

LIVE STREAM



Manufacturers Alliance
Sharing Education & Resources Peer to Peer

EDUCATIONAL SEMINAR

CAPTURING TRIBAL KNOWLEDGE

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SEMINAR SPEAKER



CRYSTAL SELCHOW

Logistics & Inventory Manager
Loram Maintenance of Way

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Capturing Tribal Knowledge



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“So you guys like build trains or something?”



Privately held business in the Coril Holding's portfolio of businesses

Headquartered in Hamel, MN

600+ employees and operating 100+ machines

Global footprint with machine sales in 25+ countries

Produce 5-10 machines per year

Check out our new YouTube channel!



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Serving Freight & Passenger Systems Worldwide



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SPEED PERFORMANCE RELIABILITY

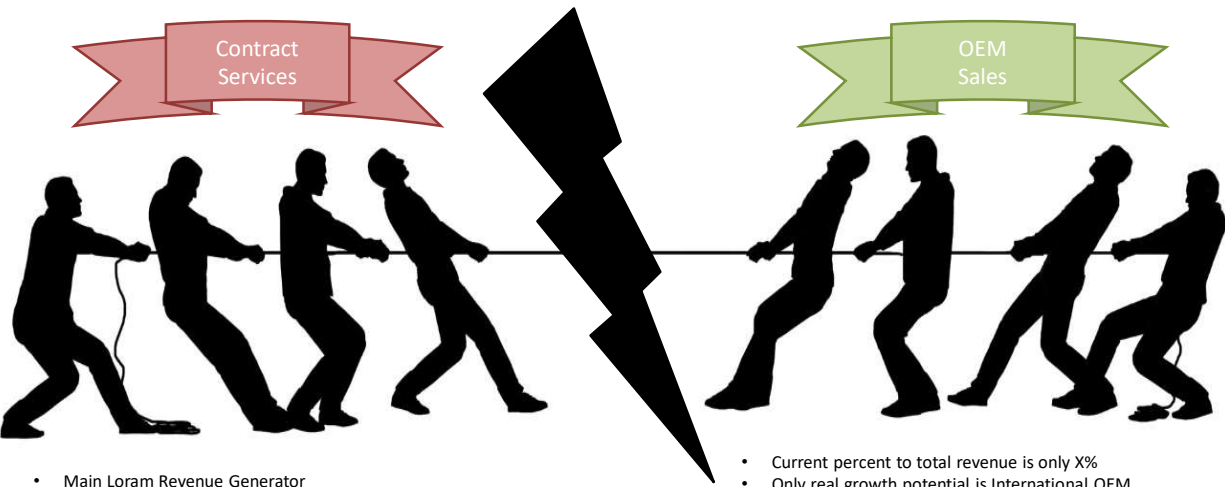
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So We Build Big
Complex Machines,
But is that our
Biggest
Problem?.....



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Contract Services


- Main Loram Revenue Generator
- North America Rail Grinding Market Domination (100%)
 - Little Growth Opportunity
- All Transactions are Intercompany, primary in North America and are expenses rather than revenue generating

OEM Sales

- Current percent to total revenue is only X%
- Only real growth potential is International OEM Sales.

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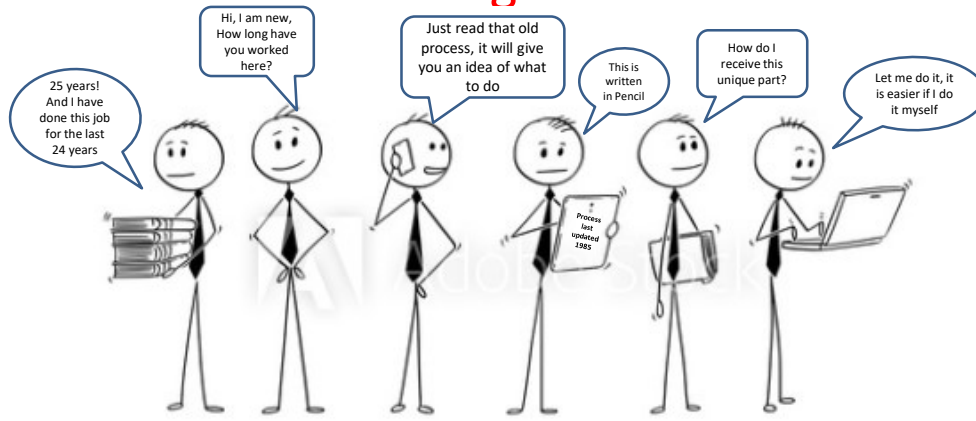
Growing as an OEM

- Importing
- INCO Terms
 - Obligations & Charges responsibilities
 - Recognition when terms are met
 - Revenue Recognition
 - Where to delivery the product
- Contract Terms & Obligations
 - Who pays for what & when?
- Spare parts
 - What parts are needed to meet contract warranty/operational period
 - How to service old machines
 - OBS parts
 - Repair parts for purchased assemblies
- One Person was primary responsible for OEM sales for 15 years..... now she is gone

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Tribal Knowledge – The Risk and How to Recognize it



Every day Actions that get the job done, but may not be written down

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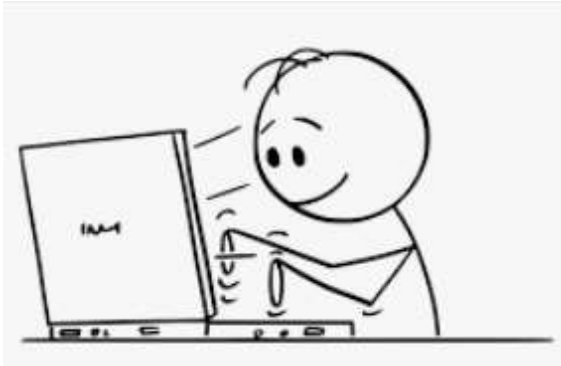
Tribal Knowledge –How to Recognize it Continued...

