RBL™ PROGRAM FIELD GUIDE

Chevron Lubricants



TWO
NEEDS AND SOLUTIONS

Phase 2: Develop the Program

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Phase 2: Develop the Program

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Best in Class Assessment Data Collection

Product Selection	Y/N	Priority 0 1 2 3
1. Equipment is currently operating under original design parameters with respect to production throughput, HP loading speeds, temperatures and maintenance intervals		
2. Component life acceptable and in-line with similar type of operations/customers		
3. Lubricant usage is acceptable and in-line with other similar operations/ customers		
4. Oil lubrication systems are original OEM design and have not been modified (i.e. additional external cooling or filtration systems have not been added)		
5. Centralized grease systems are original OEM design and have not been modified (i.e. heat shields or external water cooling with hoses on bearing housings have not been added)		
6. Most economical and efficient package styles used		
7. Predominantly a single brand of lubricants used—exceptions are OEM or warranty specific fluids		
8. Viscosity grades within product family groups (hydraulic, engine, gear, etc.) are rationalized and kept to a minimum		
9. Number of greases are rationalized—use of one grease where possible; if more than one grease, the greases are compatible		
10. Environmental and process contaminants (water + dirt) are either minimal or properly controlled		
11. Lubrication survey was conducted in the past 3 years, and updated for new equipment or changes in operational parameters		
12. For critical equipment, OEM lubricant specifications identified and followed		
Action Items:		

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Product Integrity	Y/N	Priority 0 1 2 3
1. Storage area for package products (drums, kegs, pails and case goods) is sheltered, clean and product is organized by fluid type with labels or wall charts		
2. Drums are stored on sides or covered with plastic/cloth; kegs and pails are covered; stock is rotated first in, first out (FIFO)		
3. Bulk tanks or totes have proper breather units to capture larger particles and protected from rain water entry		
4. Bulk tanks have had a product integrity sample taken within the past 18 months (just above tank heel)		
5. Delivered bulk oil is filtered during off-loading procedures to target ISO cleanliness specs		
6. In-field or in-plant lube stations protected from contaminants (process + environment); transfer containers (includes funnels, hoses, etc.) are dedicated by product group, and protected from contamination		
7. For critical equipment, make-up oil is added through direct hose connection and filtered going into reservoir—NOT poured in using funnel/bucket arrangement.		
8. System reservoir units properly maintained (relatively clean, breathers, oil level gauges, fill connections)		
9. ISO Cleanliness codes have been established and ports for taking oil samples are installed on oil systems.		
10. Hoses, pumps, valves (servos, proportional, directional) and actuators (motors, cylinders, drives) are achieving desired service life		
11. Fluid is achieving expected or appropriate service life		
Comments		

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Optimized Lubrication Intervals	Y/N	Priority 0 1 2 3
1. Products being used are aligned with maintenance goals of extended drains capabilities (for systems using multiple lubricants, all products should be aligned)		
2. Oil analysis program is in place and trending analysis done by maintenance/ engineering, lubricant vendor or the oil analysis laboratory		
3. Product integrity standards have been established and are at the desired level (see Product Integrity section)		
4. Make-up oil is recorded and tracked		
5. Current intervals are standardized based on most critical piece of equipment or most severe operating conditions		
6. For diesel engine applications, actual fuel burn rates are recorded and tracked		
7. Actual operating conditions are known—ambient temperatures and contaminant levels (dirt and water), production or through-put, travel distance and typical incline grade, and operating hours or miles per year		
8. Lubrication staff is well trained by vendor—Fundamentals of Lubrication, Oil Analysis, Storage and Handling Best Practices and specific Product Application courses		
9. Lubrication program performance is tracked and measured—via scorecard; typical examples are percent of work orders completed on time, success rate at hitting preventive maintenance (PM) target interval within +/- 10% of scheduled interval, ISO Cleanliness targets established and routinely tracked, oil analysis turn-around times (from taking sample to receiving report), etc.		
10. Lubrication PM intervals are consistent with similar type operations or industry standards		
Comments		

