Maintenance Planning & Scheduling Scorecard

Personalised for

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Your Overall Score

43%

Here's how you scored on the individual elements:

0%

Prioritisation

64%

Planning

40%

Scheduling

80%

Execute & Close Out

50%

Review & Improve

86%

Process & Leadership

Congratulations on completing your maintenance planning & scheduling scorecard!

Getting planning & scheduling working well is a critical step in fighting your reactive work environment and improving your productivity.

Planning & scheduling, or work management as it's often called, ensures the right work gets done, at the right time, with the right tools, materials, and people. Without it you will remain stuck in a reactive maintenance environment, fighting fires, struggling low productivity and high levels of stress.

The typical industry productivity or wrench time is somewhere around 30%. With proper maintenance planning and scheduling, you can drive this up to 45% and effectively **increase your workforce by 35% without hiring anyone.**

Understanding your scores

This Maintenance Planning & Scheduling Scorecard gives you an overall score - 43% in your case - as well as individual scores for the 6 elements of:

- Prioritisation
- Planning
- Scheduling
- Execute & Close Out
- Review & Improve
- Process & Leadership

These 6 elements are a simplification of our detailed Maintenance Planning & Scheduling Assessment Tool which considers 10 areas.

Each score will be expressed as a percentage ranging between 0% and 100% and also converted to a rating of Low, Medium, or High to help you better understand your relative performance.

Improving performance

When it comes to improving performance there are three essential pieces of information you need:

(1) **where you are today** i.e. how good is your current performance

(2) **where you want to be** in the future i.e. what does good look like

(3) **how you are going to get there**

This **Maintenance Planning & Scheduling Scorecard** will give you a lot of information on where your current performance stands.

We have included links to several resources to help you understand what 'good' maintenance planning & scheduling looks like, and some information on how to make that transition (helping you with the 'how to get there' part).

In the next few pages we summarise your performance across the 6 elements and at the end of this PDF are some helpful next steps on how to **improve your maintenance productivity**. Because, that is what planning & scheduling is all about!

Your Overall Score

43%

Your maintenance planning & scheduling score

Your overall score of 43% is LOW, which indicates you have a significant opportunity to improve maintenance productivity.

