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This month, the author takes an in-depth look at why you need a planner and who it should be.

When my children were small, Santa Claus—*yours truly*—liked to assemble presents late on Christmas Eve. Once the kids were asleep, I would get out my trusty pliers, adjustable wrench, two screwdrivers and, in light of the festive nature of the enterprise, perhaps a cup of eggnog. Mrs. Claus would put on some holiday music and bring out a plate of cookies, at which point I would get to work. I always enjoyed great success with this process...that is, until I encountered the Big Red Playhouse.

Let's get this out of the way up front: The Big Red Playhouse job went south because I wasn't prepared. I didn't have a plan. I got off to a late start putting the thing together. Then, once I opened that large cardboard box, I was confronted with dozens of oddly shaped pieces of red and yellow plastic—*but no instruction manual.* Yup, the unexpected had occurred (as it tends to do). Looking at all those little pieces, fasteners and clips, I knew common sense couldn't save me. Even worse, I realized that I needed four different sizes of Allen wrenches. I didn't have any Allen wrenches.

Pressure was added when upper management—*Mrs. Claus*—advised me of the disaster in store for us if the gift recipients awoke to learn that Santa had failed them. So, for the next six hours, I did the best I could with what I had, finishing up right around sunrise. While the playhouse didn't look like the picture on the box (and several pieces of red plastic were left over), at least it held together. Of course, if it hadn't been for the fact that the kids ran right by the playhouse on their way to play in the box it came in, I would have been in serious trouble.

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Lessons learned

I've thought about the Big Red Playhouse—*not fondly*—many times since that night. An amusing story, it's also a very real example of what can go wrong when a job isn't planned.

To begin, I was overconfident the project would get done—*I had always managed to finish it in the past*. As it turned out, I really didn't have enough time to do the job (but I didn't know it). Since this was the first time I had ever tried to build a Big Red Playhouse, I was unfamiliar with the correct procedure.

I had no written instructions, parts list or bill of material. To add insult to injury, I lacked the correct tools. Adding injury to insult, I cut my hand on a screw around 3 a.m. (which just goes to show what can happen when you get in a hurry and don't know what you're doing). And finally—*once it had become apparent that the deadline might not be met*—management added to my stress by pointedly reminding me of my obligations. No matter. I plowed ahead. The job had to get done.

What this means to you

If my Big Red Playhouse experience doesn't strike a chord with you, I submit that a) you don't have children yet, and/or b) you are new to the maintenance trade. What happened to me that long-ago Christmas Eve happens every day in hundreds, if not thousands, of maintenance organizations around the world.

Technicians are sent out to perform tasks for which they are not prepared. Jobs are guaranteed to go wrong because maintenance personnel don't have enough time to complete them. Projects are doomed to fail because millwrights lack written instructions, comprehensive illustrations and diagrams and/or adequate parts lists. Work schedules and productivity are jeopardized because multi-crafts don't have access to the proper tools and are unfamiliar with specific procedures. Worker well-being is put at risk because safety protocols aren't clear. Last but not least, good employees are subjected to undue pressure when the schedule begins to lag and the search for the guilty begins.

Once this scenario is set into motion, we sit back and hope for yet another miracle. Sometimes we get one; more often, we don't. We end up over budget and behind schedule for a task that may have to be done again because it was performed incorrectly the first time. (If we were lucky, no one got hurt in this mayhem.)

Remember the old adage: "When it comes to maintenance management, we are only as good as our last 30 days." Who among us wants to base our maintenance strategy on luck? What we need is good planning.

Gearing up

If you're going to succeed as a maintenance manager, YOU MUST PLAN YOUR WORK. Unfortunately, in a sluggish economy, management may be hesitant to approve the expense associated with adding positions—*even one as crucial as a maintenance planner*. The prevailing mind-set in hard times seems to be that the maintenance department should just buckle down and work harder and longer.

Positions such as planner, scheduler, maintenance clerk and even reliability engineer all pay for themselves in very short order. As such, they are a wise investment, rather than an unnecessary expense. It isn't a case that a maintenance department ought to have such positions staffed. Rather, it is a documented fact that no maintenance organization can be completely successful without filling these roles.

Once the decision has been made to begin planning your work, the first step is to select and train a planner. Often a maintenance organization will promote from within and select one of its better millwrights or technicians for the job. This promotion structure is good for morale and laudable for that very reason, but ultimately the success or failure of this approach depends entirely on the individual qualities of the chosen candidate.

Maintenance managers and HR professionals should keep in mind that the skills and talents that make for an excellent maintenance professional out on the plant floor may not always translate well into an office setting. Innate knowledge of the plant's processes and machine centers is not necessarily a guarantee of success.

A good candidate for the planner position will be a person with a passion for details—*not necessarily a perfectionist, but close to it*
. At a minimum, this individual will realize the importance of the accuracy of information and the clarity of its presentation.

The job also calls for someone with excellent organizational skills, who can "see" the big picture and convey its elements onto a written page in the chronological order in which the job steps should occur. This critical component means the planner must be an effective writer.

Moreover, the planner must have the ability to view the job as a contiguous whole and envision what might go wrong, then must be able to allow for those potential pitfalls and have the appropriate contingency plans prepared.

The chosen candidate also must be capable of reading, understanding and distilling technical information down to its essence. He/she should be familiar with the manufacturing process, but not necessarily have come from the maintenance organization—*or even from the plant*— to be a success.

Capturing the benefits

For planning to become a successful part of your maintenance strategy, it must become part of your maintenance culture. This enculturation cannot take place if it appears that planning is only being done when it's convenient for management—or because it's what the home office wants. Consequently, planners can't be pulled away from their duties and assigned to other tasks, such as supervision, scheduling or even general maintenance. Maintenance planning will fail under these conditions. More importantly, management will assume planning is being performed because the job has been filled. In other words, the function of planning will be seen as having had no effect on reliability.

Keep in mind that planning will have little benefit for your organization if it's viewed as a nuisance by the maintenance staff—i.e., just more paperwork that "they" have come up with to keep the "suits" happy—and is only done by rote. Everyone in the department must own the concept of planned work and understand its importance.

- They must be educated to appreciate both the function and the purpose of planning, as well as the fact that it is not simply another flavor of the week.
- They need to understand and appreciate the company's expectation that assigned work is done according to plan.
- They must also come to realize that both the work order and the written job plan are living documents, and that if an error is discovered or a better method envisioned, then this information must be shared with the planner.

You now have information you need to make the case for a planner. Next time, we will revisit the specifics of the process and how to write a good job plan. **LMT**

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