

WHITEPAPER

# Best Practices for Planners and Schedulers



PROMETHEUS GROUP



## Best Practices for Planners and Schedulers

Streamlining your work order planning and scheduling process is one of the most effective ways to improve maintenance operations and increase wrench time. Industry average wrench time performance is typically low, often between 25 and 35 percent, with the rest of the time taken up with other tasks.

The good news is that effective planning and scheduling can dramatically increase this percentage with top performing organizations averaging in the 50 to 60 percent range. The increased productivity can greatly reduce downtime on production assets and help avoid loss of revenue, while also decreasing maintenance costs and ensuring resources are optimized.

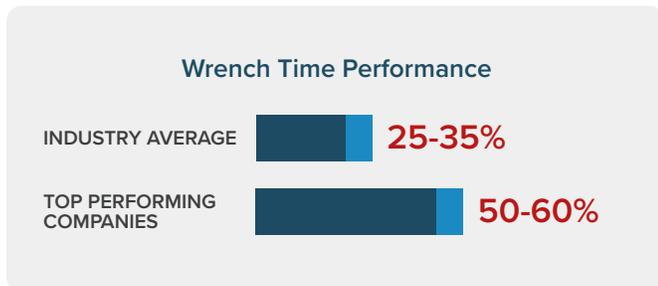
- Reactive work and break-in work interrupts the agreed upon schedule
- Job status and completion isn't clearly communicated, delaying other scheduled work

Raising the average wrench time from 35 to 55 percent creates a significant increase in productivity, without adding any additional resources to the organization! Best practice planning and scheduling enables crews to complete more work without sacrificing quality, as they have better job plans, the parts and supplies available for the job, and it reduces the time taken to complete jobs as well the time between scheduled jobs.

Effective planners and schedulers take actions to eliminate these time wasters. One of the most effective ways to improve wrench time for technicians is a well-executed work order planning and scheduling process, which provides visibility and clarity to all personnel involved in the process.

Developing a focused improvement plan may include:

- Improving the Bill of Material (BOM) quality
- Enhancing visibility and coordination with production
- Improving the communication of assignments to craft personnel
- Ensuring materials and tools are available
- Verifying work package and task instructions are readily available



Craft time can be wasted during an average day when:

- Materials and tools are not available and ready when the work needs to be done
- Safety measures are not taken prior to the start of a job, causing personnel to wait around until safety measures are completed

Planners and schedulers who follow these best practices support improving wrench time and productivity. In effect, this generates greater profits due to the reduction in downtime and more work being done with similar resources. Furthermore, following best practices simplifies the planning and scheduling process and creates consistency and predictability.

## Best Practices of an Effective Planner

Planners are responsible for ensuring that what is needed for a job and tasks or instructions on how to do the job are complete and accurate. Some best practices include:

 **Maintain a Single Source of Truth**  
All data should be maintained in a single EAM/CMMS. Accounting for craft hours, materials, and equipment in one system makes it much easier to measure the effectiveness of the maintenance process. Time is not wasted by exporting and importing data from one system into another and data entry errors are reduced. Additionally, maintaining a single source of truth ensures that feedback and updates to job plans are captured and included.

 **Arrange for Parts and Permits**  
Equipment, permits, tools, and materials should be available for workers before any job starts. The goal of maintenance planning is to produce high-quality, efficient work. Crews will complete assigned work more quickly when they have everything they need.

 **Reuse Task Lists and BOMs**  
Planners can spend hours looking up materials and scoping for documents for a routine work order. Often this data will need to be repeatedly entered into similar work orders. By creating a task list or standard BOM, planners can create a more informed plan and save time by not repeating work.

 **Ensure Knowledge Transfer**  
Fully integrated maintenance planning and scheduling software can give all departments access to the same workflow and best practice methods. This also helps to retain knowledge that would otherwise be lost when a more senior and knowledgeable worker retires or leaves the company.

 **Concentrate on Future Work**  
As a rule, planners should be disciplined and only focus on upcoming work. If they are not thinking of the future, then no one is! Dealing with break-in work should be left to schedulers and supervisors.

## Best Practices of an Effective Scheduler

Schedulers are responsible for determining when jobs should be scheduled and completed, with the most critical work taking priority, and ensuring there are trades available to complete the planned job. They should also help communicate the work plan and any changes across the organization. Some best practices include:

 **Maintain a Single Source of Truth**  
All data, including schedules and work orders, should be maintained in your organization's EAM/CMMS. This eliminates duplicate data entry, multiple versions of spreadsheets, and provides other stakeholders with the visibility and data they need in their roles. This also substantially reduces or eliminates the time spent on identifying which record is correct.

 **Schedule Based on Equipment Availability**  
An effective scheduler ensures that the equipment is available and only properly planned work orders with available parts and materials are scheduled. Workers will be unable to complete the job on schedule if materials and equipment are not available, leading to lower productivity and other potential issues.

 **Schedule at Capacity**  
Overextending the workforce causes confusion and leads to missed opportunities on the plant floor. Conversely, scheduling too little work leads to underutilization. Effective schedulers assign work evenly between crafts to ensure that time is not wasted, resources are maximized, and production is not interrupted.

 **Coordinate and Communicate**  
Publish the schedule for execution to ensure communication transparency. This keeps work visible and builds trust across different functions. Schedulers should post the schedule in a common area, or better yet have it available for access digitally, and help clearly communicate the schedule.



### Create a Break-in Team

Unplanned work is more expensive than planned work and negatively affects available wrench time and reliability. It should be eliminated as much as possible, but it can be a challenge to eliminate it completely. Creating a break-in team or group that focuses on unplanned maintenance ensures that it will not interfere with the schedule for the other teams.

### Summary

Effective planning and scheduling of maintenance resources helps improve strategies for preventive maintenance and asset management. An effective best-in-class planning and scheduling solution can help increase worker productivity, ensure knowledge transfer between experienced workers and new hires, and enable cross-functional collaboration.

Centralizing your plant maintenance scheduling program through a comprehensive solution that integrates seamlessly with your EAM/CMMS saves time and effort. The right solution gives users the power to easily and intuitively visualize the schedule, align it with production and other factors, and optimize the amount of work completed by the available resources.

The Prometheus Planning & Scheduling module provides web-based planning and scheduling solutions for maintenance management, as well as the ability to expand and optimize preventive maintenance management, materials management, and shutdowns, turnarounds, and outage planning and execution. It is an out-of-the-box solution that streamlines and enhances maintenance processes with applications that fully integrate with your EAM/CMMS solution (such as SAP, Oracle, Maximo, and more), keeping a single source of truth for your data while providing users easy to use tools and enhanced functionality to effectively execute.



*Learn more about how Prometheus Group can help your organization today.*

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## About Prometheus Group

Prometheus Group is a leading global provider of comprehensive and intuitive enterprise asset management software solutions that work within ERP systems and span the full work management life cycle for both maintenance and operations. Developed jointly with end users, Prometheus software enhances the customer experience for planning, scheduling, and executing work for both routine maintenance and shutdowns and turnarounds, all while protecting the workforce with safety solutions and electronic permit to work. Our straight-forward functionality, graphical visualization, and simple processes enable customers to increase productivity, reduce costs, and improve reporting. For more information, please visit [www.prometheusgroup.com](http://www.prometheusgroup.com).