

PdM PROGRAM SELF-ASSESSMENT TOOL

	TOPIC	QUESTION	RATING (Y)es (N)o (U)nsure	
1	Methodology for Choosing Equipment	To determine the proper PdM application, we used the equipment's criticality, failure modes and risk analysis as part of our decision-making criteria.		▲
2	Methodology for Choosing Equipment	We have a procedure for completing asset criticality.		▶
3	Methodology for Choosing Equipment	We have a procedure for performing a Failure Mode Effects Analysis (FMEA) on critical assets.		▼
4	Stakeholder Roles & Responsibilities	We have an active, visible Program Champion for PdM.		◀
5	Stakeholder Roles & Responsibilities	We have identified the Roles and Responsibilities for each stage of our PdM program setup.		▲
6	Stakeholder Roles & Responsibilities	We have personnel identified to fill each of the necessary PdM roles.		▼
7	Stakeholder Roles & Responsibilities	Responsibilities for PdM are consistently performed by the correct role, without interference or crossover into other roles.		▶
8	Defined Goals & Processes	We have a documented strategy (or charter) for our PdM program, and have data collection procedures in place.		◀
9	Defined Goals & Processes	We have documented objectives and goals for our PdM program.		▲

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10	Defined Goals & Processes	We communicate (and make visible to others) our PdM program goals.		▶
11	Defined Goals & Processes	We regularly track and review progress toward our PdM goals.		▲
12	Defined Goals & Processes	The goals of our PdM strategy are specific and relate directly to PdM activities.		▶
13	Training and Skills	We have documented minimum standards and experience requirements for PdM data collectors and analysts.		▲
14	Training and Skills	We require PdM data collectors and analysts to have the training and certification for that responsibility.		◀
15	Training and Skills	We regularly conduct some type of refresher training for data collectors and analysts.		▶
16	Systems: Budget	There is a dedicated budget for our PdM program.		◀
17	Systems: Budget	We have included training in our PdM budget.		▲
18	Training and Skills	We have general PdM training for other personnel (non-data collectors/analysts) such as supervisors, managers, reliability engineers, maintenance technicians.		▶
19	Training and Skills	We have a program in place to train and quickly assimilate new team members to our PdM program.		▶
20	Systems: CMMS	We consistently use a computerized maintenance management system (CMMS) to track PdM tasks by asset.		◀

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21	Systems: CMMS	PdM routes are generated automatically with a CMMS work order.		▶
22	Systems: CMMS	We have a mechanism to view time, labor & costs by asset and by PdM route.		▲
23	Systems: CMMS	We code PdM finds correctives by a separate CMMS code to distinguish them from other correctives.		▶
24	Systems: CMMS	Corrective repairs from PdM finds are put into individual work orders (their own work order) within the CMMS.		▲
25	Systems: CMMS	We assign unique CMMS codes to our different PdM routes.		▲
26	Systems: CMMS	To understand the overall health of each asset, we maintain a single database of data from all technologies.		▶
27	Stakeholder Roles & Responsibilities	We have a working partnership with our internal information technology (IT) team to support our infrastructure and any new systems requirements.		▼
28	Methodology for Choosing Equipment	We have a process in place to review PM tasks and turn them into PdM tasks.		▶

		YES	NO	UNSURE
◀	Most important ↑			
▲				
▶				
▼				