IDCON INC

## 6 Phases of Shutdown Turnaround Optimization Process

Strategy Review

Worklist Review

Planning Review

Scheduling Review

Execution Review

Critique Review

# SHUTDOWN BEST PRACTICES SELF-ASSESSMENT*

Score how well your organization manages Shutdowns (turnarounds or outages).

1 = Never  5 = Sometimes  10 = Always

Your score

- ☐ Maintenance and Operations strategic plans identify long range major shutdowns
- ☐ Countdown schedule and procedures are documented and ***used*** to manage shutdowns
- ☐ Our shutdown organization is defined with identified roles and responsibilities
- ☐ Contractor / Procurement / Stores are involved early in the shutdown strategy
- ☐ Shutdown key performance indicator tracking is in place
- ☐ Shutdown Work is selected based on value to maintaining reliable plant operation
- ☐ PM / PDM incorporated in shutdown to avoid redundancy
- ☐ Shutdown Job walk down is performed by maintenance coordinator, supervisors and planners before shutdown
- ☐ Previous Shutdown Close-Out Review and Lessons Learned results are incorporated in current plan
- ☐ Each Work Order plan has detailed work steps, labor, material, tools, support functions, and cost estimated.
- ☐ Special tools and equipment are inspected / tested / tagged prior to the shutdown
- ☐ Shutdown Master Schedule includes Operations/Maintenance/Engineering activities and interrelationships
- ☐ Contracting strategy review and evaluation process is in place
- ☐ Operations handover and maintenance hand-back procedures in place
- ☐ Daily / shift shutdown meetings are held to review progress, make adjustments to schedules or resource allocations, and to finalize the next day or shift work activities.
- ☐ There's a system for tagging valves and leaks (isolation/repair/replace)
- ☐ Lock Out Tag Out (LOTO) Procedures continuously reviewed and updated
- ☐ Operations completes permitting paperwork on prior shift (as much as possible)
- ☐ Final Key performance indicators are documented /analyzed
- ☐ Process in place to document post shutdown testing, baseline data, and set up PM/PDM requirements.

☐ Total your scores

20 - 69 = Poor performance of these best practices
70 - 120 = Fair performance of these best practices
121 - 170 = Good performance of these best practices
171 - 200 = Excellent performance of these best practices

*This is a sample of our self-assessment survey.
For the full self-assessment, attend our Shutdown Turnaround Optimization Process training course.