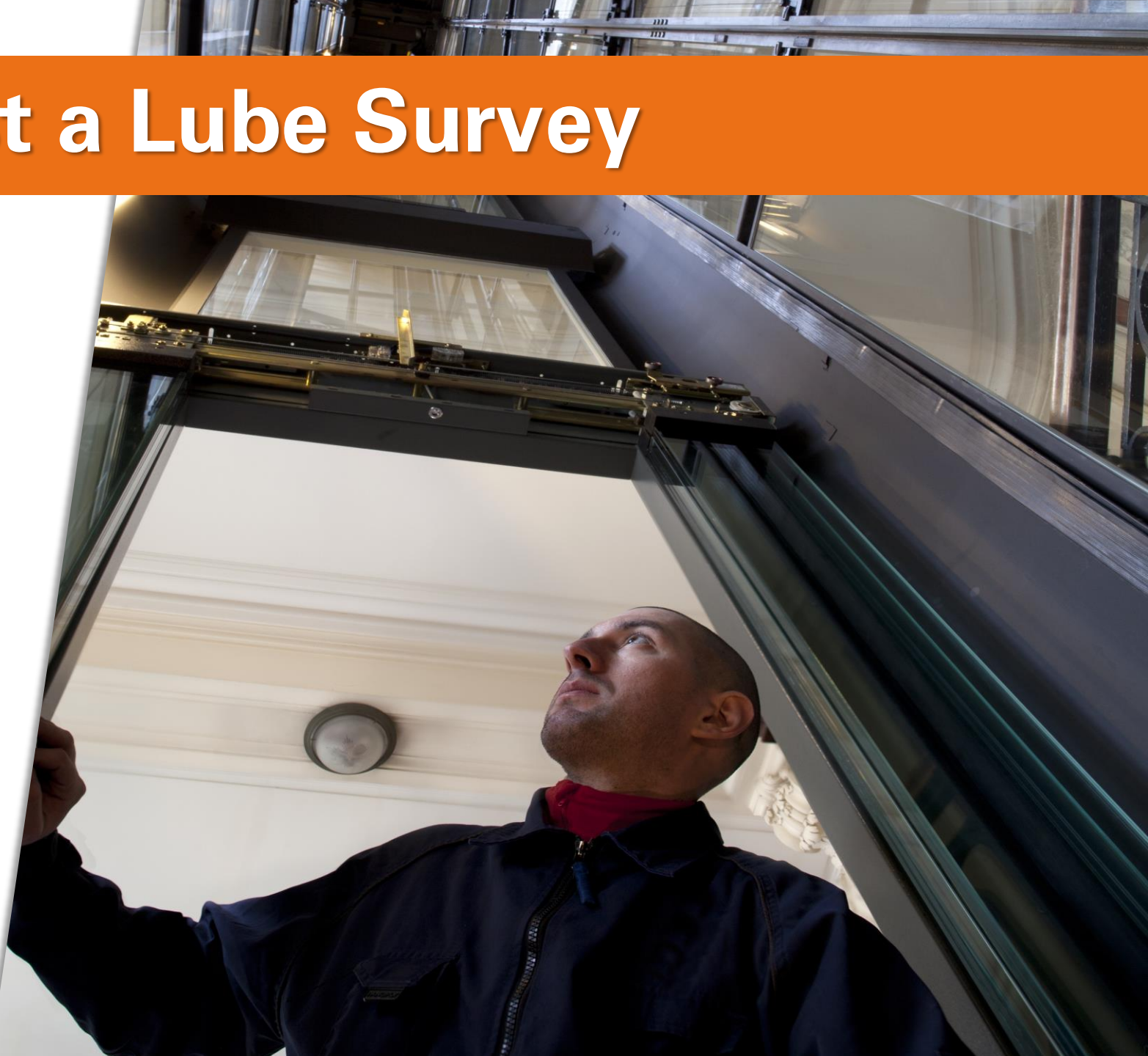
New Lubricant
Supplier

2

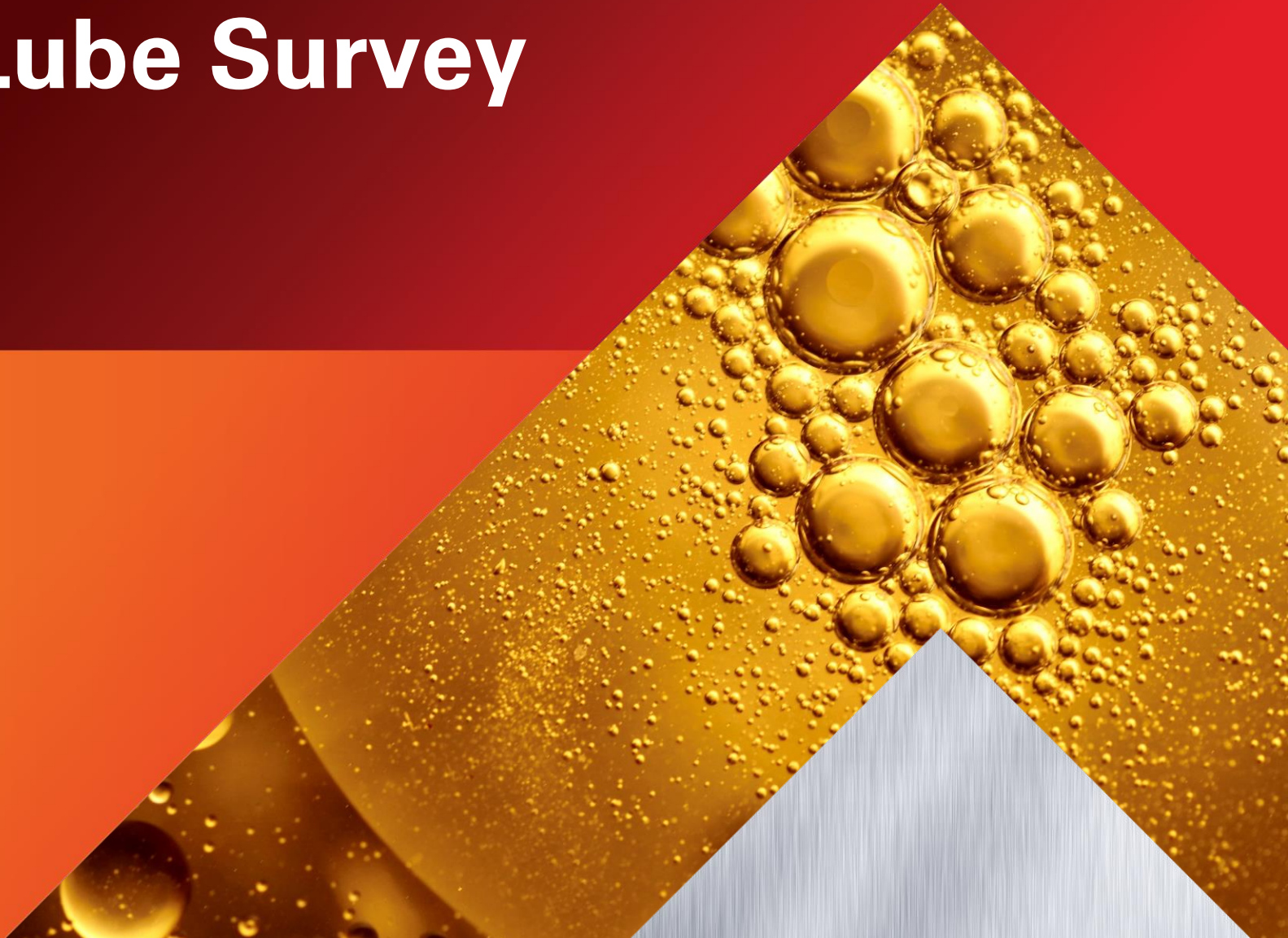
Failures or
Issues

3

It's been a
while...



Benefits of a Lube Survey



Benefits to Your Customer

- Consolidation Opportunities
- Opportunities to find problems

Benefits For You

- Opportunity to build better relationships
- Opportunity to learn about customer operations and applications
- Potential for growth



Tools & Resources



How Can We Help?



