What and Who Makes a Good Planner/Scheduler

Those of you who have sipped my “Mike’s World Kool-Aid ®” already know my thoughts on the planning and scheduling of maintenance work, the rest of you should take a big gulp!

Without a doubt planners are the single most important organizational and process change you can make when developing or restructuring your maintenance team. A good experienced planner is worth more than some of your best technicians. For those of you who are not familiar with the planner concept it may be difficult to understand how this is possible.

The reason the planner function is so important is by developing good work plans, and then good work schedules, the planner improves the performance of all technicians. It improves work quality, work quantity, and work efficiency. A good planner can plan work, procure parts and supplies, and schedule all of the work for a crew of approximately 15 technicians. Within week or two it will appear that you have added 1 or 2 additional technicians to your crew due to the increased amount of work your team is completing each and every week. If you are curious about what is in a good work plan check out the tip of the month from December 2012: Work Order Planning - How Many Details do You Need?

So how do you find and select a good planner? Before we start interviewing candidates let’s discuss what traits and experiences a good planner needs to have.

A planner should be the following:

- **Skilled craft people** - in the trades they plan for
- **Experience** - in your business and organization
- **Leadership skills** - take charge personality
- **Organizational skills** - neat, orderly, and systematic work style
- **Office technology skills** - software tools and computer competence
- **Project management skills** - ability to organize work with multiple tasks and timetables

The best method for finding a good planner is from within your existing maintenance staff. The majority of all successful planner/schedulers are developed from within your own organization. This ensures you have a planner that knows your business including all of you assets, systems, and equipment. The standard way this is done is to:

1. Take your best craftsman who has the potential to be a good planner
2. Remove them from the crew
3. Begin to develop and fine tune the planner skills
Now I know some of you are reading this and saying to yourself “gee whiz, Mike is crazy this time he wants me to take my most valuable employee(s) and put them behind a desk pushing paper instead of fixing stuff!! No way this is going to happen!”

Well I am serious! Pull them out of the crew, give them all the tools a planner needs, and start them off with concentrating on finding parts for all upcoming work. Over time begin to add detailed plans to the work requests and lastly begin to develop work schedules. Now I admit it will be difficult at times when your customers are demanding you put “Mr./Ms. Fix it All” back in the field to help with problems and in the early days you may need to do this from time to time. But long-term you need to tell the new planner to lock up their tools and focus on being a full time planner. I have even suggested to maintenance managers that they take the new planner’s tools and lock them in their office. The point being is you must use a little discipline to get the program going and to keep it going because the end result will far outweigh the problems during the startup phase of the planning process.

If for some reason you feel you don’t have a qualified planner candidate in your existing personnel then you might need to advertise outside of your company. This is usually not as successful as developing from within but it may be your only resort. If you go outside to find a planner be very certain the planner is good enough in all aspects of the job responsibilities to allow them to fit in with your existing culture and personalities. Over the years I have worked with wage and salaried planners. If you use wage planners they should be your highest paid wage employee or at least in the same range as foreman or lead technicians if they have supervisory responsibilities. If you decide to use a salaried position they should be paid in the same range as your supervision team. If you need to go outside to find a planner/scheduler placing them in the salaried ranks will probably be more successful than you placing them in the wage ranks.

Keep in mind if your existing maintenance team is not large enough to warrant a full time planner you can make it a part time work assignment. In this case, your best craftsman may plan one day a week or only on Friday afternoons or some similar schedule. The key is the planning function or process must exist at some level in order for you to improve your teams’ quality and efficiency.