



# OFF-ROAD QUESTIONNAIRE

**COMPANY NAME:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**CONTACT NAME:** **First:** \_\_\_\_\_ **Last:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

1. Lead in question: Describe for me the primary type of work your company is involved in.  
*Ask how they measure their performance, i.e. cost per ton, cost per hour, cost per mile, cost per cubic yard.*

## BASIC EQUIPMENT QUESTIONS:

2. What type(s) of equipment do you have? Number of units?  
*This information will provide direction in calculating annual product volume and types of products used.*

Type of Equipment	Brand (Preferred OEM)	Number of Units
Articulated Trucks		
Backhoe Loaders		
Track Loaders		
Wheel Loaders		
Wheel Dozers		
Off-Highway Trucks		
On-Highway Trucks		
Excavators		
Graders		
Scrapers		
Compactors		
Paving Equipment		
Other		
Other		

3. How long do you keep your equipment? \_\_\_\_\_

4. Do you lease or own your equipment? \_\_\_\_\_

*These questions help qualify if the customer is seeking long-term equipment life or only concerned with basic equipment maintenance to keep warranty intact. Those that seek extended equipment life will likely appreciate the value in a premium product offering.*

5. Where do you maintain your equipment? \_\_\_\_\_

*Prompt for internal vs. external (contracted maintenance, i.e. CAT). Seek customers who do most of their maintenance in house.*

## BASIC ENGINE QUESTIONS:

6. What are your engine drain intervals? \_\_\_\_\_

*Those that use drain intervals outside OEM recommendations could be a nice fit with Castrol premium products. This type of customer tends to be a maintenance leader and is willing to explore best practice improvements in their maintenance programs.*

7. What parameters do you use to schedule rebuilds? \_\_\_\_\_

*Knowing exactly when to rebuild a component requires a careful evaluation of OEM rebuild recommendations, oil analysis results, rebuild/failure histories, component maintenance history, fuel consumption, etc. Understanding how the customer schedules rebuilds provides powerful insight into the level of sophistication of their maintenance program.*

8. Is your department under the type of budget pressures that so many others are today? (Circle One) Yes / No

9. How has this impacted your maintenance program? \_\_\_\_\_

*This question provides insight into how the company views their maintenance department. Some view maintenance cost as overhead that reduces their bottom line profit. Others view maintenance cost as an integral part of their operations and understand the key roll this function plays in the health and profitability of the business. Seek customers that value their maintenance department and don't focus on lowest cost as a way to manage the business.*

10. What engine oils do you use?

Product: \_\_\_\_\_ Package Size: \_\_\_\_\_ Bulk Tank Size: \_\_\_\_\_

Product: \_\_\_\_\_ Package Size: \_\_\_\_\_ Bulk Tank Size: \_\_\_\_\_

Product: \_\_\_\_\_ Package Size: \_\_\_\_\_ Bulk Tank Size: \_\_\_\_\_

## BASIC OIL ANALYSIS QUESTIONS:

11. Do you perform oil analysis? If Yes, how often? \_\_\_\_\_

12. Who provides your oil analysis services? \_\_\_\_\_

13. What do you like about their program? \_\_\_\_\_

14. Do they provide training on sampling, labeling and report interpretation? (Circle One) Yes / No

15. What would you like in an oil analysis program that your current provider does not provide?

*Use these questions to uncover the specifics of their sampling program and determine if the Castrol LabCheck offers features their current provider does not. Without proper training, most customers don't fully utilize the capabilities of a good oil analysis program.*

## BASIC GREASE QUESTIONS:

16. What grease do you use? (Brand, type, etc.) \_\_\_\_\_

17. How long have you been using that grease? (If recently changed, why?) \_\_\_\_\_

18. Do you use one grease for all applications? \_\_\_\_\_

*If they use several different types, investigate thickener compatibility.*



## BASIC TRANSMISSION QUESTIONS:

**19.** What different types of transmission fluids do you use?

Product: \_\_\_\_\_ Package Size: \_\_\_\_\_ Bulk Tank Size: \_\_\_\_\_

Product: \_\_\_\_\_ Package Size: \_\_\_\_\_ Bulk Tank Size: \_\_\_\_\_

Product: \_\_\_\_\_ Package Size: \_\_\_\_\_ Bulk Tank Size: \_\_\_\_\_

**20.** Do you have any Allison transmissions in your on-road fleet (dump trucks, lube trucks, etc.)

\_\_\_\_\_

## BASIC HYDRAULIC QUESTIONS:

**21.** What type of Hydraulic oil are you using?

Product/Vis: \_\_\_\_\_ Package Size: \_\_\_\_\_ Bulk Tank Size: \_\_\_\_\_

Product/Vis: \_\_\_\_\_ Package Size: \_\_\_\_\_ Bulk Tank Size: \_\_\_\_\_

Product/Vis: \_\_\_\_\_ Package Size: \_\_\_\_\_ Bulk Tank Size: \_\_\_\_\_

**22.** What is your standard drain interval? \_\_\_\_\_

**23.** What do you expect from a hydraulic oil? \_\_\_\_\_

*Potential dialogue to discuss Dual Range or Trans-C HT.*



## BASIC LUBE SUPPLIER QUESTIONS:

**24.** Who do you currently buy from? \_\_\_\_\_

**25.** Do you maintain your own tank levels? (Circle One) Yes / No

**26.** How are orders placed? (Salesman visit, keep full, phone, etc.) \_\_\_\_\_

**27.** Do you have a contract with your current oil supplier? (Circle One) Yes / No

**28.** Do you have any loaned equipment? (Circle One) Yes / No If Yes how much? \$\_\_\_\_\_

**29.** What do you expect from an oil supplier? \_\_\_\_\_


\_\_\_\_\_

*Determine the level of support by their current supplier vs. expectations. Many customers buy based on factors such as convenience, price, and brand/supplier recognition. Make the customer aware of the benefit of sales and technical support in improving the profitability of their business.*

**30.** What problems do you need solved? \_\_\_\_\_

\_\_\_\_\_

*This could also be restated as "What keeps you up at night?" Identify issues the customer struggles with and seek innovative solutions to address these problems through your lubricant program.*



**Thank you for your time.** We will take the information you gave us today and put together a Program that will fulfill all of the requirements we discussed. When would be a good time to schedule a meeting?

Date: \_\_\_\_\_ Time: \_\_\_\_\_



For more information contact your Castrol Sales Representative.  
Call 1.888.CASTROL or log onto [www.castrol.com/us](http://www.castrol.com/us).