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Lubrication Program Management	Y/N	Priority 0 1 2 3
1. Computerized Maintenance Management Program (CMMS) is used for scheduling maintenance and recording history (either PC or web-based), as opposed to wall charts, machine cards, or simple excel sheets		
2. Oil analysis and vibration data is integrated into CMMS program		
3. For fleets or mobile equipment, fuel usage and costs (per unit) are integrated into the CMMS program		
4. Lubrication intervals are scheduled by condition-based monitoring, oil analysis, vibration analysis, or fuel burn + make-up oil rates		
5. Equipment repair history is easily retrievable for maintenance staff when required (i.e. historical records are kept)		
6. ISO Cleanliness targets are established for new fluids (receiving + bulk tank + dispensing points) and all critical oil systems		
7. External filtration for critical oil systems is conducted when oil analyses dictates (out of target ISO Cleanliness range)		
8. Make-up oil usage is tracked and recorded in CMMS for critical equipment		
9. Lubrication program benchmarks (lubrication intervals, usage, and performance criteria) are shared with affiliated or sister operations (best-practice sharing)		
10. Standardized lubrication tasks are documented and are easily accessible to maintenance staff (e.g. how to grease a bearing, proper hydraulic system inspections or fluid change-outs, etc.)		
11. Procedures exist for evaluating new lubricants or for optimizing lubrication intervals		
Comments		

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Inventory Management and Vendor Performance	Y/N	Priority 0 1 2 3
1. Lubricant inventory turns are at a minimum of 4 per year for all package styles—desired metric is 6 turns per year		
2. Package products are neatly organized in storage area by product group and grade; wall charts are placed either above each product group or centrally located to identify the product, primary applications, min/max levels, and vendor contact information		
3. Bulk tanks are adequately sized to minimize the number of deliveries per month, but also ensure an adequate safety net		
4. Totes or intermediate bulk containers (IBCs) are utilized when possible to avoid drum handling		
5. For operations with multiple locations, the procurement process is centralized to a single location for contract administration and billing		
6. Inventory min/max levels are proactively managed by current vendor(s)		
7. Bulk tanks are monitored remotely (electronic tank gauges) either by current vendor directly or by centralized procurement office		
8. Emergency orders and less-than-minimum orders are placed on average 1 per month or less		
9. Vendors are currently tracked with a performance scorecard to measure on-time and in-full deliveries (OTIF), billing efficiencies, usage/cost reporting, and Health, Environment and Safety (HES) standards (spills, product integrity, etc.)		
10. Current bulk and dispensing equipment is adequate to meet volume demand and is appropriately configured to reduce operator error at loading and dispensing points, meet HES requirements, and ensure product integrity standards are met		
11. Bulk tanks are properly labeled for product and required OSHA/MSHA cautions/warnings		
Comments		

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RBL™ Program Sales Process Tracker
Calculator Data Collection

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(Note: all calculators may not be available in your Region's RBL Program Generator)

RBL Program

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RBL™ Program Sales Process Tracker
Calculator Data Collection

Engine Oil - Diesel 1	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Lubricant Usage per Lubrication Maintenance Service (average Gallons or Liters per Unit)		
Current Lubricant Average Make-Up or Top-Off Percentage (typical range is 6 to 8%)		
Target Lubricant Average Make-Up or Top-Off Percentage (typical range is 6 to 8%)		
Filter Usage per Lubrication Maintenance Service (Average Number Used Per Unit)		
Current Maintenance Interval (Miles, Kilometers, Hours, Days)		
RBL Program Target Maintenance Interval (Miles, Kilometers, Hours, Days)		
Current Lubricant Price. Price can be quoted per gallon or liter. Identify what you used in the comment field.		
RBL Program Target Lubricant Price (Quoted per Gallon or Liter)		
Current Filter Price (per Filter or per Filter Set)		
New Filter Price (per filter or per filter set) *Note: If you are not changing filter recommendations, enter the same price used above. If you are proposing a new filter type to be used, enter the new filter price.*		
Comments		

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RBL™ Program Sales Process Tracker
Calculator Data Collection

