DAY IN THE LIFE OF A PROACTIVE MAINTENANCE PLANNER

BY RICKY SMITH, CMRP

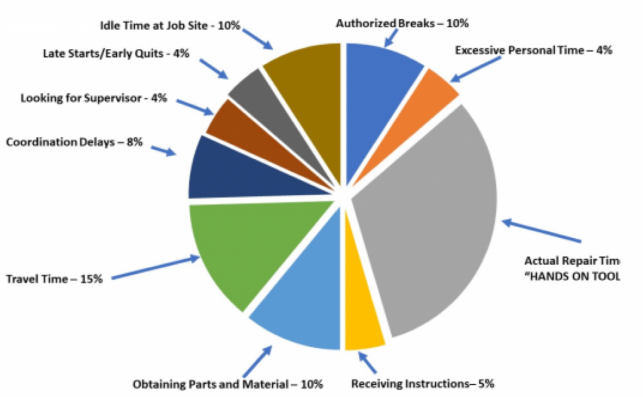
IN PARTNERSHIP WITH:
THE MAINTENANCE COMMUNITY BY UPKEEP

Maintenance Planners (planner/scheduler) are one of the most misused resources in the maintenance organization. We must always remember that the Maintenance Planner represents that single resource in the organization who is strictly dedicated on preparing for the future.

Sources of Maintenance Wastes:

- Waiting for Instructions or Drawings
- Winging it Without Instructions or Drawings
- Waiting for Parts
- Looking for Supervisors for Instructions
- Making Multiple Trips to the Job Site
- Looking for the Right Tools
- Making the Wrong Tools Work
- Waiting for Approval/Permits
- Waiting for the Equipment to be released
- Shutdown, Cooled Down, Drained, etc.
- Waiting on a Crane Lift
- Having too many/ too few craft-workers per job
- Not placing the right craft / skill for the job
- Repeat Repairs and Rework

Without this focus, we fall victim to the typical maintenance wastes associated with a reactive organization. Reactive Maintenance Organizations have a “Low Wrench-Time” because of all the sources of Maintenance Waste.



The only method to achieve optimal and stable wrench-time is through Maintenance Planning and Scheduling. Maintenance Planning and Scheduling are two different functions which are dependent on each other.
If an organization increases by wrench-time by 10% it could make a serious impact of equipment reliability.

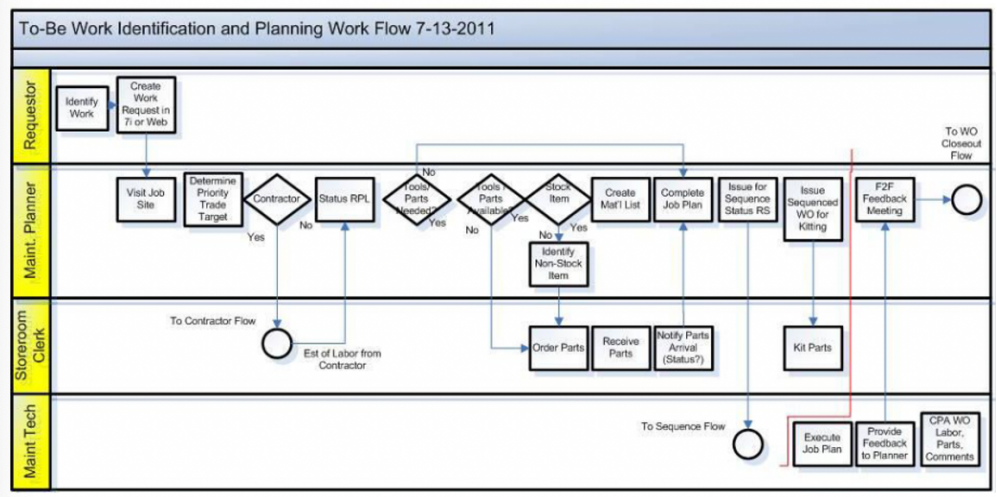
- World Class Wrench-Time = 55-65%
- Typical Wrench-Time = 15-25%
- Worst in Class Wrench-Time = 5-10%

- **Wrench-Time** is a measure of crafts personnel at work, using tools, in front of jobs.
- **Wrench-Time** does not include obtaining parts, tools or instructions, or the travel associated with those tasks.
- **It does not include** traveling to or from jobs.
- **It does not include** time spent obtaining work assignments.

