



FIELD RESOURCE

Lubrication Program Readiness Checklist

Use this checklist to test whether a bounded pilot has the ownership, engineered requirements, field controls, and evidence needed to operate reliably before it is scaled

PLANT / SITE	PILOT AREA
PROGRAM OWNER	REVIEW DATE

HOW TO USE IT	Mark each item Ready, Partial, or Gap. Record the evidence and owner. A high score alone is not a scale decision: unresolved risks, weak field usability, or unclear escalation should hold the pilot in place
RATING RULE	☐ READY ☐ PARTIAL ☐ GAP

The four controls this checklist tests

01 Governance Scope, risk, ownership	02 Requirements Lubricant, quantity, interval
03 Field control Storage, procedures, routes	04 Evidence and scale Exceptions, KPIs, learning

The objective is not a perfect score. It is a pilot that can explain its requirements, prove its work, and close what goes wrong

Governance and engineered requirements

These checks test whether the pilot has a clear owner, a risk-based scope, and approved machine requirements

1. Governance and pilot scope

01 Named program owner

One person is accountable for decisions, reviews, and follow-through

Evidence / owner: _____

Ready	Partial	Gap

02 Critical asset list

The pilot assets are identified using consequence, redundancy, severity, and lubrication sensitivity

Evidence / owner: _____

Ready	Partial	Gap

03 Unique lubrication-point IDs

Every point can be positively identified in the field and in the record system

Evidence / owner: _____

Ready	Partial	Gap

2. Engineered requirements

04 Approved lubricant list

Each point has an approved lubricant and performance specification

Evidence / owner: _____

Ready	Partial	Gap

05 Asset-specific quantities

Application or fill quantities are documented from an approved technical basis

Evidence / owner: _____

Ready	Partial	Gap

06 Technically based intervals

Intervals reflect the machine, duty, environment, and available evidence

Evidence / owner: _____

Ready	Partial	Gap

07 Controlled substitutions

A named authority verifies equivalence, compatibility, changeover, and affected documents

Evidence / owner: _____

Ready	Partial	Gap

Lubricant protection and field execution

These checks test whether the engineered requirement survives receipt, storage, transfer, application, inspection, and sampling

3. Lubricant protection

08 Receiving and storage standard

Identity, condition, labeling, quarantine, storage, and exception response are controlled

Evidence / owner: _____

Ready	Partial	Gap

09 Dedicated transfer equipment

Containers, pumps, hoses, fittings, and filters are identified and protected from contamination

Evidence / owner: _____

Ready	Partial	Gap

4. Field-ready execution

10 Machine-specific procedures

The point, lubricant, quantity, method, state, tools, observations, evidence, and escalation are clear

Evidence / owner: _____

Ready	Partial	Gap

11 Route validation

Sequence, access, production state, task duration, and field practicality have been tested on a real shift

Evidence / owner: _____

Ready	Partial	Gap

12 Sampling and inspection plan

The failure mode, evidence channel, representative point, frequency, context, and response are defined

Evidence / owner: _____

Ready	Partial	Gap

Evidence, competence, and control

A pilot is ready to scale only when abnormal conditions reach an owner, corrective actions close with evidence, and changes remain traceable

5. Evidence, competence, and control

13 Alert ownership

Every abnormal result has a recipient, severity, response time, and required next action

Evidence / owner: _____

Ready	Partial	Gap

14 Practical competence verification

People demonstrate the required task in the field and retraining triggers are defined

Evidence / owner: _____

Ready	Partial	Gap

15 Exception closure

Closure requires corrective-action evidence and verification by a named role

Evidence / owner: _____

Ready	Partial	Gap

16 KPI definitions

Each metric has a numerator, denominator, data source, owner, cadence, and interpretation

Evidence / owner: _____

Ready	Partial	Gap

17 Change control

Changes to requirements, products, procedures, hardware, or alarms are approved and traceable

Evidence / owner: _____

Ready	Partial	Gap

6. Scale decision

18 Scale gate

The pilot has stable data, usable procedures, trained roles, working escalation, and agreed lessons before expansion

Evidence / owner: _____

Ready	Partial	Gap

Close the pilot with evidence, priorities, and an explicit decision

Action and scale decision

Use this page during the pilot review. Scale only when the remaining gaps are understood and controlled

DECISION OWNER	DECISION DATE
NEXT REVIEW	AREA PROPOSED FOR SCALE

Priority action register

PRIORITY GAP	OWNER	DUE DATE	CLOSURE EVIDENCE

Pilot scale decision

Select the decision only after the pilot review confirms that technical requirements, field usability, evidence quality, competence, and corrective-action closure are stable enough for the next area

HOLD	EXTEND PILOT	SCALE

This checklist is a practical starting point. Asset requirements, lubricant selection, intervals, quantities, modifications, and safety conditions still require competent technical review and plant approval