Prior to the beginning of the Maintenance Day Shift:
The maintenance planner's day starts before the regular maintenance day shift in order to review the work orders that came in overnight. The planner will make an estimate of the man-hours, number of personnel, and craft types needed for any emergency work orders that must be started that day, then move those work orders directly to the maintenance crew, followed by a quick phone call to notify the maintenance supervisor responsible for that area of the plant. The planner will also code these jobs as emergency work orders so the level of this type work can be tracked over time. Well-disciplined proactive maintenance strategies (PM/CBM) coupled with effective planning and scheduling will make these emergency jobs fewer and fewer over time.

The planner should also use good planning and scheduling techniques on his/her own responsibilities. Once any emergency work has been estimated and sent to the maintenance crew, the maintenance planner will plug new work requests into his/her field inspection schedule. Some jobs may need to be worked into the current day’s field inspection schedule in order to be put on the next day’s maintenance schedule. Other new requests can be scheduled for field inspection and planning later in the week. It is important for a proactive planner to schedule all of his/her jobs (other than emergency work) for field inspections on a particular day to be most effective. The planner will also set the planning status for those new requests to “Planning” to show planning is underway.

Early Morning:
Field inspections: Armed with an inspection schedule, job inspection forms, and a camera, the planner will begin making his/her inspection of all of 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. The planner will make note of the complexity and predictability of the various issues related to a particular job in order to create an effective job plan suited to the particular job. Also, the planner will pay particular attention to job issues where significant delays were identified in the wrench time study. Understanding and watching for complexity, predictability, and likely wrench time losses will enhance the likelihood of creating a job plan that will minimize delays during execution and result in a high-performing work force. More on these topics can be found in the 3rd edition of Planning and Scheduling Made Simple, by Smith and Wilson.

Immediately after completing field inspections is a good time to start ordering parts, or at least creating a list of parts to order, depending on the time available before meeting with the supervisor, scheduler, and maintenance coordinator. At this point in the process, it is not known when the job will actually be scheduled, so any parts not on site should be ordered on the same day they are identified as a need. In particular, identifying the parts that will require more than 24 hours to obtain will be important. The planner should also be aware that day and the status should be changed to “Waiting for Parts.” Parts that are available from the store room should be put on reserve so they will be available for ordering the day before the job is scheduled for execution. The planner will also need to review the status of parts previously ordered and update the status to “Ready to Schedule” on the work requests where all parts have arrived and storeroom parts are all on reserve. Some organizations go ahead and have storeroom parts delivered and placed in parts kit boxes for each job. This process can work fine, but when jobs get pushed to the future for execution, you can end up with a lot of parts kits to keep track of, or you can end up sending some parts back to the storeroom if jobs get canceled. If you have a firm parts reservation system, it will be best if the parts are put on reserve so they can’t be brought out for a different job, yet if a job gets cancelled, they don’t have to be returned. Less handling and better inventory accuracy provided by the reservation approach will reduce costs.

Working from the job inspection form, the planner will identify the various needs required by the jobs and will start documenting the job plan. First and foremost is the job summary page, which will contain the basic information that a fully qualified mechanic who is very familiar with this type of job would need. The job summary page would provide reference numbers to the detailed information for the job that would follow in the job plan. This type of job plan format will allow those familiar with the task to quickly review the job using only the summary sheet. Anyone less familiar or skilled would have references on each item on the job summary sheet to the specific section of the job plan to access the specific information.
they need. This provides maintenance person- 
with quick access to the information they need without having to read through informa-
tion they don’t need. See more on this in Plan-
ing and Scheduling Made Simple, 3rd edition, by 
Smith and Wolcott.

All of the planner’s free time should be spent 
refining and permanently documenting job plans. 
As the job plans database grows, he/she will have more plans that can be used on 
future jobs with only minor refinements. This 
will allow the planner to plan for a greater 
number of field maintenance personnel. As job 
plans are completed, the planner should update 
his/her backlog status to “Planning Complete.” 
When all parts not available through stores have 
been received and the storeroom parts are on 
reserve, the status should be changed to “Ready 
to Schedule,” assuming the job plan has been 
completed. The scheduler will initiate the deliv-
ery of storeroom parts on reserve the day before 
the job is scheduled for execution.

