

Advanced Planner Workshop (4 Day hands on)

Prep-work for Workshop

- Provide at least 10 jobs that are ready to be planned. The agenda will be flexible to accommodate for weather or other issues that may arise. Weather may impact jobs being reviewed during field work. Please include both inside and outside work in the 10 jobs provided.
 - ◆ Provide Jobs that Require Parts
 - ◆ Can come from PMs that have identified corrective repairs needed
 - ◆ Could be new equipment installation work (within reason)
 - ◆ Could be fill-in work for Do-it-Now squad
- Conduct preparation meetings with any personnel or departments requiring it
- Schedule times and personnel for meetings
- Reserve parts area for kits

Attendees should include:

- Planners
- Schedulers
- Backup/Potential Planner
- Maintenance Supervisors
- IT/CMMS Personnel (Support Function for CMMS Data Entry)
 - ◆ As part of the class preparation, try to arrange for a computer to be available that can log onto a “test” CMMS database in order to show entry into “live” system – CMMS Admin. should be present to assist

Advanced Planner Workshop (4 Day hands on) (cont'd)

Agenda

Day 1

Planning Team Prep (classroom) Training

Welcome & Orientation

Introduction to Planning and Scheduling

► **Planning Functions**

- ◆ Validation of Required Fields in Work Order
 - Ensure fields in work order are properly filled out
 - Fields from Previous Step
 - **Deliverables:**
 - ✓ *Understand the Importance of Valid Info on W/Os*
 - ✓ *Knowledge of which Inconsistencies to look for*
- ◆ Visit the Job Site
 - Look at Equipment
 - Talk to Supervisor
 - Discuss Scope

NOTE: PARTS OF THE NEXT 2 STEPS SHOULD BE COMPLETED HERE

- **Deliverables:**
 - ✓ *Understand the items that should be addressed when reviewing the jobsite, as it relates to Safety, permits, special tools, etc.*
 - ✓ *Understand the important issues concerning communications with the necessary parties*
- ◆ Determine Basic Information
 - History Review
 - Effect on Operations
 - Drawings
 - Tools
 - Parts
 - Permits
 - Previous Job Plans
 - **Deliverables:**
 - ✓ *Understanding of What goes into a Well Planned Job*

Advanced Planner Workshop (4 Day hands on) (cont'd)

- ◆ Plan the Work
 - ID job tasks
 - ID Maintenance Skills Required
 - Sequence Skills Required
 - **Deliverables:**
 - ✓ *Understanding of What goes into a Well Planned Job*

- ◆ Determine Availability of Materials
 - Check inventory in CMMS
 - Physically validate inventory
 - Begin kitting
 - **Deliverables:**
 - ✓ *Understanding of Materials Procurement*
 - ✓ *Understand Interaction of Planning and Stores Personnel*

- ◆ Request Materials
 - Repair P.O.
 - Compare cost
 - Consider delivery
 - Issue purchase requisition
 - **Deliverables:**
 - ✓ *Understanding of Materials Procurement*
 - ✓ *Understand Interaction of Planning and Stores Personnel*

- ◆ Complete the Work Plan
 - Finish job planning sheet (get approval)
 - Finalize the work plan
 - **Deliverables:**
 - ✓ *Documentation Complete*

- ◆ Kit the Supplies
 - Parts
 - Tools
 - Documents (Permits, LO/TO, Drwgs., etc.)
 - **Deliverables:**
 - ✓ *Planned Work Order – Ready to Schedule*

Advanced Planner Workshop (4 Day hands on) (cont'd)

- ◆ Complete the Scheduling Process
 - Set priorities with production and maintenance (RIME)
 - Consider project support
 - Hold weekly scheduling meeting
 - Inform production of schedule
 - Print RFS backlog or access live CMMS database
 - Communicate status
 - **Deliverables:**
 - ✓ *Understanding Preparations for Scheduling Meeting*
 - ✓ *Understanding of Meeting Facilitation*
 - ✓ *Understanding of Partnership Interactions to Achieve Scheduling Goals*

- ◆ Assignment of Work
 - Timing of Assignments
 - **Deliverables:**
 - ✓ *Understanding Supervisor's Role in Assigning the Work to the Crew*
 - ✓ *Understanding the Impacts of Maintenance Schedule on Operations*

- ◆ Execution of the Work
 - Kit Pick ups
 - Perform the Job
 - **Deliverables:**
 - ✓ *Mechanics Understanding of Planned Job Contents*
 - ✓ *Mechanics Understanding of Benefits of a Planned Job*

- ◆ Work Order Follow Up
 - Record planning facts
 - Incomplete kit
 - Inaccurate/incomplete info
 - Time to repair
 - Complete W/O – craftsperson and supervisor
 - Approval by requestor
 - Documentation of changes
 - Close W/O
 - **Deliverables:**
 - ✓ *Planner's Understanding Job Discrepancies*
 - ✓ *Understanding of Mechanic's Responsibilities in Work Order Closure*
 - ✓ *Understanding of Supervisor's Responsibilities in Work Order Closure*
 - ✓ *Understanding of Information Accuracy for Equipment History Sake*

Advanced Planner Workshop (4 Day hands on) (cont'd)

- ◆ File the Job Plan
 - ISO/OSHA Considerations
 - **Deliverables:**
 - ✓ *Understanding of Document Retention*
 - ✓ *Understanding of Auditing Requirements*

► Scheduling Functions

- ◆ Weekly/Daily Scheduling Meetings
 - Validate Work Request
 - Attendees
 - Scope
 - Timing
 - Resources
 - Priority
 - **Deliverables:**
 - ✓ *Importance of Meeting*
 - ✓ *Meeting Minutes*
 - ✓ *Approved W/O*
 - ✓ *Observation and Feedback on Mtg. Interaction*
 - ✓ *Meeting Facilitation Skills*

Day 2

Planning Team Field Training

Recap previous day

Field exercise (using knowledge and tools learned in day one)

- Break up into teams
- Each team plan one complex job and two less complex jobs
- Each team develop their individual Work Plans in the classroom
- Review each team's plans
- Round table discussion & lessons learned

Advanced Planner Workshop (4 Day hands on) (cont'd)

Day 3

Planning Team (classroom) Training

Recap Previous Day

Continue Classroom Session

- Planning & Scheduling Roles & Responsibilities
- Roles & Responsibilities of Operations and Maintenance
- Work Prioritization
- Planning & Scheduling Support Systems
- Round table discussion & lessons learned
- Documentation
- Metrics and Measures
- Continuous Improvement Tools

Day 4

Planning Team Field Training

Recap Previous Day

Field Exercise

- Each team plan one challenging job
- Each individual plan one challenging job
- Each team develop their work plan
- Each individual develop their work plan
- Review all work plans
- Enter example of work plan into the CMMS database
 - As part of the class preparation, try to arrange for a computer to be available that can log onto a “test” CMMS database in order to show entry into “live” system – CMMS Admin. Should be present to assist

Round Table Discussion and Lessons Learned

Conclusion of Training