

SOPs help your maintenance team become more effective.

# Seven Steps TO WORK ORDER SUCCESS

***If these planning and scheduling guidelines aren't SOP (standard operating procedure) around your maintenance department, they should be.***

**Steve Mueller**  
Daniel Penn Associates

**WANT TO HELP YOUR** maintenance team become more effective? While new computerized maintenance management systems (CMMS) are making everyone's job easier, certain procedures are sacrosanct, regardless of technology. These guidelines should be part of every maintenance department's operation.

## **1 Supervisors are responsible for execution of the current schedule. Planner/schedulers are responsible for creation of the future schedule.**

Don't ask supervisors to do their own planning and scheduling. Their value is in managing the execution of work; let them focus on that. Planners and schedulers pay for themselves if the organization is large enough (an old rule of thumb is one planner for every 20 workers). To adapt and adjust to changing priorities,

the planner and the supervisor should communicate frequently about job plans.

In general, planners and schedulers should not be involved with current jobs. Supervisors will manage new jobs that invariably pop up and disrupt the current week's schedule.

To maximize the shop's capacity, the scheduler may have allocated tasks to specific workers. The actual assignment of work, however, is solely the responsibility of the supervisor. There should be no territorial disputes about this.

## **2 No work orders will be released without a "ready" status code from Dispatch or Planning.**

"Ready" means ready. In other words, material, tools, work-site access, permits, and other items are all in order so that the job can begin. Once a work order is released, there should be nothing to

prevent the job from starting. Adhere to this guideline and you'll avoid that black hole of released but unworkable jobs that can linger in a supervisor's backlog.

## **3 Every worker should start each shift with ready work.**

Too often, the first 20 to 30 minutes of a shift are spent doing everything *but* working—sometimes because no one has been told what to do. Don't let this happen in your shop. The schedule should have work orders ready to go first thing. If there aren't any scheduled work orders, you should have some shop, 5S, or other work ready to go.

## **4 All planned work should include estimated hours, a status code (from the CMMS if available), and priority.**

If there are no estimated hours, the job

is not a planned job and not ready for work. The status code indicates that the job is ready for work. The priority helps everyone understand how important the job is in the event of a resource or schedule conflict.

### 5 The requester's "priority" always yields to an agreed-upon order of importance.

For example, maintaining negative air pressure in an isolation room in a hospital is agreed upon as being more important than fixing a thermostat in the executive suite, regardless of the priority given by the requester. It's wise to make sure that "agreed upon" levels of importance for requested work are really agreed upon by all involved so there's no argument down the road. The scheduler assigns a priority such as "urgent," "important," or "routine," based on established criteria. For obvious reasons, emergency work is not scheduled and should be performed immediately.

Keep in mind that preventive maintenance will always be a top priority—and

may even have a dedicated crew to assure that it is accomplished on schedule.

### 6 All work must be on a work order.

The paperwork may come afterwards, as in the case of urgent/emergency work, but all work must find its way to a work order and into the CMMS. No exceptions.

### 7 Work orders are to be closed out on the same day they are completed.

Closing out a work order on the same day that it's completed keeps the data and the metrics current. Managing the backlog is critical to managing maintenance. This becomes very difficult if the backlog in the CMMS doesn't reflect current reality.

Although this list could certainly be expanded for specific circumstances, these seven guidelines are key for most maintenance organizations. Above all, maintenance teams must communicate constantly to make sure all parties are in

synch and all work orders are completed to spec and on schedule. **MT**

As director of Commercial Operations for the West Hartford, CT-based management consulting firm Daniel Penn Associates ([danielpenn.com](http://danielpenn.com)), Steve Mueller focuses on the needs of private-sector clients. His 30 years of consulting experience include working with all levels of management in a wide range of industries, and addressing virtually all business processes, from service to manufacturing.

#### LEARN MORE

For more information, see:

- ▶ "Polish Up Your Maintenance Planning" [maintenancetechnology.com/2016/03/polish-up-your-maintenance-planning/](http://maintenancetechnology.com/2016/03/polish-up-your-maintenance-planning/)
- ▶ [danielpenn.com/insights-resources/](http://danielpenn.com/insights-resources/)
- ▶ [danielpenn.com/blog/](http://danielpenn.com/blog/)



#### USEFUL TECHNOLOGY IN THE PALM OF YOUR HAND

Provide Faster Troubleshooting, Lower Cost for Repairs and Easy Documented Maintenance - USE VIP SERVICE!

Technicians use their Tablet & VIP Service Applications:

- **VIP On Demand** – to see exactly what the technician needs to troubleshoot and get the job done fast – right at the work site.
- **VIP Zip** - connects field technicians to the experts via video, email and voice to resolve issues while they are at the problem site.
- **VIP Real Time** –provides instant access to Key Performance Indicators (KPIs) while standing at the equipment location.
- **VIP Audit** –provides immediate and automatic documentation for a permanent record of completed maintenance tasks.

**VIP SERVICE SAVES TIME AND MONEY!**



See Our Demo Video at:  
[wmvipservices.com](http://wmvipservices.com)

To Save Time & Money:  
Joel Gil (312)489-1095  
or email at:  
[joel.gil@wmeng.com](mailto:joel.gil@wmeng.com)