Engine Oil - Diesel 2	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Lubricant Usage per Lubrication Maintenance Service (average Gallons or Liters per Unit)		
Current Lubricant Average Make-Up or Top-Off Percentage (typical range is 6 to 8%)		
Target Lubricant Average Make-Up or Top-Off Percentage (typical range is 6 to 8%)		
Current Maintenance Interval (Miles, Kilometers, Hours, Days)		
RBL Program Target Maintenance Interval (Miles, Kilometers, Hours, Days)		
Current Lubricant Price. Price can be quoted per gallon or liter. Identify what you used in the comment field.		
RBL Program Target Lubricant Price (Quoted per Gallon or Liter)		
Current Filter Price (per Filter or per Filter Set)		
New Filter Price (per filter or per filter set) *Note: If you are not changing filter recommendations, enter the same price used above. If you are proposing a new filter type to be used, enter the new filter price.*		
Comments		

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Calculator Data Collection

Hydraulic Oil	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Lubricant Usage per Lubrication Maintenance Service (Average Gallons or Liters per Unit)		
Current Lubricant Average Make-Up or Top-Off Percentage (typical range is 8 to 12%)		
Target Lubricant Average Make-Up or Top-Off Percentage (typical range is 8 to 12%)		
Filter Usage per Lubrication Maintenance Service (Average Number Used per Unit)		
Current Maintenance Interval (Miles, Kilometers, Hours, Days)		
RBL Program Target Maintenance Interval (Miles, Kilometers, Hours, Days)		
Current Lubricant Price: Can be quoted per gallon or liter, Identify what you used in the comment field.		
RBL Program Target Lubricant Price: Can be quoted per gallon or liter. Identify what you used in the comment field		
Current Filter Price (per Filter or per Filter Set)		
New Filter Price (per Filter or per Filter Set). *Note: If you are not changing filter recommendations, enter the same price used above.*		
Comments		

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Calculator Data Collection

Engine Oil - Natural Gas	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average HOURS or DAYS of operation per Year per Unit)		
Lubricant Usage per Lubrication Maintenance Service (Average Gallons or Liters per Unit)		
Current Lubricant Consumption Rate is per hour or per day; use same metric (day or hour) based on Annual Work Load metric		
Target Lubricant Consumption Rate is per hour or per day; use same metric (day or hour) based on Annual Work Load metric.		
Filter Usage per Lubrication Maintenance Service (Average Number Used per Unit)		
Current Maintenance Interval (Miles, Kilometers, Hours, Days)		
RBL Program Target Maintenance Interval (Miles, Kilometers, Hours, Days)		
Current Lubricant Price: Can be quoted per gallon or liter, Identify what you used in the comment field.		
RBL Program Target Lubricant Price: Can be quoted per gallon or liter. Identify what you used in the comment field.		
Current Filter Price (per Filter or per Filter Set)		
New Filter Price (per Filter or per Filter Set) *Note: If you are not changing filter recommendations, enter the same price used above.*		
Comments		

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Calculator Data Collection

Engine Oil - Marine, 2 Stroke	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment - Average Days per Year per Unit		
Power Output per engine per day - kWh (considering plant factor @ 85%)		
Current Specific Lube Oil Consumption or SLOC (g/kWH)		
RBL Program Target Specific Lube Oil Consumption or SLOC (g/kWh)		
Current Lubricant Price (per Liter)		
RBL Program Target Lubricant Price (per Liter)		
Comments		

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Calculator Data Collection

Engine Coolant	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Coolant Usage per Lubrication Maintenance Service (Average Gallons or Liters per Unit)		
Coolant Average Make-Up or Top-Off Percentage (Industry average 4 to 8%)		
Current Maintenance Interval (Miles, Kilometers, Hours, Days)		
RBL Program Target Maintenance Interval (Miles, Kilometers, Hours, Days)		
Current Coolant Price *Note: Can be quoted per gallon or liter, Identify what you used in the comment field.*		
RBL Program Target Coolant Price *Note: Can be quoted per gallon or liter. Identify what you used in the comment field.*		
Current Supplemental Coolant Additive (SCA) Usage per Year. (number of spin on filters or liquid SCA added per piece of equipment)		
RBL Program Target SCA Usage per Year (expressed as number of spin on filters or liquid added per piece of equipment) *Note: If using Delo® ELC, this number may be zero.*		
Current SCA Price (per filter or per volume)		
RBL Program Target Filter / SCA Price (per filter or per volume) *Note: If you are going to with Delo ELC, this may be zero.*		
Comments		

