



Management Assessment Exercise

Title: Management Assessment of Planning Quality

Check each question that can be answered YES for your organization and, using the formula provided, score your organizations planning quality.

- Are all work orders filled out correctly?
- Are work orders analyzed in the field?
- Are supervisors given an opportunity to contribute to the planning and scheduling of work orders?
- Is the justification for work orders and particularly the lead-time allowed questioned regularly?
- Are the predetermined materials and equipment needs specified for all work orders?
- Are estimates demanding but realistic? Is feedback from supervisors encouraged? Are estimates being steadily refined?
- Are the least required number of mechanics assigned to jobs whenever possible?
- Are sketches and specifications made when required?
- Is the planning of work orders up-to-date (i.e., no backlog of unplanned work orders)?
- Are recurring jobs analyzed for the purpose of establishing model work order plans?
- Are work orders properly coded as to type of work and correct authorization obtained?
- Are daily planning and scheduling visits held with the customers and supervisors according to the procedure?
- Is shutdown information obtained sufficiently far enough in advance to plan effectively?
- Are approaching shutdowns given attention soon enough to plan adequately?
- Are work orders "Closed Waiting for Sign Off" and "Waiting Material" regularly checked as to status?
- Are contract jobs properly charged to work orders?
- Is a full day's work scheduled every day for every maintenance person?
- Is operations notified in advance when to have equipment shutdown or prepared so that it can be worked on without delay?
- Are daily schedules consistently issued on time?
- Does the supervisor have faith in the schedule and follow it?
- Are work orders scheduled according to the priority established by the originator? If a job can not be scheduled within the desired interval, is the originator notified?
- Do daily work schedules account for every mechanic clearly, including absences?
- Does the process of scheduling force a review of every job in progress each day?
- Is the backlog reviewed regularly to identify overdue work orders and actions established with the custodian?
- Are arrangements made with the custodian to establish who will arrange for special safety or entry permits?

- Is shop work coordinated closely with fieldwork?
- Are completed work orders promptly returned to the originator to close?
- Is the necessary manpower scheduled for minor repairs?
- Is the effectiveness of the estimates and plans checked after job completion?
- Is the delivery of predetermined material arranged for in advance?
- Is effort made to improve material specifications and insure its availability on the job when needed?
- Are preventive maintenance inspection sheets checked and the necessary work orders written and scheduled?
- Do the work schedules contain a backup of lower priority unscheduled work (2 or 3 fill-in jobs)?
- Are all PM work orders properly scheduled according to the frequencies established?
- Is follow-up maintained on all work orders for materials?
- Is the backlog of corrective work orders under control?
- Is there an environment of order, discipline, and efficiency displayed at the planner or supervisor's desk?

Total YES /37 =

% **Planning Quality**

Student Name: _____

Company Name: _____

Date: _____