

# Job Plan Template

*Every planned job that reaches the floor arrives with this. BOM, procedure, hours, safety, drawings. If the technician improvises, it wasn't planned.*

**Companion to:** *Fix the System*, Chapter 6. **Who uses it:** the planner. One per job. The template should feed into your CMMS, or live as an attachment to the work order if the CMMS doesn't natively support structured job plans. **How long to fill out:** 15-30 minutes for a routine job, 45-90 for a first-time job or an unfamiliar asset.

## Job Identification

| Field                                                  | Value |
|--------------------------------------------------------|-------|
| Work Order #                                           | _____ |
| Asset ID                                               | _____ |
| Asset location                                         | _____ |
| Job type (PM / Corrective / Inspection / Modification) | _____ |
| Priority (Urgent / Standard / Planned)                 | _____ |
| Originating notification #                             | _____ |
| Date planned                                           | _____ |
| Planner initials                                       | _____ |

## Scope of Work

*In two or three sentences, describe the specific work to be performed. Not the asset's condition. The WORK.*

Example: "Replace coupling between pump drive motor and pump body. Verify alignment within 0.003" TIR. Pressure-test to normal operating conditions before return-to-service."

**Scope:**

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# Bill of Materials (BOM)

Every part the job requires. If a part is substitutable, list the substitutes. If a part has to be expedited, flag it.

| Part # | Description | Qty | Stock location | On-hand?                                                 | Substitute OK?                                           |
|--------|-------------|-----|----------------|----------------------------------------------------------|----------------------------------------------------------|
|        |             |     |                | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
|        |             |     |                | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
|        |             |     |                | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
|        |             |     |                | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
|        |             |     |                | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
|        |             |     |                | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |

BOM verified by: \_\_\_\_\_ Date: \_\_\_\_\_

If any part is marked "On-hand: No" AND "Substitute OK: No", the job CANNOT be scheduled yet. Flag the planner.

## Procedure

Not the full engineering manual — a one-page step list specific to this job. Aim for 5-15 steps. If the job requires more than 15 steps, either break it into sub-jobs or refer to an external procedure document by name.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

Add more lines as needed — but if you exceed 15 steps, pause and ask whether this should be two jobs.

## Hours Estimate

| Breakdown                    | Hours |
|------------------------------|-------|
| Setup / lockout / permits    | _____ |
| Active work                  | _____ |
| Testing / verification       | _____ |
| Cleanup / close-out          | _____ |
| <b>Total estimated hours</b> | _____ |
| Crew size                    | _____ |
| Total labor-hours            | _____ |

*Notes on the estimate (assumptions, known risks that might extend the job):*

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## Safety Requirements

- ☐ Lockout / tagout required
- Isolation points: \_\_\_\_\_
- ☐ Confined space permit required
- ☐ Hot work permit required
- ☐ Elevated work / fall protection required
- ☐ Chemical / hazardous material handling
- Specifics: \_\_\_\_\_
- ☐ Specific PPE beyond standard (respirator, face shield, dielectric gloves, etc.)
- List: \_\_\_\_\_

**JSA (Job Safety Analysis) attached or referenced:** ☐ Yes ☐ No

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## Drawings & Attachments

*List and attach any drawings, schematics, or reference documents the technician will need.*

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

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## Operational Coordination

- ☐ Asset coordination with operations confirmed
  - ☐ Estimated asset downtime window: \_\_\_\_\_ hours
  - ☐ Pre-notification required (who and when): \_\_\_\_\_
  - ☐ Post-completion notification (who and when): \_\_\_\_\_
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## Planner Sign-Off

**This job is ready to schedule.** Parts are confirmed available or substitutable. Procedure is specific. Hours are estimated within reason. Safety requirements are identified. Operational coordination is clear.

**Planner signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*If any field above is incomplete or unresolved, this job is NOT ready to schedule. Do not sign.*

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## For recurring jobs

If this is a PM or other recurring job, consider whether this job plan should become the ASSET'S standard plan in the CMMS. Good job plans, once proven in execution, get reused. Update the CMMS job template after the first successful execution.

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*From Fix the System by Ivan Getov. Companion to Chapter 6: Plan. [getov.xyz/toolkit/fix-the-system/ch06/job-plan-template](http://getov.xyz/toolkit/fix-the-system/ch06/job-plan-template). Free. No email required.*