

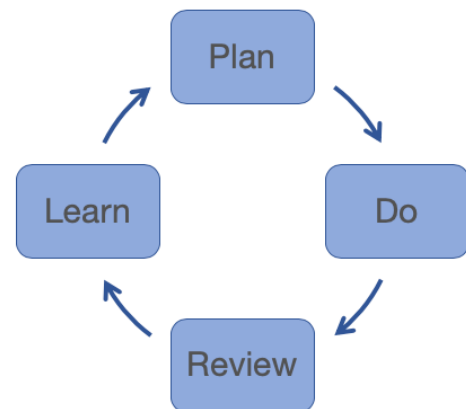
## Fact sheet – The planning cycle

### Introduction

There is a phrase, *'the squeaky wheel gets the oil!'* One key thing that we must ensure as we set up planning processes is that we don't get focussed on solving only the loudest noise. Often in rail and aviation running/daily maintenance the loudest noise is to keep service running for tomorrow. That is important, but what is important too is what is service looking like in a week's time, and how much is this service costing? The biggest shift in philosophy in a plan-led organisation is the move from a service at any cost mentality to **service at the right cost**.

During the course we spoke of the leadership behaviour set required in moving from super-hero to predictable mentality; in this fact sheet we address the planning cycle and the importance of each phase of it. The planning cycle is simply a derivation of the Deming cycle; Plan, do, review and, learn. Efficient organisations have realised that the review and learn phases are critical to ensuring cost and quality are also maintained. There are three elements in any effective planning process:

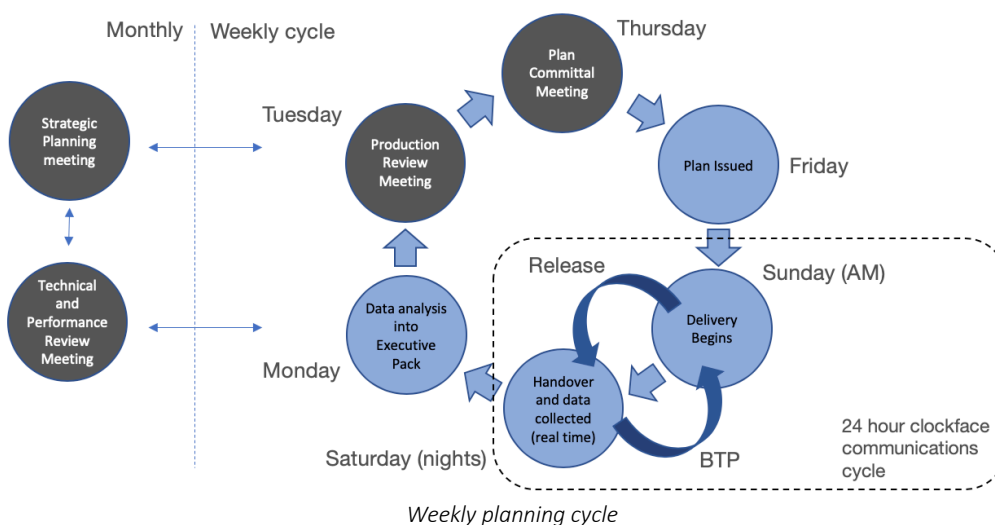
- ❖ The planning cell (discussed in the fact sheet – the planning team)
- ❖ The planning cycle and the
- ❖ Drumbeat communications



### The weekly planning cycle - leadership

If you haven't already done so it would be worth reading the fact sheet on long-term planning as the weekly plan we discuss here is merely a high-definition version of the longer-term (strategic) plan. As we can only successfully rally resources beyond the 13 week point, to control costs and quality we have to be focussed in the future – buying time for today if you like.

The purpose of the weekly planning cycle is to govern the running maintenance and ensure that the daily activity is channelled in the right direction to deliver service, at the right cost and vehicle reliability. Many organisations I visit suffer short-termism, in that to protect service tomorrow the plan is built in the very last minute, and as such is completely reactive. The weekly cycle takes your organisation to a proactive point for your running maintenance.



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In a plan-led organisation there is only one plan that all work to – ALL WORK TO, the plan becomes King. The plan is developed by the planning cell using all the intelligence and inputs available. They build the most viable plan that delivers the right service, but one that also utilises all the available depot and labour capacity. Some of the philosophical shift required is that Planning become responsible for setting work output levels, rather than Production teams. Planning are held accountable for ‘spending’ all the resources, and in doing this they would evaluate where resources are being perished. The review meeting challenges the plan and the delivery of it to continually improve the process, week on week.

The plan is developed by the planning cell and agreed (or committed to) by all parties; Production, Materials, Engineering, and Operations. All now work to this plan and make best endeavours to deliver the plan, or collectively change the plan if situations dictate. The week following delivery, a review meeting is convened to look at how well the plan and the delivery of it performed – naturally the KPI here will be around Service, Cost and Quality. **Plan stability** measures the ability of rolling stock control to ‘feed’ the line accurately; **Labour utilization** considers the planned use of resources; **Productivity** considers how well those resources were deployed. This plan, deliver, review cycle is continuous.

