Maturity Matrix Levels and Processes

Step 1: The 4 Maturity Levels

The maturity matrix allows you to identify which stage you are in by reviewing the properties of that stage.

- **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

Step 2: The 15 Processes

1. Planned Purchasing (PPR):	'Excellent' is defined as implementing a formal planned purchasing process, TCO is a focus, and vendors are annually reviewed to improve performance.
2. Expedited Purchasing (EPR):	'Excellent' is defined as having tracking and auditing procedures in place (for at least three years), decisions are based on the lowest TCO, and the practices are continually audited to discover ways to improve.
3. Storeroom Receiving (SRC):	'Excellent' is defined as 100% of all orders are received and documented in the system, audits and improvements are consistently made, and vendors deliver on time over 90% of the time with 95% accuracy.
4. Inventory Stocking (IST):	'Excellent' is defined as having a storeroom preventive maintenance program scheduled and executed, ABC classification is used, and parts are immediately stocked in assigned bins.
5. Satellite Stores Stocking (SSS):	'Excellent' is defined as the utilization of satellite stores, parts are transferred to the satellite stores, and the stores are managed by vendors or as an extension of the storeroom with tracked reports and metrics.
6. New Item Set-up (NIS):	'Excellent' is defined as inventory parts have recommended storage levels, safety stock, and re-order points; the Reliability Engineer is involved in the decisions to stock certain items, and all parts are tied to an operating asset and BOM.

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7. Inventory Issue (IIS):	'Excellent' is defined as more than 80% of issues are kitted and delivered, unplanned parts/materials are sorted via issue tickets, and no maintenance personnel is allowed in the storeroom.
8. Inventory Cycle Counting (ICC):	'Excellent' is defined as inventory accuracy over 95%, every critical insurance part is identified and counted, ABC is consistently used, and corrective actions are implemented for recurring variations.
9. Return to Inventory (RTI):	'Excellent' is defined as weekly audits for unused materials, accurate history and usage is used to predict service life, maintenance expenses are reduced, and Maintenance Techs, Planners, and Storeroom personnel frequently communicate.
10. Return to Vendor (RTV):	'Excellent' is defined as 99% compliance to vendor return process, data is tracked for over three years, and maintenance costs are reduced.
11. Add-Revise-Inactivate (ARI):	'Excellent' is defined as having standard description procedure revisions approved and published, parts are standardized, and a gatekeeper coordinates inventory changes.
12. Planned Work Kitting (PWK):	'Excellent' is defined as over 80% of parts/materials are kitted, communication and coordination between Storeroom and Maintenance is prioritized, kitting areas are secured and controlled, ready-to-schedule kits are less than four weeks old, and inventory investment is reduced.
13. Storeroom Delivery (SDL):	'Excellent' is defined as all deliveries and equipment needs are scheduled in advance, efficiency is monitored, and labor utilization is optimized.
14. Obsolete Inventory Identification (OII):	'Excellent' is defined as having the right materials (including quantity and priority) in inventory, annual reports on status of slow-moving inventory, and reduced carrying costs.
15. Repairable Component (RCM):	'Excellent' is defined as 100% of repair items have an item code and approved service shop, 100% of repairable items have standards and acceptance criteria, and vendor performance is strong and tracked for vendor rating.