

PM Kitting Checklist

Every PM due on day N has its full parts kit staged in a labeled tote at the tool crib by end of shift on day N-2. If the kit cannot be staged, the PM moves. No PM goes to the floor without its kit.

Companion to: *Fix the System*, Chapter 15. **Who uses it:** the maintenance planner kitting PMs 48 hours before execution, the tool-crib clerk receiving the kit, and the technician picking it up. **When:** run it every day at the kitting window (typically 14:00 or end of shift on day N-2). **Why this exists:** kitting failures are the single largest cause of PM misses. A missed kit cascades into tech idle time, a scheduling decision made under pressure, and a PM that closes with the wrong parts or does not close at all.

Part A — Planner verification (run for each PM 48 hours before execution)

Complete this section for every PM scheduled for day N, by end of shift on day N-2.

Work order number: _____

Asset: _____

Scheduled date / shift: _____

Assigned technician: _____

Asset criticality: A / B / C (circle one)

Part number verification

- ☐ Each part listed on the WO has a current part number confirmed against the asset's parts list.
- ☐ For every listed part, stock availability is confirmed in the warehouse system. **Write the on-hand quantity next to each line.**
- ☐ If a part number on the WO is wrong or superseded, correct the WO now. Do not wait for the tech to discover it at the bin.
- ☐ If a listed part is out of stock:
- ☐ Check substitute-part table. Approved substitute available? -> proceed.
- ☐ No approved substitute? -> **defer this PM and log it.** Do not ship the kit without the critical part.

Kit assembly

- ☐ Pull each part from the warehouse. Use a labeled kit tote (not a box, not a bag). One tote per PM.
- ☐ Include every consumable listed on the procedure: gaskets, seals, o-rings, grease, lockwire, sealant, fasteners. The consumable list is frequently longer than the parts list. If the procedure does not specify consumables, add the standard consumable set for this asset type.
- ☐ Include a printed copy of the current procedure. Revision date at the top. If the procedure is known to be wrong, note the correction on the cover page so the tech sees it first.
- ☐ Include any special tools called out by the procedure (puller, torque wrench, dial indicator, specific socket size). Do not assume the tech will bring them.

- ☐ Tote label carries: WO number, asset tag, scheduled date, tech name.

Tote placement

- ☐ Tote staged on the designated PM kitting shelf at the tool crib.
- ☐ Tool-crib clerk has signed acknowledgement of receipt on the kit log.
- ☐ Kit log entry carries: tote ID, WO number, date staged, planner initials, clerk initials.

Sign-off

Planner name: _____ Initials: _____ Time completed: _____

Part B — Tool-crib handoff (run at the start of the execution shift)

Complete this section when the technician arrives to pick up the kit.

- ☐ Technician arrives at the tool crib at or before the scheduled PM start time.
- ☐ Clerk pulls the tote by WO number. Tote found: Y / N.
- ☐ If not found -> clerk calls the planner immediately. Do not release the tech to the work area without a resolution.
- ☐ Technician inspects the kit against the procedure's parts list before leaving the crib. Any mismatch flagged on the spot.
- ☐ Technician signs the kit log on pickup.

Red flags that stop the handoff:

- Kit is missing. -> Planner call. PM does not proceed until resolved.
 - Kit has wrong parts. -> Planner call. Verify and correct before the tech starts.
 - Procedure is a revision older than what the tech has seen work. -> Flag for procedure review.
 - Tech knows a torque, clearance, or sequence that the procedure does not capture. -> Flag for procedure rewrite. Do not block the PM. Log the gap for Part C.
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Part C — Post-PM capture (run at close-out)

Complete this section when the technician closes the WO. This is how the playbook closes the loop back to the procedure rewrite work.

- ☐ Kit used as shipped? Y / N. If N, what was substituted or missing?
- ☐ Procedure followed as written? Y / N. If N, what was deviated and why?
- ☐ Tribal knowledge the tech used that is not in the procedure: _____
- ☐ Actual labor time: _____ (vs. planned _____)

- ☐ If any field above has a non-empty answer, **this PM generates a procedure-rewrite ticket**. Open the ticket before closing the WO.
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What to avoid

- **Kitting the day of the PM.** The 48-hour cutoff exists because same-day kitting collapses under any single disruption. One planner out sick, one stockout, one wrong part number, and the PM misses.
 - **Shipping an incomplete kit.** "Most of the parts are there, we'll figure out the rest" is how deferred PMs become closed PMs with the wrong parts. Defer the PM. Do not ship incomplete.
 - **Letting the tech kit their own PM.** The tech's job is execution. The planner's job is preparation. Blurring the line means the tech spends 30 minutes kitting on the clock at the warehouse instead of at the asset.
 - **Treating the kit log as optional.** The log is the audit trail. A missed kit with no log entry cannot be root-caused.
 - **Skipping Part C.** Every PM that closed with a deviation is a signal. If you do not capture Part C, you lose the procedure-rewrite queue.
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End of checklist. File Part C responses weekly for procedure review at the Chapter 9 close-out audit.