# Advanced Shutdown and Turnaround Management

25 – 29 January 2027
Johannesburg (South Africa)

Dubai - UAE: +971 4 450 5697
Istanbul - Türkiye: +90 539 599 1206
Amman - Jordan: +962 79 712 3347

# Advanced Shutdown and Turnaround Management

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Advanced Shutdown and Turnaround Management for Experienced Leaders is a 1-week course for people who already lead or coordinate plant shutdowns, turnarounds and outages. It moves past the basics to work-list prioritization, budget setting, KPI-based execution control and judging whether an event succeeded. You leave with a Turnaround Execution Control Plan for your next event from this advanced shutdown and turnaround management course by Mercury Training Center.

## About This Course

Experienced turnaround teams still overrun budgets and schedules when the work list grows unchecked and progress is judged by feel. To follow, you should already have taken part in planning or running at least one shutdown. You work on cases from process plants and power stations and build your own control plan as you go.

## Who It Is For

- Leaders accountable for a turnaround's scope, budget and safe restart.
- Maintenance and reliability leads who decide which equipment work enters the event.
- Operations leads who hand plant over for shutdown and accept it back for startup.
- Planning and cost control leads who set baselines and report progress during execution.
- Contractor managers who answer for their crews' productivity and safety.

This course is not for newcomers who have never worked on a shutdown, who will gain more from an introductory turnaround management course, nor for schedulers who want detailed scheduling software practice, who are better served by a course on planning and scheduling tools.

## Competencies You Will Build

- Event Strategy Setting: you define what the event must achieve and how success is judged.
- Work-List Challenge: you test every proposed job against risk and reliability need before it enters the scope.
- Budget Control: you set an event budget with contingency and hold the team to it during execution.
- Execution Monitoring: you run daily KPI reviews and act on variances.
- Contractor Leadership: you align contractor and owner teams on roles, targets and safety expectations.
- Post-Event Evaluation: you measure the event against its targets and feed the lessons into the next one.

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## What You Will Be Able to Do

By the end of the course you will be able to:

- From a draft work list, rank each job by risk and reliability value and freeze a defensible scope.
- Given a frozen scope and resource estimates, set an event budget with a justified contingency.
- Using a set of execution KPIs, read a daily progress report and decide the corrective actions.
- Given several overlapping events on one site, sequence them to avoid clashes of crews and equipment.
- From a risk register, build risk responses into the event plan rather than a separate document.
- Using post-event data, judge whether the event met its targets and record the lessons for the next one.

## Course Content

## Day 1: Turnaround Strategy and Leadership Organization

- Shutdown Planning Strategy Linked to Plant Reliability and Production Goals
- Recurring Shutdown Problems Diagnosed From Past Events
- Management Planning Milestones From Event Approval to Startup
- Turnaround Organization Chart and Leadership Roles for Owner and Contractor Staff
- Event Success Criteria Agreed With Operations and Senior Management

## Day 2: Scope Challenge and Work-List Prioritization

- Plant Shutdown Preparation and Maintenance Handover Requirements
- Work-List Challenge Meetings Using a Risk-Based Prioritization Matrix
- Work Breakdown Structure for a Large Process Unit Turnaround
- Scope Freeze Rules and Late-Addition Approval Process
- Critical Path Method and Short-Cut Planning Methods for Leaders Reviewing a Plan

## Day 3: Budgets, Materials and Contractors

- Event Budget Built From Scope, Resource Estimates and Contingency
- Materials Planning and Control for Long-Lead Items
- Contractor Selection, Kick-Off and Performance Expectations
- Multiple Project Scheduling Across Overlapping Site Events
- Safety, Quality and Environmental Requirements Built Into Contract Terms

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## Day 4: KPI-Based Execution Control

- Execution KPI Set for Progress, Cost, Productivity and Safety
- Daily Progress and Productivity Tracking Against the Baseline
- Cost Control and Forecast-to-Complete During Execution
- Risk Management Integrated Into the Shutdown Plan and Daily Reviews
- Emergent Work Handling and Escalation Decisions on Shift

## Day 5: Leading and Evaluating an Event in Practice

- Exercise: Work-List Challenge on a Refinery Unit Case
- Exercise: Event Budget and Contingency Review for a Power Station Outage
- Exercise: Daily Execution Review Using Sample KPI Reports
- Post-Event Evaluation Against Success Criteria and Lessons-Learned Capture
- Turnaround Execution Control Plan Completed for Your Next Event

## Case Studies and Exercises

The following are suggested activities and may be adapted to the group.

- Case study: a refinery unit turnaround whose work list doubled during preparation; you decide which jobs to defer.
- Case study: a power station outage running behind schedule; you analyze the KPI reports and choose recovery actions.
- Exercise: a petrochemical plant with two contractors sharing one area; you produce an interface and escalation plan.
- Exercise: a fertilizer plant after restart; you judge the event against its success criteria.

## What You Take Back

You take back the Turnaround Execution Control Plan, the document that ties your next event's scope, budget and KPIs to the reviews that keep it on track. In your first month back you use it to run a work-list challenge, confirm the budget and agree the reporting routine with your team.

- Event success criteria and a scope freeze record.
- An event budget with contingency and forecast rules.
- An execution KPI set with a daily review agenda.
- A post-event evaluation and lessons-learned template.

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## Quick Answers FAQ

### What experience do I need before advanced shutdown and turnaround management training?

You need to have worked on at least one shutdown, turnaround or outage. You should already understand work lists, schedules and permits, because the course builds on them.

### How does advanced shutdown and turnaround management differ from an introductory turnaround course?

An introductory course walks through the phases of a turnaround. The advanced level assumes you know them and concentrates on leaders' decisions: what to cut from the work list, how much contingency to hold and when to act on a KPI.

### How do you measure whether a shutdown or turnaround succeeded?

You measure it against criteria agreed before the event: safety, duration against plan, final cost against budget, scope completed and plant reliability after restart. Without agreed criteria, success is judged by opinion.

### What do I take back from advanced shutdown and turnaround management training?

You take back a Turnaround Execution Control Plan for your next event, with success criteria, a budget with contingency and an execution KPI set.

### For Your Manager

After this course, your team member can challenge the work list, set a budget with justified contingency, run KPI-based daily reviews and evaluate an event against agreed criteria. They return with a Turnaround Execution Control Plan for the next shutdown, first used at the scope challenge and budget approval stage of that event.

training@mercury-training.com
www.mercury-training.com