- If you hear “this is how we have always done it” Ask Why? Do you get Results?
- If you hear “this is just an exception no need to enter this master data in the system”.
- If you hear “this is too complex for others to do it right”.
- If a specific action, transaction, task, etc. does not happen unless a specific person is in the “seat” and makes it happen.
- Cross train employee’s to “cover” for each other, this often highlights actions not documented.
- Do the activity yourself, if possible.
- Pay close attention when training new employees, document questions, ask new employee to markup processes with questions.
- If a specific action, transaction, task, etc. does not happen unless a specific person is in the seat and makes it happen.

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Capturing Tribal Knowledge



- Always ask first but then.....

Document – Document – Document

- Utilize your ERP System
 - Master Data; Routings; Customer Info, Supplier Info; Transportation Info
- Develop/Write Processes
 - Take pictures/screen shots, the reader may lose interest in text heavy documents and miss critical info.
 - Develop/utilize a document & process storage system
- Record your online meetings/training
 - Loram uses Microsoft Teams, we record all training for ERP go live training, or acquisition training.
- Engage your IT Team
- Leverage peer groups and networking groups.



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Loram Specific Examples – Using Video Training System

Role	Task	Responsible Person	Not Allowed	Person(s)	Training Date	Recording Link
No Part Purchase Requisition Creator	Create No Part Purchase Requisition	Everyone but Machines, Receivers		everyone		
No Part Purchase Requisition Authorizer	Authorize PR	Authorizers		already defined per authorization rules		
Inventory Management	Setting up new parts - Inventory Part Screen	Inventory Coordinator/Planner	Admins	Axel Vaughan	18-May-20	https://web.microsoftstream.com/video/6d48353a-7063-4dec-9a3a-71d7ad404ac
	Copy part to machine sites	Inventory Coordinator/Planner		Axel Vaughan	18-May-20	
	Setting up safety stock, order intervals, planning me	Inventory Coordinator/Planner		Axel Vaughan	18-May-20	
	Cycle counting - Setting up a scheduled cycle count	Inventory Coordinator/Planner		Axel Vaughan	19-May-20	https://web.microsoftstream.com/video/6b65c5a3-5300-4a20-b512-8c529d1be31a
	Cycle counting - Verification of Cycle Count		Not the person who does the counting not someone who does receipts of inventory			
		Inventory Coordinator/Planner		Axel Vaughan	19-May-20	
	In Transit Review	Inventory Coordinator/Planner		Axel Vaughan	19-May-20	
	Scrapping inventory parts (Define scrap policy and	Inventory Coordinator/Planner		Axel Vaughan		
	Setting up a serialized part	Inventory Coordinator/Planner		Axel Vaughan	18-May-20	
	Setting up a part to be rebuilt	Inventory Coordinator/Planner		Axel Vaughan	18-May-20	
	Receipt of Inventory (NPEC)	Inventory Coordinator/Planner		Axel Vaughan	19-May-20	

Video training has allowed us the following

- To easily capture Tribal Knowledge through conversation.
- As a leader I can re-watch and understand what questions are asked, and where we need to put additional focus.
- Reduce “lost time” when training new team members
- Easily train new team members remotely



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Loram Specific Examples – Using ERP System

Supply Chain Matrix for Customer

To External Customer: Address ID: 1693 1 ☒ Default Address

From External Supplier		From Supply Site													
Supply Site	Ship-Via	Description	Default	Exception	Delivery Terms	Delivery Terms Description	Del Terms Location	Route ID	Route Description	Forwarder ID	Picking Lead Time	Shipment Type	Shipment Location No	External Transport Lead Time	
10	10	Air	<input checked="" type="checkbox"/>	<input type="checkbox"/>	21	CPT - Carriage Paid To	Guarulhos			5		7 OEA		15	

- Customer Defaults loaded in our ERP System
 - INCO Terms Loaded and Terms location listed
- Transportation Times & Carriers Loaded
- This has reduced order entry time, increased data/shipment accuracy, and moved all customer information from a desktop or “brain” in to a system.

Forwarders

Forwarder	Name	Association No	Default Language	Country	Creation Date
1	Dachser USA				6/24/2019
10	Customer routed				6/25/2019
11	Dayton Freight				4/6/2020
12	USP Freight				4/6/2020
13	XPO Freight				4/6/2020
14	FedEx Freight				4/6/2020
15	SAIA Motor Freight				4/6/2020
16	YRC				4/6/2020
17	Old Dominion				4/6/2020
2	Superior Freight US				6/25/2019
20	Adantic Overseas Miami, FL				5/13/2020
21	INTERNACTIONAL				5/13/2020
22	Interflight Harmonized Logistics - Inwood, NY				5/13/2020
23	Transport Monneau - Angou, Quebec				5/13/2020
24	Parcel Standard Next Day Overnight				5/13/2020
25	Global Cargo Miami, FL				5/19/2020
3	Superior Freight UK				6/25/2019
4	XPO Logistics				11/16/2019
5	DSV AIR & SEA INC		English	UNITED STATES	6/12/2020



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- Always ask permission & explain why you are collecting the data.
- Establish Trust with the team.
- Never assume there is no tribal knowledge.
- Have a plan, collection method, who is collecting.
- Never assume you collected all of the tribal knowledge.



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