

PM Kitting Checklist

The 48-hour kit-and-stage protocol. Parts laid out, procedure attached, tag hung. If you skip the RESTOCK step, kitting decays in three weeks.

Companion to: *Fix the System*, Chapter 6. **Who uses it:** the planner and the stockroom lead, together. Run this on every scheduled job 48 hours before execution. **Time required:** 5-10 minutes per job once the habit is established. First week will be longer as the process gets worked out.

48 hours before execution — kit the job

Job identification:

- ☐ Work order number: _____
- ☐ Scheduled execution date: _____
- ☐ Scheduled crew: _____
- ☐ Kit location: _____ (where it will be staged)

BOM reconciliation:

- ☐ Pull the job plan. Confirm the BOM is attached and complete.
- ☐ For each BOM item, verify current stock:
- ☐ All items on-hand? _____ (Yes / No)
- ☐ Items requiring substitute: _____
- ☐ Items requiring expedite: _____
- ☐ If any item is NOT on-hand AND not substitutable, FLAG the planner immediately — the job may need to be rescheduled.

Physical kit assembly:

- ☐ Pull each part from stockroom to staging location.
- ☐ Lay out parts in logical order of use (first-used on top).
- ☐ Attach a paper copy of the job plan to the kit.
- ☐ Attach a kit tag with: WO number, asset ID, scheduled date, crew.
- ☐ If safety items (lockout locks, tags, permits) are needed, include them in the kit or flag where they're picked up.
- ☐ Photograph the kit (phone camera is fine) and attach to the WO in the CMMS. Ten seconds. Saves arguments later about what was kitted.

Kitting complete:

- ☐ Kit tag signed and dated by kitting planner: _____
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0 hours — day of execution

Pre-shift verification (crew lead):

- ☐ Kit present at staging location? _____ (Yes / No)
- ☐ All BOM items present? _____
- ☐ Job plan attached? _____
- ☐ Any substitutions since kitting? _____
- ☐ Safety items present? _____

If any item is MISSING, crew lead pauses the job and notifies planner + scheduler before starting. Do not start a job on an incomplete kit. Record the delay — this is the data that drives the restock protocol.

After the job — the RESTOCK step

This is the step most plants skip, and it is the step that determines whether kitting stays installed.

Closing technician checklist:

- ☐ All unused parts returned to their original stock locations?
- ☐ Any parts actually consumed recorded on the WO?
- ☐ If a kit PART was PULLED (robbed) from this kit for ANOTHER job, was the OTHER job's planner notified so they can rebuild the kit?
- ☐ Kit tag closed out (dated, signed, "executed" or "raided-for-WO-X")?
- ☐ **Restock request filed for any consumed critical parts?**

Planner end-of-week restock routine (Friday afternoon, 20 minutes):

- ☐ Pull the week's closed kit tags.
- ☐ Cross-reference with consumed-parts entries in the CMMS.
- ☐ For every part consumed that was NOT auto-reordered by the stockroom's min-max system, submit a restock request.
- ☐ For every kit that was raided, flag the original kit for rebuild next week.

Without this Friday routine, kits get pulled and never rebuilt. The crew arrives at the next scheduled job, the kit is gone or incomplete, and the planning stage silently falls apart within a quarter.

Monthly kitting audit (15 minutes)

- ☐ Random-sample 10 recently kitted jobs.
- ☐ Check: was the kit complete on day-of-execution? _____ / 10

- ☐ Check: was the kit restocked properly after? _____ / 10
- ☐ Identify any pattern: same asset class getting raided? Same shift missing parts?

Target: >8 of 10 complete on day-of. >8 of 10 restocked. Below either, walk the floor and find out why.

Common failure modes (and fixes)

"The kit was raided overnight and nobody told me." Install the raid-notification protocol. When a part is pulled from an existing kit, the closing technician must notify the original kit's planner through the CMMS or Slack or Teams. No exceptions.

"The BOM in the job plan is wrong." This is a planning feedback issue — the planner rebuilds the BOM from the first actual kitting attempt. Update the CMMS job template so the next time this job recurs, the BOM is right.

"Parts showed up wrong because the spec was ambiguous." Spec the BOM with manufacturer part number and substitute options. Ambiguous BOMs produce wrong parts. The planner owns the spec quality.

"We don't have time to photograph the kits." Ten seconds per kit. If that's too much time, kitting is not yet a priority at your plant. Raise it to the maintenance manager.

From Fix the System by Ivan Getov. Companion to Chapter 6: Plan. getov.xyz/toolkit/fix-the-system/ch06/kitting-check-list. Free. No email required.