# ROAD TO RELIABILITY™ ACADEMY

## ONLINE COURSE IN MAINTENANCE PLANNING & SCHEDULING

A world-class, fully online training course that will teach
your staff how to increase maintenance productivity
through effective planning & scheduling
and increase your workforce by 35% for free.

**SMRP**
APPROVED
PROVIDER

# Tired of Your Low Productivity, Reactive Maintenance Environment?

Well, I can't blame you. A reactive maintenance environment can be soul-destroying, especially to those of us who know there is a better way to work.

A safer way, a lower-cost way, a more profitable way.

A more enjoyable way to work.

But you're not alone. Industry studies show over and over again that maintenance productivity is often poor, and typically as low as 30%. That means that during a 10-hour day your technicians only spend 3 hours doing actual maintenance work. Sometimes even less.

So, when you pay your maintenance technicians for a full day's work you only get 3 hours of your money's worth.

And no, that's not because your technicians aren't working hard. It's because organisations make it too hard for people to do the right thing.

The average day is simply filled with too much inefficiency and waste.

But it doesn't have to be like that.

Experience and research show that with an effective maintenance planning & scheduling process you can grow your productivity to 45%. And as you continue to improve you can increase your productivity to world-class levels of 55% or 60%.

## Many Implementations of Planning & Scheduling
## Fail in The Long Run

Many organisations do set out to implement maintenance planning and scheduling. Unfortunately, most of these organisations do not achieve the long-term results they expected.

Often the improvements don't last, even when the initial implementation seemed successful.

You see, if you implement planning & scheduling without a comprehensive approach that addresses project management and change management principles you simply cannot succeed.

The outcomes just won't be sustainable.

## A lot of Planning & Scheduling Training is Ineffective

A standard classroom-based planning & scheduling course lasts 3 days.

You walk in and 3 days later you walk out.

Usually with a binder full of slides under your arm to remind you of your death-by-PowerPoint experience.

Three months later you will have forgotten most of what was covered in those 3 days.

Many of these courses do not address what it takes to make the required changes in your organisation and your ways of working. And without a successful change, the return on investment of most of these death-by-PowerPoint experiences is near zero.

And, add insult to injury, if you don't happen to live in a well serviced market like the US, the UK, parts of Western Europe or say Australia you will have very limited access to high-quality planning & scheduling training.

## The Solution Is Here

Finally! The solution is here. An online course that teaches you the essentials of Maintenance Planning & Scheduling and shows you how to successfully implement it in your organisation.

Now there really is nothing left to stop you from taking your first step on the Road to Reliability™.

## Maintenance Planning & Scheduling: The Online Course

On offer is a new, modern-day solution to this problem. World-class quality maintenance planning & scheduling training delivered straight to you, wherever you are in the world.

Your course will be delivered to you through an online learning management system using pre-recorded video lessons. All you need is a reliable internet connection and a modern web browser. Easy.

And, you don't need to travel. You don't need to be away from your family. You don't need to try to explain to your boss why you'll be out of the office for several days. Instead, you can show your boss how much many you save by not traveling.

Travel costs can often be more than the actual course fees! Not anymore.

This accredited course makes maintenance planning & scheduling training suddenly more accessible and more affordable than ever before:

