

## Coaching Card Planner/Scheduler Processes

Date

Name

**Activities**

Rating Scale

1 - Never                      2 - Sometimes                      3 - Always

Are Job Plans being scoped?

Is the planner using the stores requisition sheet?

Is the planner effectively using job plans?

Are WO priorities being adjusted properly?

Are the different status codes being utilized?

% of jobs scoped by a technician

% of jobs scoped by the Planner

% of work scheduled for next week

Is the planner leading the weekly planning meeting?

Are there any jobs online that are older than 24 hours?

Do all planned jobs have a complete job package?

Does the total backlog have any items over 6 months old?

**Reports and Documents**

Customer Production Schedule

Total Backlog Report

Ready Backlog Report

Schedule Compliance

Job Plans Completed

Rolling Four Week Forecast

**Results and Outcomes**

Is there a multi week backlog available to review for the team?

Does the customer group have buy-in and trust that weekly activities will be followed?

Are the customers seeking work-arounds?  
(Seeking technicians directly or hiring contractors outside planning)

Is there a weekly schedule produced and posted?

**Follow up Notes / Recommendations**

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Coach

Please circle one

1	2	3
1	2	3
1	2	3
1	2	3
1	2	3

Please indicate percentage

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YES	NO
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Copies available at the meeting?

YES	NO
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