

MAINTENANCE PLANNING & SCHEDULING WORKSHOP

BY: **RICKY SMITH,
CMRP, CMRT, CRL**



MAINTENANCE PLANNING AND SCHEDULING

5 DAY VIRTUAL WORKSHOP WITH RICKY SMITH, CMRP



DATE S: April 17-21, 2023 ----- 5 Hours a Day

12:00noon – 5:00pm ET

PRICE : \$ 1595.00 USD/ PERSON

**RSVP OR REQUEST MORE INFO BY EMAILING
R_SMITH@WORLDCLASSMAINTENANCE.ORG**



Alcoa Mt Holly - World Class Maintenance Model



OVERVIEW

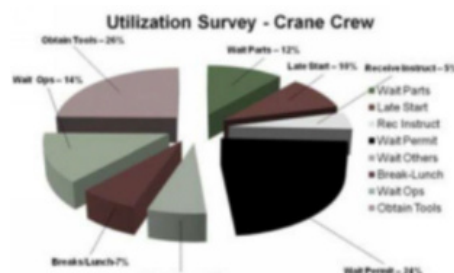
“Learning through hands-on exercise or knowledge sharing.”

-RICKY SMITH, CMRP

This workshop is “activity based” (hands on) with the focus on “Best Practice Maintenance Planning and Scheduling” with the focus on optimization of Maintenance Wrench-Time.

Who should attend this course:

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



OVERVIEW

THE OBJECTIVES

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 how to Measure an organization’s current Wrench-time
- Define Methods to Optimize Maintenance Wrench-Time
- Create a Proactive Maintenance Planning and Scheduling Workflow Model which impacts Maintenance Wrench-time
- Create Leading and Lagging Planning and Scheduling Metrics
- Define how to transition from current state to a more Proactive Planning and Scheduling Process
- Define how to measure and manage Maintenance Backlog
- Learn to implement and manage a Proactive Kitting Process
- Gain first steps in how to Manage Change
- Create a Master Plan, with timeline for Proactive Maintenance Planning and Scheduling Implementation / Optimization

DAY 1 : MAINTENANCE PLANNING AND SCHEDULING OVERVIEW

- Instructor and Attendee Introductions
- Expectations from each attendee
- Expectations from instructor
- Daily Training Schedule
- Proactive Maintenance Workflow Model/Process
- Exercise: Maintenance Planning and Scheduling Assessment
- World Class Maintenance Planning and Scheduling Case Study (Alumax/Alcoa Mt Holly – John Day PE)
- Definition of:
 - Maintenance
 - Reliability
 - Work Identification
 - Preventive Maintenance
 - Predictive Maintenance
 - Maintenance Planning
 - Maintenance Scheduling
 - Work Execution
 - Work Order Close Out
 - Backlog
- What is Wrench-Time and how it impacts Asset Reliability
- Maintenance Planning and Scheduling Vision, Mission and Guiding Principles
- Individual Exercise: Day in the Life of a Proactive Maintenance Planner
- Group Discussion – How does Maintenance Planning and Scheduling Actually Work?

TRAINING

SCHEDULE

Day 2 - MAINTENANCE PLANNING AND SCHEDULING, Cont.

- Face Base Map: Dec 2018 - 2019 Development – Proactive Maintenance
- EceCee a RACI Chart for Proactive Maintenance

The image shows a RACI matrix titled "Maintenance Scheduling RACI" with the subtitle "Roles and Responsibilities". The matrix lists various tasks and assigns roles (Responsible, Accountable, Consulted, Informed) to different positions. A legend at the bottom explains the RACI codes: R (Responsible), A (Accountable), C (Consulted), and I (Informed). It also includes a note: "Should be aware (See and) (Not in the List) (Not in the List)".

