



Global Leaders In Maintenance & Reliability

Maintenance Planning & Scheduling

Big Goals Deserve Big Results.

Make It Happen With Marshall Institute.

It's time to transform World Class education into World Class performance.

Training Overview

This comprehensive 3-day course, developed for both the new and seasoned planner, gives you all the tools you need to help you kick-start your Maintenance Planning and Scheduling system.

In our increasingly competitive marketplace, there is less tolerance for unplanned downtime. Industry is experiencing the pressure of rising costs, foreign competition, and the need to improve work force productivity. Companies must make productive use of all their resources — labor, material, capital — through best maintenance practices. Maintenance Planning and Scheduling has the greatest profit potential of any maintenance function — a “sure-fire” way to quickly improve maintenance performance and productivity.

Based on current maintenance trends and technologies and our vast expertise, we provide you with information and activities to better equip you to implement Planning and Scheduling. This interactive session includes information on how to build a winning partnership with production, a step-by-step implementation plan, and detailed information on the daily role of the planner. As always, we present real-world illustrations on the fundamentals of Maintenance Planning and Scheduling to help you increase productivity and lower overall costs — which means faster repairs, less downtime, and greater availability.

Planning and Scheduling is a “must have system” in high performance organizations. Experience shows that the “Best of the Best” do the basics very well. Let us help you become “Best of the Best.”

Learning Objectives:

- Identify how maintenance supports World Class Asset Management
- Identify the benefits Planning and Scheduling has on Maintenance productivity
- Summarize the roles and responsibilities of Maintenance Planners and Schedulers
- Define the essential support systems for effective Planning and Scheduling
- Recognize the benefits of partnerships
- Discuss the importance Process Maps and RACIs play in Planning and Scheduling
- Identify the benefits of proactive and standard identification and prioritization
- Demonstrate the ability to plan PM, PdM & CM work
- Demonstrate the ability to build a weekly maintenance schedule
- Identify the benefits of standard work execution and closeout
- Discuss how analyzing Maintenance Metrics can improve performance
- List the differences between maintenance and project Planning and Scheduling
- Develop an action plan for improving your performance

Agenda - Maintenance Planning and Scheduling Training

Day 1

Welcome & Orientation

Section 1: Introduction to World Class Asset Management

- Asset Management
- Maintenance Excellence
- Improvement Opportunities

Section 2: Value of Planning & Scheduling

- Importance of Planning & Scheduling
 - Activity #1: Numbers Game
- Improvement Opportunities

Section 3: Planner/Scheduler Roles and Responsibilities

- Planner Responsibilities
 - Activity #2: Planner Responsibilities
- Scheduler Responsibilities
 - Activity #3: Scheduler Responsibilities
- Planner/Scheduler: Combined Role
- Improvement Opportunities

Section 4: Support Systems

- CMMS
 - Work Order System
 - Time Keeping
 - Equipment Identification
 - Preventive/Predictive Maintenance
 - Materials Management
 - Activity #4: Support Systems Definitions
- Improvement Opportunities

Section 5: Partnerships

- Importance of Partnerships
- Improvement Opportunities

Day 1 Review

Day 2

Sections 1-5 Learning Review

Section 6: Understanding Processes

- Process Guides
- Process Maps/Workflows
 - Activity #5: Workflow
- RACI
- Maintenance Workflow
- Improvement Opportunities

Section 7: Identify & Prioritize

- Work Identification
 - Preventive/Predictive Maintenance
 - Basic Equipment Care
 - Work Request
- Work Orders
- Work Prioritization
 - RIME
- Improvement Opportunities

Day 2 (cont.)

Section 8: Plan

- Planning Maintenance Jobs: Process Steps
 - Review and analyze documentation
 - Visit the Job Site
 - Determine basic information
 - Build Job Plan
 - Activity #6: Planning
 - Determine availability of materials
 - Complete Job Package
- Improvement Opportunities

Day 2 Review

Day 3

Sections 6-8 Learning Review

Section 9: Schedule

- Scheduling Maintenance Jobs: Process Stages
 - Review and confirm Work Order details
 - Generate Preliminary Schedule
 - Attend the Weekly Scheduling Meetings
 - Release Schedule
 - Adjust Schedule Based on YTT Meeting
 - Activity #7: Build a Schedule
 - Improvement Opportunities

Section 10: Work Execution & Closeout

- Work Execution
- Work Closeout & Documentation
- Improvement Opportunities

Section 11: Analyze

- Analyze
- Maintenance Metrics
- Backlog Management
- Planner's Improvement Tools
- Improvement Opportunities

Section 12: Shutdown, Turnarounds and Outages Planning & Scheduling

- STO Planner/Scheduler
- STO Timeline Phases
- Improvement Opportunities

Sections 9-12 Learning Review

Section 13: Planner / Scheduler Improvement Plan

Wrap-Up

Contact us to improve your Maintenance and Reliability performance:

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