DEFINITIONS:

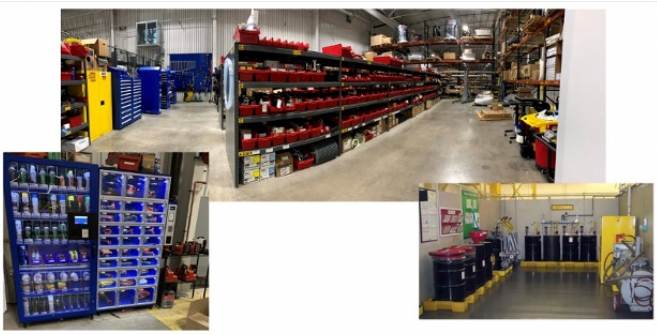
Without definitions we are dependent on everyone's opinion.

- Maintenance Planning - the process of future maintenance work which the job has been scoped, parts and material identified, # and type of maintenance craft, downtime required (if required).
- Maintenance Scheduling – the process of scheduling maintenance resources with productions by day by hour.



DEFINITIONS CONTINUED:

- Weekly Maintenance Scheduling Meeting – a weekly scheduled meeting with production, maintenance, engineering (if required) to ensure all stakeholders are in agreement with the preliminary schedule which was created with Production and Maintenance Leadership based on the needs of the site.
- Parts Kitting – the process to identify and stage parts required for upcoming Maintenance Scheduled Work



- Maintenance Rework – Rework is Corrective Work completed on previously maintained equipment that has prematurely failed due to maintenance operations, or material problems.

MAINTENANCE PLANNING AND SCHEDULING ROLES AND RESPONSIBILITIES:

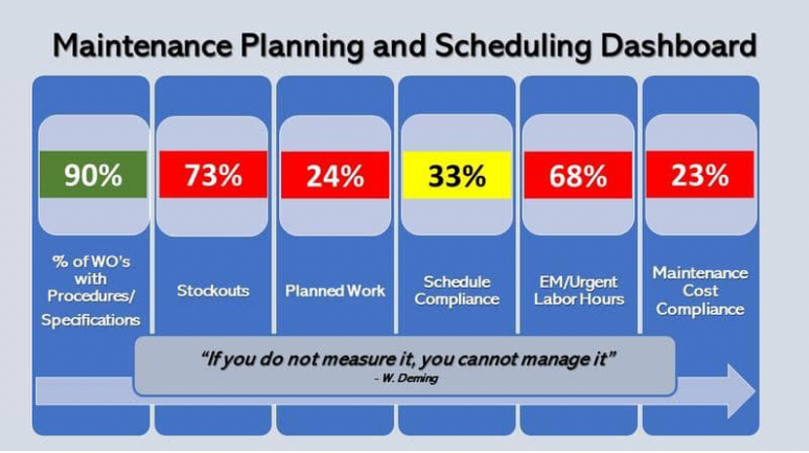
Maintenance Planning and Scheduling Roles and Responsibilities is critical to success to ensure all stakeholders understand their role and responsibilities in this process. See example below of a Maintenance Planning and Scheduling RACI.

