Mobil Serv℠

Performance by ExxonMobil

Distributor Lubrication Engineer guidebook

Energy lives here™

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Definitions

AOBE	Area of Best Effort
AOW	Accounts Objectives Worksheet
ATW	Advance Technical Workshop
AUTO	Automotive Lubricants
DBC	Distributor Business Counselor
DLE	Distributor Lubrication Engineer
DSM	Distributor Sales Manager
DSO	Distributor Services Offer
DSR	Distributor Sales Representatives
EAS	Expert Analysis Services
EB	Equipment Builder
EHL	Elasto-Hydrodynamic Lubrication
EMEBS	ExxonMobil Equipment Builder System
FES	Field Engineering Support
IL	Industrial Lubricants
LE	Lubes Engineer, Field Engineer, or Technical Service Engineer
PES	Planned Engineering Services
POP	Proof of Performance
PPE	Personal Protective Equipment
PQI	Product Quality Index
SD	Strategic Distributor
S&HE	Safety and Health Environment
Snr DSR	Senior Distributor Sales Representatives
STLE	Society of Tribologists and Lubrication Engineers
TETAT	Technical & Engineering Training Assessment Tool
THD	Technical Help Desk
TM	Territory Manager
UOA	Used Oil Analysis

Foreword

The ExxonMobil distributor should be seen by the customer as a professional and reliable supplier of ExxonMobil lubricants and basic technical services. From the management to the field sales team, the way you act and how you look should convey the same confidence, competence and professionalism that the customer expects.

To sell high-performance lubricants and services in a competitive market, a sales team needs to have a thorough understanding of its products, services and customer applications. Many of the opportunities to sell high-performance products, such as Mobil SHC™, MobilGrease™ and Mobil Delvac™, come from careful identification of the buyer's needs. While reps are often perceived as being focused only "on the sale," Distributor Lubrication Engineers (DLEs) are recognized as professionals whose skills can provide valuable insights into the buyer's business. Thus, DLEs should be made an integral part of the field sales team.

This proven sales structure that includes dedicated DLEs is recommended for all distributors selling Industrial, CVL Off-Highway and Marine products.

Most lubricant suppliers sell on price and features —
we win by **Benefit Selling**.

1 Distributor Lubrication Engineer overview

Objectives of a DLE —

The key objectives for DLEs employed in the distributor organization are to provide technical support, protect existing customers, and seek new business opportunities in upselling and conversion to improve the organization's profitability.

DLE work scope
Position description

Key deliverables of position:

- Accountable for the implementation of all technical support programs within the territory of responsibility. Implement established account strategies and deliver lubrication solutions to key customers in line with the Distributor Services Offer. Direct and coordinate all "on-site" analytical investigations.
- Support the business sales goals, primarily with Mobil SHC™, MobilGrease™ and Mobil Delvac™ products, to focus sector customers.
- Clearly document all customer benefits and obtain appropriate recognition from customer management.

Key responsibilities:

- Develop individual account strategies in support of the Distributor Sales Representatives' (DSR) territory sales goals.
- Consult and plan with DSM, DSRs and FES to implement Planned Engineering Service and appropriate technical programs for nominated customers where applicable.
- Identify and quantify profit improvement opportunities with existing customers.
- Implement and evaluate technical programs for customers.
- Provide technical support for the implementation of new products and marketing campaigns.
- Document results of technical projects to quantify savings and/or cost avoidance using Benefit Reports and Proof of Performance.
- Work with DSM and DSRs to develop new industrial and automotive customers. Identify customer needs. Using Benefit Proposals, communicate proactively with target account technical staff to promote early adoption of Mobil™ lubricants and programs.
- Identify and secure product upgrade opportunities.
- Act as technical resource for the distributor sales team.
- Provide feedback on industry segment trends, product performance, equipment functions, etc., to the distributor management team.
- Present training courses to new sales staff and customers on lubrication fundamentals, basic product knowledge, applications and basic technical programs as per the Distributor Services Offer.

See Chapter 3 — "Roles and responsibilities" — for more details.

1 Distributor Lubrication Engineer overview

Typical job description

Key competencies and behaviors	
Customer responsiveness	Identifies customers' concerns and improves existing level of service, responds positively to customers' requests or complaints.
Health and safety awareness	Has full understanding of safe work practices and acts in a manner consistent with local laws. Able to undertake planned inspection of customer sites and develop improved work practices.
Business acumen	Identifies current cost/value opportunities. Understands how these will impact the cost of delivering service offer to the customer and the actual/perceived value to the customer.
Open thinking and learning	Has the confidence to challenge fixed assumptions. Eager to try new approaches and acquire useful new skills.
Bias for action	Is keen to get results. Looks for opportunities before being asked. Takes responsibility for overcoming obstacles.
Decision-making and judgment	Makes sound decisions in a timely way to ensure action.
Communication skills	Conveys information fluently, interpreting and clarifying details and explaining rationale. Confident in presentation and discussion of factual data with an audience. Can write clear, cogent reports.
Teamwork	Encourages and respects contributions of others at all levels and is sensitive to their different needs and motivations. Volunteers information and ideas.

Skills and knowledge	
Customer development	Adequately understands customer business processes. Develops and implements strategy for the development of the commercial relationship.
Sales presentation	Gives convincing well-argued presentations, offering needs-based solutions focusing on the key elements.
Negotiation skills	Able to prepare simple negotiation strategy with risk analysis and predicted outcome. Effectively applies skills and techniques of negotiating.
Product and technical service knowledge	Understands the applications and advantages of all products and supporting technical services. Guides the customer to use an appropriate mix of products and technical services based on a clear understanding of the solutions.
Brand offer	Able to identify the buying behavior of customers and address their needs with the appropriate offer.
Equipment familiarization	Has knowledge of equipment and principles of operation.
Information resources	Has knowledge of information resources.
Troubleshooting problems	Capable of troubleshooting and/or sourcing support when necessary to tackle problems and provide solutions.
Information technology skill	Is a confident PC software user. Able to apply PC skills to improve efficiency and solve business problems.

