



# Planning & Scheduling

## Course Overview

A key element to any operational leader's success is having a maintenance department running at optimal effectiveness and efficiency. To achieve this, it is essential to have competent work preparers / schedulers that can ensure the maintenance workforce is provided the right information, tools, and materials. However, very few have been formally trained, but learned through on the job training which leads to shortcuts and inefficiencies that ultimately affect the bottom line. As a result, proficient work preparers with the proper knowledge and training are in high demand.

Planning & Scheduling is a 3 day, interactive training course designed to provide work preparers / planners with proven techniques, tools and effective procedures that promote efficiency and directly impact performance levels of the entire maintenance workforce. This in turn influences the organization's capacity, availability, and reliability of their assets.

Whether you are a seasoned preparer wanting to pick up new "tips and tricks" or a prospective preparer trying to gain a thorough understanding of preparer's daily roles and responsibilities, this course will provide you with the essential knowledge and expertise to give you the competitive edge.

## Learning Objectives

- **Improve** Work Process Flow effectiveness
- **Distinguish** the role of planner versus scheduler
- **Develop** an impactful PM/PdM Program
- **Explore** the importance of scheduling and how it affects work execution
- **Understand** how Close Out and Analysis are the keystones for continuous improvement
- **Identify** KPIs for continuous improvement

## Course Format

This course will be held in a highly interactive workshop format with case studies and real-world examples.

The material has been designed using Adult Learning Methodology that believes the ideal ratio for optimum learning and retention is 60%/40%:

60% - blended combination of discussion, practical exercises, simulations, and case studies

40% - material/slides

Participants will engage in interactive exercises and discussions throughout the course to ensure the material is not only taught, but can also be applied. Limited class size (15-20 participants) is strictly enforced to enhance individual learning experiences and interaction with the instructor and other participants.

## Course Outline

- Introduction to Planning & Scheduling
- Planner Roles & Responsibilities
- Work Identification & Prioritization
- Initial Work Preparation/Planning
- Detailed Work Planning
- Materials Management
- Scheduling
- Work Execution
- Preventative Maintenance & Planning
- Close Out & Analysis
- Continuous Improvement

## Pre & Post Course Assessments

Each attendee will complete a pre-course assessment to gauge their current levels of knowledge and experience. At the conclusion of the course, attendee's will then complete a post-course assessment to ensure the material was presented effectively.

## Takeaways

- Prioritization Tool
- Free Trial of Planning Optimizer®
- Certificate of Attendance
- Training Manual
- Worksheets/Exercises
- Contact Information of Instructor for Support

### Who Should Attend

Planning & Scheduling was designed specifically for individuals participating in or aspiring to enter the Maintenance or Shutdown Planning fields.

#### By Job Title:

- PM/Maintenance Preparers
- Turnaround Preparers
- New & Potential Preparers/Schedulers
- Maintenance Leads/Supervisors
- Lead Technicians & Operators
- Operation Supervisors
- Improvement Leaders
- Material Coordinators

#### By Sectors:

- Bio Pharmaceutical
- Facilities
- Food and Beverage
- Manufacturing
- Mining
- Oil & Gas Upstream & Downstream
- Petrochemical/Chemical
- Power Generation
- Utilities & Transportation