Maintenance Planning and Scheduling RACI

Task/Functions	Maintenance Planner	Maintenance Supervisor	Maintenance Technician	Stores Attendant	Production Manager	Maint. Manager
Work Identification (From PM/PdM and Work Request)		A	R	C	C	
Plan Work	R	C	C	I		A
Schedule Work	R	R	I	I	R	A
Execute Work		A	R		I	I
Work Order Close Out		A	R	C		I
Failure Reporting, Analysis, Corrective Action System	C	C	R	C	C	A

Responsibility	"the Doer"
Accountable	"the Buck stops here
Consulted	"in the Loop"
Informed	"kept in the picture"

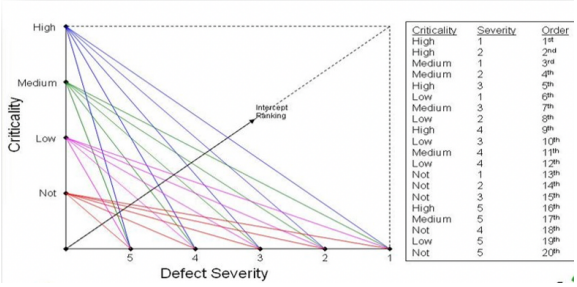
Measuring how effective and efficient Maintenance Planning and Scheduling in any organization is critical to success of Maintenance and Production. Lord Kelvin, 1824-1917, stated, "If you cannot measure it, you cannot manage it" and Planning and Scheduling thus must be measured, or it will not be managed.



DAILY SCHEDULE FOR MAINTENANCE PLANNER:

Monday:

- Armed with an inspection schedule (jobs to be planned), job inspection forms, and a camera, the planner will begin making his/her inspection of all the job sites.
- The planner has established a logical route to minimize travel time and will make notes of the specific needs of the requests, any ancillary work that should be completed by the mechanics while at the job site, and all of the other applicable information required for a well-planned job
- Reviews Work Orders written over the weekend to see if additional work is needed
- Reviews Maintenance Ready Backlog (Ready to Schedule) to as to identify which Work Orders need to be scheduled the following week
- Focuses on Work Orders that need to be Planned based on Intercept Ranking model (see below)



Criticality	Severity	Order
High	1	1st
High	2	2nd
Medium	1	3rd
Medium	2	4th
High	3	5th
Low	1	6th
Medium	3	7th
Low	2	8th
High	4	9th
Low	3	10th
Medium	4	11th
Low	4	12th
Not	1	13th
Not	2	14th
Not	3	15th
High	5	16th
Medium	5	17th
Not	4	18th
Low	5	19th
Not	5	20th

Tuesday:

- Armed with the information gathered during the field inspection on the previous day, processing parts needs, and updated status reports on jobs that have received some or all the parts ordered, the planner should meet with the maintenance supervisor. The planner should bring a copy of the updated planning backlog. This meeting should be short, 30 minutes or less, and its purpose is twofold:

1. Provide preliminary info to those who will be building/amending the maintenance schedule
2. Ensure that the planner has scheduled the various jobs in his/her queue in a manner consistent with the needs of maintenance and production. The planner should share parts issue updates and the schedule for his/her planning activities.

Wednesday:

- The planner reviews all “Ready to Schedule” Work Orders with Production and creates a preliminary schedule that is agreed upon for the following week.
- After the meeting, the planner ensures are parts / material for next week are kitted in a secure area.
- The planner continues to focus on work orders which are in the backlog which have not been “planned” to review scope of work, parts required, order parts or material as needed, etc.

