



## Effective Communication: Specific Lifting Instructions to Prevent Damage to Process Equipment

### Overview

The Industry Business Roundtable’s (IBR) Crane & Rigging (C&R) Committee, composed of SMEs from owners and contractors, collaborated to develop this “Best Practice” to ensure that specific lifting information of existing equipment is communicated to the user. The challenge that owners and contractors have is to ensure the safety of their employees and equipment while maintaining a productive work environment.

Industry Business Roundtable’s purpose is to educate participating companies, so that every company represented will be better informed and can make their own decisions. IBR members are not required to adopt the IBR recommendations or policies but to review and apply the best practices that will benefit their workforce where applicable.

### Purpose

Establish “Best Practice” guidance to set an action plan to eliminate potential damage to process equipment, personnel, and other assets. Provide a Safety resource for employers and employees alike.

### Recommendation

To ensure specific lifting information of existing equipment is communicated to the user in the field preventing costly equipment damage (E.g. heat exchanger has an expansion section not easily detected and requires specific precautions when lifting to prevent damage).

### Considerations

- a. Asset owners can add specific lifting requirements/warnings to existing manufacturer drawings.
- b. Add a step in SAP or other planning software/system that requires a box to be checked etc. before the task can be progressed to the next step. This box could be “Are there any special lifting requirements for this equipment?” The owner can develop a specific system or action to capture the requirements.
- c. Add specific warning signs to equipment in the field.
- d. Add QR code stickers to equipment in the field that will pull up specific critical lifting information or warnings.
- e. Implement specific paint color for equipment with special lifting requirements.
- f. Develop a matrix of process equipment with special lifting requirements and add it to the site C&R procedure in an appendix.
- g. Incorporate any or all the above actions into the site-specific Crane & Rigging procedure and or SAP planning step.