

Maintenance Planner and Scheduler Minimum required Skills, Knowledge and Competency

There are specific minimum set of capabilities required of the people doing the maintenance planning and maintenance scheduling roles. The list below was developed using the Maintenance Planning and Scheduling SIPOC Diagram. Other desired capabilities are listed on the Characteristics of a Perfect Maintenance Planner document.

Maintenance Planner

No	Planner Skills, Knowledge, Competency	Purpose
1	Proficient User of the Operation's computerised information management systems	Quickly find and provide the correct information stored in the various databases used by the Planner
2	Identify and collect together an asset's operating and maintenance parameters	To know how to run an asset at its operating duty and maintain it at that level of performance
3	Identify and collect together an asset's engineering and technical parameters	Provide information to rebuild an asset to the manufacturer's specifications
4	Uses Records Cataloguing and Records Management to build and maintain a framework for all recorded asset history	Correctly store, maintain and retrieve asset historic records
5	Database management to build and maintain a framework for all documented information	Correctly store, maintain and retrieve all necessary asset information in the databases
6	Navigates document management system to find any document within 30 seconds	Correctly manage, maintain and control documents
7	Uses knowledge configuration management to ensure the correct information and data is within maintenance documents	Correctly develop and update maintenance documents with accurate and appropriate work quality and technical information
8	Correctly catalogue and describe parts for Stores catalogue	Correctly identify parts, correctly order parts, and improve and maintain Store's Catalogue accuracy
9	Select suitable condition monitoring technology and methodology	Prove the condition of an asset and postulate on its likely future operating capability
10	Identify and specify key asset operating conditions and component health parameters	To define exactly what must be achieved to produce an asset that is surely reliable and will operate properly
11	Develop work quality control standards and set quality assurance tests (e.g. ITP, ACE 3T)	Ensure an asset is built correctly, will function to manufacturer's specifications and operate correctly
12	Understands the design engineering, manufacture and construction of an asset	To correctly rebuild an asset to a state that ensures reliability and proper operation
13	Understands proper conditions required for the components' in an asset	Confidently decide if a parts is in good condition or not to deliver long service and operation
14	Uses best practice workflow controls and task management practices	To ensure maintenance work tasks are efficiently done right-first-time
15	Understands and applies business and operating risk assessment process and risk mitigation selection	To fully appreciate the business risks that arise in the use of plant and equipment and to control that risk through appropriate maintenance practices
16	Does task and job risk assessment and selects the right risk mitigations	To ensure a maintenance work task and SHE risks are done under ALARP and without time delays
17	Knows and uses best task time management practices	To manage and organise task requirements, people and resources effectively and efficiently to correctly complete a work order on time
18	Competently develops and maintains CMMS content, asset hierarchy structure, information databases, Stores Catalogue	Able to single handily develop, maintain and support information structures and databases of the assets that they plan work orders for
19	Correctly develops work order job costing to $\pm 10\%$ accuracy every time	To fully appreciate the financial implications of a job and use that knowledge to make wise financial decisions and manage the maintenance budget
20	Expertly navigates CMMS, asset hierarchy structure, information databases, Stores Catalogue and finds required information within 30 seconds	Find any information and confirm the status of any work order task requirements

21	Proficiently runs meetings and get consensus and agreement to action decisions	Ensure all parties are fully aware of work order requirements and the actions needing to be done to keep the job on schedule
22	Develop purchasing and contract specifications, including selecting appropriate and correct technical standards and specifying special deliver requirements to protect items and parts reliability	Purchase the right equipment, parts and materials to prevent operating risk and minimise future operating life maintenance costs
23	Applies best order delivery and stores receiptal practices	To track all orders along the supply chain and ensure purchased items and services are on schedule
24	Interrogate databases to develop management reports, performance graphs and provide financial information	To monitor department, equipment and maintenance process performance in order to find improvement opportunities
25	Competently select PM and PdM strategies, activities and scheduling of maintenance intervention from first principles to prevent failure causes and failure modes	Correctly identify the operating life maintenance strategies to apply to an asset and each of its parts, and select when to perform the associated activities to maximise asset operating profit
26	Able to develop complete Maintenance Budget for the assets they plan for	Permits sound forecasting of cash flow and allows inclusion of new maintenance strategies into operating plans
27	Fully conversant with best Stores Management practices	Ensure spare parts are kept reliable while in storage, that stocked parts are replenished in time, and all purchased parts are safely stored and found

Maintenance Scheduler

No	Scheduler Skills, Knowledge, Competency	Purpose
1	Proficient User of the Operation's computerised information management systems	Quickly find and provide the correct information stored in the various databases used by the Scheduler
2	Uses best practice workflow controls and task management practices	To ensure maintenance work tasks are efficiently done right-first-time
3	Applies job risk assessment and risk mitigation proactively to stay in-front of potential problems	To ensure each maintenance job is done under ALARP operational risk and without delays
4	Understands and applies business and operating risk assessment process and risk mitigation selection	To fully appreciate the business risks that arise in the use of plant and equipment and to control that risk through appropriate maintenance practices
5	Knows and uses best job time management practices competently	To manage and organise parts and materials, work requirements, people, contractors and resources effectively and efficiently to complete the daily work schedule
6	Fully understands and can identify and explain an operating asset risks and competently knows how to mitigate and control them	To ensure all safety preparations have been made to truly address all job and work task risks
7	Uses interpersonal negotiation skills and influencing skills to maintain the agreed schedule	Convince people to action agreements in a timely manner that maintains the weekly schedule
8	Competent in project management of multi-disciplinary crews on large construction works	Identify project risks and control them to ALARP
9	Competently develops bar charts and PERT diagrams	Ensure schedule work can confidently be achieved with available manning and resources
10	Proficient at manpower and resource levelling	Ensure sufficient and appropriate skills and capability are available at the right time to do a work order
11	Expertly navigates CMMS, asset hierarchy structure, information databases, Stores Catalogue and finds required information within 30 seconds	Find any job specific information and confirm status of any scheduled work order requirements
12	Proficiently runs meetings and gets consensus and agreement to action decisions	Ensure all parties are fully aware of schedule requirements and the actions needing to be done to keep the daily schedule