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Calculator Data Collection

Gear Oil / Transmission Fluid	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Lubricant Usage per Lubrication Maintenance Service (Average Gallons or Liters per Unit)		
Lubricant Average Make-Up or Top-Off Percentage (Industry average 3 to 6%)		
Filter Usage per Lubrication Maintenance Service (Average Number Used per Unit)		
Current Maintenance Interval (Miles, Kilometers, Hours, Days)		
RBL Program Target Maintenance Interval (Miles, Kilometers, Hours, Days)		
Current Lubricant Price: Can be quoted per gallon or liter, Identify what you used in the comment field.		
RBL Program Target Lubricant Price: Can be quoted per gallon or liter. Identify what you used in the comment field.		
Current Filter Price (per Filter or per Filter Set)		
New Filter Price (per Filter or per Filter Set) *Note: If you are not changing filter recommendations, enter the same price used above.*		
Comments		

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Calculator Data Collection

Grease	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Current Maintenance Interval (MILES/KMs, HOURS or DAYS)		
RBL Program Target Maintenance Interval (Miles, Kilometers, Hours, Days)		
Current Lubricant Price. Price can be quoted per Lb., KG., or per container. Identify what you used in the comment field.		
RBL Program Target Lubricant Price. Price can be quoted per Lb., KG., or per container. Identify what you used in the comment field.		
Current Lubricant Usage per Month *Note: Use same unit of measure as above – Lb., KG., or per container*		
RBL Program Target Lubricant Usage per Month *Note: Use same unit of measure as above – Lb., KG., or per container*		
Comments		

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Calculator Data Collection

Compressor Oil	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average HOURS or DAYS of operation per Year per Unit)		
Lubricant Usage per Lubrication Maintenance Service (Average Gallons or Liters per Unit)		
Lubricant Average Make-Up or Top-Off Percentage (Industry average 6 to 8%)		
Filter Usage per Lubrication Maintenance Service (Average Number Used per Unit)		
Current Maintenance Interval (Miles, Kilometers, Hours, Days)		
RBL Program Target Maintenance Interval (Miles, Kilometers, Hours, Days)		
Current Lubricant Price: Can be quoted per gallon or liter, Identify what you used in the comment field.		
RBL Program Target Lubricant Price: Can be quoted per gallon or liter. Identify what you used in the comment field.		
Current Filter Price (per Filter or per Filter Set)		
New Filter Price (per Filter or per Filter Set) *Note: If you are not changing filter recommendations, enter the same price used above.*		
Comments		

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RBL™ Program Sales Process Tracker
ISOCLEAN™ Certified Lubricants

Application Data	Data	Comment
Product Application (Hydraulic System, Journal Bearings, Gearbox, Rolling Element Bearings, etc.)		
Chevron ISOCLEAN Certified Lubricant		
Total Equipment or Units Being Evaluated		
Annual Production per Piece pf Equipment (Average Miles, Kilometers, Hours or Days of Operation per Year per Unit)		
Current Oil Change Interval (Miles, Kilometer, Hours or Days)		
Target Oil Change Interval (Miles, Kilometers, Hours or Days)		
Lubricant Replacement During Oil Change (Average Gallons or Liters per Unit)		
Lubricant Average Make-Up Or Top-Off Between Drain Intervals (Gal or Liters)		
Filter Usage per Lubrication Maintenance Service (Average Number Used per Unit)		
Comments		

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ISOCLEAN™ Certified Lubricants

Lubricant and Filter Cost	Data	Comment
Current Lubricant Price. Price can be quoted per Gallon or Liter. Identify what you used in the comment field.		
RBL Program Target Lubricant Price. Price can be quoted per Gallon or Liter. Identify what you used in the comment field.		
Current Filter Price (per Filter or per Filter Set)		
New Filter Price (per Filter or per Filter Set) *Note: If you are not changing filter recommendations, enter the same price used above.*		
Average Hours to Change Oil and Filter(s) (include only mechanic/maintenance personnel actual time to complete job)		
Average Labor Rate per Hour for Oil Service		
Downtime for Replacement and Repairs	**Data**	**Comment**
Average Number of Hours Equipment is out of Service due to Component Repair or Replacements *Note: This is typically longer than what is required to actually perform the maintenance service due to travel time to shop, or time equipment is ideal waiting on service.*		
What is the average 'value' (or profit) per HOUR the equipment generates – or what value does the customer assigns to their equipment? In some cases, the customer may only know the operating costs, and in other cases the customer may actually know the revenue or profit values. Can be expressed as: profit per hour, cost per hour, or revenue per hour. Indicate in comment section which one is most applicable to their operation		
Comments		

