

# CBM Discovery Worksheet



<b>Company Name:</b>
<b>Address:</b>
<b>Web site:</b>
<b>Corporate Office (Location):</b>
<b>Other sites interested/involved in CBM:</b>
<b>Industry:</b>
<b>Contact / Title:</b>
<b>Phone:</b>
<b>Email:</b>
<b>Supervisor:</b>

## Step 1:

Identify the Goal(s) that the client wants to achieve with their CBM program and to estimate a financial value on that specific goal (may need to research and fill in later)

Goal	Value (\$\$\$) of Goal to Client

Some of the client goals may be to increase uptime, avoid lost production, lower overall maintenance costs, reduce unnecessary repairs or preventive maintenance (PM) tasks, improve the return on investment in maintenance, implement acceptance testing on newly installed equipment, etc.

It is important to get the client to state their goals in his/her own words so they accept it as a goal instead of agreeing with one of the more general goals listed above.

For example, one of our current customers in the food processing industry has estimated that their CBM program is directly responsible for increasing the number of production days per year by 4 days (with an output of \$40,000 per day (8 hour shift) per line, this goal amounts to increase revenue of \$160,000 per year per shift). The client could also think of the \$40K of revenue (per shift) per line as a cost avoidance of \$40K if the line were down for an 8 hour shift. This type of linking of \$ value to specific goal this is important when we can get it because it enables us to establish the value of what we are selling and gives our buyer a justification for it when he has to go for internal approvals.

# CBM Discovery Worksheet



Another example, sing a measure of success to clarify the goal(s) comes from a client in the marine industry who invests approximately \$1M into their CBM program per year and have consistently enjoyed an average benefit to cost ration of 20:1 over the last 20 years that this measurement has been used. This dramatic benefit to cost ratio is due to well documented cost avoidance, i.e. lower maintenance costs, based on early detection of impending faults and scheduled machine downtime.

## Step 2:

Identify what the client is doing today regarding his/her maintenance program, how it supports his/her goal(s) and what we can do to improve their CBM program.

