



Maintenance Planning & Scheduling Workshop

5-day workshop at client location

Overview

Transform your maintenance team from firefighting mode into a proactive, well-planned operation with our 5-day intensive workshop (with 6 months of follow-up support) that will show you how to boost wrench time, reduce unplanned work, and get more done with the team you already have. This workshop is run at your location by Reliability Academy founder, Erik Hupjé, for up to 25 participants, but a group of 12 to 16 usually leads to a better learning experience with more engagement. The workshop is priced at USD \$25,000 plus travel costs.

Audience

Designed for maintenance & reliability professionals in Oil & Gas, Mining, Chemicals, Power, Industrial Gases and other asset-intensive industries like large-scale manufacturing, or major logistics operators (ports, airports). Whether you're a maintenance supervisor, planner, scheduler, reliability engineer, maintenance coordinator or operations manager, this workshop addresses the day-to-day challenges you face – from permit delays and parts issues to unplanned downtime and frustrated technicians. You'll learn a proven end-to-end planning & scheduling process that has been applied successfully across heavy industry worldwide.

The Productivity Challenge

Industry studies consistently show that maintenance wrench time – the portion of a technician's shift spent actually turning wrenches – typically sits between 25% and 35%. That means for every 8-hour shift, only 2 to 3 hours are spent on value-adding work. The rest is lost to waiting for permits, waiting on isolations, chasing parts, looking for tools, travelling, waiting on other trades, and rework.

Most organisations respond to this by trying to hire more people, running overtime, or outsourcing work. But the real answer is much cheaper and more sustainable: fix the underlying planning & scheduling process. Effective planning & scheduling can realistically add 35% to your maintenance capacity – without hiring anyone.

High-Impact Best Practices

In these 5 days you will learn how to:

1. Increase your effective maintenance workforce by 35% or more through better planning, scheduling and execution, without adding headcount.
2. Measure and improve wrench time using simple, proven techniques your team can apply immediately.
3. Build a quality work request and prioritisation process that keeps the right work in front of the team.
4. Plan work properly – with accurate scopes, materials, tools, resources and job plans that technicians actually use.
5. Manage backlog so it becomes a source of information, not a source of stress.
6. Build a Frozen Weekly Schedule and a Long-Term Schedule that reflect reality and actually get executed.
7. Manage execution, emergent work and genuine emergencies without destroying the schedule every week.
8. Close out work properly and turn job history into real learning and continuous improvement.
9. Set up the right metrics to drive the right behaviours – and avoid the watermelon KPIs that look green but hide red performance.

Interactive & Practical

No death by PowerPoint – expect engaging discussions, case studies, and exercises drawn from real scenarios across client locations worldwide. This isn't an academic or exam-prep course, it's a hands-on program built on industry research and real-world success. Participants will review their own planning & scheduling process, identify the biggest gaps, and build a practical improvement roadmap they can start executing the week they return to site.

What you'll walk away with

- A 12-month Planning & Scheduling improvement roadmap tailored to your site.
- Templates & toolkits for work request quality, prioritisation, job planning, backlog management, weekly and long-term scheduling, and close-out.

- A wrench time measurement approach you can run on site without specialist tools.
- Benchmark data & an ROI calculator to secure management buy-in for the improvements you recommend.
- Peer insights from heavy-industry professionals across mining, oil & gas, chemicals and power.

6-Month Support & Community

Building an effective planning & scheduling process isn't something you do in a few days, which is why the learning doesn't end after 5 days. Your registration includes six live monthly Q&A sessions directly following on from the live workshop, so you can get coaching on building your roadmap and working through implementation challenges as you apply what you learned. This ongoing support and an exclusive online community ensure you maintain momentum and actually see results on site. (Most courses end on Day 5 – we keep helping you succeed for 6 more months!)

Workshop Content

Topic 1 – Framework for reliability improvement & the productivity challenge

This topic sets the scene for the whole workshop. We start with a short introduction to the Road to Reliability™ framework to show where planning & scheduling fits in the bigger picture of maintenance & reliability excellence, and why it is one of the two most critical processes for any maintenance organisation.

We then dig into the productivity challenge that almost every maintenance organisation faces: too much reactive work, low wrench time, and frustrated people working hard but not getting ahead. We will look at why this happens and how effective planning & scheduling is the single biggest lever to break out of the reactive cycle.

Specifically we will cover:

- The ‘Best of the Best’ research and the Road to Reliability™ framework
- Why planning & scheduling is critical for reliability and cost performance
- The reactive maintenance trap and how organisations get stuck in it
- Wrench time – what it is, what good looks like, and how to measure it
- The eight common forms of waste during maintenance execution
- The business case for planning & scheduling – realistic productivity gains and cost impact

Topic 2 – Overview of Planning & Scheduling

Before diving into the detail, it is critical that everyone in the room shares a common understanding of what planning & scheduling actually is (and isn’t), what the end-to-end process looks like, and why each step matters. In many organisations ‘the planner’ is doing a bit of everything – scheduling, expediting, ordering parts, chasing permits – and the process has never been properly defined.

In this topic we give participants a clear, end-to-end view of the planning & scheduling process and the key principles that underpin it. This sets the foundation for the detailed topics that follow.