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Frequency for Component Repair or Replacement	Data	Comment
Current Corrective Component Interval (Miles, Kilometers, Hours or Days) *Note: on average, how often do they replace components in question*		
Current Cleanliness of Oil in System (ISO Cleanliness Code)		
ISOCLEAN target cleanliness ISO code		
Downtime Associated with Component Repair or Replacements	**Data**	**Comment**
Hours required to perform the component repair or replacements (average hours - include only mechanic/ maintenance personnel actual time to complete job)		
Maintenance Labor Rate (Average per Hour)		
Component Data	**Data**	**Comment**
Current Component Price (per Unit or per Package/Set)		
New Component Price (per Unit or per Package/Set) *Note: if you are not changing component make/model recommendations, this should be the same price used above, if you are proposing a new component make/ model to be used, enter the new component price*		
Comments		

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Calculator Data Collection

Other Chevron Lubricant	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Lubricant Usage per Lubrication Maintenance Service (average Gallons or Liters per Unit)		
Current Lubricant Average Make-Up or Top-Off Percentage (typical range is 6 to 8%)		
Target Lubricant Average Make-Up or Top-Off Percentage (typical range is 6 to 8%)		
Filter Usage per Lubrication Maintenance Service (Average Number Used per Unit)		
Current Maintenance Interval (Miles, Kilometers, Hours, Days)		
RBL Program Target Maintenance Interval (Miles, Kilometers, Hours, Days)		
Current Lubricant Price. Price can be quoted per gallon or liter. Identify what you used in the comment field.		
RBL Program Target Lubricant Price (Quoted per Gallon or Liter)		
Current Filter Price (per Filter or per Filter Set)		
New Filter Price (per filter or per filter set) *Note: If you are not changing filter recommendations, enter the same price used above. If you are proposing a new filter type to be used, enter the new filter price.*		
Comments		

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Oil Analysis Program	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Current Oil Analysis Sample Price (per unit)		
RBL Program Target Oil Analysis Price (per unit)		
Current Oil Analysis Sample Interval (miles, kilometers, hours, days)		
RBL Target Oil Analysis Sample Interval (miles, kilometers, hours, days)		
Comments		

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Equipment Uptime - Extended Service Protection	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Average number of hours that equipment is out of service due to Lubrication Maintenance Service. *Note: This is typically longer than what is required to actually perform the Lubrication Service due to travel time to shop, or time the equipment is idle while waiting for service.*		
What is the average "value" (or profit) PER HOUR the equipment generates - or what value does the customer assign to their equipment? In some cases, the customer may only know the operating costs, and in other cases the customer may actually know the revenue or profit values. Can be expressed as Profit per hour, Cost per hour, or Revenue per hour. Indicate in the "comment section" which one is most applicable to their operation.		
Current Maintenance Interval (Miles, Kilometers, Hours, Days)		
RBL Program Target Maintenance Interval (Miles, Kilometers, Hours, Days)		
Comments		

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Calculator Data Collection

Maintenance Labor - Extended Service Protection	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Average hours required to perform the Lubrication Maintenance Service (include only Mechanic/Maintenance Personnel actual time to complete job)		
Average Maintenance Labor Rate (per Hour)		
Current Maintenance Interval (Miles, Kilometers, Hours, Days)		
RBL Program Target Maintenance Interval (Miles, Kilometers, Hours, Days)		
Comments		