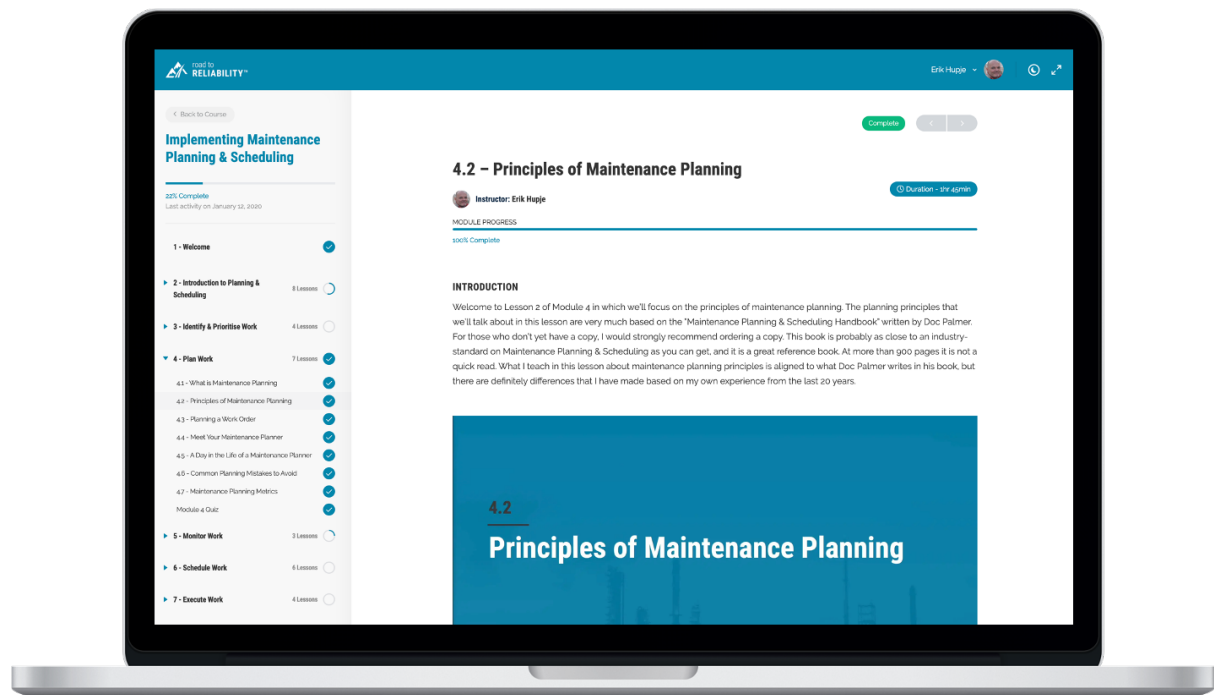▶ **100% online. Take the course anywhere, anytime**

Because this course is 100% online, with all content delivered through pre-recorded video lectures housed in a state-of-the art, web-based learning management system you can truly take this course anywhere in the world, any time of the day. Even on your mobile as you take the bus to work. All you need is an internet connection and a web browser.

▶ **Complete with proven framework for implementation**

To ensure you succeed where many have failed in the past I will be teaching you a proven and comprehensive framework for implementing maintenance planning & scheduling. I want you not just to enjoy this course, I want you to get a real return on your investment!

▶ **Lifetime access**

Sign up for the Professional Edition of Maintenance Planning & Scheduling Online and you will get life-time access. You don't just get 3 days of classroom training and a bunch of slides. You can watch the pre-recorded training videos as many times as you want, whenever you want.

# What We'll Cover in The Course and What You'll Learn

▶ How to build a business case for implementing or improving planning & scheduling in your business and how to sell this to your leadership. This includes how to estimate the value planning & scheduling can bring to your organisation.

▶ The key elements in the maintenance planning & scheduling business process and how they interact with each other. This includes developing a planning & scheduling business process flow specific for your organization.

▶ The key roles in the maintenance planning process particularly the maintenance planner, the scheduler and the supervisor.

▶ The importance of work prioritization and different methodologies that could opt for including the Ranking Index for Maintenance Expense (RIME) priority system and using a Risk Assessment Matrix (RAM).

▶ How to Deal with Emergency Maintenance work so that you don't lose control and remain to slip back into a reactive work environment

▶ How to effectively manage your maintenance backlog including what categories of backlog you should use, how much backlog you should have and how to monitor your backlog

▶ How to implement Maintenance Planning & Scheduling in your organisation successfully, including the project management and change management principles you need to address. The importance of training and especially coaching and how to set this up for success. How to measure the success of your implementation and ensure long term sustainability.

▶ And much, much more ... from setting quality standards for work requests, to the most important planning & scheduling KPIs and how to calculate them, to how to deal with emergent work during the execution phase

| MODULE 1:<br><br>WELCOME TO THE COURSE | A short module, but very important module. In this module we'll get get you setup for success.<br><br>We'll cover course objectives, go into the details of exactly what you'll learn and how we will work together.<br><br>In addition I'll give an introduction to the online learning management system. And introduce you to our support staff and where and how to ask for help. |
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| **MODULE 2:**<br><br>**INTRODUCTION TO PLANNING & SCHEDULING** | In this module we start the real work. After a brief exploration of the role of maintenance in asset-intensive industries, we'll explore why we need planning & scheduling.<br><br>We'll cover the increase in productivity and what that means for the bottom line of the business you work for. But we'll also explore other key benefits of planning & scheduling that are maybe less tangible like workforce motivation and safety.<br><br>In the final lesson of the module we touch on some critical characteristics of maintenance work that influence how we set up a successful maintenance planning & scheduling process. |

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| **MODULE 3:**<br><br>**IDENTIFY & PRIORITISE WORK** | Module 3 is all about work is initiated and prioritised. Fail to get this right and you'll continue to chase your tail and will not get out of the reactive maintenance model.<br><br>Most organisations don't realise how critical this step is. Most managers and supervisors don't want to spend the time on getting this right.<br><br>In this module I will explain why you don't want to be making that mistake and why putting a lot of effort in creating quality work requests and prioritising them properly is so critical to your success.<br><br>And in the last lesson we'll touch on some KPIs that you can use to measure your success. |

