



## Real-Life Stories

# Case Study: Optimizing Lockout Procedures For A Multi-Site, National Retailer

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A large, multi-site retailer needed professional assistance in writing lockout procedures for their machinery and equipment at over 450 stores across multiple states. Their end goal was compliance and safety during the servicing and maintenance of their equipment. Given their unique challenges that required out-of-the-box thinking, Master Lock was the clear choice based on their experience, expertise, flexibility, and creative problem solving when developing individualized plans and scopes of work.

As an organization highly committed to safety, it was important to this premium retailer that they take a proactive approach to control any hazardous energy that could impact safety and/or the efficiency of their stores – and the sooner the better. It was also important to ensure that the customer shopping experience was not interrupted in any way.

One unusual and daunting challenge they faced was identifying the power source for each piece of equipment in every store to create a usable outline that accurately mapped each location's electrical system. And with three different store configurations, it was critical to develop a unique approach. A "one size fits all" solution wasn't going to work here.

In addition to the mapping, the retailer made it a priority to have equipment-specific lockout procedures created for each of the hundreds of pieces of equipment in each store. Access to the procedures was an important component to ensure they were readily available to their entire team of internal authorized personnel in charge of servicing and maintaining the equipment. With frequent engagements with outside contractors, they also needed to be able to easily communicate the organization's hazardous energy isolation methodology to contractors using these new equipment-specific lockout procedures.

They knew that the electrical mapping as well as the new policies and procedures were critical to keeping everyone – from internal employees to contractors – accountable for adhering to the organization's safe work commitment, without causing any unnecessary downtime in the stores. And they chose Master Lock to help.

## Goals & Analysis

## Develop a Lockout Plan Focused on Safety, Compliance, and Accountability

With frequent engagements with contractors, the client had 5 key goals related to their lockout procedures:

- **Compliance** - Have readily available lockout procedures for each piece of equipment.
- **Safety** - Ensure a safe work environment for all employees and authorized personnel.
- **Accountability** - Hold the organization, employees, and contractors accountable for safe work practices.
- **Read/Write/Audit Procedure Capability** - Ensure authorized personnel have access to software that allows them to edit, change, and add information and lockout procedures when needed.
- **Electrical System Mapping** - Create a detailed outline of each store's electrical system - identifying the MCC panels and circuit breakers that go to all machines requiring lockout.

## Using Master Lock's vast experience and expertise, the following are solutions that were put into place to address the client's compliance and safety challenges:

- **Written Lockout Procedures** - Master Lock took on the immense task of writing lockout procedures for hundreds of pieces of equipment across hundreds of store locations that involved multiple two- to four-man teams deployed across the country. This allowed the client to focus on daily business operations while having the peace of mind that their lockout procedures were both compliant and effectively supporting the safety of their employees.
- **Electrical System Mapping** - To address the client's need to help their staff more easily and accurately identify which panels and circuit breakers controlled which piece of equipment, Master Lock developed a comprehensive schematic of each store's electrical system – from MCC panels and circuit breakers to each piece of equipment in the store requiring lockout.
- **Master Lock eLOTO Software** - In support of their written lockout procedures, Master Lock provided access to a software platform that allowed maintenance supervisors to edit, change, or add information to their procedures as needed.
- **Training** - To ensure all employees were up to speed on how to effectively use the supporting software, Master Lock provided web-based demonstrations for all relevant employees and authorized individuals.
- **Lockout Device Deployment** - Based on the lockout procedure development, Master Lock created standardized lockout device kits and visual aids for each store to be used as reference for maintenance supervisors to understand exactly what was necessary to effectively apply the lockout procedures. The highly customized kits were developed for each type of store and the number of authorized personnel allocated at each store. These kits were carefully selected and comprised of ball valve and gate valve devices, circuit breaker devices, lockout hasps, sets of keyed-alike locks, and other specific devices based on unique isolation points. Approaching lockout devices in this manner allows them to maintain an inventory of devices specific to their store.

## Results

With approximately 25% of the stores complete, the client was able to see immediate results supporting their goals of compliance, safety, accountability, procedure updates and mapping.

**Specific results include:**

- **Quick Implementation** - Master Lock was able to deploy a series of teams to very quickly begin implementation, and with the first push, Master Lock completed over 450 stores. The client was able to immediately begin addressing potential areas of concern with their equipment and avoid compliance issues and safety concerns.
- **Gap Identification** - With the proper tools in place, the client was able to easily “health-check” their equipment to identify any potential deficiencies and have a solid plan ready for any necessary servicing or replacements.
- **Time Savings** - With the task of procedure writing and mapping in Master Lock’s court, the client was able to save countless hours of work, which allowed them to stay focused on more pressing in-store issues and avoid any store closures.
- **Accessible Mapping** - With a simple and universally understandable reference tool that identified exactly what equipment was fed from which panel or breaker for lockout of each piece of equipment, the client was able to avoid costly and timely circuit tracing for their entire electrical system.

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