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Equipment Uptime - Durability	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Average number of hours that equipment is out of service due to Corrective Maintenance Service. *Note: This is typically longer than what is required to actually perform the Corrective Service due to travel time to shop, or time the equipment is idle while waiting for service.*		
What is the average "value" (or profit) PER HOUR the equipment generates - or what value does the customer assign to their equipment? In some cases, the customer may only know the operating costs, and in other cases the customer may actually know the revenue or profit values. Can be expressed as Profit per hour, Cost per hour, or Revenue per hour. Indicate in the "comment section" which one is most applicable to their operation.		
Current Maintenance Interval to Replace Component (Miles, Kilometers, Hours, Days)		
RBL Program Target Maintenance Interval to Replace Component (Miles, Kilometers, Hours, Days)		
Comments		

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Calculator Data Collection

Maintenance Labor - Durability	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Hours required to perform the Corrective Maintenance Service (include only Mechanic/Maintenance Personnel actual combined time to complete job)		
Average Maintenance Labor Rate (per Hour)		
Current Corrective Maintenance Interval (Miles, Kilometers, Hours, Days)		
RBL Program Target Corrective Maintenance Interval (Miles, Kilometers, Hours, Days)		
Comments		

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Calculator Data Collection

Component Costs	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Current Corrective Maintenance Interval (Miles, Kilometers, Hours, Days)		
RBL Program Target Corrective Maintenance Interval (Miles, Kilometers, Hours, Days)		
Current Component Price (per Unit or per Package/Unit)		
New Component Price (per Unit or per Package/Set) *Note: If you are not changing component make/model recommendations, this should be the same price as used above. If you are proposing a new component make/model to be use, enter the new component price.*		
Comments		

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Calculator Data Collection

Fuel Costs - Truck Loads per Month	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Current Transport Loads of Fuel Delivered per Month		
Current Fuel Reference Price (per Gallon or Liter) can also be stated as a Differential Price over Rack or Posted Price. Use the (-) sign for below Rack or Posted Price.		
Current Delivery Costs and Other Fees per Transport Load if applicable (if fees are included in delivered price, leave as zero)		
RBL Program Transport Loads of Fuel Delivered per Month		
RBL Program Average Transport Load Size (Gallons or Liters). This entry may be the same as above in the Current information.		
RBL Program Fuel Reference Price (per Gallon or Liter) can also be stated as a Differential Price over Rack or Posted Price. Use the (-) sign for below Rack or Posted Price		
RBL Program Delivery Costs and Other Fees per Transport Load of Fuel (if included in delivered price, leave as zero)		
Comments		

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RBL™ Program Sales Process Tracker
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Fuel Costs - Usage per Year	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Current Average Usage of Fuel per Month (Gallons or Liters)		
Current Fuel Reference Price (per Gallon or Liter) can also be stated as a Differential Price over Rack or Posted Price. Use the (-) sign for below Rack or Posted Price.		
Current Delivery Costs and Other Fees per Transport Load if applicable (if fees are included in delivered price, leave as zero)		
New Target Usage per Month (Gallons or Liters)		
New Target Fuel Reference Price (per Gallon or Liter) can also be stated as a Differential Price over Rack or Posted Price. Use the (-) sign for below Rack or Posted Price		
New Target Delivery Costs and Other Fees per Transport Load of Fuel (if included in delivered price, leave as zero)		
Comments		

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Fuel Efficiency Improvements - Gallons	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Fuel Reference Cost (Price per Gallon or Liter)		
Current Average Monthly Usage (Gallons or Liters)		
Target Fuel Efficiency Improvement (enter as a Percentage)		
Comments		

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Fuel Efficiency Improvements - MPG	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Fuel Reference Cost (Price per Gallon or Liter)		
Current Average Fuel Usage for Fleet (Miles / Gal or KM / LTR)		
Target Fuel Efficiency Improvement (enter as a percentage)		
Comments		

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Fuel Card Lock	Data	Comment
Total Equipment or Units being evaluated		
Annual Production per Piece of Equipment (average Miles, Kilometers, Hours or Days of operation per Year per Unit)		
Fuel Reference Cost (Price per Gallon)		
Current Average Fuel Usage for Fleet (Gallons or Liters)		
Target Fuel Shrinkage Improvement as a percentage (Card Lock system can reduce usage by a range of 2-10%)		
Comments		

