



## TACKLING A SELF-ASSESSMENT

As we have discussed the method for presenting some sort of self-assessment for our monthly readers you quickly realize it is not an easy task. The key is to make it as simple as possible and, at the same time, make it a meaningful tool that will provide benefits.

Many of you know the assessment component of the consulting business is normally the easiest part of the analysis; it is the solutions component which takes time and experience to properly complete. Most organizations realize they have problems and quiet often know what they should be doing to fix the situation. But often they do not have the experience and knowledge to develop a Master Plan that has enough granularities to provide useful, detailed information.

So my challenge is to provide you a relatively simple self-assessment that will give you a snap shot of where your organization is currently. And, at the same time, give you some ideas of things that need to be changed or improved within your management practices and culture.

When we perform assessments and analysis we concentrate on as many as 20 different areas to establish a clear picture of a client's culture and management practices. Here we will focus on the areas I consider to be the most important and which also have considerable consequences towards your efforts to improve your asset reliability and maintenance program.

I will give you a few statements in is each category. Review the downloadable file for a mini assessment matrix. Color in each field with the level of completion you have in each field. Remember; be honest with yourself as higher ratings will not fix anything.

Below are some of the simple questions you need to ask yourself about your organization. Go to the downloadable file for more content detail.

### Asset Data Management

1. You own a computerized maintenance management system
2. Your critical assets are populated in the data bases with name, rank, and serial number
3. Staff is trained on its use
4. Work orders are written for 95% of all work completed
5. Completed work orders are review, coded, and closed on a timely basis



### Preventive Maintenance (PM)

1. The value of a PM program is understood by all
2. PM check lists exist for all critical equipment
3. PM's are scheduled a year in advance (unless conditioned based)
4. Major discrepancies found during PM's are discussed and reviewed
5. PM compliance is part of yearly personal performance reviews
6. 10% of all completed PM's are audited yearly

### Work Planning and Scheduling

1. Unusual work requests are discussed to determine best approach
2. A managed backlog of work exists and is reviewed on a regular basis
3. All non-reactive work has some planning, parts listed, special tools and equipment, and unusual tasks listed
4. Weekly work schedule is discussed and published each week
5. Weekly work schedule is measured for compliance
6. 80% of all completed work is planned, scheduled, and has parts kitted prior to the start of the work week

### Parts and Supplies

1. Management control exists for buying parts and supplies
2. Designated supply areas exist
3. Supply areas and rooms are secured
4. All parts usage is documented on asset work orders
5. Critical spares are documented and secured
6. Inventory is optimized based on usage trends

### Performance measures

1. There are no current maintenance based performance measures
2. Work order backlog is documented
3. Reactive versus planned work is measured
4. PM compliance is measured and accountability exists
5. Weekly work schedules are measured for compliance
6. Yearly auditing of all maintenance policies and procedures are audited on a yearly basis



If your score and colors are in the red and yellow then you have a little work to do. Keep in mind that if you scored low in each category you have higher levels of “chaos” in your daily asset management and maintenance life. Whenever you have “Chaos” you will have:

- Higher labor costs
- Higher parts costs
- Lower work quality
- Lower morale
- Lower customer satisfaction
- Shorter asset life
- Increased safety incidents

This all equates to you getting less sleep at night, more calls on weekends and vacations, and an unhappy or bumpy home life.