Breaking the Lubrication Mentality Barrier

By Stacy Heston, CLS, CMRP, PMP, Sr. Project Manager – Reliability

I was recently asked a question about lubrication that I'd like to share, since it seems to be a problem that many plants encounter: *I'm about to implement a lubrication program for my plant, but I realize that no matter how many processes I put in place, they won't work if I can't get the people to follow them. How do I change the culture of my team to improve reliability?*

With any type of program implementation, five steps are generally involved in a successful process: Evaluate, Initiate, Plan, Execute, and Monitor & Control. The first four steps are typically the easy part, but the last step – Monitor & Control – is a crucial phase and can be more difficult.

Monitoring and controlling is where we follow up with those who are performing the lubrication work, whether it is the actual task of greasing a bearing, simply storing the lubricants in an appropriate manner or following up on inspection tasks. The Execution phase is where the new program edicts are distributed to key personnel, usually at the management or supervisory level. Sometimes those edicts do not make it to those in the field in a timely or accurate manner, depending on the method of communication.

So, how do we overcome this issue and identify shortfalls within the Monitor & Control process? Here are four basic steps to utilize:

1) Inspect – Take a tour of your facility. Does what you see match the goal?

a. Are transfer containers clean, sealed, labeled, etc?

b. Do you see piles of accumulated grease around a bearing?

c. Are desiccant breathers being utilized? Have they expired?

2) Chit Chat – Visit with personnel doing the work and not their supervisor or manager.

When visiting with those in the trenches, I like to employ the statements, "Tell me about your process" and "Show me how it's done." Also, include, "Why do you do it this way?" These questions can be used during the initial Evaluation phase to perform scoring, and also during the Monitor & Control phase to indicate if changes are starting to be made at the field level. If the process I am told about and shown does not match the goals, the next question should be, "Are you aware of the changes being made?" Then add in some specifics. This step can offer valuable insight into the mindset of employees, and can help determine the next necessary step.

3) Communicate – If steps 1 and 2 suggest excellent progress is being made, you may be able to stop at this point. However, if they do not, it may be time to re-evaluate your communication plan with the personnel in the field. At this point, the lack of implementation could be an issue of communication breakdown through misunderstanding of the goals behind the implementation, general disinterest or incorporating the wrong personnel.

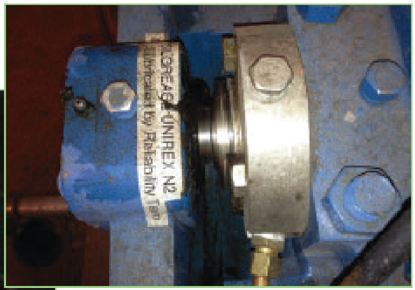
As a general rule of thumb, if you are relying on word of mouth for implementing edicts, stop. While word of mouth is important in getting the message out, it should not be the only form utilized. The main reason is people tend to forget the specifics of what, how, and why. Written documentation should be incorporated into the implementation. Documentation, whether in the form of an email or formal document, should express the following:

a. What specific task needs to be done.

b. Why this task needs to be done.

c. How it should be done.

d. A timeline for completing the task in this manner.



Left: *An example of a company who was moving towards the use of dedicated, sealable, and color coded containers but, 18 months later, the original re-used containers are still in use.*

Above: *After re-assigning re-grease procedures to the Reliability Team, maintenance personnel continued to re-grease this bearing. The bearing has been over-greased with an incorrect grease which causes damage to the bearing.*

4) Training – Training can take on many forms, and it can be a powerful tool in gaining understanding and support for an implementation. When I work with clients and see issues within the organization, training is the first step towards addressing the problem. Training can take on a variety of styles — from one-hour awareness training that covers the high level basics, to detailed hands-on training with lubrication technicians. It can also involve personnel who are not directly involved with lubrication, but who may be inadvertently sabotaging the implementation process.

Some general guidelines on who and when to train include:

a. Mechanics or Millwrights: When routine lubrication tasks are being reassigned to lubrication technicians.

b. Planners: When routine lubrication tasks need to be removed from PMs or incorporated in a different fashion.

c. Operators: When transitioning to, or from, an Operator Care program.

When implementing a lubrication program, the Monitor & Control phase can make or break your implementation. This phase provides the necessary verification to ensure goals are being met. Basic follow up techniques can ensure understanding with personnel at all levels, and should be used often to ensure continued progress. IMPO