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| **MODULE 4:**<br><br>**PLAN WORK** | Module 4 is all about maintenance planning, why it is important and the 6 principles that underpin a sound maintenance planning process.<br><br>We'll talk quite a lot about roles & responsibilities because this is where many organisations go wrong. They burden their maintenance planners with work that should be done by others and in doing so they never reach the productivity improvement they were aiming for.<br><br>We'll also discuss the level of detail that is required in a maintenance work order, what makes up a good 'work pack' and we'll touch on common mistakes and some useful KPIs. |

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| **MODULE 5:**<br><br>**MONITOR WORK** | This is a step in the planning & scheduling process that is not often talked about, but it's key to your success.<br><br>Once the work is planned, all materials are ordered, and purchase orders have gone out for external services you need to keep an eye out on when vendors are available, when materials will arrive at site etc.<br><br>And when that's all in place, you need to flag the planned work in your CMMS as 'Ready for Execution' as a handover point to the Scheduler. |

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| **MODULE 6:**<br><br>**SCHEDULE WORK** | Module 6 is all about scheduling. We'll talk about how scheduling is different from planning and why you need both.<br><br>We'll discuss 5 basic scheduling principles including why you need to schedule for a Frozen Week. how to build up your Weekly Schedule. And we'll delve in to capacity planning plus we'll talk about some basic scheduling techniques and concepts.<br><br>As usual our last lesson in this module will cover KPIs in this case those KPIS that you can use to drive your scheduling process for example Weekly Schedule Compliance. |

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| **MODULE 7:**<br><br>**EXECUTE WORK** | Module 7 is all about executing the maintenance work that has been planned and scheduled. This is the core of the process and a lot of what we do in planning & scheduling is to drive efficiency in this part of process<br><br>We'll focus extensively on the role of the maintenance supervisor. We'll discuss in detail how you need to manage Emergency Work. And we'll touch on how you should be dealing with Emergent Work, the work you discover whilst doing a job. |

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| **MODULE 8:**<br><br>**CLOSE OUT WORK** | Module 8 covers the close out of work. This is where we capture everything that went well and the things that didn't go too well.<br><br>We provide feedback to the planner in terms of planning quality, materials etc. and we capture technical history in the CMMS so the reliability engineers can use that information in their continuous improvement programs. We'll also discuss how this links into your Defect Elimination and Root Cause Analysis processes.<br><br>The secret to successful planning & scheduling is a continuous improvement loop and that relies on the proper close-out of work and high-quality feedback. |

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| **MODULE 9:**<br><br>**REVIEW & IMPROVE** | Module 9 is all about making things better and better or in other words: Continuous improvement and how to build that into your business and your work processes.<br><br>We'll delve in to using KPIs to drive performance and the limits to what KPIs can do for you. We'll talk about the need to have a 'process owner' who conducts annual process 'audits' and the value of GEMBA walks.<br><br>In Lesson 4 of this module we'll touch on a contentious subject - measuring wrench time. How to do it, when to do it and when not. |

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| **MODULE 10:**<br><br>**IMPLEMENTING PLANNING & SCHEDULING** | Module 10 is where this course is really completely different than all the other planning & scheduling courses out there.<br><br>In this module we will give you a tried and tested process to implement planning & scheduling in your organisation. We'll cover the business case, change management basics, setting up your project team for success, the need for coaching and each lesson comes complete with practical tools and techniques that are proven to work when it comes to implementing planning & scheduling in a real business environment. |

# A **State-Of-The-Art** Learning Management System

To successfully deliver an online training course you need to get many things in place including fantastic content, a great online environment and world class support:

▶ **Fantastic Content with International Accreditation**

The content of this course is well-proven, has been derived from decades of real industry experience, is fully aligned with industry practice.

The course and its content is accredited by the Society of Maintenance & Reliability Professionals (SMRP) and grants credits towards your CMRP recertification.

▶ **Great Online Environment**

The online environment is truly a state-of-the-art solution that has been adopted by industry giants like the University of Washington or the University of Florida.

The learning management system is intuitive, easy to navigate and integrated with private discussion groups so you can interact with your instructor and fellow students.

▶ **World Class Support**

The course has dedicated support staff in place and the forum is professionally moderated to ensure a safe and welcoming environment.

# Meet Your **Teacher**

Hi, I am Erik Hupjé, founder of the Road to Reliability™ and I will be your course director.