Task & Position	Plan	Identify	Assign	Issue	Monitor	Final	Post
Manage Asset Criticality	I	R	I	I	R	C	A
Identify Ready to Schedule Work Orders (RTS)		A	C		R	R	I
ID Plans Availability for Scheduled Work Orders	R	A			C	I	
Create a Preliminary Schedule		A	I	I			
ID Skill Requirements and Availability		A	C	C	I	C	
Review Preliminary Schedule with Production	C	C	C		R	R	C
Manage Scheduling Meeting		A	I		R	C	
Publish the Schedule	I	A	I	I	R	I	I
Adjust Schedule Daily as Needed		A	R	I	C	I	
Manage Maintenance Dashboard (Leading/Lagging KPIs)	I	A	I	I	R	I	I

- Planning and Scheduling Leading and Lagging KPIs
- Expectations from PM and PdM
- Failure Modes and how to manage and mitigate them
- Creation of the following Proactive Maintenance...

• Vision Statement

• Mission Statement

• Guiding Principles

- Developing and Managing an Effective Maintenance Planning and Scheduling Process

• Planning and Scheduling Workflow Process

- Steps required to develop an Effective Planning and Scheduling

• Program

• Repeatable/Effective Procedures

• Planning and Scheduling Roles and Responsibilities (RACI)

• Managing a Proactive Planning and Scheduling Program

TRAINING

SCHEDULE

Maintenance Planning and Scheduling Leading and Lagging KPI Maintenance Planning and Scheduling Dashboards

- Exercise: Create Definitions for Maintenance Planning, Maintenance Scheduling, Parts and Material Kitting
- Group Question: 1 thing each person learned today

DAY 3: MAINTENANCE PLANNING

- Review of Day 1
- Proactive Maintenance Planning Process
- Maintenance Planning Definition
- Requirements of Maintenance Planning
- Planned Job Requirements
- Repeatable Procedure Definition
- How to create Repeatable Procedures
- Parts Requirements/Kitting Process
- Definition of Kitting
- How to establish a Kitting Process
- Parts Ordered from Vendor vs Storeroom Stock
- Security of Scheduled Work Parts/Material
- Exercise: Create Maintenance Planning Vision and Mission
- Exercise: Create Guiding Principles for Maintenance Planning
- Developing an effective Maintenance Planning process
- Maintenance Planning Roles and Responsibilities
- Maintenance Planning Leading and Lagging KPIs
- Creating Leading and Lagging KPIs for Maintenance Planning
- Exercise: Creating a Process Map for Maintenance Planning

DAY 4 : MAINTENANCE PLANNING (CONTINUED)

- Exercise: Create RACI Chart (Roles and Responsibilities for Maintenance Planning)

Why Repeatable Procedures are critical

Examples of Repeatable procedures for Preventive Maintenance

How to create a Repeatable Procedure

Exercise: Create a Repeatable Procedure for Replacement of a pump Provided

- Proactive Maintenance Scheduling

Maintenance Scheduling Definition

Requirements of Maintenance Scheduling

Requirements for Daily and Weekly Scheduling

Roles and Responsibilities for Scheduling

Leaderships expectations of Maintenance 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

TRAINING

SCHEDULE

- Creating a WIP or Maintenance Scheduling
- Creating a P&C or Maintenance Scheduling
- Preliminary Plan Development with you from the past 2 days.

DAY 5: MAINTENANCE PLANNING AND SCHEDULING ALIGNMENT

- Managing Maintenance Planning and Scheduling Exercise (2 Hours)
- Knowledge Assessment (Test)
- Role Play - Group Exercise: Real World “Proactive Maintenance Process” exercise
Players include: Maintenance and Production Leadership, Maintenance Planner / Scheduler, Storeroom Person, Maintenance Technician
- Maintenance Scheduling Exercise: Create a Weekly Maintenance Schedule with the following players: Maintenance Planner, Maintenance Supervisor, Production Management (4 Hours)
- Pulling Maintenance and Planning into the Real World for you when you return (Think about this day as if you had all the control and power do anything do anything that is required for success)
- Create a Maintenance Planning and Scheduling Mission, Vision and Guiding Principles for your organization
- Create Leading and Lagging KPIs for your organization
- “The Wall” (what is it and how will it impact success)

MAINTENANCE PLANNING AND SCHEDULING ALIGNMENT

- 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
- EXERCISE: Create a Plan when you return (individually with my guidance)
- Course Evaluation
- Course Completion Certificates



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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



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



DATAHUB
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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.



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