



Maintenance Planning and Scheduling Best Practices

“2 Day Workshop in Charlotte, NC

“Cost: 1295.00”

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**

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**
- **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 how Maintenance Planning and Scheduling can impact Maintenance Cost**

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)**

Individual Exercise 1: Planning and Scheduling Assessment

- **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 2: 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**
- **How to establish a Kitting Process**
- **Security of Scheduled Work Parts/Material**

Individual Exercise 3: 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 4: Create a Repeatable Procedure for Replacement of a pump provided

Group Exercise 5: Planning/Scheduling Kitting Parts

Individual Exercise 6: Leading and Lagging KPIs

Definitions: “Definitions aligns communication in Maintenance”

- Maintenance
- Scheduling
- Reliability
- Wrench-Time
- Planning
- Scheduling
- Maintenance Rework
- Kitting Parts

How to establish a Kitting Process

- Parts Ordered from Vendor vs Storeroom Stock
 - Security of Scheduled Work Parts/Material
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Day 2 – Maintenance Planning and Scheduling, cont.

Individual Exercise: 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

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

Group Exercise: Steps to Optimize Maintenance Planning and Scheduling

Individual Exercise: “What is RACI” and Create a Maintenance Scheduling RACI

MAINTENANCE PLANNING AND SCHEDULING

Tasks <i>Decisions / Functions</i>	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

R esponsibility	“the Doer”
A ccountable	“the Buck stops here
C onsulted	“in the Loop”
I nformed	“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

Exercise: Create Maintenance Scheduling Vision and Mission

Exercise: Create Guiding Principles for Maintenance 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?

Exercise: Lessons Learned from Day 1 and 2

Exercise: Create a Preliminary plan to implement based on what you learned from the past 2 days.

Master Plan Example

Tasks	Quick Wins	Crawl	Walk	Run
Optimize Maintenance Wrench-time	Plan/Schedule work for a specific crew/area	Measure Rework and Schedule Compliance	Measure and Track Cost by Asset / Equipment Type	Implement to another area or equipment type
Optimize Maintenance Storeroom	Secure Storeroom 24/7	Barcode all parts	Track Stockouts and Material cost by asset type	Post a Materials Management Scorecard
Equipment Bad Actors	Define the criteria what is a Bad actor	Create a scorecard showing bad actors by asset type and post for all to see	Perform RCA on Bad Actions	Track and post the results
CMMS	Create an SOP focused on "How to Use the CMMS"	All Assets must have an asset number attached	Work Orders are written for all Maintenance Work and charged to a specific asset	Measure and Track Maintenance Rework
Maintenance Scorecards	Created a Maintenance Scorecard on Maintenance Planning and Scheduling	Create a Maintenance Scorecard focused on Work Execution	Create a Maintenance Scorecard on Maintenance cost by asset type	Post Scorecards in Specific locations where everyone can see
Root Cause Analysis	Hire an RCA Consultant	Purchase RCA Software	Establish RCA Triggers	Measure the results of RCA Results
Operations Alignment with Maintenance	Hire a consultant to train Senior Leadership in Maintenance/Reliability Best Practices	Create a high-level operation/maintenance scorecard	Site/Production/Maintenance/Reliability Engineer Review scorecard weekly	Establish Targets and goals
Create Process Maps for Maintenance/Reliability Processes				
Maintenance Planning and Scheduling	Create Process Maps for Planning and Scheduling	Create Guiding Principles for Planning and Scheduling	Review Guiding Principles with Operations and receive agreement	Measure Maintenance cost by asset type to see if Planning and Scheduling is impacting reliability