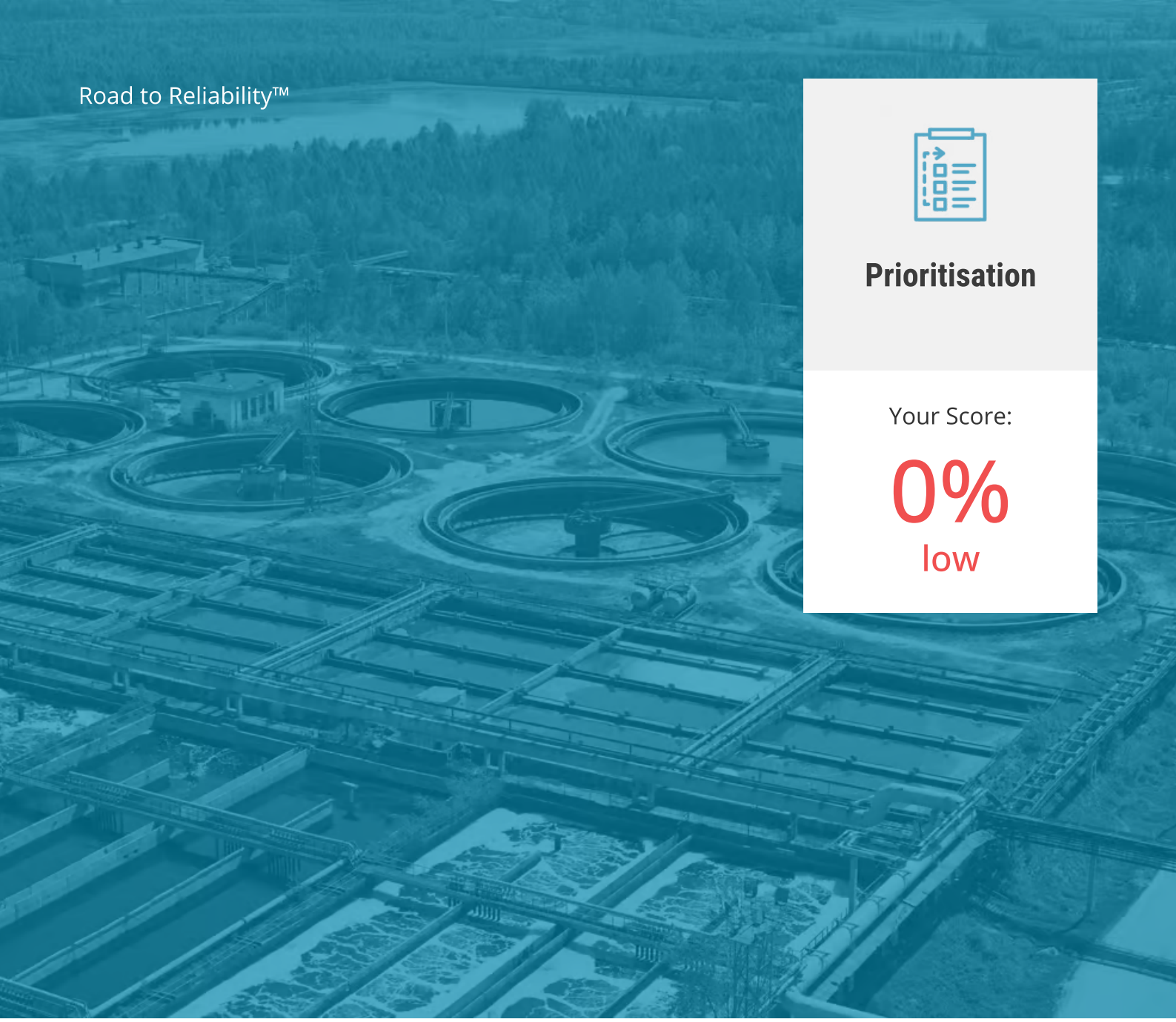
In doing so you can add a lot of value to your organisations' bottom line by eliminating waste from your maintenance processes. Not only will you add value, but you will also finally get rid of that reactive maintenance culture and create a more positive working environment.

And don't forget that an effective Maintenance Planning & Scheduling process not only creates monetary value, it also improves safety, reduces stress in the workforce and improves morale.

Recommendations:

After you read this PDF report spend some time on the following resources to get a better understanding of what 'good' looks like when it comes to planning & scheduling:

- Read our article Without Planning & Scheduling You Will Fail
- Then watch this video on The Value of Maintenance Planning & Scheduling.



Prioritisation

Your Score:

0%

low

Prioritisation

Prioritisation is essential to creating a stable working environment and improving productivity.

Your **LOW** score indicates you need to make some major changes here.

Tips to improve your Prioritisation score

You are not alone

Don't worry about your score, you're not alone. Many companies struggle with a reactive maintenance environment and have a lot of break-ins to their Weekly Schedule, and mostly that's because of poor prioritisation. All too often work that is not really Emergency Maintenance is still allowed to break-in to the Weekly Schedule as a result of emotional priorities or because those who shout loudest get their work done. This is why you need a better prioritisation method, adopt something like the RIME matrix or a Risk Assessment Matrix. And you need to review and prioritise all new work requests on a daily basis in a short & crisp Daily Review Meeting.

Action #1 - Better Prioritisation

Download an example of a RIME and RAM matrix via these links and implement it in your organisation. It doesn't have to be built into your CMMS, to begin with, paper copies will work:

- RIME Matrix
- Risk Assessment Matrix

Action #2 - Daily Review Meeting

Establish a Daily Review Meeting where both Maintenance and Operations representatives attend and jointly review and prioritise all new work requests. Any work request that is deemed an emergency and breaks into the Frozen Weekly Schedule should be approved by the Superintendent or Manager accountable for Schedule Compliance.