As can be seen in the chart above the cycle is continuous but for the ease of description we shall say it starts with the **committal meeting**.

### Plan committal meeting

The purpose of this meeting is to bring together all the elements that are required to make up the plan. Well, if being honest they should have already been brought together and the meeting is about committing to the plan.



A typical attendee list might look like this:

	Person	Inputs
Chair	Fleet planning manager	<ul style="list-style-type: none"> <li>◆ Provide meeting LEADERSHIP</li> <li>◆ To ensure the plan meets the service needs at the right cost and reliability profile</li> </ul>
Required attendee	Senior Production Manager	<ul style="list-style-type: none"> <li>◆ Labour capacity for the following week</li> <li>◆ Facility constraints for the following week</li> </ul>
Required attendee	Materials manager	<ul style="list-style-type: none"> <li>◆ Materials availability to meet the plan proposed</li> <li>◆ Upcoming known materials challenges</li> </ul>
Required attendee	Engineering lead/manager	<ul style="list-style-type: none"> <li>◆ To provide details of any specific engineered defects</li> <li>◆ Reliability updates etc.</li> </ul>
Required attendee	Control room/rolling stock control	<ul style="list-style-type: none"> <li>◆ To update of any service challenge to the proposed plan</li> </ul>

“An agreed and shared plan that delivers the business objectives AND utilises all the resources of the business in the most effective manner”

- Matches load and capacity
- Manages defects (non-routine) work
- Manages constraints
- Builds contingency

The key thing that the chair of the committal meeting must ensure is that all people are walking away working to the plan. Check the body language and if needs be drill deeper. All must leave the meeting with best endeavours to deliver the plan, a plan that all have agreed to.

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### Review meeting

In my experience of plan-led in organisations, especially ones such as rail running maintenance where the pace is undoubtedly frenetic, this meeting always gets dropped. ALWAYS!! Because in the race to deliver service tomorrow the look back is not helping that particular task and so the review meeting is seen as an unnecessary burden. You almost can ‘feel’ the tension ease as service is made....then tonight we do the same thing over again – no review means, no learning. No learning means you will never improve performance!



So, let us be very clear what the reason for the review meeting is. Effective planning established what will deliver cost competitiveness, the plan is committed to at the committal meeting. The review meeting measures how well that plan performed and what we (collectively and individually) can do [next week] to make the plan better. Only through this iterative process can an organisation improve, without the review meeting you are in danger of doing the same thing over and over – and guess what, you will get the same result! That isn’t managing, that is coping, and your organisation deserves better.

To run the review meeting effectively you need data, data that enables you as an organisation to start talking around your challenges in a language that others can understand. Consider the following statements:

1. “Last Tuesday was a bad night, service disruption caused challenges and that’s why the list of work was not completed!”
2. “From last Tuesday we can see that we perished 24 of our 108 hours waiting for trains to come into the facility. This was due in part to the late arrivals. Our productivity was only 38% that night (normally 65%) as the team were largely without productive work until 23:45. Is there something we can do in future that allows us to use such time more effectively?”

If you were paying the wage bill etc., which of those statements gives you more confidence that the management team know what they are doing? Exactly! The benefit and perils of the review meeting are clear, making it happen is your role as a leader. The structure is not dissimilar to that of the committal meeting:

	Person	Inputs
Chair	Senior Production Manager	<ul style="list-style-type: none"> <li>• To review the data packs and guide the meeting</li> <li>• Hold people to account for improvements</li> </ul>
Required attendee	Production Manager (Duty Shift Manager)	<ul style="list-style-type: none"> <li>• To understand the measures and translate those to their teams</li> <li>• To answer specific issues to allow understanding</li> </ul>
Required attendee	Fleet planning manager	<ul style="list-style-type: none"> <li>• To address any planning shortfalls, provide insight and direction to their team for future planning</li> </ul>
(Required attendee)	Materials manager	<ul style="list-style-type: none"> <li>• If specific materials issues caused plan failures attendance requested to answer and give details</li> </ul>
(Required attendee)	Engineering lead/manager	<ul style="list-style-type: none"> <li>• If specific engineering issues caused plan failures attendance requested to answer and give details</li> </ul>

### Weekly – looking back one week

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It is a review of performance, so that we can learn and make different decisions next week that will improve performance. Performance means service, cost and quality.

- ❖ How well did the plan perform – exam compliance, on time arrival, on time departure
- ❖ Right traction to right location
- ❖ Productivity
- ❖ Cleaning standards etc. etc.....