2 Benefit of a dedicated DLE

Goals and advantages of a dedicated DLE

To improve distributor business, a DLE will:

- **Be a product and application technical resource** — Knowledgeable about both product and application, should be able to provide lubrication solutions through technical supports. Offering this service from within your organization shows customers that you can meet their basic needs.
  Benefit to distributor: Retain existing customers and gain new customers.
- **Sell more Mobil SHC™, Mobil 1™ and Mobil Delvac™ products – enhancing profitable growth** — The more opportunities we can find to sell flagship products to customers, the more chance we have to help customers/end users. This helps to make the customer's business more sustainable, and it helps distributor avoid competing on price.
  Benefit to distributor: Secures account, increases potential to extract higher margins/ improve account profitability in the long term.
- **Provide technical credibility on new business gain efforts** — This gives the customer confidence to trust the distributor with its lubricant business.
  Benefit to distributor: Creates differentiation and increases potential to gain new business.
- **Introduce PES approach to distributor's customers** — DLE will get the opportunity to learn customer better and understand customer's objectives, and with that knowledge will help distributor find saving/ earning potential with customer.
  Benefit to distributor: Secures account and increases potential to improve account profitability in the long term.
- **Utilize access to ExxonMobil technical selling tools** — ExxonMobil will assist the DLE with the selling tools, updated with the latest technology progressively, to improve their competency.
- **Become distributor technical trainer** — A trained DLE should be able to provide lubrication fundamentals training to customers, and on ExxonMobil products, services and technical expertise. DLE will be a technical resource for the distributor to rely on for quick response and basic technical inquiries/requirements. Distributors should also leverage the Mobil™ Technical Help Desk for this purpose.
- **Improve the technical confidence of distributors** — Distributor confidence can be won with the help of a highly effective and competent DLE. ExxonMobil distributors can compete and win with a dedicated DLE.
- **Build relationship with customer's technical people** — A dedicated DLE will normally work closely with his/her technical network contact to understand the customer needs and educate customers on TCO concepts, and then provide lubrication solutions rather than selling the product on price.
  Benefit to distributor: Allows distributor to extract more margin/increase their profitability (a more sustainable approach with Mobil™ products).
- **Manage technical program/product introduction** — A dedicated DLE will improve the deployment of technical programs according to the DSO. The DLE will focus on these programs to ensure successful implementation.

Please refer to the DLE justification tool to help determine the potential value DLEs can bring to the distributor organization: **Open DLE Justification tool >**
Upon downloading, the file will indicate it is locked. **Click "Read-only" to access**. Do not enter a password.

3 Roles and responsibilities

DLE roles and responsibilities

Work safely – at work site — Dressing in the correct, personal protective equipment (PPE) shows the customer you are professional. Following good safety practices is not only smart, but it also makes good business sense. Refer to Attachment I for the recommended PPE.

Ethical behavior — The DLE and SD should observe all local laws and regulations.

Product and application support — (this can be reactive and proactive).

- **Reactive** — Having a competent DLE who is capable of visiting the customer immediately to conduct basic on-site troubleshooting and to identify the root cause of a problem will not only save your business with that customer, it also will provide an opportunity to show how you are different from other oil companies.
- **Proactive** — Provide on-site service, such as oil purification or evaluation of storage and handling. (Customers can become so reliant on this service in their maintenance practices that losing you as a supplier can become a big problem.)

Training — A DLE is expected to train both their customers, and their own personnel with updated information and technology from ExxonMobil. A trained DLE should be able to adequately present lubrication fundamentals, Mobil Serv℠ Lubricant Analysis, and storage and handling best practices, to existing and potential customers.

Winning new business and protecting existing business — Winning new business takes a lot more resources than maintaining an existing business, so looking after existing customers makes good business sense. We can often leverage our established customer base to win new business in the same market. Engineering services can help maintain and build strong customer relationships.

Implement and roll out ExxonMobil program — DLE should participate in all ExxonMobil and SD-relevant programs and provide the up-to-date technical information to clients.

Benefit selling — The DLE must be able to sell product and technology based on product benefit rather than price.

Upselling — Use flagship products for upselling – leverage Proof of Performance (POP) to help customers understand how these products will help to improve their equipment performance.

Sell flagship products — The benefits of using flagship products should easily outweigh the higher costs in critical and high-stress applications. Once customers make the change, they will be very reluctant to change again.

Competitive conversion — Benefit selling skills with proven performance experience, plus with total technical support to convert non-ExxonMobil product.

Report writing — One important part of a DLE's role is the generation of benefit reports and Proof of Performance. In reality, this is possibly the most important task a DLE can undertake. Normally, the work conducted, and benefits achieved, are rarely communicated back to customer management or decision-makers. It is therefore vital that we communicate our achievements through formal reports.

Expense control — DLEs are responsible for SD initiatives and program implementations, and should always factor in the cost and expenses incurred to run the programs. The bottom line is that the DLE should bring profit to the SD at the end of the programs.

3 Roles and responsibilities

Improve profitability through new and existing customers.

New customers
The DLE's primary function is to convince new customers of the benefits they will enjoy by using distributor-supplied ExxonMobil products and/or services and thereby win the business at higher margins.

It is impossible to present specific customer benefits if you don't know the customer. Therefore, winning business at high margins requires a planned approach that includes site visits prior to the submission of your offer. The DLE must complete a plant audit to identify opportunities that can be identified as tangible customer benefits in the offer and at any presentations during the decision-making process.

Existing customers
The DLE's primary function is to improve the profitability of existing customers by identifying and implementing opportunities to sell flagship products and, where possible, to sell services such as Mobil Serv℠ Lubricant Analysis (used oil analysis) and on-site inspections.

The DLE will achieve this by building strong relationships with key maintenance staff, and identifying clear and quantifiable benefits for the customer. If the clients perceive that we are helping them, then they will share other opportunities with us.

Not all opportunities will lead to a sale of flagship products, but they will create tangible and intangible benefits that the customer should acknowledge by signing a benefit report. When presenting the benefit report for approval, it is also useful to have a draft Proof of Performance (POP) for the client to consider. Some protocols prevent customers from endorsing any external document, so it is always a good idea to understand their position before presenting a POP.

These endorsed reports will assist the sales team when negotiating higher prices or new contracts.

Characteristics of a successful DLE

- Energetic
- High self-confidence
- Positive attitude
- Diligent & persistent
- Self-motivated
- Ability to work alone
- Ability to work in a team
- Competitive
- Professional appearance
- Persuasive
- Disciplined
- Good time & project management skills
- Results focused
- Technical understanding

Requirements of a successful DLE

- Intelligence: Good psychometric test scores
- Education: Post-secondary education, prefer degree in mechanical or marine engineering
- High safety awareness
- Experienced hire: Experience in technical application role
- New graduate: Preferred bias toward technical sales
- Strong analytical skills
- Good communication skills: Local and others depending on customer (e.g., customer has English-speaking decision-makers)

4 DLE calculator

Objective

The objective of the DLE calculator is to provide the distributors some guidance in determining the number of DLEs they should engage based on their business need. The DLE calculator should not only consider the current structure and technical competency of the sales organization, but should also consider the business demographics. This document provides both a simple calculator and a more detailed version that can aid a distributor to determine the optimum number of DLEs to support their business goals.

Typically, at least one dedicated DLE should be considered if:

- By volume: IL > 3kb and/or PCI > 7kb
- The AOBE consists of many medium-to-large focus sector customers
- Expertise in a focus sector creates a competitive advantage

As a reference:

	Industrial lubricant	Auto lubricant
Servicing customer needs (practical)	Include all accounts that have service contracts or commitments.	Add a percentage of total IL time. 10% to 20% should be sufficient.
	Include all opportunities for upselling or winning flagship product sales.	
	Include travel time.	
	Then add 20% to 30% for supporting others' customers with unplanned service.	
	Calculate the time needed to support DSRs with new target customers. This will depend upon the maturity of the AOBE.	
Research and reporting (theory)	Assume one day per week in the office for project research, customer and DSR queries, and report writing.	
How many DLEs?	Has knowledge of information resources.	
	Capable of troubleshooting and/or sourcing support when necessary to tackle problems and provide solutions.	

