



# Reliable Maintenance Planning, Estimating and Scheduling

## You Can Plan for Reliability and Maintenance Excellence

### **SPECIAL DISCOUNT**

*Your Investment for this 3- Day Session is the World's Best Educational Value!! In fact, register 3 and the 4th Person attends for FREE!*

*This is a 25% savings for your Team of 4.*

### **PRIDE Members**

*Remember you receive an additional 10% discount on all training and TMEII products.*

### **100% Guarantee**

*A complete refund is provided if you cannot achieve a 10 to 1 return on investment from this training.*

*Ralph W. Peters  
President, TMEII*

If you want to achieve reliability and maintenance excellence, this **TrueWorkShop™** is a must attend. You will learn about implementing the best practices you need for effective maintenance planning, estimating and scheduling. You will bring back the tools and knowledge to begin or enhance a planning, estimating and scheduling function in your organization. This includes:

1. A hands-on, working knowledge of today's best maintenance planning, estimating and scheduling techniques
2. A working knowledge of the tools and techniques for estimating using the ACE Team Benchmarking Process
3. A greater understanding how planning and scheduling can be the cornerstone for a broader approach to maintenance improvement within your organization

In addition, we will help ensure you have other best practices in place for becoming a profit-centered operation. They will be tailored for both plant and facilities maintenance operations participants' that want to achieve measurable bottom line results.



### **TMEII CONTACTS:**

Pete at 919-270-1173 ([Pete@PRIDE-in-Maintenance.com](mailto:Pete@PRIDE-in-Maintenance.com)) or  
Anne at 919-896-5368 ([Anne@PRIDE-in-Maintenance.com](mailto:Anne@PRIDE-in-Maintenance.com))

**Register Now & Pay Online: We accept Visa, MasterCard and American Express**

# Reliable Maintenance Planning, Estimating and Scheduling

This TrueWorkShop™ is Tailored for Participants for Manufacturing Plant and Fleet Maintenance, Pure Facilities Maintenance and Healthcare Operation

## Still not sure if this program is for you?

If your answer is **YES** to these following important questions then you must attend.

1. If you could receive a 5-to-1 return on investment, would you invest?
2. Could you use a 10% to 30% increase in wrench time; Craft Utilization?
3. Are you a takeover target for contract maintenance that is more productive?

## What is a TrueWorkShop™?

The Maintenance Excellence Institute International believes the [principles](#) and [practices](#) covered can be taken back and put into practice for a true return on investment for the training we provide:

- Extensive practical exercises on key topics
- Extensive idea sharing and instructor's case studies from over 300 plant and facility sites.
- Each attendee with today's most comprehensive benchmarking tool; *The Scoreboard for Maintenance Excellence* to complete prior to start date. Results will be strategic, tactical and operational. "Do It Now" plans of action for the 27 best practice topics.
- A clear understanding of today's best practices is so important to successful implementation.

We have helped very large organizations develop a client specific [Scoreboard for Maintenance Excellence](#). We have found that best practice training is necessary so an organization truly understands the full potential of our assessment results.

## Take An Important First Step:

This training process is for application and not theory and is for both the public and private sector in plant maintenance and pure facilities maintenance. Remember, we guarantee this [TrueWorkShop™](#) will help provide you with the important steps to improve the maintenance process and the business side of the maintenance in your operation.

## Why You Should Attend this TrueWorkShop™

You will be able to bring back a comprehensive understanding about how to implement important maintenance tools and concepts that should be a part of your ISO 55000 strategic maintenance plan. In addition to Reliability-Centered Maintenance (RCM) you gain knowledge improving an existing PM, PdM and CBM program with application of Total Productive Maintenance (TPM), and Risk-Based Maintenance (RBM).

## Who Should Attend

- Storeroom Managers / Supervisors
- Maintenance Planners / Maintenance Schedulers
- Storeroom Staff
- Maintenance Foremen / Maintenance Supervisors
- Maintenance Coordinators
- Plant Directors / Plant Engineers
- Facility Managers
- Property Managers
- MRO Purchasing Procurement Staff
- Maintenance Managers

## You Will Learn Through Practical Case Studies & Exercises from the Following Sectors:

- Oil & Gas
- Manufacturing
- Mining
- Transportation & Rail
- Utilities

[Register Now & Pay Online:](#) We accept Visa, MasterCard and American Express

# Reliable Maintenance Planning, Estimating and Scheduling

## Important Course Work

To wrap-up this **TrueWorkShop™** delegates will draw up specific improvement plans to address their Top 5 Areas for Improvements in power point format. The goal is to achieve implementation when they return to their organizations. Furthermore, after the workshop is over, complimentary follow-up support is provided from TMEII via phone, email or Go To Meeting virtual sessions when needed.