A couple of important considerations in the review meeting;

- ❖ The culture has to be supportive – learning, desire to improve – not seeking blame for failure. The Chair must accept that no matter how well the plan was built it will in some way fail, the key message is to improve. (See fact sheet on learning culture)
- ❖ The metric pack has to work for the business. Not being too cumbersome to build and yet providing sufficient information to allow data-driven decision making, and escalation where required. (see fact sheet on metric pack in GS05 fact sheet pack)

### Periodic technical review

Sitting outside of the planning cycle but part of the plan-led system is some form of **periodic technical review**. This review might be monthly or every quarter depending upon the need. The key focus of this review is to address the performance of the train, its components and the maintenance regime. For each platform it should challenge and hold to account:

- ❖ The reliability displayed
- ❖ Technical challenges both presently known and up coming
- ❖ Modifications upcoming
- ❖ Campaigns
- ❖ Performance review
- ❖ Powerplant management
- ❖ Manufacturer support
- ❖ Maintenance schedule review
- ❖ Balanced regime v escalating
- ❖ RCM – CBM etc.
- ❖ System issues

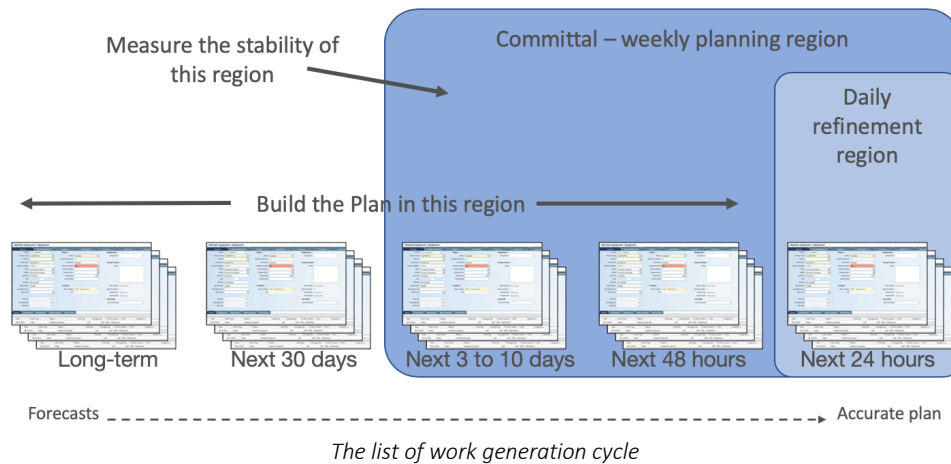
The outputs of the periodic technical review meeting would likely be a series of action plans to improve reliability or reduce costs; plans which are held to account at future meetings. This meeting would likely be chaired by the Engineering Manager, or even Engineering Director.

### Daily business

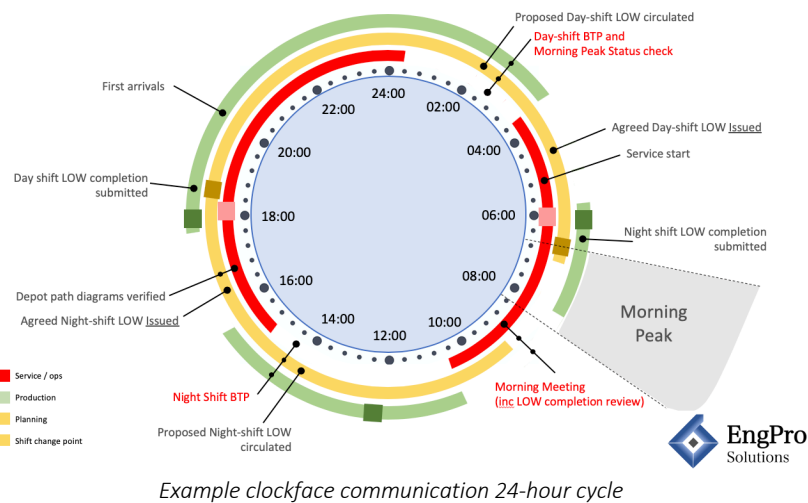
The biggest challenge I hear in running maintenance delivery is that of the plan changing in relation to operational needs. Some of this is expected but also some of that is due the fact in engineering we do not articulate very well what the challenges these changes create. In reality in a fleet of say 100 units, you are probably only scheduling 4 or 5 back to the maintenance centre. Keeping those protected is not the hardest thing in the world, unless we allow focus to be diverted. One key measure is **plan stability**, as the more stable you can make your plan the easier it is to deliver and the easier it is to make it cost competitive, whilst delivering service and reliability.

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The work packs should be built in advance, the purpose then of the daily business is to make sure any refinements are incorporated. For example, sickness might be high, or a road is out of action, or the lathe has failed, or the materials ordered have not arrived. Many things can happen, and it is important that you co-ordinate the changes to the plan. However, if you revert to building the plan at this daily stage, naturally you will have a daily focus.



It is worth establishing a daily meeting cycle, something we call clockface communications. See the simple chart below, the idea is to allow all people to understand where shifts change, where collective meetings are, so that they come prepared and ready.



### Assertiveness during meetings

These meetings are functional meetings and are vital to the running of the business. They don't have to be solemn places that drain the life force from you, but they have to be functional. Recall your skills from the core leadership course regarding the blend of assertive and responsive behaviours – use this approach extensively.

If you are holding a meeting and a telephone attendee you feel is not paying attention, call them out. Without being mean or aggressive simply call them out; people don't make that mistake twice generally. The key point here is that you must have a discipline in the meeting, make the meeting a friendly place, but keep the meeting focused.