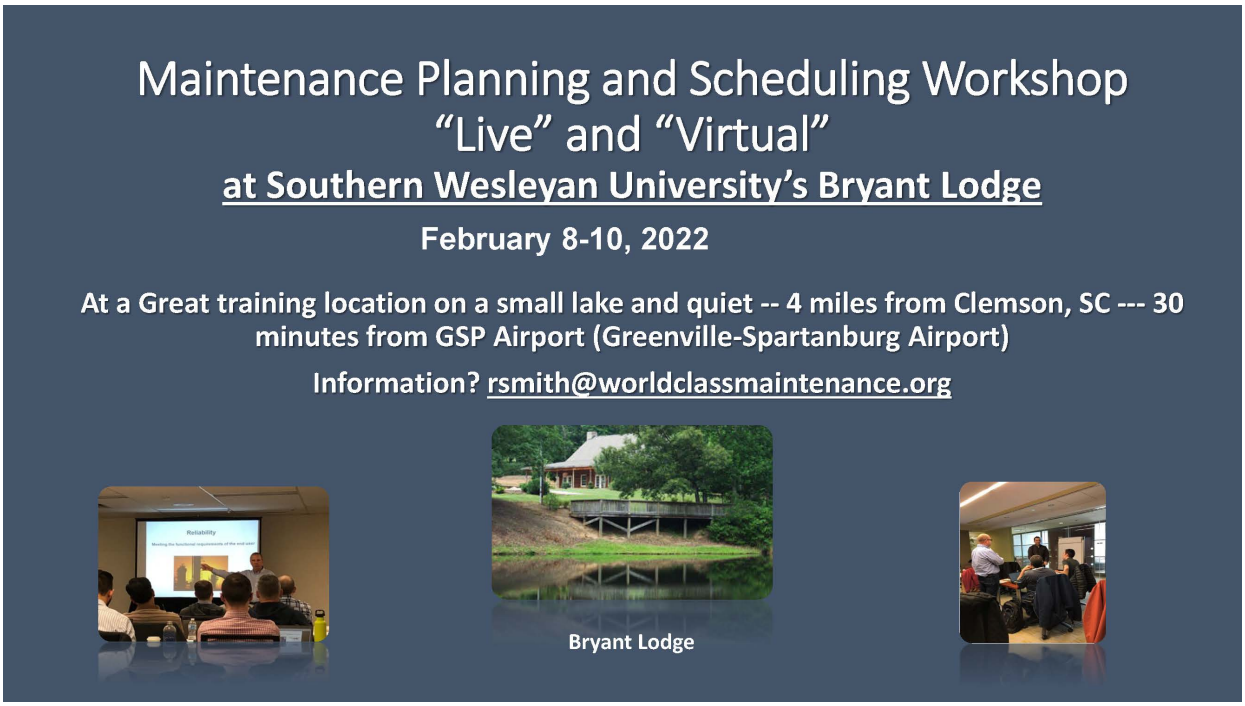
Thursday:

- Planner prepares for Maintenance Scheduling meeting by producing the agreed upon schedule with production for the following week.
  - Attendees: Maintenance Planner, Production Leader, Maintenance Supervisor, Contractor (if work they are performing may impact the schedule)
- Maintenance Planner facilitates the Scheduling meeting (30 minutes max)
- A timekeeper ensures everyone stays focus and gives a 5-minute warning and times up announcement.
- At end of meeting maintenance supervisor and production leader shake hands and tell each other, “we do the best we can to meet this schedule next week”

Friday:

- Schedule published for all to see in targeted locations in the plant
  - In Maintenance Shop
  - In Cafeteria
  - In Production Office
  - In Maintenance Supervisor Office

JOIN ME FOR A THREE-DAY WORKSHOP ON 'MAINTENANCE PLANNING AND SCHEDULING' - MORE INFO BELOW.



Download a Brochure at: www.worldclassmaintenance.org or email rsmith@worldclassmaintenance.org for more info

THINGS YOU WILL LEARN...

1. Why a Maintenance Planner/Scheduler is critical to all Maintenance Organizations
2. How Planning impacts the effectiveness and efficiency of Maintenance Work resulting in less equipment failures
3. How Maintenance Scheduling impacts Employee Morale and through an increase in "Wrench-Time"
4. How to create a Maintenance Planning and Maintenance Scheduling Process Map which provides repeatability
5. How to create Leading and Lagging Metrics in order to effectively manage Planning and Scheduling
6. What a "Day in the Life of a Proactive Maintenance Planner" looks like

... and so much more.