

Maintenance Planning and Scheduling Made Simple

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Learning Objectives

1. Tips to apply on Maintenance Planning and Scheduling
2. Understand the ways the organization's behaviors can limit the effectiveness of maintenance planning and scheduling.
3. Review how the planner scheduler should be focused strategically on the future, working from a foundation of continuous improvement .
4. Comprehend that the majority of maintenance work should be based on business priorities, not uncontrollably emotional ones



Survey

A few simple questions



Please remain standing until the
answer to a question requires
you to sit down

Most importantly, be as
honest as you can ...



1. If your site does not have a formal Maintenance Planner Scheduler position,

Please sit down



2. If your site has the same person as the Maintenance Planner Scheduler and Supervisor or Team Lead position,

Please sit down



3. If your site Maintenance Planner Scheduler is managing contractors, handling emergency work, or finding parts for either emergency or planned jobs in progress (current week)

Please sit down



4. If your site is doing 50% or more reactive work over planned work

Please sit down



5. If your site Maintenance Planner Scheduler does NOT have metrics specific to Planning and Scheduling performance

Please sit down

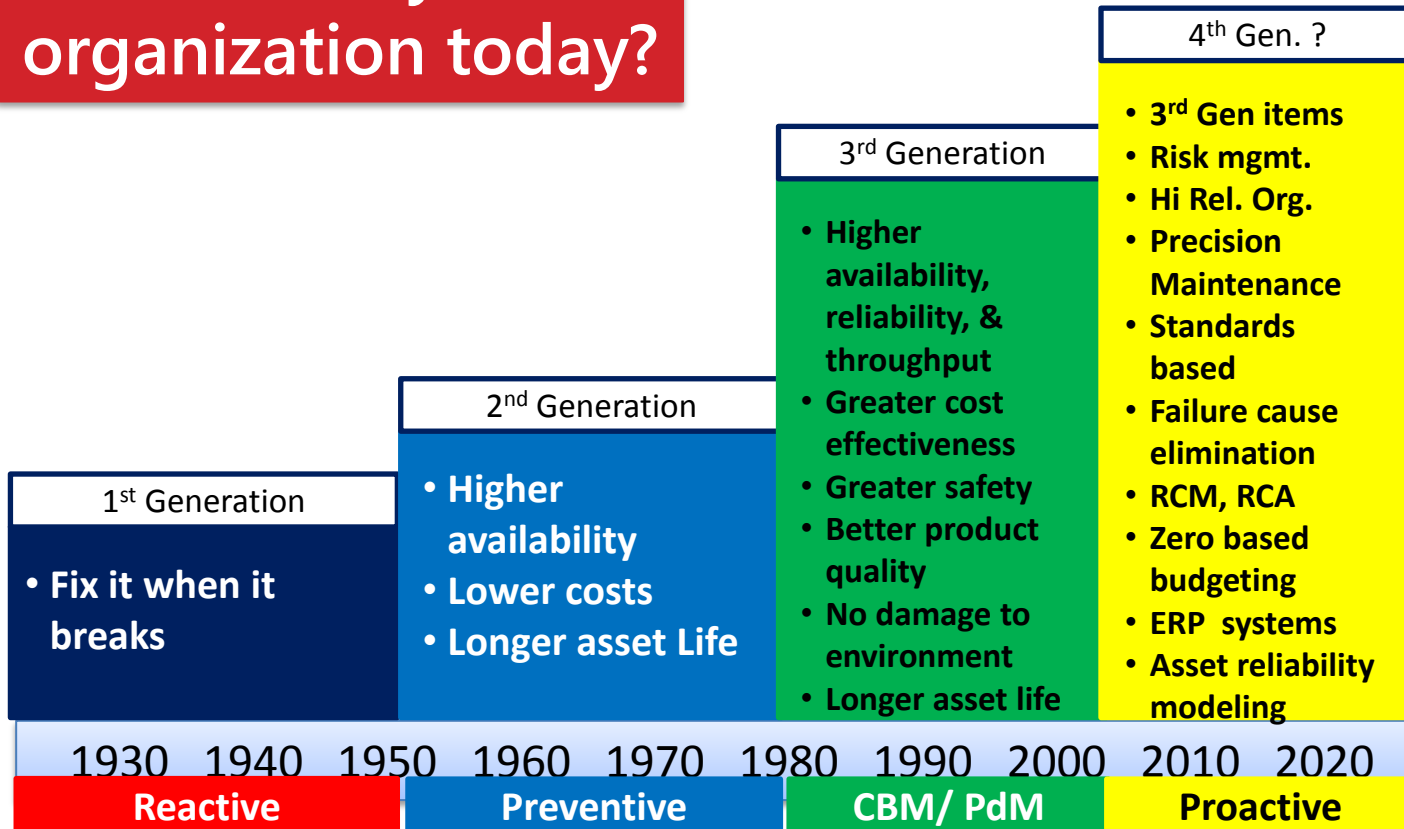


6. If you do NOT have an audit process where you audit at least 3 work orders per month

Please sit down



Where is your organization today?



