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The Value of Compliance: Implementing a Successful Work Order Management System

The identification and execution of maintenance work can be extremely time consuming and expensive when not managed properly. However, the use of a well-constructed, site-supported Work Order Management (WOM) process can help to reduce those costs while also increasing efficiency.

This article outlines the essential components required to develop a functional WOM system. Beginning with management buy-in and moving through planning and scheduling to close-out, it highlights the small steps managers of all sites can take to improve site-wide maintenance and efficiency.

Essential Support

First, for a WOM system to function well, site-wide support is crucial. Everyone involved in requesting, planning, scheduling and executing work at the site must follow the same WOM system. Top management support is essential in order to secure widespread adherence. This way if anyone is unclear about or chooses not to follow the system, top management can guide the culture of the site by encouraging compliance.

While everyone's support of and compliance with the Work Order Management system is required, Operations' active involvement will have the greatest effect. As the customer of maintenance activities, Operations request the majority of the work and control the availability of equipment. When Operations understand the importance of complying with the Work Order Management system, following the system becomes much easier for the rest of the participants.

Notification and Communication

The Work Order Management system begins with someone discovering that repair work is required. No matter what the site's CMMS is, work requests or notifications are created. A daily Notification Review Meeting, attended by top Operations, Maintenance, Inspection and Engineering key stakeholders, enables the site to operate within a culture which provides all the required information when requesting work.

During this review meeting the participants check the quality of the required information: specific functional location of the equipment, description of the problem, priority of the work and a reasonable future date by which the work needs to be started. Work requests submitted in this manner become the basis for the planner's priority list when planning work.

Planner Priorities

The planner should now be able to access the CMMS and clearly understand what equipment requires repair, what the issue is and when the work needs to be start-

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ed. The planner can begin planning the highest priority work first. He can do this without intense instruction due to the high quality of information provided in the work request. Once the work is fully planned and the required material has arrived on site, the weekly scheduling process can begin. Scheduling should never occur on the "promise" of material delivery.

Liaison with Operations

The weekly schedule is created by providing Operations with a comprehensive list of all planned, ready to schedule work. The base of this work – world class dictates 60% or higher – should be Preventative Maintenance (PM). The remainder of the available man-hours is scheduled based on the repair work which is ready to schedule. Operations review the list of work and provide maintenance with a yes/no answer regarding the scheduling of PM.

If Operations is unable to make equipment available for PM work, an explanation must be provided. For the repair work, Operations provides the order in which it would like the work to be done, a 1 for the work which it deems most important then a 2 for the next most important and so on until the list is complete. The routine maintenance scheduler then takes this information and creates a resource loaded schedule. This resource-loaded schedule is reviewed by Operations, who provide correction and agree to support the execution of the schedule by making the equipment available when the repair is scheduled.

Compliance and Close Out

Compliance to the weekly schedule can be achieved through active supervision of the craftsmen completing the work. Having front line supervisors actively supervise the work will increase the productivity of craftsmen through the timely elimination of issues encountered. Supervisors who provide craftsmen with this support can keep the craftsmen working on value added activities more often. To be truly effective, a set of KPIs to measure performance is needed. Front line supervisors utilize these measurements to identify gaps in performance and address issues with the backing of all those involved in the Work Order Management system.

The final step in the Work Order Management system is the punctual close out of completed work. Closing out of work in a timely manner makes available the information needed for the KPIs. The minimum KPIs for an effective Work Order Management system include: craft productivity, PM compliance, schedule attainment and lost time tracking. These metrics will provide management across the site with the information necessary to continuously improve the system.

In order to prevent your backlog from growing, Operations must allow Maintenance to work all jobs to 100% completion; this means taking down scaffolding and replacing insultation.

The Value of Compliance

The entire site will benefit from compliance to the WOM system. Operations will benefit from an increase in reliability and therefore uptime. Reliability will improve through the completion of PMs and will be followed by a surge in uptime. The maintenance department will benefit from a reduction in maintenance labor cost as work that is planned and scheduled is less costly – the "rule of thumb" is 3 to 4 times less – than work executed in a reactive mode. Reduced maintenance labor cost will first be realized as less overtime is needed and, as schedule compliance increases, straight time hours will be reduced as well.

Not every site utilizes or complies with a Work Order Management system. However, by supporting a well-developed system with all the essential components, employees will be challenged to perform better and site reliability as a whole will increase. By using Work Order Management to reduce maintenance cost, companies will not only boost efficiency but will set themselves on the path towards greater productivity and ultimately, profitability.