

5 Ways to Measure Your Planning and Scheduling 2 Maturity Matrix



Elements		LEVEL 1 NOT ENGAGED	LEVEL 2 EXPERIMENTING	LEVEL 3 ENLIGHTENED	LEVEL 4 GOOD PRACTICE	LEVEL 5 BEST PRACTICE
OUTAGE PLANNING	Outage Organization	No formal outage organization defined. Decisions regarding the outage are made by individuals, independent of the big picture.	Outage leader implied by job title, but authority and centralization of communication and leadership not recognized. Still a high degree of individual decision making with no coordination to the big picture.	Outage leadership role defined with responsibility for communication and decision making. Organization not further defined. Leader tied to high number of decisions, resulting in slow progress and independent decision making with no coordination to the big picture.	Formal outage organization with responsibilities defined for areas such as materials management, safety, mobile equipment, contractor interface, and overall outage leadership. Team still challenged with communication gaps, delaying decisions and progress.	Fully integrated outage organization with specific roles and responsibilities defined. Clear evidence that this team works in a cooperative manner and adheres to the process. Communication and decision making is largely seamless.
	Single Outage Plan	Outage plan not formal or published. Groups work off of informal lists. Multiple plans for the outage exist (maintenance, engineering, operations, etc.).	Single outage plan developed, but the quality of the plan is severely lacking. Plan consists largely of simple work lists developed with spotty job plans. Knowledge of plan resides largely with maintenance leaders.	Single outage plan developed cooperatively with input and oversight from all affected disciplines. No critical path identified. All jobs are considered equal; no consistent view on priorities.	Level III + Critical path job for the outage identified and lower priority jobs arranged around it. Higher degree of understanding across the organization.	Level of detail on the plan to support an hour-by-hour breakdown. Plan is communicated clearly across the organization and universally understood. Scheduling conflicts between tasks extremely rare.
	Risk Analysis Performed	No risk analysis performed.	Rudimentary risk analysis performed. Some jobs are identified to be "watched more closely".	Formal risk analysis performed, but largely subjective. Level of detail does not drill down to specific recovery or avoidance actions to be taken. Largely a prioritization exercise based on risk; little or no action taken from analysis results.	Level III + Specific factors for critical jobs defined. Organization still struggles with execution of avoidance and recovery actions. Emergencies occur and focus is on quick recovery.	Level IV + Both recovery and avoidance activities identified and personnel responsibilities assigned for most critical jobs. Emergencies still occur but they are rare and organization is well prepared for them.
	Outage Process	No formal process for outage planning; resources allocated as "just-in-time" immediately prior to outage. Greatly diminished outage performance.	An outage process and cut-off dates have been established. Cut-off dates not enforced. Outage performance is poor; organization struggles to recover from outages.	Formal outage process established and routinely adhered to, covering only critical elements of the outage planning process, to include Identification, Prepare, and Execute. Process only includes those directly impacted.	Level III + Check Readiness, Execute, and Review processes incorporated. Process includes total organization involvement.	Level IV + Heavy reliance on the review element with lessons learned integrated into future outages. Measureable and quantifiable improvements to outage performance over time.
WORK CONTROL	Work Requests	Work Requests are not used; work reporting is extremely informal (verbal).	Work is requested informally in most cases. A formal system for reporting work exists, but it is overlooked and people prefer to use the phone or verbal requests.	All requested work is reported via some formal system, but only certain individuals have access to these systems. Delays in requesting work occur. Limited feedback to the requestor.	Individuals report all requested work within the same shift as the problem is noted, but multiple systems for reporting work may still exist. Some consolidation issues prevail.	Every individual is able to use a single system for reporting work with detailed information, and reports work when problem is noted. Feedback to requestor is ensured.
