

Follow Up and Follow Through

By Preston Ingalls

If you peruse the OEM manuals, you will often see certain checks or lubrication assignments recommended to be completed daily or weekly.

Because of the normal wear and tear from heavy loads, environmental challenges, and other job-related physical stresses on equipment, these assignments are essential in maintaining the physical integrity and reliability of that equipment.

As managers and supervisors, we assign the responsibilities of conducting daily and weekly frontline service tasks to equipment operators in addition to operating the equipment. These are referred to as “walk-arounds.” The operator is supposed to conduct certain routine inspections, and in some cases, lubrication tasks prior to operating the equipment. In addition, they are often responsible for doing similar tasks at the end of the day. These basic upkeep responsibilities ensure that the equipment stays in the best possible shape. We refer to this collection of activities as Operator Care or Frontline Maintenance.

FRONTLINE MAINTENANCE

So, how do we make sure these get done? Well, one obvious choice is to train the people to perform them. This means not only explaining what they are supposed to do as routine, but where and when. In addition, the WHY is also important. If they understand the logic or rationale, they can empathize with the need.

The next step is to provide them with visual reminders so they don't have to depend on recall. Our memories are not reliable and we depend on remembering far more than we should. The way to help with this is to provide visual reminders or job aids. We refer to these as checklists or standards. They list the tasks in the sequence or order we should follow to make sure we didn't forget one.

This sounds like all you need to do is show them what to do, explain the reason, and give them a reminder device to help. Now it all gets done ... right? Not necessarily.

ENSURE COMPLETION

The capacity to “follow up and follow through” is an important trait for successful leaders. If you delegate a task to someone, you are obligated to ensure its completion. Some folks assume that once they assign or delegate an assignment that they are indeed finished with that. This is false as delegation is NOT abdication. If you had the initial responsibility to get things done, it is your job to make sure they did get done.

The point here is the assigned procedure may not be very meaningful if there is no governance process to ensure compliance. This is why we audit. Here are some addition reasons:

- Leadership involvement reinforces importance in maintaining equipment condition. Visiting the field to see an operator's equipment is an indicator of significance of Operator Care (OC) to leadership.
- It is another form of objective feedback on the process and criteria, which improves Operator Care.
- It is a form of recognition for doing a good job and motivation for those not.
- Leadership feedback helps operators understand and interpret criteria. Improvement also takes place via training and/or coaching.



ABOUT THE AUTHOR

Preston Ingalls is president and CEO of TBR Strategies, LLC, a Raleigh, North Carolina-based maintenance and reliability firm specializing in the construction and oil and gas industries. Preston can be reached at pingalls@tbr-strategies.com, or visit www.tbr-strategies.com.

- It facilitates improvement in audit scores by identifying barriers to success and ensuring strategies are in place to address.
- It is a means of (leadership) learning the process by doing.
- It is a way to find out if there is confusion with the standards and expectations.
- It reinforces the value of taking care of the equipment.

DO THE AUDIT

Auditing, in this application, means we periodically and randomly check to ensure that those daily and weekly tasks we assigned are indeed done. After all, the adage is “inspect what you expect.” If you do not follow up, then the employee may assume that it is not very important to you, but when you do follow up, that it is very important. Some basic rules to auditing are:

- Be objective (i.e., look at evidence; do not make assumptions or allow your views to affect the findings).
- Be fair and consistent.
- Stay focused on the criteria.
- If it doesn't seem right, your intuition is probably right ... lift some rocks.
- Do not finalize findings until you have sufficient evidence—don't jump to conclusions.
- Avoid generosity as that lowers the high jump bar or expectations—be fair but firm.
- Use a camera as a picture IS worth a thousand words.

We suggest using some form of scheduling reminders to trigger a random audit rather than relying on that non-reliable memory. You can designate a “Task” in Microsoft Outlook to “Conduct audit of backhoe #BH456” on a certain date. You can insert as many reminders and share the responsibility with others to conduct the audits.

The key to auditing is persistence. You can't just do it a few times and assume that everything is in place. Remember, the message is “if it is important to my boss ... it is important to me.”

The key to a good audit is that the audit standard should match the standard the operator was trained to. It wouldn't be fair to check their

completion of “draining the fuel water separator daily” if they have never been shown what, when, where, or how often. The auditor can request the operator accompany them on the audit and have them pull the dip stick to check the level, point to where they lubricate, and show where they perform each task. If they are

responsible for daily lubrication, it is fairly evident if joints and bearings have received fresh grease recently.

Providing coaching at the end of the audit is essential in giving instantaneous feedback. It helps to calibrate the operator to the expectations and provide reinforcement of what they did well. ■

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