

Work Management Maturity Matrix

Process	Reactive No process or procedure in place	Emerging Informal process in place, or process in place only for regulatory compliance	Proactive A formal process is established and well understood. Process includes flow charts, step definitions and responsibility matrix	Excellent Process effectiveness drives business results. Data is shared and used for decision-making. Process audits drive improvements
Work Identification (WID)	<ul style="list-style-type: none"> Work requests are rarely written or include incorrect equipment and non-existent descriptions Requestors do not enter work priority or submit all requests as “top priority” Work is requested via word of mouth or radio Requests and work orders are generated by maintenance vs. asset owner/user 	<ul style="list-style-type: none"> ≥70% of work requested to the correct asset within the hierarchy Asset owners/users request work an informal (subjective) priority Most work (≥60%) documented on a work order Information is of sufficient detail to take appropriate action ≥60% of the time. 	<ul style="list-style-type: none"> ≥85% of work requested to the correct asset within the hierarchy Asset owners/users request work and follow a documented priority coding process with ≥85% compliance Majority of work (≥85%) is properly documented on a work order Information is of sufficient detail to take appropriate action ≥85% of the time 	<ul style="list-style-type: none"> ≥99% of work requested to the correct asset within the hierarchy Asset owners/users request work and follow a documented priority coding process with ≥99% compliance. No work is done without a properly documented work request/work order Work identification process is audited and continuously improved
Work Approval (WAP)	<ul style="list-style-type: none"> Work requests are approved without review Requests do not have required information (≤50% documented) Requests are not corrected or returned for completion (≤50%) 	<ul style="list-style-type: none"> Work requests are sometimes approved after review and appropriate priority coding Work requests have some required information before approval (≥50%) Requests are sometimes corrected and/or returned for completion (≥50%) 	<ul style="list-style-type: none"> ≥ 85% of requests follow a documented approval and priority coding process ≥85% of work requests have the required information and follow the documented identification process before approval ≥85% of requests are frequently corrected and/or returned for completion 	<ul style="list-style-type: none"> ≥ 99% of requests are approved with proper review and priority coding ≥ 99% of work requests have the required information and follow the documented identification process before approval ≥ 99% of improperly filled out work requests are returned for completion
Urgent Work Preparation (UWP)	<ul style="list-style-type: none"> No documentation or measurement of emergency or unplanned work; evident ≥60% or more of weekly work is unplanned Crafts are dispatched to jobs via radio or word of mouth and obtain their own parts, tools, equipment, etc. Work orders are not used to capture emergency/unplanned work Return to service activities are not coordinated or completed prior to releasing the asset (≤50%) 	<ul style="list-style-type: none"> Emergency/break-in work beginning to be documented and is ≤50% Planners and supervisors equally involved in coordinating, dispatching, and obtaining parts for emergency/unplanned work Some work orders are used to capture time and parts; the overuse of standing work orders is evident Return to service activities are coordinated and completed prior to releasing the asset (≥50%) 	<ul style="list-style-type: none"> Emergency/break-in work is ≤20% and effectively managed Clear, documented process manages unplanned work Work is effectively captured on a work order for the correct asset with ≥85% compliance; standing work orders are rare Return to service activities are coordinated and completed prior to releasing the asset (≥85%) 	<ul style="list-style-type: none"> Emergency/break-in work is effectively managed and ≤15% Reducing unplanned work is a joint effort between all affected parties Work is effectively captured on a work order for the correct asset with >99% compliance; standing work orders are extremely rare Return to service activities are coordinated and completed prior to releasing the asset (≥99%)
Work Planning (WPL)	<ul style="list-style-type: none"> Non-existent or minimal job planning, labor estimating or parts kitting If planners exist, they frequently coordinate emergency work and expedite parts Majority of maintenance is conducted in reaction to an emergency/breakdown No job library; bill of materials (BOMS) are limited and/or incorrect (≤50%) 	<ul style="list-style-type: none"> ≥50% of jobs are planned, estimated and kitted Planners sometimes (50%) scope jobs in the field; emergency work consumes much of the planner’s time ≥50% of work orders have accurate labor estimates ≥50% of assets have accurate BOMs 	<ul style="list-style-type: none"> Planning, kitting, return to service, and estimating takes place on most work orders (>85%); planners are minimally involved in emergency work Comprehensive and detailed plans/task lists are created; planners routinely scope jobs in the field (>85%) A library of pre-planned work orders is developed and BOMs are correct (>85%) Planners receive feedback from completed work orders and update the job plan library (>85%) 	<ul style="list-style-type: none"> Planning, kitting, return to service, and labor estimating takes place on all corrective work orders (≥99%); planners are not involved in emergency work ≥99% plans/task lists are created with accurate details; planners regularly scope jobs in the field BOMs are correct (≥99%); a library of pre-planned work orders is developed and updated based on craft feedback (≥99%) Greater than 90% of work is planned and kitted; actual vs estimated accuracy is within 10-15% (cost-hours)