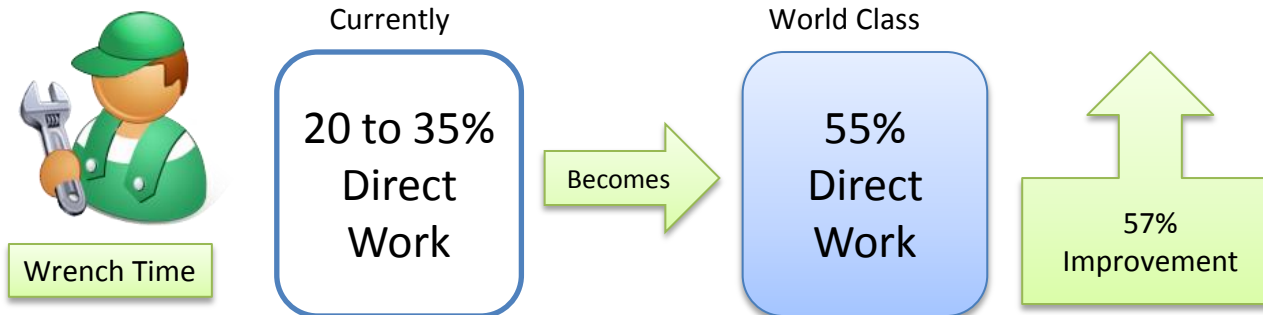
Benefits of Planning and Scheduling

- More efficiently performed jobs
- Lower cost
- Less customer/ tenant disturbance
- Higher quality (reduced variability)
- Improved morale and job satisfaction
- Increased equipment life
- Reduced parts usage
- More work with fewer resources

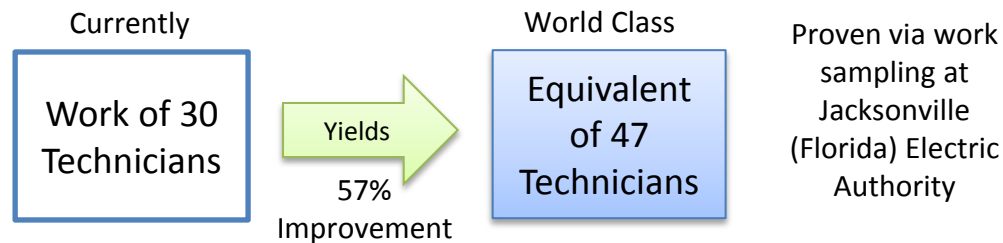
3 – 5 hours of execution time saved for 1 hour of advanced preparation



Provides the service of generating Labor Hours



* Direct Work = Not hunting for parts, information, or waiting for equipment to become available



Source: Maintenance Planning and Scheduling Handbook, Palmer



Avoidable Delays

Work Management Process

Reactive Unplanned

Supervision evaluates

Is it real?

Marshall resources

Execute work

Feedback necessary

Feedback necessary

Identification of Work

Work Request/
Work Order

Emerg./
Urgent?

AWAPPR

Approval process

Approved?