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Payment Terms	Data	Comment
Expected Average Cost per Unit (Gallons, Liters, Lbs, Kg)		
Average cost of money or interest rate. *Note: Acceptable average ranges from 6-12%*		
Expected Monthly Usage (Average Gallons, Liters, Lbs, or Kg)		
Current Payment Terms (Days)		
New Target Payment Terms (Days)		
Comments		

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Procurement Process Improvements – Storage Tank Monitoring	Data	Comment
Number of Storage Tanks Monitored		
Average Procurement Labor Rate per Hour		
Current Average Manpower Required to Measure Storage Tank Levels - Hours per Month		
Current Storage Tank Monitoring System Fees per Storage Tank per Month		
RBL Program Target Manpower Required to Measure Storage Tank Levels - Hours per Month		
RBL Program Target Storage Tank Monitoring System Fee per Storage Tank per Month		
Comments		

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Procurement Process Improvements – Consolidated Supplier	Data	Comment
Average Cost per Invoice - Includes inventory tracking, order processing, verification, billing and reconciliation. *Note: Typical rates run between $50-$100 per invoice.*		
Average Annual Cost per Vendor Being Managed. *Note: Industry average ranges between $500 to $1000 per Vendor per year based on time required to manage specific lines and package types.*		
Average Annual Cost per Product Being Managed. *Note: Industry average ranges from $100 to $200 per product/package type per year based on time required for vendor managed tasks.*		
Current Number of Vendors Being Managed for Relevant Product Categories		
Current Number of Vendors Being Managed for Relevant Product Categories. *Note: Count each package style as a Product*		
Current Number of Invoices Processed for Lubricants, Coolants, Fuels, etc. per Month. *Note: In most cases, this is the same number as how man orders they place each month.*		
Other Procurement Processing Costs Incurred each per Month		
RBL Program Target number of Vendors required to be managed for relevant Product Categories		
RBL Program Target Number of Products to be Managed for Relevant Product Categories. *Note: Count each package style as a product.*		
RBL Program Target number of Invoices to be Processed for Lubricants, Coolants, Fuel, etc. per month		
RBL Program Target Other Procurement Processing Costs incurred per month		
Comments		

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Storage Tank and Dispensing Equipment	Data	Comment
Number of Storage Tanks Required. Bulk Tanks or Totes, or Intermediate Bulk Containers (IBC)		
Number of Dispensing System Required includes items such as Product Pumps, Dispensing Metering / Control Fixtures, Nozzles, Hose Reels		
Current Average Cost per Storage Tank Bulk Tank or Totes, or Intermediate Bulk Containers (IBC)		
Current Bulk/Storage Tank Maintenance Costs per Tank per Year. Includes insurance, general maintenance fees, and transport and permit fees. Typical average range is from $300 to $1000 per tank depending on storage tank capacity.		
Current Average Dispensing System Cost. Includes items such as Product Pumps, Dispensing Metering / Control Fixtures and Hose Reels, and Nozzles.		
Current Annual Dispensing Equipment Maintenance/Repair Budget per System. Includes items such as Product Pumps, Dispensing Metering / Control Fixtures, Hose Reels, and Nozzles. Typical ranges from 5% to 10% of System Cost depending on operating conditions and handling practices.		
RBL Program Average Cost per Storage Tank, Bulk Tank, or Tote / Intermediate Bulk Container (IBC)		
RBL Program Bulk/Storage Tank Maintenance Cost per Tank per Year. Includes insurance, general maintenance fees, and transport and permit fees.		
RBL Program Average Dispensing System Cost. Includes items such as Product Pumps, Dispensing Metering/Control Fixtures, Hose Reels, and Nozzles.		
RBL Program Annual Dispensing Equipment Maintenance/ Repair Budget per System. Includes items such as Product Pumps, Dispensing Metering/Control Fixtures, Hose Reels, and Nozzles.		
Comments		

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Products Used	Brand(s)	Product Name(s)
Engine Oils		
Hydraulic Oils		
Transmission Oils		
Gear Oils – Mobile Equipment		
Gear Oils – Fixed Plant Equipment		
Grease – Mobile Equipment		
Grease – Fixed Plant Equipment		
Open Gear Grease		
Compressor Oils		
Coolants		
Other Products		

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