	Work Order Usage	Production areas receive attention based on loudest complaints. Priorities are constantly shifting.	Work Orders are managed by the planner or maintenance supervisor based on production input. No consistent method applied.	Formal system documented, but not consistently applied. Maintenance leader determines priorities.	Work Orders prioritized by either asset criticality, defect severity, or Work Order type. Formal system documented and followed most of the time.	Work orders prioritized by asset criticality, defect severity, and Work Order type simultaneously. Formal documented system consistently applied.
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WORK CONTROL	Work Order Prioritization	Work Orders rarely or never used.	Individual Work Orders are rarely issued. Blanket Work Orders are commonplace.	Individual Work Orders used for proactive work. Reactive work covered under blanket Work Orders.	All proactive and reactive jobs have individual Work Orders. Repairs/follow-up work performed under parent Work Order or PM Work Order.	All proactive and reactive jobs have individual Work Orders. Scope creep and additional work receive a separate follow-up Work Order.
	Work Order Status	Work Order Status not in use; all Work Orders entered as the same status.	Excessive number of statuses used. No one pays attention to status and they are not generally understood.	Workflow processes documented, but only understood and used by a core group. The organization as a whole does not react properly to the Work Order status. No controls over adding statuses to the system.	Level III + Controls over adding Work Order statuses to the system exist. Organization as a whole understands the statuses, but utilization of the status codes is not consistent.	Level IV + Workflow is bound by Work Order status; evidence of consistent compliance is present. Process mapped and consistently followed.
	Work Order Closeout	When the work is complete, Work Orders are often left in an open status for a long period of time, with little or no feedback provided.	Work Orders are closed with some part codes identified. No coordination delays recorded. Verbal feedback at best, but spotty performance.	Work Orders closed with part, some problem, and some reason codes identified. All coordination delays >60 minutes recorded. Written feedback provided on <50% of Work Orders.	Work Orders closed with part and problem identified as well as some reason codes. All coordination delays >30 minutes recorded. Written feedback on >50% of Work Orders.	Work Orders closed with part, problem, and reason codes identified. Required follow-up work is noted. All Work Orders have some form of written feedback provided on same shift.
	Backlog Management and Measurement	Backlog is not measured or understood.	Backlog is understood and actual performance known by a few select people. Backlog calculations largely inaccurate. No reaction to current performance.	Work Orders have estimated hours assigned and backlog is known in total number of hours. Organization struggles to do anything with this information, but it is generally accurate.	Work Order backlog is calculated in "crew weeks". "Ready to Schedule" backlog is easily identified. Appropriate reaction to backlog calculations by leaders in the organization.	Level IV + Management closely monitors backlog trends to determine proper staffing and contract labor needs. Constantly seeking ways to expand "Ready" backlog.
	Work Order History: Failure Reporting and Corrective Action System (FRACAS)	Failure data is not tracked.	Failure codes exist, but usage is spotty. Some craftspersons record them diligently, most do not.	Failure codes are entered for most Work Orders, but little or no data analysis is done. Poor knowledge of failure codes.	Level III + Organization does proper analyses and understands codes; struggles with corrective action follow up.	Level IV + The organization gains great benefit from the solutions executed as a result of the FRACAS process.
METRICS / SCORECARDS	% Planned vs. Unplanned	"0% Planned 100% Unplanned"	"30% Planned 70% Unplanned"	"50% Planned 50% Unplanned"	"70% Planned 30% Unplanned"	"90% Planned 10% Unplanned"
	Ready Backlog	Unknown or Not Measured	Less Than 1 Week Ready Backlog	1 Week Ready Backlog	2 Weeks Ready Backlog	4 Weeks Ready Backlog
	Wrench Time	Less than 25%	25% to 35%	35% to 45%	45% to 55%	Greater than 55%
	% Estimated Vs. Actual Hours	Unknown or Not Measured	50% Accuracy	60% Accuracy	70% Accuracy	80% Accuracy
	% Available Labor Scheduled	Unknown or Not Measured	30%	50%	75%	100%
	Schedule Compliance	Unknown/Not Measured	> 30%	> 50%	> 70%	> 80%

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