## The Roadmap to Certification Success

The webinar will begin in less than 10 minutes.





## The Roadmap to Certification Success

The webinar will begin in less than 5 minutes.









## The Roadmap to Certification Success

- Types of certifications available
- Value of being certified
- Qualifications for success
- How to prepare for your exams

## Amber Fessler - CLS, OMA-I, CLGS

- CITGO Senior Technical Services Representative
- Materials Engineer
- I1 Years Experience in Lubricants
- STLE Certified
  - Certified Lubrication Specialist
  - Oil Monitoring Analyst I
- NLGI Certified
  - Certified Lubricating Grease Specialist



## Luke Buchanan - CLS

- CITGO Senior Account Manager
- 11 Years of Selling Experience in the Lubricants Industry
- STLE Certified
  - Certified Lubrication Specialist



## David Turner - CLS, OMA-I, CLGS

- CITGO Senior Technical Services Representative
- Chemical Engineer
- 40+ Years Experience in Lubricants
- STLE Certified
  - Certified Lubrication Specialist
  - Oil Monitoring Analyst I
- NLGI Certified
  - Certified Lubricating Grease Specialist
- Active in STLE, NLGI, and ASTM









## **Certification Organizations**



## Society of Tribologists and Lubrication Engineers (STLE)

- Premier technical society for lubrication professionals
- Advance the science of tribology and the practice of lubrication engineering
- Lubrication training courses
- Monthly publications *Tribology and Lubrication Technology* (TLT) and *Tribology Transactions*.





## **STLE Certifications:** Oil Monitoring Analyst I

- Oil Sampling
- Application of Test Methods
- Data Interpretation
- Troubleshooting
- Lubrication Fundamentals

A person who holds OMA-I certification is a technical expert in in-service oil analysis and data interpretation.





**STLE Certifications:** Certified Lubrication Specialist

- Lubrication Fundamentals
- Lubricant Analysis
- Lubricant Selection
- Lubricant Manufacturing
- Lubrication of Common Mechanical Components
- Problem Solving / Troubleshooting

A person who is **CLS** certified is considered to be a technical expert in a **wide range** of lubrication topics.



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### **STLE Certifications**: Oil Monitoring Analyst II & Certified Metalworking Fluid Specialist



stle

METALWORKING

CERTIFIED

FLUIDS Specialist

#### **Oil Monitoring Analyst II**

 Advanced topics in oil analysis, intended for lab managers, reliability engineers, etc.

#### **Certified Metalworking Fluid Specialist (CMFS)**

 Advanced topics on metalworking fluids, specific to those who evaluate, select, and maintain metalworking fluids



## National Lubricating Grease Institute (NLGI)

- Disseminate information that can lead to the development of better lubricating greases
- Provide better grease lubrication engineering service to the industry
- Publish a standard defining grease consistency
- Publish specifications for automotive and industrial greases
- Bi-monthly technical journal NLGI Spokesman
- Technical presentations and education courses





## NLGI Certification: Certified Lubricating Grease Specialist

- Grease Formulation and Components
- Grease Manufacture
- Grease Testing
- Grease Selection
- Industrial Applications
- Automotive Applications
- Troubleshooting



A person who holds **CLGS** certification is considered to be a **technical expert** in the **field of lubricating grease**.

### **International Council for Machinery Lubrication**



- Dedicated to helping lubrication practitioners succeed in their professional careers
- Geared mainly toward lubricators and lab technicians
- Supports efforts in ASTM, ISO, etc. regarding the development of lubrication-related standards and guides

### **International Council for Machinery Lubrication**





- MLT I/II Designed for people who maintain and lubricate equipment
- MLA I/II/III Designed for people who work in the field of lubricant analysisbased condition monitoring
- LLA I/II Designed for people involved in the laboratory analysis of in-service

## **ICML Certifications:** Machinery Lubrication Technician

#### MLT I

- Maintenance Strategy
- Lubrication Theory
- Lubricant Selection
- Lubricant Application
- Lube Storage and Management

#### MLT II

#### **MLT I + additional topics**

- Lubricant Formulation
- Grease Application and Performance
- Lubricant Testing and Performance Analysis





## ICML Certifications: Machinery Lubricant Analyst

#### MLA I

- Maintenance Strategies
- Lubrication Theory / Fundamentals
- Maintenance Strategies
- Lubricant Selection
- Lubricant Application
- Lube Storage and Management
- Lube Condition Control
- Oil Sampling
- Lubricant Health Monitoring
- Wear Debris Monitoring and Analysis

#### MLA II

MLA I + additional topics

- Lubricant Roles and Functions
- Oil Analysis Maintenance Strategies
- Lubricant Contaminant Measurement and Control



MLA II + additional topics

- Fundamentals of Machinery Wear
- Analyzing Lubricant Degradation
- Oil Analysis Program Development and Program Management