## Very Important Pre-Course Work

Each company will be guided through a self assessment audit of their current operation using **The Scoreboard for Maintenance Excellence™**. This will become part of the course practical exercise and also becomes an important baseline as to where a company stands with today's best practices. It is equivalent to an ISO 55000 audit. Attendees will be guided through this self-assessment. Attendees are also asked to define their Top 5 Areas for Improvement.

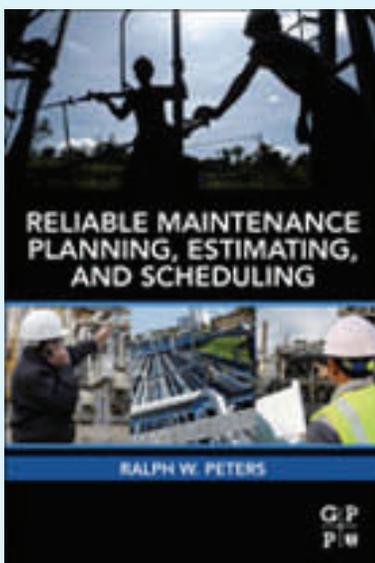
## Other TrueWorkShop™ Deliverables

We also provide many very important deliverables in an easy to use Excel format in addition to the program outlined below.

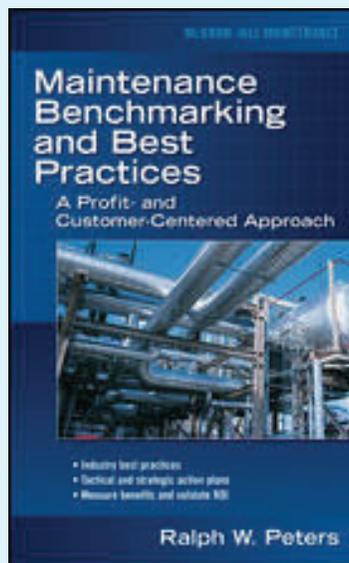
1. **The Scoreboard for Maintenance Excellence** - Today's most comprehensive benchmarking tool for each attendee's operation that benchmarks your site against today's best practices. Facilities maintenance organizations will receive **The Scoreboard for Facilities Management Excellence** .
2. **The CMMS Benchmarking System** - For defining how well a current CMMS is supporting best practices and for gaining maximum value from an existing CMMS
3. **The Reliability & Maintenance Excellence Index** - A powerful measurement process to validate shop level results and return on investment in maintenance improvement
4. **The ACE Team Process** - Today's most progressive and easy to use methodology for defining reliable planning times and quality repair methods. A complete *how to* procedure's manual for implementing this process of estimating
5. Electronic copies of TMEII two major books; **Maintenance Benchmarking and Best Practices (McGraw-Hill-2006)** and **Reliable Maintenance Planning, Estimating and Scheduling (Elsevier-2015)**

## Extensive Knowledge base of References to Take Home:

This workshop is based on Pete's two books:



*Reliable Maintenance Planning, Estimating and Scheduling*



*Maintenance Benchmarking and Best Practices*

TMEII provides more electronic references for all TrueWorkShops™ than any other series of courses now being offered from around the world.

Each attendee will receive e-book copies of these two major books plus many, many more valuable topic references on CD. The electronic versions are included to allow easy application and duplication of all course materials. Attendees receive all PowerPoint's used and "one of the largest Maintenance, Reliability and MRO Materials Management Glossary" currently available.

TMEII believes in providing each attendee an extensive knowledge base to support professional development well beyond actual class time.

**Register Now & Pay Online: We accept Visa, MasterCard and American Express**

# Reliable Maintenance Planning, Estimating and Scheduling

## TrueWorkShop™ Agenda

TrueWorkShop™ - 8:30 AM to 3:30 PM each day. All lunches & reference materials are included. Dress is casual.