Late Morning:
Now armed with the information gathered 
during the field inspection route, processing 
parts needed, and updated status reports on jobs 
that have received some or all of the parts or-
dered, the planner should meet with the main-
tenance supervisor, scheduler and coordinator. 
The planner should bring a copy of the updated 
planning backlog. This meeting should be short, 
30 minutes or less, and its purpose is two–fold: 
1) provide preliminary info to those who will be 
involved in planning the maintenance schedule, 
and 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 is-
spection updates and the schedule for his/her plan-
ing activities. Any other major constraints, such 
as boom truck, crane needs, or other special 
needs for particular jobs, will need to be com-
municated. This will provide maintenance and 
operations with important information that will 
allow them to start planning for when particular 
jobs will be ready for placement in the mainte-
nance schedule. This meeting will also allow 
management and operations to provide feed-
back to the planner on any changes that need 
be made to the planning schedule. For ex-
ample, the planner may have a particular job 
schedule for planning to be completed and have 
“Ready to Schedule” status by next Tuesday, 
when, in fact, production needs it earlier or later.

Early Afternoon:
Immediately after lunch, the planner 
will continue writing job plans, researching techni-
cal issues for particular jobs, obtaining approval 
for jobs meeting specific criteria, referring other 
jobs to engineering for redesigns as applicable, 
and finalizing the status of the requests as ap-
propriate.

Each day, the planner should designate a 
time frame for communication with the 
mechanics on jobs recently com-
pleted. This is an important step for the planner 
to be able to improve the effectiveness of the 
plans he/she creates.

Late Afternoon:
An hour or so before the daily scheduling 
meeting, the planner should review his/her 
e-mail account and phone messages to see if 
there have been any late changes to the current 
plan that has been forming for the next day’s 
schedule. This information will have an impact on 
the job summary sheets the planner takes to the 
scheduling meeting. The daily scheduling 
meeting is not a meet-
ing where the planning backlog will be re-
viewed and jobs will be selected for scheduling. 
Because the planner needs to keep the status 
of all jobs updated, and because of the late 
meeting morning between the planner, sched-
uler, maintenance coordinator, and the main-
tenance supervisor, the schedule has inherently 
been forming on its own. The daily scheduling 
meeting is where the weekly schedule will be 
either confirmed for the next day or slightly 
adjusted or changed as needed. Any jobs present-
ded themselves after the weekly schedule was made. Also, changes may be 
made to other days, depending on needs and 
planning status of the jobs. This meeting should 
take 30 minutes or less if each role has prepared 
in advance and communicated effectively with 
the other players as needed. The meeting’s pur-
pose is only to finalize what they have already 
been discussing and working toward since the 
previous day’s daily planning meeting.

After the daily scheduling meeting, the 
scheduler will change status of any work orders 
that are to be added to the maintenance sched-
ule and will order all parts that are on reserve 
in the storeroom. Following the daily planning 
meeting, the planner will amend the field in-
spection schedule and make any adjustments 
necessary to the overall planning schedule.

The planner will need to update any mea-
sures the organization tracks relative to plan-
ing, such as man-hours planned and emergen-
cy man-hours per day.

End of the Day:
The planner will make a quick review of the 
entire Planning Backbone:
• Is the job status up to date on all jobs?
• Is the field inspection schedule for the next 
day ready?
• Have all parts coming from off-site been 
ordered, and have that been placed on reserve 
for jobs that have been inspected?

Conclusions:
Notice that the planner has not had any in-
volve-ment in the work that is underway, and almost 
all of the planner’s activities have been directed 
toward work that will leverage his/her time. 
The only exception to this should be the small 
amount of time it took the planner to make a 
quick labor estimate on emergency work. A