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Process	Reactive	Emerging	Proactive	Excellent
Work Scheduling (WSC)	<ul style="list-style-type: none"> No future scheduling or coordination takes place (possible exception of PMs) Emergency or break-in work is $\geq 50\%$ No measures of schedule compliance On-time (10% rule) PM compliance is $< 50\%$ 	<ul style="list-style-type: none"> Work is scheduled one day ahead; other departments having little to no input Emergency or break-in work is $< 50\%$; some work is scheduled $\geq 50\%$ The importance of schedule compliance is understood and $\geq 70\%$ On-time (10% rule) PM compliance is $\geq 70\%$ 	<ul style="list-style-type: none"> Work is scheduled one week ahead, forecasted ≥ 4 weeks ahead and coordinated between affected groups Emergency or break-in work is $< 20\%$; most work is scheduled $> 80\%$ Weekly schedule compliance is $> 80\%$ On-time (10% rule) PM compliance is $\geq 90-94\%$ 	<ul style="list-style-type: none"> Work is scheduled one week ahead, forecasted ≥ 8 weeks ahead and coordinated between affected groups 100% available manpower scheduled Schedule compliance consistently $> 90\%$ On-time (10% rule) PM compliance is $\geq 95\%$
Work Execution (WEX)	<ul style="list-style-type: none"> Technicians typically choose and plan their work each day Pre-job briefs are inefficient; crafts arrive at the job site > 1 hr after shift start time It is optional to follow established procedures or written job plans Maintenance supervisors consumed with emergencies and rarely monitor work execution 	<ul style="list-style-type: none"> Work is typically chosen and assigned by a supervisor each day Pre-job briefs exist; $\geq 50\%$ of the time crafts arrive prepared at the jobsite within 20-30 min after shift start Crafts are expected to follow established procedures/job plans with $\geq 70\%$ compliance Maintenance supervisor regularly monitors work execution and ensures job kits are complete and correct ($\leq 50\%$) 	<ul style="list-style-type: none"> Supervisor assigns work based on the published schedule with $\leq 20\%$ break-in work Pre-job briefs are effective; $\geq 80\%$ of the time crafts arrive prepared at the jobsite within 20-30 min after shift start time Crafts are expected to follow established procedures/job plans and provide feedback with $> 85\%$ compliance Maintenance supervisor regularly monitors the work being accomplished and ensures job kits are complete and correct ($\geq 50\%$) 	<ul style="list-style-type: none"> The supervisor assigns work based on the published schedule with $\leq 10\%$ break-in work Pre-job briefs are effective; $\geq 90\%$ of the time crafts arrive prepared at the jobsite within 20 min after shift start time Crafts follow established procedures/job plans and provide effective feedback with compliance $> 99\%$. Maintenance supervisor regularly monitors the work being accomplished and ensures job kits are complete and correct ($\geq 80\%$); return to service activities completed prior to releasing the assets back to the owner
Work Closeout (WCO)	<ul style="list-style-type: none"> Work orders are not completed by the person doing the work Limited description of work completed is; many unclosed work orders in the database No failure codes or cause codes Failure data is not available and/or not used for continuous improvement 	<ul style="list-style-type: none"> Work orders are completed by the person doing the work and reviewed by the supervisor with $\geq 70\%$ compliance Description of completed work is routinely accomplished with few unclosed work orders ($\geq 70\%$ compliance) Some failure codes or cause codes are used on work order ($\geq 50\%$) Some failure data is available and used ad hoc for continuous improvement 	<ul style="list-style-type: none"> Work orders are completed by the person doing the work and reviewed by the supervisor with $\geq 85\%$ compliance Description of completed work is a documented expectation with no unclosed work orders ($\geq 85\%$ compliance) A mature list of failure codes and failure modes are used correctly with $\geq 85\%$ compliance Accurate failure data is available and used on an proactive basis for continuous improvement 	<ul style="list-style-type: none"> Work orders are completed by the person doing the work and reviewed by the supervisor with $\geq 99\%$ compliance Proper work closeout documentation has $\geq 99\%$ compliance; work backlog is accurate A mature list of failure codes and failure modes are used correctly with $\geq 99\%$ compliance An effective, documented program exists to use failure data for continuous improvement

Key performance indicators	Planned Work	Unplanned work	Schedule compliance	Planned Work	Unplanned work	Schedule compliance	Planned Work	Unplanned work	Schedule compliance	Planned Work	Unplanned work	Schedule compliance
	Not measured	Not measured	Not measured	$\geq 50\%$	$\leq 50\%$	$\leq 70\%$	$\geq 80\%$	$\leq 20\%$	$\geq 80\%$	$> 90\%$	$< 10\%$	$> 90\%$