

Close-Out Quality Rubric

The five-element standard. A close-out that meets all five feeds the cycle. A close-out that meets fewer starves it. Print, laminate, post in the shop.

Companion to: *Fix the System*, Chapter 9. **Who uses it:** technicians (as a checklist at the asset), supervisors (as a scoring reference during the weekly audit), the maintenance manager (as a training tool for new hires). **Posted where:** in the maintenance shop, attached to every crew-lead clipboard, taped above the CMMS terminal.

The five required elements

Every close-out, every time, captures all five.

1. PARTS CONSUMED

Every part ACTUALLY used, by part number. Not the BOM estimate. What was actually installed.

Meets standard:

- "Bearing 6308-ZZ (from kit), 1x coupling spider SK-42"
- "2x gasket ECO-40, 1x gasket substituted ECO-42 (engineering-approved)"

Fails standard:

- "Parts per BOM"
- (blank)

2. FAILURE CODE

The specific failure mode observed, using the plant's CMMS failure-code taxonomy. One code minimum. Multiple codes allowed if multiple modes observed.

Meets standard:

- "B-203 — Bearing wear, radial play exceeded"
- "S-105 — Mechanical seal, face-to-face leakage; plus H-042 — shaft misalignment contributing"

Fails standard:

- "Worn out"
- "Broken"
- (blank)

Use the companion Failure Code Cheat Sheet if you're not sure which code applies.

3. READINGS OR MEASUREMENTS

Any measurement actually taken during the job. Alignment readings, torque values, pressure test results, insulation resistance readings, vibration measurements.

Meets standard:

- "Alignment 0.002 TIR after install. Pressure test 95 psi held 10 min."
- "Torqued to 120 ft-lb per spec. Megger reading 850 M Ω ."

Fails standard:

- "Tested OK"
- (blank)

4. DEVIATIONS FROM THE PLAN

Anything that happened differently than the job plan predicted. Substitute parts. Added steps. Tools that turned out to be wrong. Unexpected conditions at the asset.

Meets standard:

- "Substitute gasket ECO-42 used in place of spec ECO-40; confirmed by engineering."
- "Found coupling alignment had drifted 0.008 TIR from last service; re-aligned. Added 15 min to the job."
- (explicit "no deviations" if the job went exactly per plan)

Fails standard:

- (blank when deviations actually occurred)
- "Some issues but handled them"

5. NOTES FOR NEXT TIME

One to three sentences of honest human observation about what the technician saw that would help whoever does this job next. The hardest field to install. The most valuable.

Meets standard:

- "Third bearing on this asset in 12 months. Shaft showing slight misalignment drift quarter-over-quarter. Recommend dial-indicator check every quarter."
- "Coupling was much easier to pull after the kit included the larger puller — keep the larger puller in the kit for this asset going forward."
- "No notes — job went cleanly per plan."

Fails standard:

- "Hope it lasts this time."
- "Replaced bearing."
- "Fixed per plan."
- (blank)

Scoring

Each close-out is scored against the five elements. One point for each element that meets standard. Maximum 5 points.

Score	Rating	Action
5 / 5	Meets rubric	Possibly eligible for "well done" board (supervisor's pick)
4 / 5	Near-meets	Note the missing element. No action required.
2-3 / 5	Weak	Flag for coaching if it's a repeat pattern for this technician
0-1 / 5	Fails	Immediate bottom-5 coaching conversation

The weekly audit (supervisor routine)

Every week, 20 minutes:

- ☐ Pull 20 random close-outs from the prior week
 - ☐ Score each against the rubric (5-element checklist)
 - ☐ Identify the TOP 5 — recognize publicly on the "well done" board
 - ☐ Identify the BOTTOM 5 — schedule 5-minute private coaching conversations this week using the *Close-Out Coaching Script*
 - ☐ Track the weekly compliance % — target >70% within 90 days, >85% within 180 days
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Why this works

Technicians write for an audience. This rubric, publicly posted, gives them an audience. The weekly audit, publicly announced (without naming bottom-5 names in public), tells them the audience is paying attention.

The close-outs that come out of a plant running this rubric are the fuel for the quarterly data review (Chapter 9). The quarterly review produces loop actions — PM frequency adjustments, job plan refinements, RCAs. The loop actions, communicated back to the crew, prove to the technicians that their close-outs matter.

The rubric is the first link in that chain. Get it installed, posted, and audited weekly. The rest of the close-out system builds on it.

From Fix the System by Ivan Getov. Companion to Chapter 9: Close Out and Learn. getov.xyz/toolkit/fix-the-system/ch09/close-out-rubric. Free. No email required.