

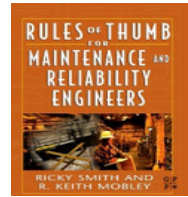
MAINTENANCE PLANNING/ SCHEDULING ASSESSMENT

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by Ricky Smith CMRP, CMRT



The biggest challenge organizations face is to know the status of their current Maintenance Planning and Scheduling process and developing a plan to close the gap between current and desired performance.

All answers should be a “yes” if not then this area may need to be explored in more depth. If you are unsure about the question or answer, then the question answer is a “no”.

Remember this assessment is only used to help an organization determine its gaps between current and desired performance.

It is recommended this assessment is performed with representatives from all state holders.

Maintenance Supervisors, Maintenance Planner, Senior Maintenance Techs
 Planning

Calculation: Identify the number of “yes” answers and multiply by 10 for a total for this section. (Possible 100 points)

Questions Yes/No	
a) Does most of the maintenance work scheduled have pre-planned job packages developed for them? (all specifications, procedures, parts, labor, etc. identified)	
b) Does the planner use the maintenance staff to assist in the development of pre-planned job packages?	
c) When is a planner/scheduler (or just a planner) performing their day-to-day job they are never called upon to rush parts in for a breakdown?	
d) Does your planner identify backlog based on categories? (ie. Ready to schedule, waiting on parts, waiting on engineering, waiting to be planned, etc) and measured by labor hours, weeks of backlog?	
e) Does the planner validate whether a work request is valid or not?	
f) Does the planner provide feedback to the requester when a work request or notification has been entered into the CMMS/EAM System?	
g) Does the planner visit the job sites of work to be planned on at least 30% of jobs?	
h) Can the planner check status of planned work parts on the CMMS/EAM within 5 minutes or less of any job?	
i) Does the planner validate work request in 3 days or less?	
j) Do you have at least one planner or planner/scheduler for every 7 to 25 maintenance personnel?	
Total “yes” answers times 10 =	

Scheduling

Calculation: Identify the number of “yes” answers and multiply by 10 for a total for this section. (Possible 100 points)

Questions Yes/No	
a) Is someone responsible for scheduling either as a full time maintenance scheduler or fulltime planner/scheduler?	
b) Do planner/schedulers or schedulers work closely with production to schedule maintenance work?	
c) Is maintenance work scheduled one week out at least?	
d) Is maintenance work scheduled by day?	
e) Is maintenance work scheduled with maintenance person’s name or names assigned?	
f) On large outages do maintenance personnel provide input into the schedule?	
g) Does the scheduler or planner/scheduler facilitate the maintenance weekly scheduling meeting?	
h) The scheduler or planner/scheduler does not report to maintenance supervision. Reporting to maintenance manager is acceptable.	
i) Next week’s schedule is posted at least the Friday prior for all to view to include maintenance and production.	
j) Is schedule compliance above 80%?	
Total “yes” answers times 10 =	

1) Key Performance Indicators

Calculation: Identify the number of “yes” answers and multiply them by 10 for a total for this section. (Possible 250 points)

	Questions Yes/No
a) Are the workflow processes mapped in your maintenance and reliability process with Leading and Lagging KPIs defined at specific points in these processes?	
b) Does the maintenance department measure the following? (all of these N/A metrics must be used to receive a yes on this one)	
i) Scheduled compliance	
ii) % of Planned Work	
iii) Rework	
iv) MTBF (Mean Time Between Failure)	
v) % of time (by vendor) vendors do not deliver on time	
vi) % of time vendors deliver the wrong part	
vii) Stockouts	
viii) % of assets ranked based on criticality	
ix) % of assets RCM Methodology has been applied and the maintenance strategy changed based on the data	
x) Bad Actors Report	
xi) #of potential failures identified	
xii) % of assets functional targets have been identified	

xiii) % of work proactive	
xiv)% of work reactive	
xv) Maintenance cost as a % of RAV (Return on Asset Value)	
xvi)Maintenance Material in Stores as a % of RAV (Return on Asset Value)	
xvii) Maintenance Cost per Unit Produced	
c) Are at least 50% of the KPIs listed above posted for all to see in the maintenance department?	
d) Are at least 25% of the KPIs listed above posted for all to see in the maintenance department?	
e) Are at least 10% of the KPIs listed above posted for all to see in the maintenance department?	
f) Are at least 10% of the KPIs listed above posted for all in production department to see?	
g) Are their targets and goals established for over 75% of the KPIs listed above?	
h) Are your KPIs listed as Leading or Lagging?	
i) For each KPI the maintenance department uses is there a standard for them (definition, objective, calculation, example calculation, roles and responsibility assigned to the KPI)?	
Total "yes" answers times 10 =	

Assessment Area	Score
1. Planning	
2. Scheduling	
3. Key Performance Indicators	
Final Score:	

Recommendations for Improvement in Planning/Scheduling:

Quick Wins: improvements (wins) that can be done within a short time, which contributes to the organization, and often with visible impact for motivational purposes.

1. _____
2. _____
3. _____

Crawl: Improvements which are sustainable and easy to put in place

1. _____
2. _____
3. _____

Walk: Improvements are made which builds sustainment

1. _____
2. _____
3. _____

Run: Continuous Improvement tasks to include scorecards



#1 Software for Maintenance & Reliability Teams

UpKeep is a service-first company that builds software designed to make maintenance easier for technicians and managers everywhere. Reduce downtime up to 18% by switching over to a preventative maintenance solution!

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Our Products



Mobile-first maintenance management and collaboration across all location, assets, and teams

With nearly 340 different machines in our work environment, it's an impossible task to manually assign and track PM's. **With UpKeep we can schedule regular maintenance without overlapping tasks with other critical jobs."**

★★★★★ Paul D, Health and Safety Coordinator



An end-to-end solution for remote condition-based monitoring

Connected and secure IoT sensors for real-time remote condition asset monitoring



Integrated & Centralized Data Ecosystem for World Class Asset Operations

The only purpose built Asset Data Platform. Asset Focused ELT Solution for advanced analytics and integrated, real-time asset data.

The Maintenance Community Coalition was founded on the belief that working together will benefit everyone within our community

Committed to helping each other thrive in our individual professional journeys by sharing resources and expertise, granting scholarships, hosting events, and unlocking knowledge – always at no cost.