I have over 20 years' experience in asset management, and specifically managing maintenance & reliability. And during those years I've worked in the Netherlands, the United Kingdom, the Philippines, the Sultanate of Oman and Australia.

My passion is for continuous improvement and keeping things simple. Through the Road to Reliability™ I help Maintenance & Reliability professionals around the globe – people like yourself – improve their plant's reliability and their organisation's bottom line.

I am a Certified Maintenance & Reliability Practitioner (CMRP), Certified Reliability Leader (CRL) and a Chartered Professional Engineer (CPEng).

# Delivering Value and Ensuring a High Return on Investment

A standard classroom-based maintenance planning & scheduling course lasts 3 days and typically costs anywhere between USD 1250 and USD 2500. Depending on where in the world you are, and who delivers the course. I've even seen 3-day planning & scheduling courses offered in the Middle East for USD 4500.

You walk in and 3 days later you walk out. Usually well fed and with a binder full of slides under your arm to remind you of your death-by-PowerPoint experience. 3 weeks later you will have forgotten most of what was covered in those 3 days.

Not with this course.

This course contains 10 modules delivered online over a period of 10 weeks (although you can go faster). Each week you receive new high-quality video lectures. Each module has multiple video lessons each supported by workbooks, audio files, transcripts and slide decks.

We will hold regular 'office hours'. During office hours students can dial into a conference call to ask questions live. And for those that can't make the live calls you can send in your questions ahead of the call and listen to the replay in the student-only course area.

But that's not all, the course will have its own private forum accessible only to students to ask questions, turn in assignments, get support and connect with other students.

You don't get that with classroom-based training.

And finally, if you get a course edition with lifetime access you get access to all future updates of the course. So, if you would like you to retake the course in 3 year's time as a refresher that's not a problem. We'll be happy to have you back. No classroom-based course will let you retake the course several years later without having to pay again.

## Some of Our Existing Clients Include:

# What Students Say About the Course

## WORTH EVERY SINGLE PENNY

An excellent course worth every single penny. I wholeheartedly recommend it to all practitioners, beginners and mature maintenance or operations managers alike, as everyone can benefit from it.

**Andrej Androjna**
Quantum Consulting
Slovenia

## A BREATH OF FRESH AIR

"... his newly created Maintenance and Scheduling course was a breath of fresh air...The content he provides is very comprehensive and easy to understand. One of the most useful chapters is how to implement the program, a topic often missing in many courses and trainings...I highly recommend it to any person or company endeavouring to advance their company's maintenance efficiency and productivity."

**Martijn Hadders**
Manager Global Maintenance & Asset Management
Henkel, The Netherlands

Find our more or book your training at:

https://www.roadtoreliability.com/planning-scheduling-online-training/

This training is delivered by

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R2 Reliability Pty Ltd. is recognized by the Society for Maintenance & Reliability Professionals (SMRP) as an approved provider of continuing education and training aligned with key subject areas related to reliability and physical asset

## Maintenance Planning & Scheduling Course Outline

| Module | Lesson | Video Duration | Assignment | Effort |
|---|---|---|---|---|
| **Module 1 – Welcome** | No individual lessons | - | - | - |
| | **Expected effort to complete Module** | **Approx 30 min** | | |
| **Module 2 – Introduction to Planning & Scheduling** | 2.1 – The Role of Maintenance | 13:00 | Y | 2 hrs 15 min |
| | 2.2 – What is Planning & Scheduling | 25:09 | Y | 1 hrs 30 min |
| | 2.3 – How Waste Occurs in Maintenance | 14:28 | N | 45min |
| | 2.4 – The Value Planning & Scheduling Creates | 34:46 | Y | 3hrs 30min |
| | 2.5 – What's in it for Me and You | 10:54 | Y | 2hrs 15min |
| | 2.6 – Rinse and Repeat | 07:09 | Y | 3hrs 15min |
| | 2.7 – Planning & Scheduling is a Process | 20:42 | N | 45min |
| | 2.8 – The Main Roles in Planning & Scheduling | 07:03 | N | 30min |
| | **Expected effort to complete Module** | **2 hrs of video** | **Approx 15 hrs total effort** | |
| **Module 3 – Identify & Prioritise Work** | 3.1 – Creating Quality Work Requests | 12:56 | Y | 3hrs 30min |
| | 3.2 – Prioritisation of Work Requests | 28:22 | N | 1hrs 15min |
| | 3.3 – Daily Screening & Approval | 13:29 | Y | 2hrs 15min |
| | 3.4 – Metrics for Identify & Prioritise | 10:40 | Y | 2hrs 45min |
| | **Expected effort to complete Module** | **1 hrs of video** | **Approx 10 hrs total effort** | |

