



Creating an Environment for Success  
by Jeff Shiver CMRP, CPMM

Too many times and in too many organizations, we send people off to training with high expectations on their return. We hope that overnight they have become equipped with the skills and knowledge to effectively start doing their new work. Unfortunately, weeks later the trainee and their organization are frustrated with the lack of progress.

Where did we go wrong? Let's take a recent case that I had the opportunity to witness. ABC Company chose to send their new Planner/ Scheduler off to be trained in the proper procedures for planning and scheduling work. The Planner comes back to the site with their newly learned planning skills and commences to attempt to plan and schedule work. On the first day back, the individual attends the normal morning meeting where the issues of the last 24 hours are reviewed and any items left uncorrected are assigned for the day. After the first hour is spent in the meeting, the planner heads off to their office only to be stopped by the Maintenance Team Leader who needs a Hot Work permit completed and delivered to Johnny down at the Waste Water Treatment area so he can get started welding a bracket for a pump. Thirty minutes later, the planner has delivered the permit. After a quick break, the planner finally makes it to their desk and turns on the computer. Fred and Susan have been watching for the Planner to show up and pounce, requesting the Planner requisition some parts they need for upcoming work tomorrow. Now the planner has to spend the next hour expediting those parts to ensure they arrive in time for Fred and Susan to do their job. The Planner looks at the clock on the wall and wouldn't you know it, it is lunch time already. The Planner says to himself, "Goodness, where does the time go?"

I am going to stop at the half day mark but I bet many of you can fill out the rest of the Planner's day based on your experience. For that Planner in ABC Company, days 2-5 don't look much different from the first day back on the job.

If we expect different results, then we must do something differently. If we want to move from a reactive environment to a reliability-centered proactive environment, we must properly plan and schedule work. That work is not today's work (reactive) but next weeks work. By planning for next week and beyond, we have the time to get the right parts, prepare the job plan, and properly schedule the equipment and resources to do the work.

As part of creating an environment for success, we have to educate all of the interfacing functions on the proper role of the Planner/ Scheduler and how those other functions contribute to the success of the planning and scheduling work. For example, the daily meeting that reviews the last 24 hours is not the place for the Planner who should be looking out a week and beyond. The Maintenance Team Leader needs to take responsibility for issuing the Hot Work permit on short notice. In the future when the job is properly planned, the Hot Work permit form should be part of the job package.



In addition to educating others on the new role, we have to set the proper expectations with that Planner/ Scheduler and hold them accountable. As an example of educating others, in the case of ABC Company; I used a Supervisors Training Course that I was conducting separately to educate all of the Operations and Maintenance Supervisors on the new role of the Planner/ Scheduler. Next, I spent time with the Maintenance Technicians explaining the role, how it affected them, and who they should seek out to expedite parts as an example.

If I can give you additional suggestions for creating a successful environment, send me an email outlining how I can help you to [jshiver@peopleandprocesses.com](mailto:jshiver@peopleandprocesses.com).

#### About the author:

Jeff Shiver is a Certified Maintenance and Reliability Professional, and Certified Plant Maintenance Manager. He held operations and technical roles across 20 years for a global manufacturer, a leader in confectionary snacks, food processing and pet care. Jeff worked in 4 different manufacturing sites and on 2 U.S. and Canadian regional assignments. Prior to his last manufacturing role as an Operations Area Manager, he was the site Maintenance Manager where he led a change effort towards a proactive reliability-based culture. His passion for maintenance and operations best practices led him to People and Processes, Inc. where he is a Managing Principal. Jeff can be contacted at [jshiver@peopleandprocesses.com](mailto:jshiver@peopleandprocesses.com).