Specifically we will cover:

- The role of maintenance in modern operations
- What planning & scheduling is – and just as importantly, what it is not
- How waste occurs in maintenance and how planning & scheduling removes it
- The value of planning & scheduling – for the business, for supervisors, for technicians and for operations
- Planning & scheduling as a process – the end-to-end flow from work request to close out
- Key roles and responsibilities across the process

Topic 3 – Identify & Prioritise Work

A good planning & scheduling process starts with good inputs. If work requests are poor quality, poorly prioritised, or not screened properly, the rest of the process is set up to fail. Many sites struggle with an unfiltered flood of work requests, unclear priorities, and no consistent approach to deciding what should be worked on first.

In this topic we cover how to create quality work requests, how to prioritise them consistently using a structured tool, and how to run an effective daily screening and approval process.

Specifically we will cover:

- Creating quality work requests – what information is needed and why
- Prioritisation of work requests using a Corrective Maintenance Prioritisation Tool (CMPT) based on RIME / RAM methodology
- Daily screening and approval – who, when and how
- Common pitfalls in work identification and prioritisation
- Metrics for the Identify & Prioritise step

Topic 4 – Maintenance Planning

Planning is where most of the productivity gains are made – and where most organisations go wrong. In many sites ‘planning’ is really just scheduling with a bit of parts ordering thrown in. True planning is about preparing a job so that when it hits the schedule, everything the technician needs is ready: scope, parts, tools, permits, isolations, resources and a usable job plan.

In this topic we cover the principles of effective planning, how to plan a work order end-to-end, what a good job plan looks like, and the common mistakes to avoid.

Specifically we will cover:

- What maintenance planning really is
- Principles of effective maintenance planning
- Planning a work order – step by step, including scope, BOMs, labour, tools, and job steps
- The role of the maintenance planner and a day in the life of a planner
- Common planning mistakes to avoid
- Maintenance planning metrics

Topic 5 – Managing Backlog

Backlog is one of the most misunderstood and mismanaged parts of the planning & scheduling process. Too often backlog is treated as a single big number to be driven down, without distinguishing between work that is plannable, work that is planned, and work that is ready for execution. The result is either a ‘backlog panic’ that destroys quality, or a backlog that quietly grows out of control.

In this topic we cover how to structure, measure and manage backlog so it becomes a valuable management tool rather than a source of stress.

Specifically we will cover:

- The Ready-to-Execute concept and why it matters
- Structuring backlog: Plannable, Planned and Ready-for-Execution backlog
- Healthy backlog levels and what different backlog sizes tell you
- Backlog metrics and how to use them without creating watermelon KPIs

Topic 6 – Scheduling

Scheduling is where planning turns into committed work. A good schedule aligns maintenance, operations and support functions around a shared plan for the week, reduces waste, and dramatically improves wrench time. A poor schedule – or no real schedule at all – is a major driver of reactive behaviour.

In this topic we cover the principles of effective scheduling, how to build and maintain a Frozen Weekly Schedule, the role of the Long-Term Schedule, and the integration between maintenance and operations via an Integrated Activity Plan.

Specifically we will cover:

- Why bother with scheduling – the business case
- Scheduling principles
- Developing the Frozen Weekly Schedule
- Long-Term Scheduling and the integration with operations
- Scheduling as a continuous process – the weekly cycle
- Scheduling metrics including schedule compliance

Topic 7 – Execution & Emergent Work

Even the best plan and the best schedule are worthless if execution is not managed properly. This is where many organisations lose the gains they worked hard to create in planning and scheduling – through poor supervision, poor quality workmanship, and uncontrolled emergent work that destroys the schedule.

In this topic we cover how to manage execution day to day, how to handle genuine emergencies without creating chaos, and how to make quality a non-negotiable part of how maintenance gets done.

Specifically we will cover:

- Managing execution – the role of the supervisor
- Quality in maintenance – doing the job right the first time
- Emergent maintenance – what it is, what drives it, and how to manage it
- Managing genuine emergency maintenance without destroying the schedule
- Protecting the Frozen Weekly Schedule

Topic 8 – Close Out & Feedback

Close out is the step that most organisations do worst, yet it is the step that enables every kind of continuous improvement. Without good close-out, you can't learn from failures, you can't improve job plans, you can't optimise your PM program, and you can't eliminate repeat defects. The irony is that close out takes very little time – it just has to be done consistently.

In this topic we cover why close out matters, how to capture meaningful job history, how to give useful feedback to planners, and the metrics that keep close out on track.

Specifically we will cover:

- The value of close out – why it matters far more than people think
- Capturing good job history – failure codes, as-found / as-left, and useful narrative
- Feedback to the planner – the critical loop that improves job plans over time
- Close out metrics

Topic 9 – Continuous Improvement

Planning & scheduling is not a one-off project. Process performance drifts, people change, and site conditions evolve. Sustaining and improving the process requires a deliberate continuous improvement approach, including regular performance reviews, process audits, and leadership presence in the field.

In this final topic we bring everything together and show participants how to keep improving after the workshop ends.

Specifically we will cover:

- The continuous improvement mindset in planning & scheduling
- Reviewing process performance – weekly, monthly and quarterly reviews
- GEMBA walks – what they are, how to run them, and what to look for
- Process audits and how to run them without turning them into a witch hunt
- Reviewing productivity and wrench time over time
- Building a 12-month Planning & Scheduling improvement roadmap

Next Steps

To discuss dates, logistics, and a proposal for your site, email team@r2reliability.com or visit reliabilityacademy.com. Call us in Australia on 1800 312 402, or from overseas on +61 2 836 626 74.