\$1,395 per person,  
4th person Free

### Day One: Building the Foundation for Effective Planning, Estimating and Scheduling

- Introductions and TrueWorkShop™ Objectives
  - Participants define Top Priorities
  - Teams Formed for Final Presentation of Their Plan of Action per TWS Knowledge Gained
- \*Is it Maintenance Management or Maintenance Leadership?
- \*Why Your Site's Maintenance Culture requires True Maintenance Leaders, Craft Leaders and Most of All PRIDE in Maintenance!
- \*Continuous Reliability Improvement: How Future-Planners Will Impact Maintenance & Reliability Excellence (materials from a new book by your instructor)
  - A brief preview of Your Instructor's new book from Elsevier's Gulf Publishing Division
  - Titled as *Reliable Maintenance, Planning, Estimating & Scheduling – Surface Maintenance Operation* focused on oil, gas, petrochemical, and heavy manufacturing
  - Applies to all successful planning-scheduling processes (day to day and shutdown planning) even facilities, fleet and healthcare facilities management
  - Redefines how planners can contribute to reliability improvement
  - Outlines best practice tools (from this TrueWorkShop™) that planners must understand
  - Why we can Plan for maintenance and reliability excellence!
- Today's Maintenance Challenges - Planning is Critical
- \*Why many planning and scheduling processes fail to achieve maximum benefits?
- **Practice Exercise:** Define Top 5 Areas for Improvement-Begin Team Work for Final Day
- Review Cost Improvements and "Gained Value" Opportunities of MPES
- Selling the Benefits of Planning and Scheduling to:
  - Management
  - Maintenance
  - Operations
  - Purchasing and the Storeroom

### Day One (Cont'd):

- \*Why Your Maintenance Storeroom & Purchasing Support to Planning is Critical to Success
  - It starts with effective on site spares management and spares control
  - Vendor managed inventory
- How Planning and Scheduling Improves Craft Productivity and Overall Craft Effectiveness (OCE)
- **Practice Exercises:** What are Current Obstacles for More Effective MPES?
- **Practice Exercises:** Calculating Your Range of OCE Improvement Opportunities: Gained value example from planning, reliable estimating, valid scheduling and work executing with solid monitoring & control.
- Organizing and Managing a Maintenance Planning and Scheduling Process
- Planner/Scheduler Selection and Key Roles/Responsibilities
- Planner/Scheduler Job Description Examples
- \*Maintenance Best Practices Needed for Effective Planning/Scheduling (New Book Sections) key excerpts from:
  - The Scoreboard for Maintenance Excellence (to evaluate overall best practices in place)
  - The CMMS Benchmarking System (to evaluate current CMMS/EAM)
  - The Reliable Maintenance Excellence (to validate results and bottom line ROI)
  - Reliability-Centred Maintenance (RCM) for Planners
    - How Failure Modes & Effects Analysis Support Job Scoping and Trouble Shooting
    - Why Root Cause Analysis (RCA) needs to be in the Planner's and the technician's Tool Box of Knowledge
    - Key Steps for managing contractor service and maximizing their productivity
    - Risk Based Maintenance and HSE Concerns all planners must consider in job plans
- Backlog Management and Defining True Maintenance Requirements to Management
  - Define total maintenance requirements as an accurate overall backlog
- Why reliable estimates for work orders are so essential to success?

**Register Now & Pay Online: We accept Visa, MasterCard and American Express**

# Reliable Maintenance Planning, Estimating and Scheduling

## Day Two: Planning and Estimating

- Steps for an Effective Planning Process
- Screening Work Request, Evaluating the job for Scope of Work, Dealing with Scope Creep
- Information Support – The Maintenance Technical Library
- Job Research, Detailed Planning and Breakdown of Job Steps
- Job Preparation and the Planned Job Package
- Getting Feedback on the Job Plan
- Coordinating Equipment Access, Permitting, Safety and Compliance Issues
- Detailed Planning of Materials, Tools, and Equipment
- Responsibilities of the Planner/Scheduler to the Materials Management Process
- \*Materials Management's Support to Proactive, Planned Maintenance
- Why Reliable Planning Times and Estimating is Important
- Various Methods for Estimating and Work Measurement in Maintenance
- Becoming a True Maintenance Leader, Not Just a Maintenance Manager
- The ACE Team Process; **A** Consensus of **E**xperts to Estimating Maintenance Type
  - Using Craft Experts for Developing Reliable Planning Times for Benchmark Jobs
  - How the ACE Team Can Improve Repair Methods, Safety and Quality
  - Developing your ACE Team of Experts
- The ACE Team Process: An Exclusive Technique Developed, Designed and Certified only by TMEI
  - Key Steps in Developing Reliable Planning Times for Benchmark Jobs
  - Using Benchmark Job Spreadsheets for Estimating Wrench Time
  - Practical Exercise: Benchmark Job Analysis Practice
  - Factors in Determining Total Planned Time for the Schedule
  - Using the Job Estimating Worksheet for Total Planned Job Time for Scheduling
- Practical Exercise: Calculating the Planning Time for Scheduling Considering Allowance for Wrench Time