4 DLE calculator

Example of DLE calculator

The following table is a checking tool for the DLE allocation. The plan below requires two DLEs.

DLE allocation form — Simple version

	Time needed for dealing with customers			DLEe' effective time in dealing with customers					Number of DLEs needed
	Quantity	Number of hours needed per customer per month (including travel time)	Total hours needed	Working hours per day per person	Number of hours reporting per day per person	Monthly working days	Number of hours for internal meetings or training per month per person	Number of hours in dealing with customers per month per DLE (including travel time)	Total number of DLEs needed
	A	B	C=A×B	D	E	F	G	H=(D-E)×F-G	I=C÷ H
Develop New Customers	6	5	30	8	1.5	25	4	158.5	0.20
Maintain Old Customers	20	8	160	8	1.5	25	4	158.5	1.00
Upselling	12	10	120	8	1.5	25	4	158.5	0.75
Total	38	23	310	8	1.5	25	4	158.5	1.95
Total	38	23	310	8	1.5	25	4	158.5	1.95

Note: The total number of DLEs will vary by AOBE. A DLE will typically service large and demanding customers and support the growth of flagship products. Travel time is also an important consideration.

Open DLE allocation form detailed version >

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5 Recruitment guidelines

Guidelines for recruitment and selection

This information should guide the distributor's Human Resources Manager to hire the right person for DLE position.

EM support
EM support (DBC, LE, TM) for all stages of DLE recruitment process is available. Your DBC plays the main role in evaluating your needs for DLE, area of activities, and specific roles and responsibilities that lead to DLE job description. LE should be engaged for assessment process specific to technical assessment (TETAT — see Chapter 10), which will help to develop DLE in distributor target markets. TM can be consulted as far as internal candidate from DSR team is considered. DBC and LE on distributor demand can participate in other stages of the process, including interview committee and decision.

Job description
DLE job description, in addition to standard job related elements, should contain deliverables, responsibilities, activities and behaviors (personal and technical competencies) related to specific roles in area of DLE activities in distributor organization. See Chapter 1 and also Chapter 3 for more information on DLE R&R.

Recruitment source
It is advised to consider promotions from within distributor organization as first recruitment source (with preference to IND DSRs). This is the source that, from experience, gives the highest quality experienced applicants and best fits to the distributor organization sales team. The internal candidate is usually well-assessed internally and tried in field on DLE related projects. Other sources such as technical schools or technical associations such as STLE can be alternatively used.

Recruitment documents
The distributor Human Resources Manager coordinates the hiring process for classified employees and other candidates; they should submit a request to hire form (see example page 13). CV and the form can be also useful for narrowing number of candidates for next stages of the process.

Assess and interview
Evaluation of technical skills and job required in a DLE should be based on the TETAT (Technical and Engineering Technical Assessment Tool), and for evaluation of business skills, behavior and Lubes sales skills the DLE Assessment Matrix can be used (see DLE Assessment and Appendices). Once the technical skills and job required in a DLE are identified, the job interview will be the primary source to identify and assess these in candidates. A job reference may be the most effective way to learn about dependability, follow-through and ability to get along with coworkers. Consider using work samples to ascertain specific job skills — prepare specific interview probing situations/ questions and evaluate strong, adequate and weak responses.

Prepare questions you will ask of each applicant and develop a form that includes the questions, interviewer name, date, name of applicant and position being filled. The form should have space for noting responses to questions, follow-up questions, and for additional comments. Each interviewer should have an interview form for each applicant.

Committee
It is recommended to use a hire committee. The panel could comprise EM personnel such as DBC, LE and TM with HR Manager who is committee lead. Committee gives better evaluation of the candidates by various functions of the distributor and EM. Each committee member should give their question(s) to HR Manager, who then prepares the lists of all questions for the

5 Recruitment guidelines

Guidelines for recruitment and selection (cont.)

candidates and lists of evaluations for the committee members. Best if the session can be organized by HR Manager in one time and the same questions can be asked to all candidates. Completing reference checks by all committee members is a critical part of the selection process.

Making hiring decision
After completing the selection process, including evaluation of written materials, interview and reference checking, review all information gathered about your candidates. Review job related skills. Match applicant data with the skills and qualities required for a DLE. Make rank list of preferred candidates and make final decision.

Informing selected candidate
It is recommended to prepare consistent information for DLEs on selection results together with formal documents to be signed.

Applicants registration form example

Applicants registration form				
Post applied:				
Name		Sex		
Present address				
Telephone		Email		
Education qualifications (from high to low)				
Time	School/College	Major	Degree obtained	
Working experience				
Time	Company	Position	Job responsibilities and achievements	
Awards and certificates obtained:				
Skills:				
Hobbies:				
Salary expected:			Available working date	
The above information are true and genuine. ☐		Applicant signature:		Date:

Information you can request from applicants varies by country. Please ensure that the information you are requesting is legally allowed and abides by local privacy laws.

6 DLE training

Training provides the foundation for enabling ongoing development of a DLE. Training increases job satisfaction and improves the ability of the DLE to contribute to the organization's profitability.

I. Distributor in-house training — By company employee

- **Pre-job training on joining**
- **Orientation first week**
- **Market visit with Sr. DLE/DSR**

II. General knowledge

Delta training phase I — Within 3 months

Module 1-8
- ExxonMobil company knowledge
- Product knowledge
- Fundamentals of lubrication
- Introduction to services conducted by TM/DBC

Delta training phase II — Prerequisite delta 1

Module 9-16
- Lubrication of machine components
- Planning and developing call communication with customers
- Safety guidelines
- Technical portion by LE

6 DLE training

III. BAT modules 1-10

1. Pulp & paper
2. Off-/On-highway
3. Plastics
4. Gas engines
5. Power gen
6. Industrial synthetics
7. Unleashing customer productivity
8. Compressors
9. Bearings
10. Automotive, PVL installed

IV. Engineering services

PES (Plan Engineering Service)
- PES concept
- Setting PES objective
- How to choose PES accounts
- Process of PES
- Benefit selling

Document writing
- Benefit report
- Proof of Performance (POP)
- Engineering report
- Summary report
- EHL calculation

Field visit
- Plant study
- Inspection
- Suffering points
- Troubleshooting
- Handling

Used oil analysis
- Test method
- Sampling
- Interpretation
- Field test kits
- Mobil Serv℠ Lubricant Analysis

Customer complaints
- General complaint
- Performance complaint
- Complaint report

