Maintenance Planning and Scheduling Best Practices

"3 Day Workshop

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This workshop is "activity based" (hands on) with the focus on "Best Practices in Maintenance Planning and Scheduling" with the focus on optimization of Maintenance Wrench-Time.

Who should attend his course:

- **Maintenance Planners**
- **Maintenance Schedulers**
- **Maintenance Planner/Schedulers**
- **Maintenance Supervisors**
- **Senior Maintenance Technicians**
- **Maintenance Managers**
- **Maintenance Planning/Scheduling Managers/Leaders**
- **Production Leadership**

The objectives of this workshop for each attendee:

- **Learn the Proactive Maintenance Process from "Work Identification to Work Order Close Out"**
- **Obtain the ability to Execute Proactive Maintenance Planning and Scheduling which optimizes Maintenance Wrench-Time.**
- **Define how "Known Best Maintenance and Reliability Practices" impacts the Planning and Scheduling processes**
- **Describe the objective, mission and attributes of Proactive Planning and Scheduling**
- **Plan and Schedule through numerous "hands on" exercises**
- **Learn Methods to Optimize Maintenance Wrench-Time**
- **Create a Proactive Maintenance Planning and Scheduling Workflow Model which impacts Maintenance Wrench-time**
- **Learn what is Preventive Maintenance and how to Optimize PM**
- **Learn how Maintenance Planning and Scheduling can impact Maintenance Cost**
- **How Process Reliability is impacted by Proactive Maintenance**

Workshop Outline

Day 1: Maintenance Planning and Scheduling Overview

- **Instructor and Attendee Introductions**
- **Expectations from each attendee**
- **Expectations from instructor**
- **Course Objectives**
- **Daily Training Schedule**
- **What is Wrench-Time and How Maintenance Planning and Scheduling Impacts Equipment Reliability**
- **Maintenance Planning and Scheduling Vision, Mission and Guiding Principles**
- **World Class Maintenance Planning and Scheduling Case Study (Alumax/Alcoa Mt Holly – John Day PE)**

Group Exercise 1: Strategy to Achieve World Class Production through Reliability

Individual Exercise 2: Assess Current State of Maintenance and Reliability

- **Work Order Close Out Backlog**
- **How to Develop an effective Maintenance Planning process Maintenance**
- **Planning Roles and Responsibilities**
- **Maintenance Planning Leading and Lagging KPIs**
- **Creating Leading and Lagging KPIs for Maintenance Planning**

Group Exercise 3: Day in the Life of a Proactive Maintenance Planner

- **Planned Job Requirements Repeatable Procedure Definition**
- **How to create Repeatable Procedures**
- **Parts Requirements/Kitting Process**
- **Definition of Kitting**

Individual Exercise 4: Kitting Parts

- **Security of Scheduled Work Parts/Material**

Individual Exercise 5: Facts about Maintenance Wrench time

- **Why Repeatable Procedures are Critical**
- **Examples of Repeatable procedures for Preventive Maintenance**
- **How to create a Repeatable Procedure and the benefits of them**

Individual Exercise 6: Create a Repeatable Procedure for Replacement of a pump provided

Group Exercise 7: Kitting Parts

Individual Exercise 8: Leading and Lagging KPIs

Definitions: "Definitions aligns communication in Maintenance"

- **Maintenance**
- **Scheduling**
- **Reliability**
- **Wrench-Time**
- **Planning**
- **Scheduling**
- **Maintenance Rework**
- **Kitting Parts**
- **Preventive Maintenance**
- **Predictive Maintenance**
- **Operator Care**

How to establish a Kitting Process?

Individual Exercise 9: Kitting Parts

- **Parts Ordered from Vendor vs Storeroom Stock**
- **Security of Scheduled Work Parts/Material**

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Day 2 Maintenance Planning and Scheduling

Individual Exercise 10: 3 Things you learned yesterday

- **Maintenance Planning Process**
- **Maintenance Scheduling Process**
- **Why Closing out Work Orders are critical**
- **Examples of Repeatable procedures for Preventive Maintenance**
- **Preventive Maintenance definition and benefits**
- **Predictive Maintenance definition and benefits**

Individual Exercise 11: Preventive Maintenance Fundamentals

Group Exercise: Create a Maintenance Planning and Scheduling Mission, Vision, and Guiding Principles for your organization

- **Risk Mitigation Planning**
- **Expectations from Leadership**
- **Common Mistakes and Miss-steps when moving into Proactive Maintenance Planning and Scheduling**

- **Why Maintenance Planning and Scheduling Implementations fail and what to do to mitigate these mistakes**

Individual Exercise 12: 14 Steps to Optimize Preventive Maintenance

Day 3:

Group Exercise: What did you learn from the past 2 days?

Group Exercise 13: Steps to Optimize Maintenance Planning and Scheduling

Individual Exercise 14: "What is RACI"

MAINTENANCE PLANNING AND SCHEDULING

Tasks Decisions / Functions	Maintenance Supervisor	Maintenance Planner / Scheduler	Maintenance Manager	Production Supervisor	Tradesman	Storeroom	Operator
Work ID PM/PdM/OpCare	R	I	A	A	R		R
Planning	C	R	A		C	C	
Scheduling	C	R	A	C		C	
Scheduling Meeting	I	R	A	C	I	I	
Work Execution	A		I		R		R
Work Order Close Out	A	R	I		R		R
FRACAS	A	R	R	R	R	R	R

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

- **Common Mistakes and Miss-steps when moving into Proactive Maintenance Planning and Scheduling**
- **Why Maintenance Planning and Scheduling Implementations fail and what to do to mitigate these mistakes**
- **Expectations from Leadership**

- **Common Mistakes and Miss-steps when moving into Proactive Maintenance Planning and Scheduling**
- **Maintenance Planning and Scheduling Scorecards are critical**
- **Who closes out work orders?**
- **Why Maintenance Planning and Scheduling Implementations fail and what to do to mitigate these mistakes**
- **How to Measure success in Planning and Scheduling**

<u>Group Exercise 15</u>: Create Maintenance Planning and Scheduling Vision and Mission

<u>Group Exercise 16</u>: Create Guiding Principles for Maintenance Planning and Scheduling

- **Developing an effective Maintenance Planning process Maintenance Planning Roles and Responsibilities**
- **Creating a Workflow Process for Maintenance Scheduling**
- **Why Maintenance Planning and Scheduling Scorecard is critical to Success?**
- **Preventive Maintenance Best Practices**
- **Predictive Maintenance Best Practices**

<u>Group Exercise 17:</u> 14 Steps of a PM Optimization Process

<u>Group Exercise 18:</u> How to Achieve Success in your Storeroom

<u>Group Exercise 19</u>: Create a Preliminary plan to implement based on what you learned from the past 3 days.