Sector Managers

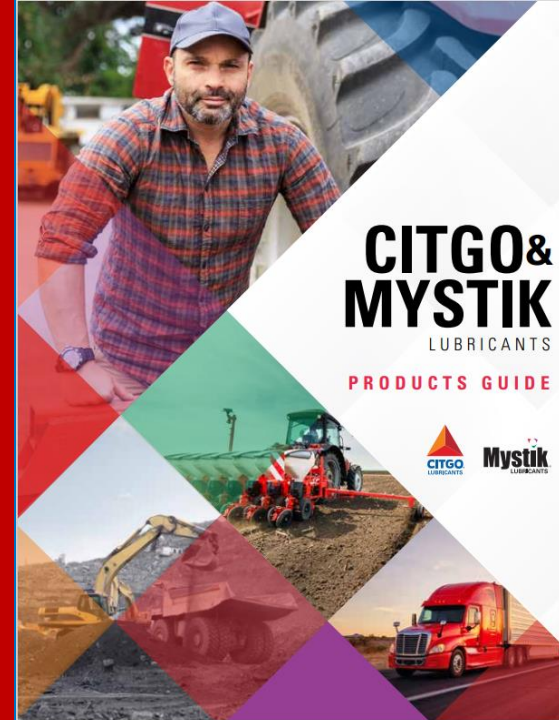
- Engine
- Industrial
- Grease

Key Industry Knowledge

- OEM Support
- Field Support

Tools & Resources

- Product Cross Reference
- Lubes Advisor
- Technical Service Reports (TSR)
- Product Guides
- Webinars
- Technical Bulletins
- Literature and Collateral



Technical Bulletins

We are pleased to offer convenient links to technical bulletins to help our customers learn more about our products and programs. Check out the list below.

Bulletin Name	Description	
Balancing Engine Protection with DPf Life	CITGARD 700 Synthetic Blend HDEO 10W-30 Balancing Engine Protection with DPf Life CITGO® CITGARD® 700 Synthetic Blend Heavy Duty Engine Oil SAE 10W-30 is a premium API CK-4 heavy-duty engine oil that utilizes a balanced approach to protect your engine and maintain your Diesel Particulate Filter (DPF) life. In this paper, we will look at CITGARD 700 Synthetic Blend Heavy Duty Engine Oil SAE 10W-30, DPF basics and how CITGARD 700 10W-30 protects the engine and maintains DPF life.	Read More
Biodegradable Flushing Procedure	Flushing Procedure: Clarion Green BIO and Clarion Green Synthetic Hydraulic Fluids In order to achieve the maximum benefit from biodegradable hydraulic fluids, a system should be as free from contamination as possible. Contamination can potentially affect the biodegradability, toxicity and fluid performance at high enough levels (typically >5%). CITGO recommends a flushing procedure for systems converting to the Clarion Green BIO and Clarion Green Synthetic hydraulic fluids. The extent of flushing depends on the fluid previously used and the type and condition of the system.	Read More
Field & Operations Safety and Personal Protective Equipment	Introduction to Field & Operations Safety and Personal Protective Equipment CITGO is committed to working safely and promoting safety wherever its employees and partners operate. This guide to work site safety is intended as a general introduction to safe practices in both everyday operations areas and the field.	Read More
FR Fluids	Use of Fire Resistant Hydraulic Fluids The use of industrial fluid power or hydraulics has increased substantially – not only in U.S. industry but also in worldwide industry. In addition to this increase in fluid power usage, we have seen some rather drastic changes in the operating conditions of industrial hydraulic circuitry.	Read More
GHS Compliance	GHS Label Compliance was required by June 1, 2015 In order to meet the requirements of the new U.S. OSHA Hazard Communication regulations that have adopted the Globally Harmonized System (GHS) of classification and labeling of chemicals, CITGO® is making changes to workplace labels for containers that hold five or more gallons, or 35 or more pounds, including pails, kegs, and drums.	Read More
Guide To Synthetic Lubricants	Guide to Synthetic Industrial Lubricants The term "synthetic lubricant" can apply to a wide range of non-petroleum derived materials used as lubricant base stocks. The most common are synthetic hydrocarbons, the polyalphaolefins, or PAOs.	Read More
How to Take a Sample	How to Take a Sample Oil and grease samples should be representative of the system from which they are taken. This can be accomplished by following a few procedures.	Read More
Understanding the ISO 4406 Lubricant Cleanliness Rating System		

LUBES ADVISOR

Please select equipment category

English (US) ▼



Automotive



Light Trucks



Commercial



Agricultural



Off-Highway



Industrial

Please select your equipment using either of the following search methods

Keyword Search

Search

Manual Search

Choose a Sector ▼

Choose a Model ▼

Questions?



Please post your
questions using the
Q&A function.



For technical inquiries or issues:
Lubes Answer Line 800-248-4684
lubeshelp@citgo.com





Thank You!

See you next time