Seminar/Programs
- DLE with experience to conduct
- LE to initiate/assist

Customer complaints
- How to choose product/ EMEBS/PRODUCT SELECTOR/ THD

6 DLE training

V. Advance training course (advance technical workshop)

Specific industries

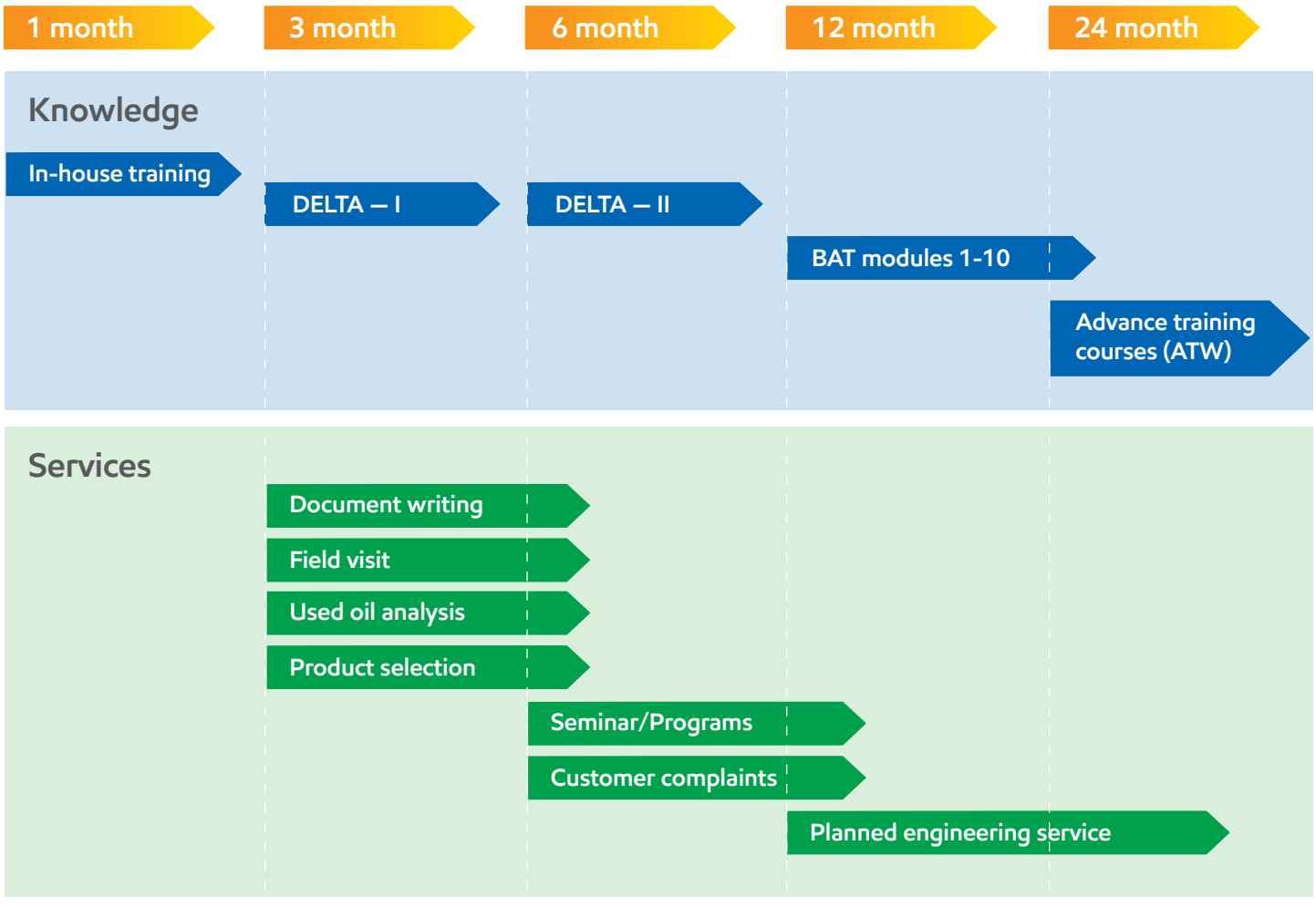
- Wind turbine
- Pulp and paper
- Gas engine
- Lubrication failure
- Cement/Open gear
- Turbines
- Steel industry
- Gear

Requirement

- Minimum 2-3 years' experience

Note: Use the Skill Matrix (Chapter 10 — DLE Assessment) to determine the DLE training requirement. The rating can be conducted by the ExxonMobil Technical team and the Distributor Sales Manager.

DLE competency development roadmap



6 DLE training

I. Distributor in-house training

Employment period	Training/Activity	Resource/Tool	Responsible person(s)
< 1 week	Orientation	Distributor in-house	DSM
< 1 month	Basic overview of local lubricant business	Distributor in-house	DSM
< 1 month	Basic overview of Mobil™ products		DSM
< 3 months	LMS module — WSML	LMS	DBC/TM/DSM
< 3 months	Market visits/OJT		DSM/Sr. DLE

II. General knowledge

Employment period	Training/Activity	Resource/Tool	Responsible person(s)
< 6 months	DELTA — Phase I *(Pre-requisite: LMS training)* - ExxonMobil company knowledge - Product knowledge - Fundamentals of lubrication - Introduction to services	DELTA I materials	DBC/TM/ LOB advisers
< 12 months	DELTA — Phase II (*Pre-requisite: DELTA I*) - Lubrication of machine components - Planning and developing call communication with customers - Safety guidelines	DELTA II materials	LE

III. Business and technical

Employment period	Training/Activity	Resource/Tool	Responsible person(s)
> 12 months	BAT modules 1-10 (*Pre-requisite: DELTA I & II*) 1. Pulp & paper 2. Off-/On-highway 3. Plastics 4. Gas engines 5. Power gen 6. Industrial synthetics 7. Unleashing customer productivity 8. Compressors 9. Gearbox/couplings/bearings 10. Automotive, PVL installed	BAT materials	LE/LOB advisers

6 DLE training

IV. Engineering services

> 3 months	Document writing - Benefit report - Proof of Performance (POP) - Engineering report - Summary report - EHL calculation	OJT/Coaching	LE/Sr. DLE
> 3 months	Field visit - Plant study - Inspection - Suffering points - Troubleshooting - Handling & storage	DELTA II materials	LE/Sr. DLE
> 3 months	Used oil analysis - Test method - Sampling - Interpretation - Field test kits	DELTA training Technical topics OJT/Coaching	LE/Sr. DLE
> 3 months	Product selection - How to choose product - EMEBS	Sell sheets Technical topics Technical help desk OJT/Coaching	LE/Sr. DLE
> 6 months	Seminar/programs - < 12 mths: Led by LE/Sr. DLE - > 12 mths: Led by DLE self	OJT/Coaching	LE/Sr. DLE
> 6 months	Customer complaints - General complaint - Performance complaint - Complaint report		LE/DSM/Sr. DLE
> 12 months	PES (Planned Engineering Service) - PES concept - Setting PES objective - How to choose PES accounts - Process of PES - Benefit selling	PES templates OJT/Coaching	LE/Sr. DLE

V. Advance training courses (advance technical workshop)

Employment period	Training/Activity	Resource/Tool	Responsible person(s)
> 24 months	Specific industries - Wind turbine - Turbines - Pulp and paper - Steel industry - Gas engine - Gear lubrication failure - Cement/open gear - Others		LE/LOB advisers

7 Offer execution

Market offer

Being trained either in-class or on-the-job will enable the DLE to develop the technical offer, and they are expected to execute these offers:

- Product Selector tool
- Technical help desk
- Understanding IL sectors
- Lubrication fundamentals
- Proof of Performance model documentation
- Oil cleanliness guidelines
- Predictive maintenance
- Troubleshootings
- Equipment inspections (gear, hydraulic, compressor, etc.) standard operating procedures
- Product applications
- Product information
- Technical bulletins
- Technical links
- Technical presentations/customer training modules

EM will assist and provide the support tool for the DLE to execute these offers on the following page.

