



Maintenance Work Planning, Scoping & Packaging Fundamentals



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Introduction:

In today's competitive and safety-critical industrial environment, effective maintenance planning and packaging are essential for maximizing asset performance, minimizing downtime, and controlling costs. This Maintenance Work Planning, Scoping, and Packaging Fundamentals course provides professionals with a comprehensive understanding of structured planning processes aligned with global maintenance standards.

Participants in this Maintenance Work Planning, Scoping, and Packaging Fundamentals training will learn how to accurately scope work, efficiently package tasks, and integrate planning with digital CMMS platforms, such as SAP PM and Maximo. By mastering modern techniques like WorkFace Planning WFP, job plan standardization, and resource bundling, professionals can significantly enhance execution reliability.

The Maintenance Work Planning, Scoping, and Packaging Fundamentals program covers essential quality and safety integration, including permit systems, LOTO, and SIMOPS. Attendees will gain insight into key performance indicators KPIs, audit mechanisms, and continuous improvement practices. It is a practical, performance-driven, and industry-leading approach that ensures lasting value for organizations.

Targeted Groups:

This Maintenance Work Planning, Scoping, and Packaging Fundamentals training targets professionals seeking specialized knowledge and skills:

- Maintenance planners and schedulers.
- Maintenance engineers and supervisors.
- Reliability and asset management professionals.
- CMMS users SAP PM, Maximo, etc..
- Turnaround and shutdown coordinators.
- Operations and production support engineers.
- Health, Safety, and Environment HSE officers.
- Maintenance and project team leads.
- Technical inspectors and QA/QC professionals.
- Professionals involved in work permit systems and compliance.

Course Objectives:

Participants will achieve the following objectives by completing the Maintenance Work Planning, Scoping, and Packaging Fundamentals course:

- Define core concepts and lifecycle stages of job planning.
- Differentiate between planning maturity levels and apply relevant models.
- Integrate planning processes within leading CMMS tools.
- Conduct comprehensive job scoping using site inspections and asset validations.
- Organize tasks effectively with logical sequencing and manpower planning.
- Estimate durations and resources using expert input and standard norms.
- Identify safety-critical requirements and high-risk job parameters.
- Create job packages with drawings, permits, and reusable templates.
- Apply digital job pack systems and align with standard job libraries.
- Select the appropriate work packaging methods based on trade, location, or task type.
- Map workfront readiness and apply job card strategies.
- Coordinate schedule integration and crew-based assignments.
- Align maintenance planning with QA/QC, SIMOPS, and industry standards.
- Monitor and evaluate KPIs such as plan accuracy and wrench time.
- Apply continuous improvement cycles to planning effectiveness.

Targeted Competencies:

Participants will gain the following competencies during the Maintenance Work Planning, Scoping, and Packaging Fundamentals program:

- Job planning lifecycle understanding.
- CMMS-based maintenance integration.
- Scoping and task breakdown analysis.
- Resource and materials coordination.
- Safety and compliance planning.
- Work packaging optimization.
- KPI monitoring and reporting.
- Execution readiness assessment.
- Interdisciplinary team coordination.
- Continuous process improvement.

Course Content:

Unit 1: Foundations of Maintenance Planning & CMMS Integration:

- Core definitions, responsibilities, and the maintenance planning cycle.
- Planning maturity models and assessing them.
- Integration with Computerized Maintenance Management Systems SAP PM, Maximo.
- Role of planners in the asset management lifecycle.

Unit 2: Scoping & Job Detail Structuring:

- Site walks and inspection techniques.
- BOM accuracy and asset hierarchy validation.
- Incorporating inspection results into work orders.
- Task sequencing, logical dependencies, and milestone planning.
- Estimating manpower using SME-based and industry norms.
- Tooling, PPE selection, and permit planning.
- Preparing for high-risk jobs: confined spaces, LOTO, hazardous areas.

Unit 3: Job Pack Development & Digital Planning:

- Standard components of job packs include JSAs, permits, and drawings.
- Creating reusable job templates for repeatable tasks.
- Digital job packs and integration into CMMS and mobile platforms.
- Building job libraries and task standardization.

Unit 4: Work Packaging Strategies & Execution Readiness:

- Concepts of WorkFace Planning WFP.
- Discipline-based vs. location-based packaging strategies.
- Mapping workfront availability and constraints.
- Developing daily/shift job card systems.
- Aligning packages with resource allocation and shift schedules.
- Bundling work orders for optimal crew productivity.

Unit 5: Safety, Quality & Performance Governance:

- QA/QC requirements in maintenance planning.
- Risk and safety permitting systems PTW, SIMOPS.
- Aligning plans with standards API, ASME, site-specific policies.
- Planner KPIs: plan accuracy, wrench time, schedule compliance.
- Creating visual dashboards and conducting planning audits.
- Driving continuous improvement through root cause analysis.

Final Insights & Key Takeaways:

Effective maintenance planning goes beyond scheduling tasks—it integrates strategy, safety, quality, and execution readiness. By mastering job scoping, digital packaging, and KPI governance, participants contribute directly to asset reliability and operational efficiency. This Maintenance Work Planning, Scoping, and Packaging Fundamentals course equips professionals with the tools and methodologies to enhance planning maturity across various industries. Ultimately, strong planning leads to safer, leaner, and more predictable maintenance outcomes.