Action #3 - Quality Standard for Work Requests

Create a simple but effective quality standard to make sure all new work requests meet basic quality requirements so that they are complete, accurately describe the issue and potential risks so that prioritisation is as quick as it can be.

Planning

Your Score:

64%

medium

Planning

Maintenance Planning is obviously key to an effective Planning & Scheduling process as it eliminates delays during maintenance jobs.

Your **MEDIUM** score indicates you still have some work to do in this area.

Tips to improve your Planning score

You can do better

Most organisations think they plan and schedule their maintenance work, when in reality most organisations focus a lot of effort on scheduling the work and then end up having to plan the work on the fly. Planning and scheduling are two very different functions, with very different requirements, that need to work together to create an efficient maintenance environment. An environment where we have as little waste as possible. A lot of organisations struggle in this space because they are confused, so here are some immediate actions you can take:

Action #1 - Understand the difference between Planning and Scheduling

Read the article Without Planning & Scheduling You Will Fail if you have not already read it, and then watch the explainer video at the top of our webpage on planning & scheduling.

Action #2 - The right Maintenance Planner

Make sure you have selected the right individual(s) to work as your Maintenance Planners, with the right background, skills and attitudes. Train your planners so they understand what is required of them and then make sure you enable them to work as Maintenance Planners. That means they do not get dragged into the current week and are not buried with assorted admin tasks.

Action #3 - Understand the Planning Principles

Considering your medium score in this area watch this video on the Principles of Maintenance Planning and then implement them in your organisation. Applying these principles will help your Planners be more effective.

Scheduling

Your Score:

40%

low

Scheduling

To really drive productivity you need to combine Maintenance Planning with effective Maintenance Scheduling as scheduling eliminates waste between maintenance jobs.

Your **LOW** score for Maintenance Scheduling shows you need to sort some things out!

Tips to improve your Scheduling score

You can do better

Scheduling is different than planning and requires less technical knowledge, but that does not necessarily make it easy. Scheduling requires well planned work orders, good data but above all: discipline. You also need to have an effective scheduling process in place. Here are some immediate actions you can take to improve your Scheduling performance:

Action #1 - Approach Scheduling as a Continuous Process

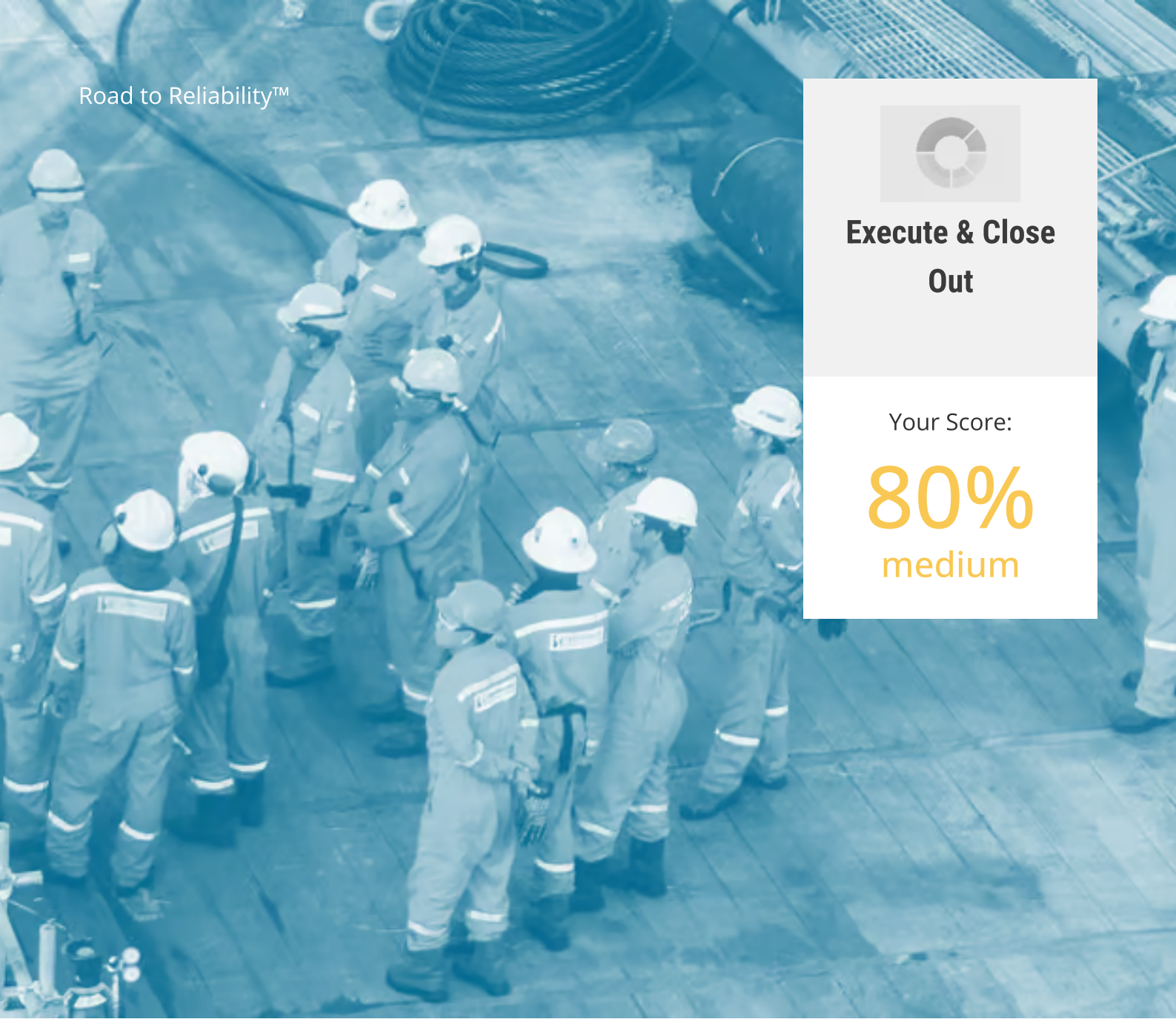
Watch this video on why you need to run your Maintenance Scheduling as a Continuous Process and after you've watched it look at what gaps there are compared to your current practices. Then fix them!

Action #2 - Measure Your Performance

Make sure that every week you measure Schedule Compliance, Emergency Work and Fill-In-Work. Emergency Work is the work that was so urgent it was identified and executed during the Frozen Week. Fill-In-Work is work that existed in your CMMS and was not in the Frozen Week, but still worked on. Together these 3 metrics can tell you a lot about the health of your planning & scheduling process.

Action #3 - Schedule Short Term and Schedule Long Term

You want to run a Frozen Weekly Schedule with ideally 4-6 draft weeks. You also need a longer term 12-month or 24-month Maintenance Schedule because that is where the big opportunities are to group work, align equipment outages, organise specific campaigns (by equipment, area, vendor). The long-term schedule is key to driving efficiency so create one if you don't already have one!



Execute & Close Out

Your Score:

80%

medium

Execute & Close Out

Everything we do in the Planning and Scheduling steps is aimed at getting productivity in the execution of our maintenance work.

But effectively managing that execution and ensuring good quality close out of work is key to continuous improvement, and by the look of your **MEDIUM** score this needs some attention!

Tips to improve your Execute & Close Out score

Room for improvement

As we just mentioned, everything we do in the Planning and Scheduling steps is aimed at getting productivity in the execution of our maintenance work. Your **MEDIUM** score here is likely the result of gaps in the previous steps in the process and you need to focus on getting those process steps effective. That said, there are still a few things to focus on when it comes to execution and close-out:

Action #1 - Get your Maintenance Supervisor to deal with Emergency Work

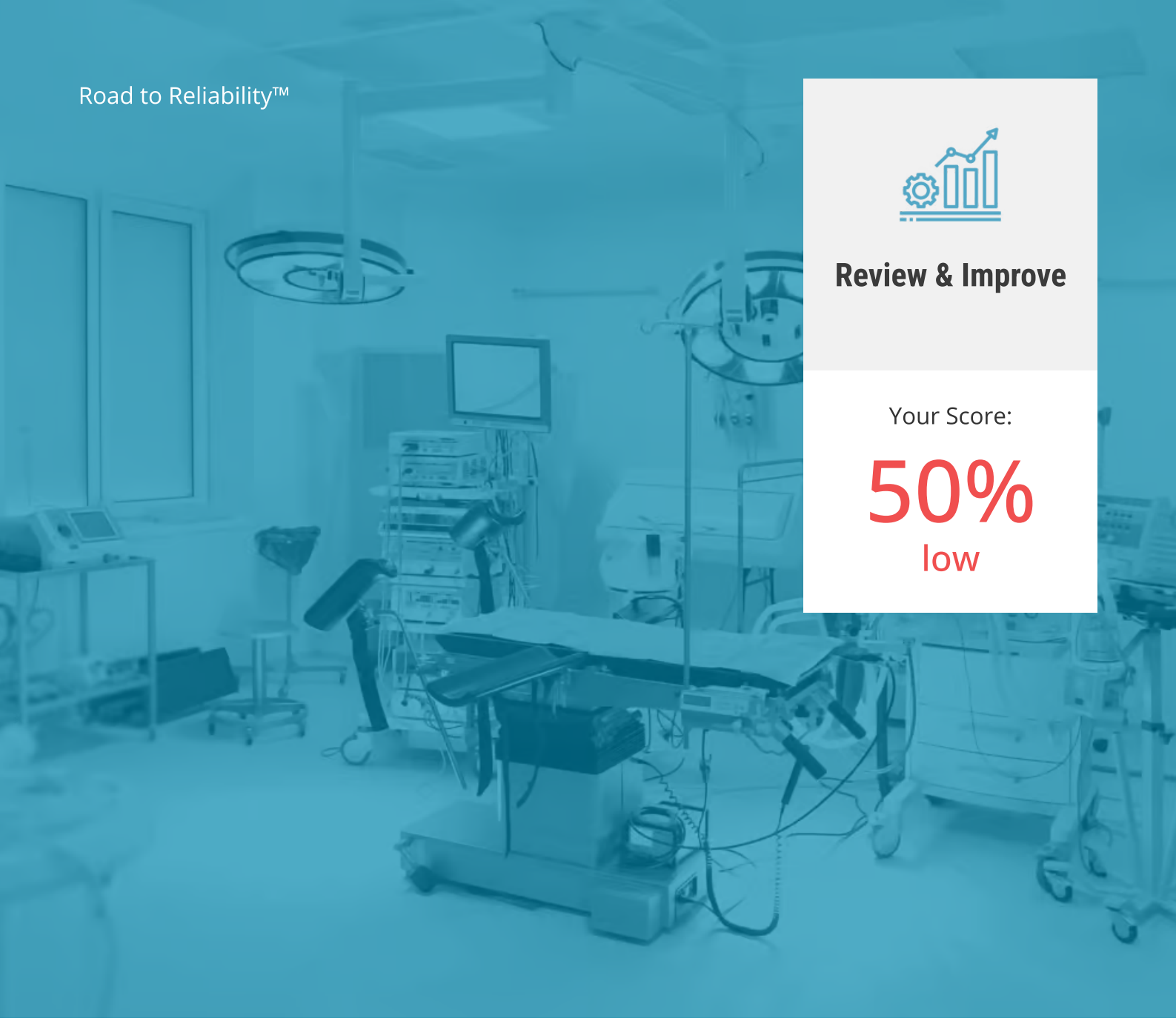
Emergency work, or break-ins, lead to a very reactive working environment and you need to minimise this and that will take some time. However, you do need to make sure that effective immediately all break-ins are managed by your Maintenance Supervisor and the crew, and no longer involve your Maintenance Planner. Your Planner needs to focus on preparing future work and must not be dragged into today's 'emergencies'.