## Day Three: Scheduling, Job Execution and Measurement of Results

- Successful Scheduling Requires Effective Backlog Management
- Coordination Required by Planners for Successful Scheduling (with Case Study)
- Preparation for the Weekly Coordination Meeting
- Scheduling Techniques
- Preparing Schedules, Job Loading & Job Schedules
- Key Guidelines for Completing the Scheduling Process
- Supervisor Responsibility for Job Execution
- Handling Schedule Adjustments
- Job Close-Out, Follow-up and Schedule Compliance
- \* Measuring Bottom-Line Results for Investments in Planning/Scheduling
- \*Measuring Performance of the Planning and Scheduling Function
  - Practical Exercise: Selecting Key Performance Metrics
  - Practical Exercise: Developing the Reliable Maintenance Excellence Index (RMEI)
- Planner's Role in Project Type Work, Shutdown and Turnaround Planning Dealing with Estimating Uncertainties (Estimating, Probability and Risk)
- \*Brief Introduction to the Earned Value Analysis Technique for Major Projects
- Practical Exercise: Earned Value Analysis
- \*The Role of Technology in Maintenance Planning, Estimating & Scheduling
  - Utilize CMMS effectively for Maintenance Data Management
  - Ensuring data integrity and accuracy
  - Paperless work orders via wireless networks and electronic signature
- Stakeholder Management & Effective Communication for Successful Implementation
- Case Study: Sanofi Pasteur, Anderson, and Boein
- Team Presentations
  - Recommended Plan of Action for Improving Maintenance and Reliability in Their Organizations
- Closing Remarks and End of TrueWorkShop™

## **We Personally Guarantee This TrueWorkShop™!**

We will give you the firepower and knowledge needed to reinforce your current maintenance needs to the Top Leaders in your organization. We can personally help you make a difference in the total operations success of your organization after you attend this event!

Top Leaders must clearly understand your needs and the consequences of gambling with maintenance costs.

**Register Now & Pay Online: We accept Visa, MasterCard and American Express**

# Reliable Maintenance Planning, Estimating and Scheduling

## The ACE\* Team Process Certification

The [Certification for the ACE Team Process](#) for Estimating is an exclusive certification available only from TMEII and designed *specifically* for planners. The complete process, which ranges from selecting and analyzing benchmark jobs for actual wrench time for job tasks; developing spreadsheets; to the development of the planned wrench time.

The result is a schedule with reliable planning times that includes planned travel and other miscellaneous time which is not considered wrench time.

This process trains the planner to analyze their job tasks (that also become standard job plans) in terms of repair method, safety, quality and reliability issues.

Several delivery options are available for this exclusive, TMEII stand-alone **TrueWorkShop™** for ACE Team Process certification.

1. As a 2-day extension to our 3-day Effective Maintenance Planning, Estimating and Scheduling **TrueWorkShop™**. With pre-course and post-course work.
2. As a 2-day public session with pre-course and post-course work.
3. As a self-paced, self-study, TMEII facilitator led and directed **TrueWorkShop™** requiring no travel. **NOTE:** This training support for planners is included at no charge as part of [The Scoreboard for Maintenance Excellence](#) assessment for the client's existing or new planners.

**\*ACE is an acronym for A Consensus of Experts who knows and has performed maintenance work.**

**IMPORTANT NOTE:** TMEII is seeking three more beta sites for new ACE Team Process Application features. If you are interested please contact us. We would welcome the opportunity to discuss this option which offers many additional benefits for you and your company.

## Understanding the True Value of Maintenance:

Regardless of the type of operation, Top Leaders must understand the "true value of maintenance."

Maintenance Leaders must develop and nurture an organizational culture that clearly supports long-term continuous maintenance improvement.

[Training for Maintenance Excellence](#) supports our belief in the basics and building upon basic best practices as the foundation for advanced maintenance practices that achieve reliability and maintenance excellence.