Support tools for the DLE

ExxonMobil Equipment Builder Service (EMEBS) and Product Selector — A database of ExxonMobil lubricant recommendations and support information from equipment manufacturers across the globe. The DLE needs to be able to access and use this database.

Online Product Data Sheet (PDS) — Product Data Sheets are available online. To search for the latest product update, please view at www.mobilindustrial.com and MSDS.

Technical help desk — Phone or email access to ExxonMobil Engineers to answer technical lubricant, lubricant application, and Mobil Serv℠ Lubricant Analysis questions.

Mobil Serv Lubricant Analysis — A key tool in any Condition Monitoring program for any customer. The DLE needs to be able to know how to register a customer/sample and interpret used oil analysis data to assist customers.

Product quality complaints — Concerns on unused product require a formal process to be followed to seek resolution. A DLE needs to understand the process for carrying this out.

Elastohydrodynamic lubrication (EHL) — A widely encountered mixed boundary and fluid film lubrication regime. A DLE needs to understand how to make an EHL calculation for bearings and gears, work with an ExxonMobil Lube Engineer for the calculation, and then make lubricant recommendations to customers.

Planned Engineering Service (PES) templates and PES planning sessions — A standardized, proactive ExxonMobil Lubrication Engineering approach to lubrication with major accounts. DSRs and DLEs need to understand the principles associated with PES and the many supporting documents/techniques available for carrying out their tasks.

DNet — Computer access for most information and data required to help in the sales support. Data could include Product Data Sheets (PDS), Material Safety Data Sheets (MSDS), and others.

Mobil Serv Power Writer (MSPW) — A persuasive writing tool that helps develop powerful communications including structure, graphics and branding. DSRs & DLEs need MSPW to develop impactful engineering reports, sales proposals and Power Point presentations.

Note: The DNet program is available in selected countries only. Please check with your respective DBC for your country rollout plan. The "10 phases of lubrication" will assist the DLE in performing the offer.

7 Offer execution

10 phases of lubrication

1. Fewest correct lubricants — A large number of suppliers results in costly replacement of orders, fails to place responsibilities for problems, and presents a potential source of error in the selection and the use of products.

2. Lubrication instructions — Provide reference materials to client to help in the selection of correct lubricants to ensure machines are to be properly protected.

3. Lubrication organization — A properly organized lubrication department will ensure that correct lubricants are used efficiently. Supervision, with the necessary manpower to maintain desired control, will supply the protection desired with low maintenance and operational costs.

4. Lubricating devices — Application labor is costly. Lubricants need to be immediately available when required if maintenance is to be kept low. Reductions in consumption are possible.

5. Storage and handling — Lubricants are delivered clean and should be maintained this way. Economical inventories are desired. Handling of product is costly and should be reviewed to keep operating costs low. Waste of product can be controlled.

6. Lubricant life — Oils rarely deteriorate. They should be cared for correctly and kept free of contaminants, so the maximum useful life and the expected machine protection will be achieved. Control over the extended use oil in enclosed lube systems is desired.

7. Oil purification — Oils should not be discarded, but reused to reduce lubrication costs. Suitable purification equipment is available if sufficient oil is available to justify its cost.

8. Lubrication controls — Simple, effective records should be kept so management can be kept informed regarding the improvement gained in lowering costs of maintenance, lost production and lubrication. The records should be simple and effective because they will serve as a basis for future comparisons.

9. Training of plant personnel — To maximize benefits through lower maintenance, production and lubrication costs, maintenance and operating personnel should be advised of the fundamentals of correct lubrication, which can be done through a series of educational meetings.

10. Preventive maintenance — Excessive wear of production machines can be prevented by taking precautionary steps before machine failure (and the resulting high maintenance and associated loss of production costs). Effective cooperation between maintenance and lubrication departments is required to ensure this.

8 DLE consultation

Objective of DLE reporting is to seek guidance and provide updates on technical activities (e.g., technical problems, advice sought or given, or customer development).

- DLE and ExxonMobil Field Engineer professional should interact, when necessary, to obtain guidance, advice, and solutions to customer concerns. Example: EB information not available in EMEBS.
- Call report — DLE should fill in a call report after every visit and, if necessary, discuss with the DSM. Any concern should be noted and reported immediately.
- DLE should keep a record of the customer recording demand, and technical problems and issues for reference. This open file, or evergreen record, will be useful as reference for future prospects or customer development in upselling or conversion.
- DLE should plan in advance, for any discussion with the customer, drawing on ExxonMobil resources as necessary to follow up with required professional or expert assistance. Prospecting, however, should always be done upfront by DLE before calling for such FES assistance.
- When faced with urgent and/or critical situations, DLEs are encouraged to collate all questions for the THD or, when necessary, the ExxonMobil Field Engineer, and ask them during the review session. It is important for the DLE to self-help first using the available tools/resources of "Mobil Performance App" and "DNet" during his/her discussions with customers. However, DLE should pose and discuss with the relevant ExxonMobil resources and/or supporting functions for urgent and/or critical situations.
- DLE monthly submission scorecard (key performance indicators and competency assessment status) should be reviewed, and outstanding issues addressed on a regular basis with ExxonMobil professionals to facilitate guidance and help.
- The distributor sales organization should follow ExxonMobil account planning approach for consultation with ExxonMobil professionals on customer need assessments, and developing plans for major and PES accounts. An example for a simple planning and pipeline management tool is below for guidance.

Open simple planning and pipeline management tool >

Upon downloading, the file will indicate it is locked. **Click "Read-only" to access**. Do not enter a password.

9 Field equipment

Objective —

The DLEs' purpose in carrying basic field equipment is to assist existing or potential customers in collecting information and data about a particular situation for further investigation and report submission. To a certain extent, some portable field equipment that enables basic tests to be conducted on-site can assist customers in resolving some of the technical problems without further investigation.

It also demonstrates the DLEs' technical competency and professionalism in servicing the customers, and helps to build customer confidence in distributor and secure the account over the longer term. The DLEs are recommended to carry this listed field equipment (some listed when required):

- √ Measuring tape
- √ Knife
- √ Laser pointer
- √ Digital camera
- √ Infrared temperature gun
- √ Flashlight
- √ Thermometer
- √ pH paper
- √ Refractometer (for cutting fluid customers)
- √ Empty sample bottles
- √ Visgage
- √ Filter patch (can be found in field test kit/ portable test kit)
- √ Water test kit (can be found in field test kit/ portable test kit)
- √ Portable test kit (IL, hydraulic, Marine, CVL Off-Highway) selection to depend on market requirements
- √ Gear inspection test kit

PPEs should include, but not be limited to, the following (i.e., should be site specific):

- √ Hard hat
- √ Safety shoes
- √ Safety glasses
- √ Gloves
- √ Ear plugs
- √ Working coverall
- √ Florescent/high vis. jacket
- √ Padlock

Note: It is the responsibility of the distributor and the DLE to understand the usage of each test kit used and to be trained before using some of the portable test kit Tools, especially when using calcium hydride to test for water content.