Action #2 - Get feedback from your technicians

The Maintenance Planning & Scheduling process relies a lot on continuous improvement because of the repetitive nature of maintenance. That means you want to get high quality feedback from your technicians on the job plans created by your Planner and make sure your Planner implements the improvements. Keep it simple and don't get feedback for every job, but make sure that for every job you get feedback, it is quality feedback, and it's actioned.

Action #3 - Complete key CMMS data

Ensure your technicians understand that capturing CMMS data like timewriting, failure codes and technical history is an essential part of their job and key to longer term improvement. Give them the time and access to capture this data and then make sure you use it!



Review & Improve

Your Score:

50%

low

Review & Improve

Maintenance is repetitive. Preventive Maintenance is repetitive by definition, but even most corrective maintenance jobs are done many times over. Jobs are done hundreds to thousands of time over the life of your plant. So imagine the power of continuous improvement!

Unfortunately, your **LOW** score means you are not leveraging this opportunity.

Tips to improve your Review & Improve score

You clearly need to improve

Your LOW score means you are not fully leveraging the opportunities of continuous improvement. Often that is because the basic planning & scheduling process is not effective. Apart from addressing the gaps in the previous process steps here are some other quick wins you can aim for:

Action #1 - Build a Library of Job Plans & Equipment Data

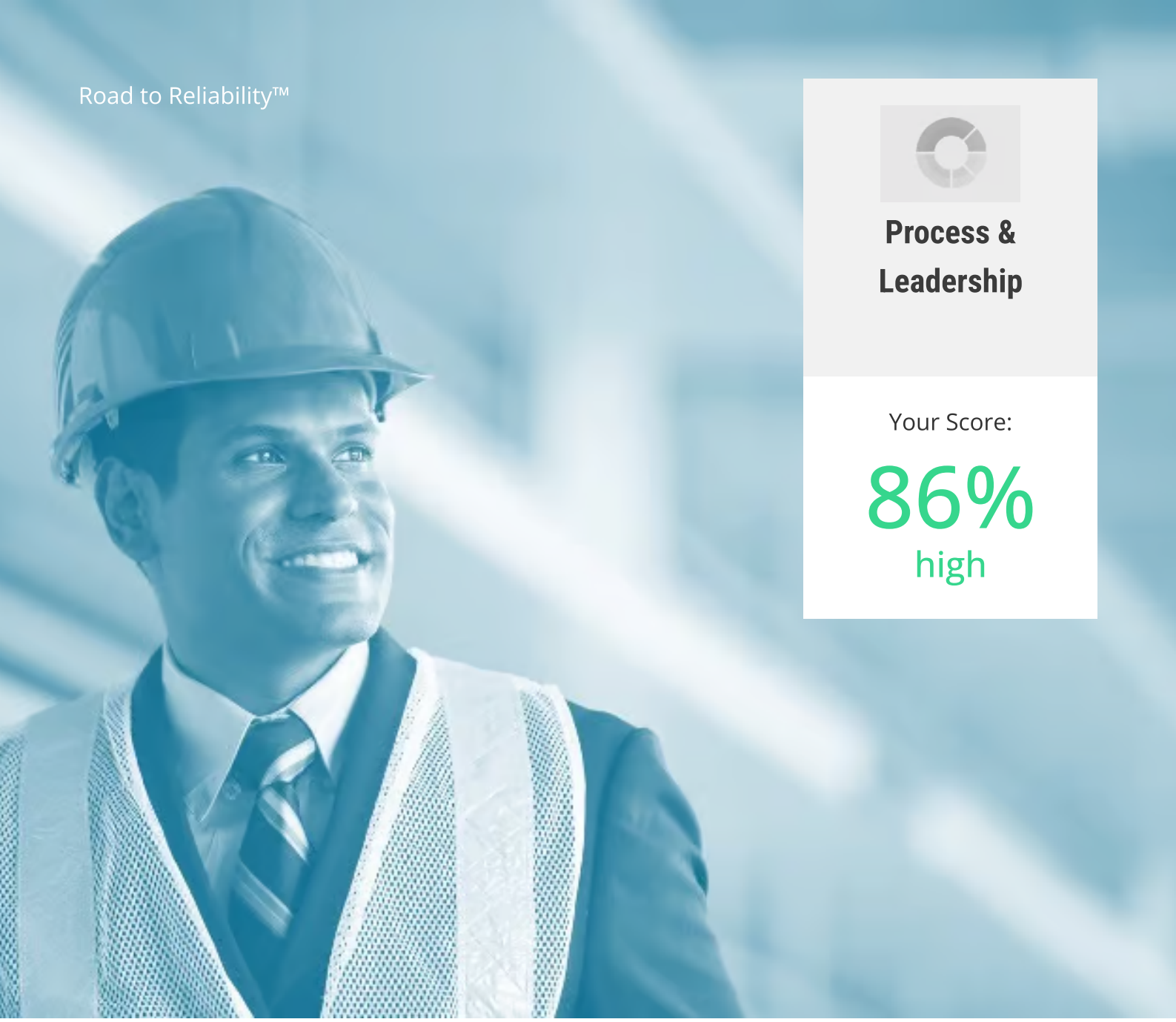
As we said before, a lot of maintenance work is done many times over the life of your plant. So do yourself and your team a favor and adopt the concept of 'create once, use many times'. Create an electronic library in a central location where your planner can save all your preventive and corrective job plans, associated documentation, and equipment files. Then improve on these every time you do a job.

