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How To
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What You Have Now

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The Right Resources:

Start Designing a
Planning & Scheduling
Program

by Kim Waterman

I f you need to implement a new planning and scheduling program, you're probably discovering that the task can be rather daunting. You need the right resources, the right organizational support, the right data, the right business practices, the right amount of time, the right change management approach, and the list goes on. This high level generic stuff may seem like implementing planning and scheduling just isn't within your grasp. But there are ways to achieve an environment that will support a planning and scheduling program that works with what you already have in place and takes into account what your team is able to manage throughout implementation and beyond. If you take a closer look at what you already have, putting the final touches on a successful planning and scheduling program may not really be that big a beast to tackle.

✓ Right Resourses

You already have them on staff; you just need to recognize it officially and maybe put a little more structure around what they're probably already doing. You already have the maintenance supervisor who assigns work to his or her crew. You have the crew lead who knows how long a particular job takes to complete based on how long it's taken the last umpteen times it's been completed. And you have that administrator who knows who's out sick, who's on vacation and when that big regulatory preventive maintenance (PM) is coming up that requires people from three different departments for a day and a half.

So leverage them.

There are countless studies full of funky math that will tell you that the average wrench time of any given maintenance technician is 35 percent of his or her day and that this figure will increase to 50 percent or more with the implementation of a planning and scheduling program. And that if you take

one maintenance tech out of a crew of say 10 and designate this person as the planner/scheduler, the efficiencies this person achieves will increase the overall output of the crew to the point that the team is achieving the work of what would have previously been attributed to a crew of 15 people.

There's plenty of justification here for designating a resource – or re-sources – as planners and/or schedulers. All you have to do is figure out who that person, or those people, are.

✓ Right Organizational Support

This one can be a bit trickier. If you don't have support from management to implement a planning and scheduling solution, you're fighting an uphill battle at best. You need at least one planning and scheduling champion within your organization who not only sees the value in implementing a program, but has the authority to help shape and enforce it.

How do you know if you have this person? If your enterprise asset management (EAM) implementation is meeting the needs of your user base (at

least for the most part), if that implementation is continually expanding and evolving both to keep up with technology and the changing needs of your organization, and/or if most of your users are working independently and comfortably with the EAM solution, chances are you have a champion already.

Planning and scheduling is generating a lot of buzz lately. It offers organizations already established with an EAM solution the ability to achieve greater efficiencies and cost savings while working with tools that are relatively low cost. It also allows organizations to stretch their dollars further while maintaining the same size workforce. It's pretty easy to pull together a compelling argument that will help you convince the higher-ups to at least let you pilot a planning and scheduling program. And it should be fairly easy to convince your existing EAM champion(s) that there's even greater return on investment (ROI) waiting to be achieved.

If you can't convince them to take the leap, convince them to speak with a planning and scheduling vendor. These vendors know the benefits of their business and can present convincing evidence to your organization's leadership.

✓ Right Data

You know implementation isn't as simple as installation. You already know you need the right data in your system to get the data you want out of it. You have an EAM solution and it works. You did all the legwork to get your data in place. You know that in order to implement a planning and scheduling solution, you're either going to have the appropriate data already available in your system, or you're going to have to get it in there somehow. There's no way around it.

What data do you need? It depends on your business processes, your organizational goals and the data you have available. Your best bet is to conduct an internal readiness evaluation, or better still, get an independent expert to do it for you. This assessment should examine your business processes to determine what data is mandated, on what basis scheduling will be conducted, what resulting data output will make the planning and scheduling efforts meaningful, and the frequency(ies) with which your pending schedules will be reexamined.

✓ Right Business Practices

What planning and scheduling methodology are you following? While the ultimate goal of all planning and scheduling methodologies is the same – to achieve greater organizational efficiency – the paths they follow to get there can be fairly different. How much backlog can you tolerate? How do you address break-ins that disrupt otherwise planned work? How far in advance do you schedule, to what percentage of your workload do you schedule each week and how often do you review your schedule with your team to ensure your goals are being met?

There are no right business practices and there are no wrong business practices. The best you have could be improved upon and the worst you have were implemented for reasons that seemed right at the time...to somebody.

Presumably, you'll be tracking your schedule in some kind of software, such as spreadsheet, project scheduling, or planning and scheduling. If you're willing to modify your business practices to meet the functionality of your software, the flexibility needs to exist within your organization, as well as a readiness to accept change, the people willing to participate in process redefinition and the time to do the work. Otherwise, you need software that offers you the functionality and flexibility to meet your process requirements with minimal customization.

✓ Right Amount of Time

Yes, there'll be an investment of time. How much time you'll need is determined by a few factors:

- How many people are involved? If you're making decisions by committee, budget your time accordingly.
- What don't you have? If you have all your data and your business processes, and you know who's going to be involved and that your biggest time spend will be in designing and implementing the program, you're all set. If you don't have those things, add time.
- What's your weekly commitment? With your planning and scheduling program in place, will you have regular meetings to support it? (Tip: You should.) How many people will spend how much time each day and/or each week conducting planning and scheduling activities? How many people will review output metrics and how often?

It's not hard to come up with these estimates and figures, and it shouldn't be hard to stick to them with the right plan in place.

✓ Right Change Management Approach

It's likely that the implementation of a planning and scheduling program will represent organizational change on some level.

In order to develop a change management approach that will help in your implementation, you need to figure out what the potential sticking points are and what you need to do to get around them. If you have to go through a union, you may want to alter your program approach to make the union change management process a little easier. If there are a number of resources very resistant to change, figure out why and an approach to addressing it. The "because I said so" approach can work when applied with the right pressure from the right spots in the team hierarchy, but working to achieve a willing buy-in will likely leave you with happier employees happily doing a better job in the long term.

CONCLUSION

These steps provide you with enough direction to at least get you started thinking about the things you can do to start pulling your planning and scheduling program together.

The implementation of planning and scheduling software should be one of the easiest steps to achieve in putting your planning and scheduling program in place. By the time a planning and scheduling vendor shows up to do the installation, you've already done 75 percent of the work.

Use this article to think of the different components of a planning and scheduling program that you already have in place in your organization. You're not starting from zero, you're just working to better organize what you already have.

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