10 DLE assessment

The DLE competency assessment is designed to help Distributor Sales Managers (DSM) understand why and how to measure the proficiency levels of the DLE. This chapter aims at providing the tools and processes to help measure the DLE's skills/knowledge and areas where they need to improve. Once you have identified the areas that a DLE needs assistance with, you can recommend the specific training to improve his/her effectiveness.

Topics in this chapter

What is a competency assessment process?

The DLE assessment process helps identify and measure gaps in the competencies that DLEs should have to perform their jobs effectively. A DLE competency assessment should be performed based on the DLE Skill and Assessment Level Matrix, which consists of four assessment categories:

1. Business skills
2. Behaviors
3. Lubes marketing skills
4. Technical knowledge (utilize the TETAT for a more detailed assessment of the competency level to execute the technical offer and steps to close gaps)

The DLE Skill and Assessment Level Matrix lists the level of performance required for each skill. The DLE assessment sheet is an input form for the DLE's skill levels and serves as a tool to identify/measure core competencies as well as any areas needing improvement.

The TETAT is the assessment tool that helps to develop a DLE in distributor target markets. It provides a more in-depth assessment of product technical knowledge, lubrication application expertise, and ability/understanding to execute key technical services. In addition, the TETAT provides a five-year road map and training courses to help bridge identified competency/skill gaps. Contact your LE for assistance with preparation and performance of the TETAT.

Who should assess a DLE?

Competency assessments can be best reviewed by distributor management. ExxonMobil technical is best suited to provide guidance and advice on the technical competency of the DLE.

10 DLE assessment

Why should we assess a DLE?

The primary purpose is to understand the DLE's skill/knowledge gaps and address them with a training solution, to improve their job performance. The DLE assessment is integral to helping a DLE reach his/her optimum performance. It is useful for DSMs to identify areas where their DLEs can improve their performance effectively. The DLE assessment is used to identify a DLE's training needs, as well as a way to help his/her career. A high-performing DLE will add value and help improve your overall business.

How often should we assess a DLE?

A DLE should be assessed at least once a year or when changing jobs. Evaluating a DLE at regular intervals will help measure how his/her skill gap is improving. Ideally, DLE assessments should be performed early in the third quarter of each year. This will help identify the training needs that are required to address the skill deficiencies.

Guideline for an effective competency assessment
The following recommendations should help you implement competency assessments within your organization. First, review the tools available for DLE assessment, and then the step-by-step recommendations on how to conduct a DLE assessment.

Tools

DLE Skill and Assessment Level Matrix

- The material offers recommendations on the required competencies of a DLE. It is also used as an input sheet that can easily identify gaps between the DLE's current skill levels and those required for each competency. (See link below for more details and actual input.)
- In addition, the DSM should implement an ongoing stewardship of the overall assessment of the distributor's ability to execute the Mobil Serv℠ (technical) offer.

Open DLE Skill and Assessment Level Matrix sheet >
Upon downloading, the file will indicate it is locked. **Click "Read-only" to access**. Do not enter a password.

Step-by-step recommendations for conducting the DLE competency assessment

Step 1: Preparing the assessment

- The DLE should come prepared to discuss his/her performance.
- Make certain you have access to the tools mentioned above.
- Have complete data on the DLE you are assessing in order to perform a well-documented assessment.

Step 2: Understanding the DLE competency model

- Read through the DLE Skill Level Matrix and be sure you have a good understanding of the different competencies that are required for an effective DLE.

Step 3: Completing the DLE assessment sheet

- For each of the competencies you are assessing, review the DLE Skill Level Matrix and determine at which level your DLE should be performing to conduct his/her job effectively.
- In the assessment column, the DSM should fill out the level at which the DLE is actually demonstrating that competency.
- The DSM should mainly focus on business skills and behaviors.
- The SD management team should take a supporting role in the DLE assessment.

11 PES program

Planned Engineering Service program

Our philosophy –

"Planned Engineering Service unleashes productivity and helps your equipment reach its maximum potential." At ExxonMobil we don't just provide lubricants that improve your productivity. We also offer unsurpassed industry expertise, tools, and programs to extract the most value out of our lubricants and your machinery.

What is Planned Engineering Service (PES)?

It is a planned, proactive approach to lubrication maintenance that aims to assist our customers in maintaining maximum usage of production equipment and lowering overall unit costs of manufactured products. A PES offer gives us the ability to hold and obtain new business at prices above the competition by establishing a long-term customer relationship.

A PES is a promise of measurable, specific benefits that the customer can expect by using Mobil™ lubricants. This method of turning product performance and engineering expertise into advantages benefits the customer.

Benefit of PES

- Builds and maintains a long-term customer relationship
- Holds or gains new business with higher margins
- Allows acquisition of greater knowledge of customer's business
- Replaces non-ExxonMobil products (cross-selling) and upgrades opportunities
- Enables price increases and price differentials.
- Opens up opportunities to sell services
- Optimizes workload and knowledge

Implementing PES

Implementation follows the sequence below:

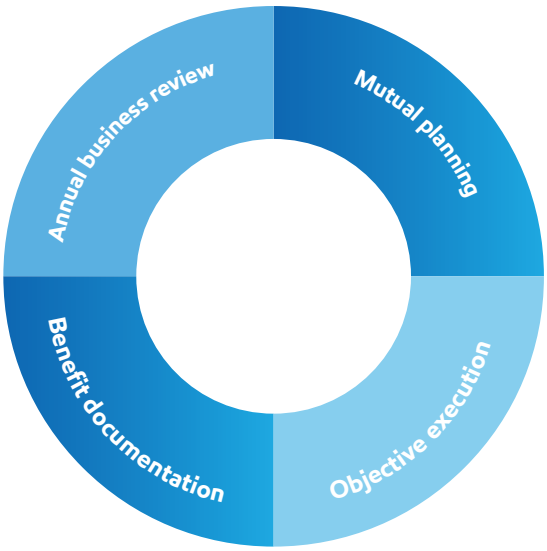
1. PES account selection
2. Preparation
3. The four-step process:
   - Mutual planning
   - Objective execution
   - Benefit documentation
   - Annual business review

The PES process

PES is a robust and consistent methodology that enables ExxonMobil to deliver services that add value for our customers, for example:

- Extending equipment life
- Reducing downtime, especially unplanned
- Extending oil drain intervals
- Reducing lubricant waste

The Mobil™ Planned Engineering Service process



11 PES program

The PES opportunity areas

PES focuses its services on the following areas to deliver an added value to our customers:

- Sustainability
- Mobil SHC™ synthetic lubricants
- MobilGrease™
- Mobil Serv℠ Lubricant Analysis (used oil analysis)
- Gear inspection
- Hydraulic inspection
- Correct lubrication
- Equipment Builder services
- Training
- Other areas as required