Action #2 - Adopt Gemba walks

After you have a set of basic metrics in place like schedule compliance, emergency work, planning accuracy, trend your performance, understand what drives good and bad performance and make simple adjustments to drive performance in the right direction. But more importantly, get your supervisors, superintendents and managers to undertake Gemba walks so they understand what is really happening out there in the workplace. What is causing issues. Where is waste occurring. And what can be done to improve it.

Action #3 - Recognise and reward the right behaviours

To drive improvement, focus on recognising and rewarding the right behaviour. When technicians raise a high-quality work request say thank you and highlight it as an example to the wider team. When a planner puts a fantastic job plan together give positive feedback. Simple things make a big difference.



Process & Leadership

Your Score:

86%

high

Process & Leadership

Without a documented process your Maintenance Planning & Scheduling efforts are doomed to fail and without leadership support, whatever you implement will never be sustainable.

Given your **HIGH** score you have the key ingredients in place to really take your performance to the next level. That is fantastic and places you in a small, select group of high performers!

Tips to improve your Process & Leadership score

You need to improve on Process & Leadership

In the long run you need an effective, well documented maintenance planning & scheduling process to ensure your performance is sustainable. And you need your organisation's leadership to understand the value Planning & Scheduling brings to the business.

Given your **HIGH** score you will likely already know this and have most elements in place but if you want to get even better, why not contact us to see how we can help you move to the next level in Maintenance Planning & Scheduling?

Action #1 - Understand the importance of good implementation

To understand the importance of effective implementation and how to create a business case to sell it to your leadership read the articles How to Implement Maintenance Planning & Scheduling and How to Sell Planning & Scheduling to Your CEO.

Action #2 - Develop a Business Case for improving performance

Use our Wrench Time Calculator to determine your current productivity and then estimate how much value you can add to your organisation by further improving maintenance productivity.

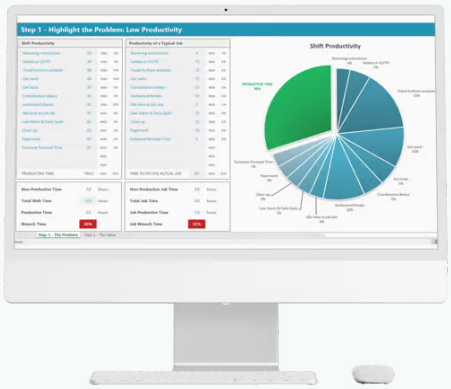
Action #3 - Book a Discovery Call

Now that you understand all your gaps and have estimated how much value you can create by improving maintenance productivity, it is time to Book a Discovery Call with Road to Reliability to see how we can help you train your team so they can implement the necessary improvements and create more value in the business.

