



Avoiding the 13 Pitfalls of Planning & Scheduling

A Practical Guide to Planning & Scheduling Success





World-class organizations cannot succeed without implementing an efficient and effective planning and scheduling process. It is one of those cornerstone practices that can elevate an organization from average to "Best-in-Class." Yet many still struggle to implement this process effectively. This paper explores **13 critical pitfalls in the deployment of Planners/Schedulers** that can prevent you from achieving operational excellence and what to do about them.



Picking the Wrong Person as Planner

The Planner position is one of the most critical in any maintenance organization. Choosing the right person with the right skills is paramount. The Planner is responsible for improving the overall utilization of the maintenance team. To succeed, this role must be filled by your very best. Management must understand and evaluate the necessary capabilities before making a selection.



Inadequately Training Planners

Even the best individuals will need thorough training. They must master the CMMS, know how to process and plan work requests, generate reports, and understand kitting and staging. Planners should be trained to an administrator's level, just short of system security access. In many plants, Planners can't even write work orders. To avoid this pitfall: Train, train, train.

3 Using Planners as Relief Personnel

One major mistake is treating Planners as relief or backup staff for supervisors, parts expeditors, or other roles. This dilutes their effectiveness. A Planner who is truly fulfilling the planning role will not have time to do anything else.

4 Using Planners for Emergency or Unscheduled Work

Planners must not be drawn into reactive work. Yes, they know the parts and tools, but pulling them into firefighting delays future work and keeps you stuck in a reactive mode. Planners should be preparing tomorrow's work, not reacting to today's crisis.

5 Planning Work from a Desk

Some Planners assume they know the job well enough to plan from a desk. This is a trap. Always visit the job site. Conditions may have changed, and overlooking issues like access or safety risks ineffective planning. Planning is not a desk job.

6 Improperly Allocating Resources and Material

Job sequencing is vital. How often do you see mechanics waiting around for other teams to finish? Planners must build job plans that allow all tasks to proceed efficiently, with materials and tools ready when needed.

7 Providing Poor Job Instructions

"Repair the machine, or change the belt" are not acceptable job descriptions. Planners must give clear instructions that allow even a new technician to perform the task. Thorough documentation reduces confusion, downtime, and rework.

8 Not Providing Feedback

Without post-job feedback, Planners can't improve future plans. Estimated vs. actual data, including time, tools, and materials, should be captured to build more accurate future work packages. If your data entry ends at "complete," you're missing vital insight.

9 Not Kitting and Staging

Planning means full preparation. This includes ensuring all parts and materials are kitted and staged in a secure location. Don't assume a storeroom clerk handled it correctly. Planners must verify kit accuracy and location.

10 Asking Mechanics for Feedback and Not Making the Changes on the Job Plan

Mechanics are closest to the work and often spot flaws or improvements in Job Plans. When they suggest edits, such as missing steps, better sequencing, or tool changes, act on them. Ignoring this feedback discourages engagement and leads to stagnant, low-quality plans that fail to evolve with field realities.

11 Poor Coordination with Operations

Maintenance schedules must align with operations to ensure equipment is ready and available. Miscommunication can result in machines still running, unsafe conditions, or missed windows—leading to delays and wasted wrench time. Regular coordination and clear scheduling communication are key to avoiding these issues.

12 Poor Backlog Management

A Planner's backlog must be clean and accurate. Eliminate duplicate or obsolete jobs. Format reports for easy review. Group by equipment first, then sort by priority. This helps identify opportunities for bundled tasks.

13 Metrics

Avoid overwhelming the team with metrics. Choose those that are actionable and easily understood. Managers don't have time for 10-page reports. Use clear visuals and graphs to convey status at a glance.

Staying on the Road to Success

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