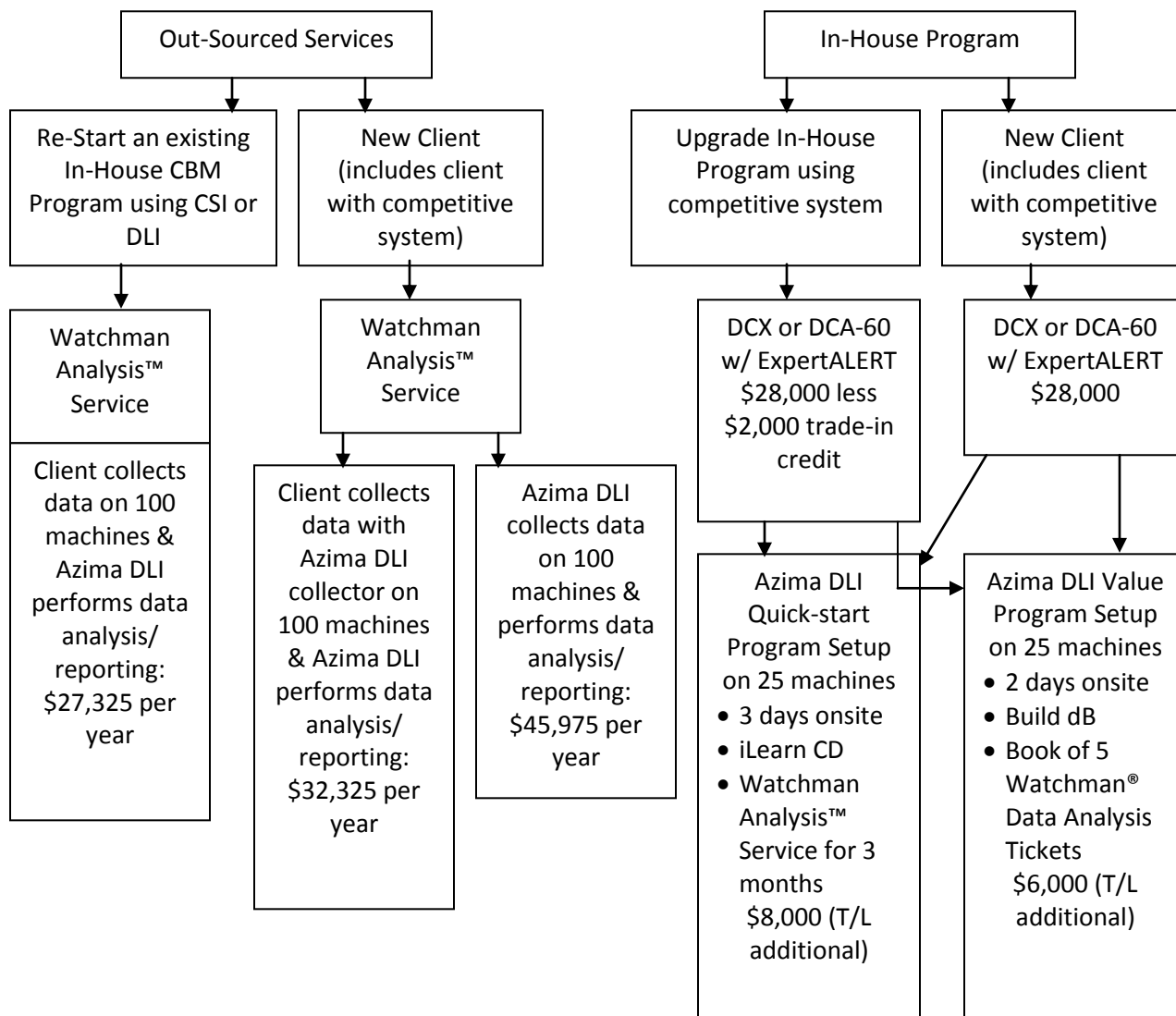
Existing Maintenance Effort	% of time spent on this effort	Technologies Used Today (e.g. Vib, Oil, IR, Motor, Align. Bal)	Supports Goal Yes / No	Recommended Improvements (e.g. Implement/Expand In-house efforts or Out-source CBM effort)
Reactive		N/A		
Preventive				
Predictive				
Proactive				

# CBM Discovery Worksheet



## Step 3:

Use the following logic tree to identify the type of Azima DLI solution that best fits the client's goals and implementation strategy. This tree leads to a budgetary price for a plant having 100 machines for the service option and 25 machines for the in-house scenario. These generic machine counts can be scaled up/down when the final proposal/price quotation is generated or after the client begins implementation.



*Note: Watchman Onsite™ Services for advanced vibration diagnostics, lube oil analysis, wear particle detection, motor diagnostics and IR thermography are available to augment any program outlined above.*

# CBM Discovery Worksheet



## Step 4:

Gather details about the scope of the program in order to create a more specific proposal / price quotation

	Machine Types	Frequency of data collection	Standard (# <= 4 brgs)	Complex (# > 4 brgs)
Critical				
Important				
Other				

*Note: If possible obtain a machine list from the client. In any case try to get an idea of the complexity of the various machine types based on number of bearings.*

Most clients that have never implemented a CBM program will not have a good idea of how often to collect data. If they have repair histories on any of their machines this type of documentation would be helpful to establish the frequency of data collection. Since CBM is based on tracking a trending it is necessary to collect enough data between failures to predict the fault. For example, if a problem machine is failing every twelve months you should collect data monthly or no less than every other month. If the client has mean time between failure data then an average of the group of machines can be determined to help determine data collector frequency. If no information is available then we should suggest starting with a conservative approach, i.e. once per month, and adjusting the frequency of data collection as necessary as useful machine history data is gathered.

## Step 5:

Obtain feedback from the client before closing the meeting/conversation. Ask what the next step is and when the client wants to implement the CBM program

Next Step:	
Implement by:	
Other:	