Want to know how much value planning & scheduling can create in your organisation?

Download our easy to use Wrench Time Calculator to determine your maintenance productivity and figure out how much value you can create by implementing Maintenance Planning & Scheduling. You can easily do this yourself, the tool really is quite simple.

Once you have your Scorecard and the result of the Wrench Time Calculator simply Schedule a Call to discuss how you can create this value in your organisation using your own team.



Download the Wrench Time Calculator

After you've downloaded the Wrench Time Calculator don't forget to read the article How to Sell Planning & Scheduling to Your CEO as it guides you through the use of the tool, and it will help to create a compelling business case.

Download the Calculator

Hourly Cost	Number of Maintenance Technicians					
	25	50	75	100	150	200
$10	$ 46,080	$ 109,440	$ 164,160	$ 218,880	$ 319,680	$ 446,400
$20	$ 92,160	$ 218,880	$ 328,320	$ 437,760	$ 639,360	$ 892,800
$30	$ 138,240	$ 328,320	$ 492,480	$ 656,640	$ 959,040	$ 1,339,200
$40	$ 184,320	$ 437,760	$ 656,640	$ 875,520	$ 1,278,720	$ 1,785,600
$50	$ 230,400	**$ 547,200**	$ 820,800	$ 1,094,400	$ 1,598,400	$ 2,232,000
$60	$ 276,480	$ 656,640	$ 984,960	$ 1,313,280	$ 1,918,080	$ 2,678,400
$70	$ 322,560	$ 766,080	$ 1,149,120	$ 1,532,160	$ 2,237,760	$ 3,124,800
$80	$ 368,640	$ 875,520	$ 1,313,280	**$ 1,751,040**	$ 2,557,440	$ 3,571,200
$90	$ 368,640	$ 875,520	$ 1,313,280	$ 1,751,040	$ 2,557,440	$ 3,571,200
$100	$ 460,800	$ 1,094,400	$ 1,641,600	$ 2,188,800	$ 3,196,800	$ 4,464,000
PV (10%) after 10 Years:		$ 3,362,307		$ 6,724,614		
PV (10%) after 20 Years:		$ 4,658,622		$ 14,907,591		

The annual value gained by increasing maintenance productivity from 30% to 45%

Plant Managers and Maintenance Managers intuitively understand the value of increasing maintenance productivity. But they often struggle to build an effective business case to engage the C-Suite. With the Wrench Time Calculator you can calculate the value you can create in your organisation by improving productivity.

But I've made it even easier: the simple look-up table shown above gives you a ballpark figure. For example, if you run a plant with on average 50 maintenance technicians (own personnel and/or contractors) and they cost you on average $50 per hour (cost to the business, not their pay) then improving productivity from a typical 30% to a more acceptable 45% would yield over $500,000 of value per year. Over 10 years that would be worth $3.36 million (discounted at 10%), or $4.66 million if you take a 20-year view.

Next Steps

Step 1 - Review your Planning & Scheduling performance

Take your time to review this report in detail, check out the additional information we have provided in the various recommendations. Watch the videos and read the articles. Then move to Step 2:

Step 2 - Assess the value

Download the Wrench Time Calculator and assess how much value your organisation can gain on an annual basis by improving maintenance productivity from the typical 30% to a more acceptable 45%. Once you understand your performance gaps and how much it could be worth to your organisation to improve planning & scheduling, it's time to take Step 3.

Step 3 - Book a call

Once you have completed your Planning & Scheduling Scorecard, reviewed the report and determined the value you can gain using the Wrench Time Calculator you should know whether you are ready to take the next step and improve your maintenance productivity. If you are ready, then simply Book a Discovery Call and we can explore how we might be able to help you.

No pressure, we don't do high-pressure sales calls. This is our mission and we genuinely want to help you improve. If we think we're not a good fit we'll be honest.

Ready to improve your maintenance productivity?

Book a Discovery Call