AWPL

Proactive Planned Work

Initial job screening

Job research

Detailed job planning

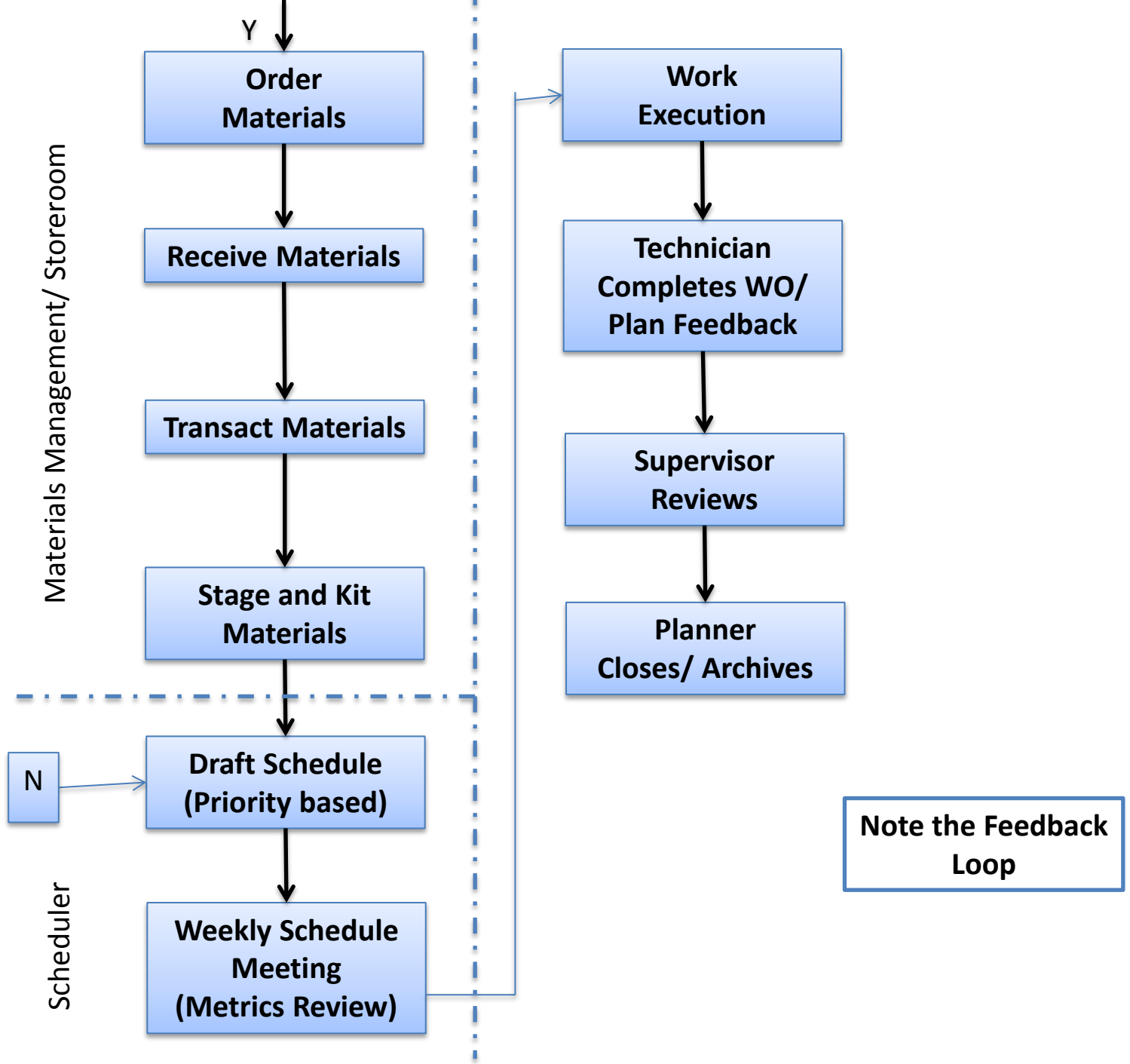
Prepare job package

INPL

AWMAT

Parts req'd?

N



Y

**Order
Materials**

Receive Materials

Transact Materials

**Stage and Kit
Materials**

**Draft Schedule
(Priority based)**

**Weekly Schedule
Meeting
(Metrics Review)**

**Work
Execution**

**Technician
Completes WO/
Plan Feedback**

**Supervisor
Reviews**

**Planner
Closes/ Archives**

**Note the Feedback
Loop**

Materials Management/ Storeroom

Scheduler

N

Tips for Success

- a) Align the organization
 - a) The big three
 - b) Spans of control
 - c) Combined roles



Tips (continued)

b) Staff the position(s)

a) Best craftsperson

b) Educate and coach

a) Train

b) Coach monthly for 6 months

c) Educate the organization



Tips (continued)

c) Focus

a) Strategic

b) Tactical



Tips (continued)

d) Must haves

- a) Next week's schedule
- b) Corrective job plans



Tips (continued)

- e) Measure and share the wins
 - a) PM Compliance
 - b) Schedule Compliance
 - c) Schedule Break-ins
 - d) More ...





Using Metrics

to Influence Planning and
Scheduling Behaviors

Tips (continued)

f) Priorities

Priority	Label	Description
1	Emergency	Unplanned - Drop everything – Pay Overtime – Current Week focus
2	Urgent	Unplanned – Cannot wait for formal planning – No overtime – Current week focus
3	PMs	Planned - Condition & time based Preventive Maintenance – should be <20-30% of planned work
4	Essential Planned	Planned – Highest planned priority behind PM work – 60% of remaining planned hours
5	Desirable Planned	Planned – Medium planned priority work – 25% of planned hours
6	Least Consequence Planned	Planned – Lowest planned priority work – 15% of the planned hours – ideal for reactive troubleshooters

Tips (continued)

- g) Barriers to success
 - a) Training/ coaching
 - b) Accountability w/ roles
 - c) Lack of partnerships
 - d) Reactivity





Questions?