## ICML Certifications: Laboratory Lubricant Analyst



### **ICML Certifications:** Machinery Lubrication Engineer



- Machine Reliability
- Machine Maintenance
  - Condition-based
- Maintenance Tribology, Friction, Wear and Lubrication Fundamentals
- Lubricant Selection
- Periodic Lubrication Maintenance Tasks
- Inspection of Lubricated Machines
- Fault / Failure Troubleshooting and Root Cause Analysis (RCA)
- Oil Reclamation

## ICML Certifications: VPR & VIM

#### Varnish & Deposit Prevention and Removal (VPR)

- Problems associated with varnish and deposits
- Factors affecting breakdown
- Proactive methods that can be used to minimize oil breakdown
- Methods/technologies that can be used to remove oil breakdown products and/or prevent deposits



#### Varnish & Deposits Identification and Measurement (VIM)

- Problems associated with varnish and deposits
- Varnish and deposits composition
- How breakdown products/ contaminants become deposits
- Oil analysis techniques that can be used to gauge breakdown and propensity towards deposit formation



## Value of Certification





# Salesmanship & Certification

Why should I undertake the certification process?

Credibility Knowledge Competitive Advantage Clients Benefit Professional Respect Career Advancement (\$) Opportunity Cost Mental Strain Expectations Real Cost





## **Why Certifications Matter**





"It began as a point of pride, and still is, but the hands-on, immediate puzzle-solving skills that accreditation provided for me both facilitated and enhanced my work in assisting customers from a Sales & Technical perspective."

- John Messinger, CITGO Senior Account Manager. Career Enhancement
Resourcefulness
Credibility
Pride

"CITGO encouraged our technical education as the sales & technical associates landscape changed. The CLS provided me with a higher level of education, status and acceptance when dealing with industrial plant engineers and plant personnel. You must separate yourself from the competition and stand out internally and externally. The more you learn, the more you earn!"

- Mark Duplantis, CITGO Senior Account Manager.



"Having recently gained my CLS certification (6 months ago), my primary want for credibility has been achieved. Being on the younger side, regarding my role in our industry, I can demonstrate the knowledge gained and feel confident not only in providing direction and assistance to customers but now feel more confident in pursuing other goals and certifications having found success with the CLS."
Brian Cook, CITGO Senior Account Manager.

Competitive Advantage
Knowledge
Credibility
Compensation

Credibility
Educator
Confidence
Knowledge

## Real-World Sales Applications







## Candidate Qualifications & Characteristics

| S      | Certification | Experience  |
|--------|---------------|---|
| ation  | STLE CLS      | Minimum of three years in the lubrication field                                   |
| alific | STLE OMA-I    | Minimum of one year of experience in oil analysis and 16 hours of training        |
| Qu     | NLGI CLGS     | Significant knowledge of grease formulation, manufacture, testing and application |



| Certification     | Experience   |
|-------------------|--|
| ICML MLT I/II     | Minimum two/three years of experience plus<br>16/48 hours of training                  |
| ICML MLA I/II/III | Minimum one/two/three years of experience and 24/48/80 hours of training               |
| ICML LLA I/II     | Minimum one/two years of experience and 24/48 hours of training                        |
| ICML MLE          | Minimum of five years of experience in the lubrication or mechanical maintenance field |
| ICML VPR & VIM    | One year of experience in the varnish identification and removal fields                |

## **Characteristics**



- Interest in how things work
- Mechanical aptitude
- Motivated to be an advisor to customers (not just sell)
- Willing to put in the amount of self-study needed to prepare for an exam
- Willing to participate in continuing education and technical activities to maintain certification

## **Certification Exam Blueprint**

## **Preparation**

- Self Assessment how much do you already know?
- Based on the exam to be taken, determine your information gaps.
- Consult the website of the organization to determine what study materials are available (body of knowledge)
- Determine if a preparation course is available for the exam
- Take a preparation course, if needed
- A preparation course should be a review, not new information





## **Body of Knowledge**







## Provided by certification organization

## Do not expect to read everything



Select references that fill in your knowledge gaps

## **How Difficult is the Exam?**

#### When to Take an Exam

- When you feel strong in the subject areas of the exam
- Immediately after taking a preparation course

#### **Difficulty / Pass Rate**

- The minimum score on most certification exams is 70%
- The pass rate on STLE and NLGI exams is less than 65%
- We do not have pass rate data for ICML exams
- Many candidates take exams more than once



## Signing Up, Cost & Renewal





## **Questions?**



Please post your questions using the Q&A function.

## **Contact Us**

Lubes Answer Line 800-248-4684

8:00 AM - 12:00 PM 1:00 PM - 5:00 PM CT Monday - Thursday

8:00 AM - 12:00 PM 1:00 PM - 4:30 PM CT Friday

lubeshelp@citgo.com









## **Future Webinars**

#### May 26, 2023

Contaminants in Lubricants

### June 30, 2023 LubeAlert® Oil Condition Monitoring



## Thank You!

See you next time!