How PES helps the customer

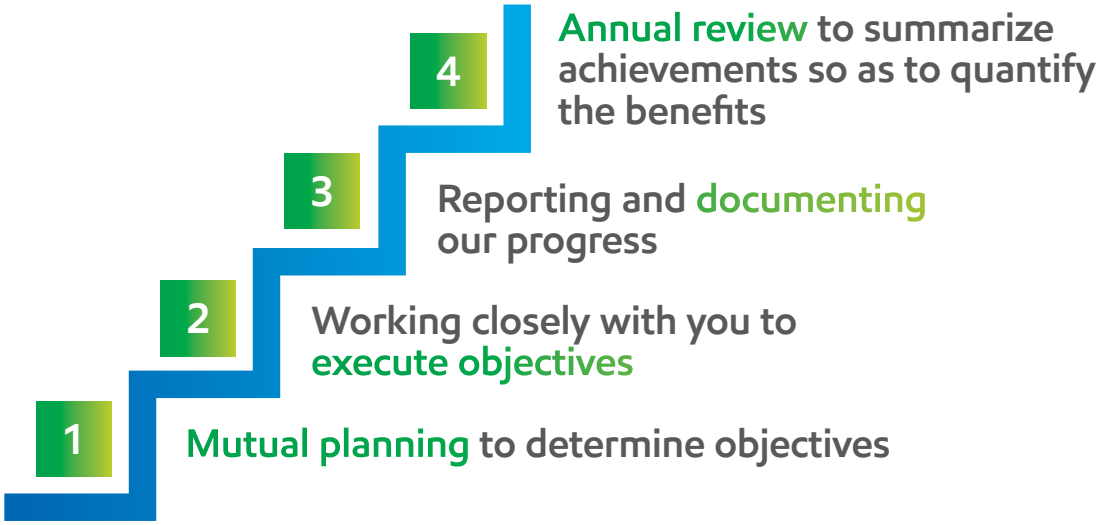
PES is a planned approach to the science of lubrication.

ExxonMobil offers unsurpassed industry expertise, tools and programs to extract the most value out of our lubricants and your machinery.

Each plant provides a unique situation where PES can help improve the customer's operation. Sales and engineering teams put their recommendations to the customer in writing.

Four steps to unleash productivity with customer

- Mutual planning
- Objective execution
- Benefit documentation
- Annual business review



11 PES program

Mutual planning

- Meet with key contacts at your location to understand business initiatives
- Establish measures and project value using your business metrics
- Prioritize importance of each objective and define integrated roles
- Develop action plans, including joint timelines and milestones
- Provide a commitment letter that summarizes and helps track mutual objectives, as well as obtaining required signatures

Objective execution

- Joint review of plans with your management to develop team cooperation
- Outline steps required to achieve desired results
- Establish and maintain factual, believable baselines
- Maintain close reciprocal communication between sales and lube engineering team responsible for your account
- Provide regular progress reports in support of projected value and begin planning for future business improvements

Annual business review

- Provide accounting of joint accomplishments compared to commitments made earlier in the year
- Summarize benefits to this site, as well as performance improvements
- Confirm that numbers and figures presented are agreed upon by your personnel
- Prepare a complete and concise executive summary brief to ensure that each manager understands the value delivered and required actions
- Repeat the process

Benefit documentation

- Provide positive and concrete facts related to your situation
- Complete value calculations using reliable quantitative data or actual performance comparisons that are meaningful to you as the customer
- Keep reports simple and straightforward, with logically-organized contents and a clear indication of desired actions
- Explicitly communicate impact on this location's business initiative(s), document actual savings, state source(s) for facts/measurements
- Benefits are documented in the following areas:

√ Less unscheduled downtime

√ Fewer machine replacement parts

√ Fewer labor costs

√ Fewer purchasing costs

√ Less lubricant consumption and waste

√ Increased production rate of acceptable goods

√ More effective maintenance control

√ Training seminars and clinics

11 PES program — Attachment I

General safety rules

Purpose
The distributor's primary objectives should be to ensure the safety and health of their employees.

Each distributor's employee should become familiar with safety rules adapted by each individual distributor's organization. Distributor supervisors/managers must enforce safe work practices through strict adherence to safety rules.

Most accidents can be prevented if everyone uses assigned safety equipment and follows the established safety rules. To operate a safe and successful business, here are some recommendations to follow:

Communication of safety rules should be accomplished by:
- Discussion during new DLE hire orientation
- Posting throughout the distributor's facility
- Annual training refresher
- Third-party site safety overviews
- Reinforcement by supervisors

Personal protective equipment (PPE)
The intent of this document is to establish a consistent minimum PPE requirement for DLE applications while the DLE is at the customer's operations and facilities. Any PPE purchased and issued must meet local regulatory requirements and recognized international standards (e.g., ANSI, ISO, EN), and when supplied to personnel it will be of fit-for-purpose quality PPE.

General requirement
PPE includes protective equipment for the eyes, face, head and extremities, and protective clothing, and respiratory devices to prevent any hazard or irritant from causing injury or impairment to personnel. All DLEs should wear the basic PPE equipment when in designated work areas of a plant. In, general the following pieces of PPE should be worn:
- Hard hat
- Safety glasses with side shields
- Long trousers
- Safety shoes
- Hearing protection — to be worn when work is done in areas of 80 dBA or greater.
- Light-duty work gloves and heavy-duty chemical work gloves (if chemicals are involved)
- Personal flotation device — where applicable

The distributor should have additional safety rules for specific operations and departments that apply to DLEs engaged in hazardous work areas or operations, such as those for:
- Lockout-tagout
- Confined space entry

Remember: PPE standard is not optional

Note: The distributor will be solely liable for any accidents incurred by the DLE while on distributor's and/or distributor's customers' premises (this includes distributor's potential customers' premises) caused by the actions, omissions or negligence of distributor, its customers and/or potential customers.

11 PES program — Attachment II

Distributor Lubrication Engineer Assessment Matrix

DLE name:_____ **Supervisor name:**_____

Co. name:_____ **Field engr. name:** _____

Date:_____ **Assessment no.:** _____

Scoring: 0 – Never displayed 1 – Hardly displayed 2 – Rarely displayed
3 – Sometimes displayed 4 – Often displayed 5 – Always displayed

1. Business skill

B01	Customer responsiveness	Meets individual customers' needs quickly and efficiently by responding positively to feedback and effectively handling and logging complaints.	
B02	Understanding business	Understands key business levers and how to act to improve performance/bottom line. Aware of the differing stakeholder interests in the business.	
B03	Understanding standards	Confident application of operating standards relevant to the job and awareness of the wider framework of company standards and relevant legal requirements	
B04	Performance management	Plans and prioritizes work to do the job well. Tracks progress against performance objectives or project plan.	
B05	Problem-solving	Solves simple problems in well-defined work situations. Sets priorities for tasks in order of importance.	
B06	Numeracy	Capable of verifying large amounts of numerical data. Can reach accurate, reasoned conclusions from available data.	
B07	Financial understanding	Uses knowledge of finance to interpret a simple balance sheet and profit and loss account.	
B08	Budget and cost control	Works within budget constraints; efficient allocation of resources with minimum waste. Avoids under-utilization.	
B09	Negotiating skills	Able to prepare simple negotiation strategy with risk analysis and predicted outcome. Effectively applies skills and techniques of negotiating.	
B11	Information technology skill	Basic application of most Microsoft Office or other relevant applications. Familiar with relevant databases and able to use effectively.	
B12	English language	Competence in a limited range of predictable simple language tasks.	
B13	Health and safety awareness	Full understanding of work permit system at customer premises. Able to undertake planned inspections of offices and customers' premises and develop improved work practices.	