## Even in Good Economic Times Maintenance is Forever!

## It's a 'How To' Step-by-Step Approach

This **TrueWorkShop™** will guide you step-by-step through the PM & PdM installation process, helping you to:

- Progress forward to ISO55000 compliance
- Understand how to define maintenance tasks with RCM
- Define criticality of assets, your repair problems, and goals
- Develop the optimum PM & PdM plus CBM program for your operation
- Understand RBM for the optimum safety
- Justify your investment and validate the benefits
- Develop a realistic Plan of Action
- Measure total operations benefits with your Reliable Maintenance Excellence Index
- Sell your program to Top Leaders and continue it long-term.

After this **TrueWorkShop™** you will know how to reevaluate your maintenance situation periodically with [The Scoreboard for Maintenance Excellence™](#), how to improve top priority areas, and how to get the results you want.

[Register Now & Pay Online:](#) We accept Visa, MasterCard and American Express

# Reliable Maintenance Planning, Estimating and Scheduling

## Your Instructors and Coaching Team



**Ralph W. (Pete) Peters** the Founder/President of The Maintenance Excellence Institute International is your primary instructor. His experience of over 40 years has included being a manufacturing plant manager at two sites; director of facilities management. He has had extensive maintenance experience within the US Army beginning in Vietnam (1970) and with the US Army Corps of Engineers building what is now called, the National Highway. He consults and provides maintenance best practice training in over 30 countries, written maintenance chapters in four books as well as a book on *Maximizing the Value of Your CMMS*. In 2006, he wrote and published *Maintenance Benchmarking & Best Practices* for McGraw-Hill's professional book division. In 2015 he completed *Reliable Maintenance Planning, Estimating and Scheduling* for Elsevier's Gulf Publishing Division. Pete's positive approach and his experience from consulting, allows him to be an excellent coach for today's top leaders, maintenance leaders and craft leaders. His worldwide **PRIDE-in-Maintenance** initiative will be highlighted in his next book with key topics from this universal book included in all of his worldwide **TrueWorkShops™**.

\* \* \* \* \*



**Frank Murphy, CPMM**, is President of IMS and has over 35 years of hands-on, maintenance-intensive experience. He founded IMS in 1995 to implement Best Practice and common-sense principles of storeroom design and setup, storage fixture selection, and parts consolidating and organizing. IMS provides all the "hands-dirty" services needed to modernize and set up a Lean and Reliable MRO parts storeroom: design, setup, relocation, consolidating and organizing, physical inventory, and bar-code labeling. Frank's experience includes being a lead mechanic, overhaul crew supervisor, maintenance planner and storeroom manager. He has trained over 1,200 maintenance personnel in 250 companies as a CMMS Trainer, and is a past Director of the National Association of Professional Organizers (NAPO). Additionally, Frank has authored several articles for trade publications, has presented seminars and IMS has exhibited at the Facilities Management and Lean Manufacturing/Maintenance conferences.

\* \* \* \* \*



**Dennis Delsanter** provides over 25 years experience in the design and implementation of reliability maintenance and manufacturing process work management systems. Some examples: With client participation Dennis has led the development of management systems for warehousing, preventive/predictive maintenance, operator based maintenance, planning, estimating, scheduling, and asset management. Dennis also provides the necessary skills training and management development to ensure sustainability. This requires establishing relationship of trust with those who will be the most affected by change. Typical assignments, resulting in increased reliability, work efficiency and profitability, have included: Exxon Mobil, Ashland Marathon, Koch Industries, Hercules Chemical, American Cyanamid, Beliot Manufacturing plus other companies in the paper making, food processing, steel, pharmaceutical and automotive sectors. Prior to his current career as a consultant, Dennis spent 20 years in all levels of Pharmaceutical Manufacturing. He has experience is in both human and veterinary products. Held positions in quality control, research, and manufacturing. His last position was Director of Operations for a mid-western pharmaceutical company.

## Training is Not Over When it's Over!

Your company will benefit most if you attend with a 3 or 4 person company team which will work together. You return to your organization with the new knowledge and team support for PM and PdM along with your new plans for reliability and maintenance excellence. We invite your Top Leaders, Maintenance Leaders and Craft Leaders to attend as a team. The workshop "is definitely not over when it's over." **Yogi Berra once said, "It ain't over until it's over!"**

Your session is definitely not over when it's over! Following completion of this **TrueWork-Shop™** a personalized follow-up will be scheduled for each attending organization. Our one-on-one coaching is to help you apply the key topics and to implement your plan of action. Implementation is your key to results and we want to help you make that happen!



**Register Now & Pay Online: We accept Visa, MasterCard and American Express**