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## Maintenance Planning & Scheduling Course Outline

| Module | Lesson | Video Duration | Assignment | Effort |
|---|---|---|---|---|
| **Module 4 – Plan Work** | 4.1 – What is Maintenance Planning | 20:44 | Y | 2hrs |
| | 4.2 – Principles of Maintenance Planning | 26:56 | Y | 1hrs 45min |
| | 4.3 – Planning a Work Order | 34:24 | N | 1hrs 15min |
| | 4.4 – Meet Your Maintenance Planner | 27:03 | N | 45min |
| | 4.5 – A Day in the Life of a Maintenance Planner | 22:24 | N | 45min |
| | 4.6 – Common Planning Mistakes to Avoid | 17:53 | N | 45min |
| | 4.7 – Maintenance Planning Metrics | 13:49 | N | 30min |
| | **Expected effort to complete Module** | **3 hrs of video** | **Approx 10 hrs total effort** | |
| **Module 5 – Monitor Work** | 5.1 – Ready for Execution | 10:28 | N | 30min |
| | 5.2 – Managing Backlog | 16:58 | N | 45min |
| | 5.3 – Backlog Reports and Metrics | 15:51 | N | 30min |
| | **Expected effort to complete Module** | **40 min of video** | **Approx 3 hrs total effort** | |
| **Module 6 – Schedule Work** | 6.1 – Why Bother with Scheduling | 06:39 | N | 30min |
| | 6.2 – Scheduling Principles | 38:22 | Y | 2hrs 45min |
| | 6.3 – Developing the Weekly Schedule | 29:13 | N | 1hrs 15min |
| | 6.4 – The Long-Term Schedule | 08:15 | N | 45min |
| | 6.5 – Scheduling as a Continuous Process | 10:58 | N | 45min |
| | 6.6 – Scheduling Metrics | 21:38 | N | 45min |
| | **Expected effort to complete Module** | **2 hrs of video** | **Approx 8 hrs total effort** | |

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## Maintenance Planning & Scheduling Course Outline

| Module | Lesson | Video Duration | Assignment | Effort |
|---|---|---|---|---|
| **Module 7 – Execute Work** | 7.1 – Managing Execution | 24:06 | N | 45min |
| | 7.2 – Quality in Maintenance | 23:09 | N | 1hr 30min |
| | 7.3 – Emergent Work | 07:04 | N | 30min |
| | 7.4 – Emergency Maintenance | 08:18 | N | 30min |
| | **Expected effort to complete Module** | **1 hrs of video** | **Approx 3 hrs total effort** | |
| **Module 8 – Close Out Work** | 8.1 – Value of Close Out | 11:38 | N | 30min |
| | 8.2 – Capturing Job History | 09:59 | N | 30min |
| | 8.3 – Feedback to the Planner | 11:25 | N | 30min |
| | 8.4 – Close Out Metrics | 05:47 | N | 30min |
| | **Expected effort to complete Module** | **40 min of video** | **Approx 2 hrs total effort** | |
| **Module 9 – Improve** | 9.1 – Continuous Improvement | 11:47 | N | 30min |
| | 9.2 – Reviewing Performance | 36:31 | N | 30min |
| | 9.3 – GEMBA Walks | 17:36 | N | 1hr 30min |
| | 9.4 – The Process Audit | 18:19 | Y | 3hrs 30min |
| | 9.5 – Reviewing Productivity | 28:16 | N | 2hrs 15min |
| | **Expected effort to complete Module** | **2 hrs of video** | **Approx 9 hrs total effort** | |

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## Maintenance Planning & Scheduling Course Outline

| Module | Lesson | Video Duration | Assignment | Effort |
|---|---|---|---|---|
| **Module 10 – Implementing Planning & Scheduling** | 10.1 – This Is A Change Management Project | 49:18 | N | 2hrs 30min |
| | 10.2 – Phase 1: Set Up for Success | 29:41 | N | 2hrs |
| | 10.3 – Phase 2: Define Your End State | 22:19 | N | 1hrs 30min |
| | 10.4 – Phase 3: Develop Your Process & Systems | 24:30 | N | 2hrs |
| | 10.5 – Phase 4: Implement | 31:07 | N | 1hr 45min |
| | 10.6 – Phase 5: Project Close Out | 15:01 | N | 1hr |
| | 10.7 – Phase 6: Sustain | 10:56 | N | 1hr |
| | **Expected effort to complete Module** | **3 hrs of video** | **Approx 12 hrs total effort** | |

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