11 PES program — Attachment II

Distributor Lubrication Engineer Assessment Matrix

DLE name:_____ **Supervisor name:**_____

Co. name:_____ **Field engr. name:** _____

Date:_____ **Assessment no.:** _____

Scoring: 0 – Never displayed 1 – Hardly displayed 2 – Rarely displayed
3 – Sometimes displayed 4 – Often displayed 5 – Always displayed

2. Behavior

Competencies			DLR Rating
C01	Open thinking and leaning	Has confidence to challenge fixed assumptions. Keen to try new approaches and acquire useful new skills.	
C02	Interpersonal understanding	Seeks to understand what people are saying and reads body language or emotions.	
C03	Personal impact and influence	Confident and positive manner. Uses direct discussion or presentation, e.g., appeals to reason, data, or others' self-interest via concrete examples.	
C04	Bias for action	Keen to get results. Looks for opportunities before being asked. Takes responsibility for overcoming obstacles in own work.	
C05	Decision-making and judgment	Confidently makes decisions in own area of day-to-day problems where there are clear options. Applies rules, standards, common sense and commercial awareness where appropriate.	
C06	Managing time and pressure	Remains calm during occasional periods of pressure, managing time and personal resources.	
C07	Communication skills	Conveys information fluently, interpreting and clarifying details and explaining rationale. Confident in presentation and discussion of factual data with a familiar audience.	
C08	Facilitation skills	Contributes as an active member of the group during meetings with effective and worthwhile contributions. Focuses on the key issues under discussion and on achievement of teams and meeting objectives.	
C09	Networking	Through day-to-day work, develops cooperative relationships with key contacts essential to get the job done. Shares and discusses ideas with others in the network.	
C10	Teamwork	Actively shares information and offers advice and encouragement to others in support of the best results. Demonstrates understanding of other team members' strengths.	
C11	Leadership	Understands own and others' roles and recognizes the importance of working to set objectives and performance standards. Adapts to change when necessary.	
C12	Coaching and developing	Basic coaching skills. Aware of the value of sharing knowledge and experience. Makes time available to advise others when needed.	
		Subtotal	

11 PES program — Attachment II

Distributor Lubrication Engineer Assessment Matrix

DLE name:_____ **Supervisor name:**_____

Co. name:_____ **Field engr. name:**_____

Date:_____ **Assessment no.:**_____

Scoring: 0 – Never displayed 1 – Hardly displayed 2 – Rarely displayed
3 – Sometimes displayed 4 – Often displayed 5 – Always displayed

3. Lubes sales skill

Competencies			DLR Rating
LS01	Competitor knowledge	Understands the relative strengths and weaknesses of the main competitor business strategies and identifies likely opportunities.	
LS02	Customer development	Has an adequate understanding of the customer business process. Develops and implements strategy for the development of the commercial relationship.	
LS03	Business acumen	Identifies current cost/value opportunities. Understands how these will impact on the cost of delivering company's product or service offering to the customer and the actual/perceived value to the customer.	
LS04	Sales presentation	Makes a sales presentation that addresses the current situation, highlights the ensuing problem, forces out consequences of the problem and therefore offers an appropriate solution.	
LS05	Negotiation	Enters into a negotiation and successfully identifies those aspects of their own and the opponents' offer that may be surrendered as concessions and those that may not, and the minima and maxima values of each to both parties.	
LS06	Sales planning	Understands the rationale and process used in sales planning, the administration of the sales planning system, and its relationship to the business and marketing plans.	
LS07	Key account management	Understands the mechanic of KAM and its practice. Knows which market sectors, segments or customers are suitable for KAM and which are not, and why.	
LS08	PES account management	Develops PES objectives and plans that are agreed upon with the customer and adhered to. Familiarity with the roles and individuals in customer decision-making unit. Coordinates PES strategy and implementation with key sales, marketing and supply personnel.	
		Subtotal	

11 PES program — Attachment II

Distributor Lubrication Engineer Assessment Matrix

DLE name:_____ **Supervisor name:**_____

Co. name:_____ **Field engr. name:** _____

Date:_____ **Assessment no.:** _____

Scoring: 0 – Never displayed 1 – Hardly displayed 2 – Rarely displayed
3 – Sometimes displayed 4 – Often displayed 5 – Always displayed

4. Technical knowledge

Competencies			DLR Rating
TK01	Product knowledge	Understands, interprets and recommends the advantages of the appropriate product solution for each application.	
TK02	Lube surveys	Understands and has conducted a few lube surveys. Knows where to source OEM/EB information.	
TK03	Programs (e.g., UOA)	Understands and has installed a program with customers. Can explain the advantages of programs and interpret results.	
TK04	Equipment familiarization	Good knowledge of all the equipment and principles of operation.	
TK05	Information resources	Good knowledge of all information resources.	
TK06	Troubleshooting problems	Capable of troubleshooting problems and providing solutions.	
		Subtotal	

11 PES program — Attachment II

Distributor Lubrication Engineer Assessment Matrix

DLE name:_____ **Supervisor name:**_____

Co. name:_____ **Field engr. name:** _____

Date:_____ **Assessment no.:** _____

Scoring: 0 – Never displayed 1 – Hardly displayed 2 – Rarely displayed
3 – Sometimes displayed 4 – Often displayed 5 – Always displayed

Assessment scoring and evaluation

1. Business skill:	$\frac{\text{Subtotal numbers}}{60}$ X 0.15 =	_____%
2. Behavior	$\frac{\text{Subtotal numbers}}{60}$ X 0.15 =	_____%
3. Lubes sales skill	$\frac{\text{Subtotal numbers}}{40}$ X 0.30 =	_____%
4. Technical knowledge	$\frac{\text{Subtotal numbers}}{30}$ X 0.40 =	_____%
5. Total scoring percentage		_____%

Scoring indicator:

90-100%	Well-trained DLE, minimum supervision required. Advance technical training required.
70-89%	Some supervision by LE with on-the-job training and on-the-job training with the DSM on business skill. Need to identify technical training required to improve technical skill.
50-69%	Needs intermediate training and a lot of guidance from both LE and DSM. Identify weakness areas and work to improve. Spend more time in on-the-job training.
0-49 %	Needs basic technical training and a lot of guidance from both the LE and DSM. Detail work plans required to improve business and technical knowledge.

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