

Reactive Work Two-Week Audit Sheet

Two weeks. Every incoming WO. Classified against the four-question rubric, not against gut feel. The classified sample tells you where the reactive work is actually coming from.

Companion to: *Fix the System*, Chapter 18. **Who uses it:** the planner and maintenance supervisor, together. One of them runs intake; the other audits the classification after the fact. **When:** days 1-14 of the install (baseline). Re-run at day 60 (verification). Re-run quarterly after stabilization. **Why this exists:** plants measure reactive work as a single percentage and stop there. The percentage is a sum of four very different things: true emergencies, preventable failures, pseudo-emergencies, and operator-environment calls. The audit separates them so the install attacks the real top cause, not the average.

Step 1 — Prepare the audit

Before day 1:

- Print the four-question intake rubric and laminate copies for the planner, the supervisor, and the CMMS intake screen.
 - Calibrate the rubric with the maintenance supervisor on 10 recent WOs before the audit starts. Walk through each one out loud. Alignment on day 0 is the biggest predictor of a clean audit.
 - Confirm the audit window (14 consecutive days) and brief the shift supervisors that every incoming WO will be classified — they do not need to do anything differently, but they should expect questions.
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Step 2 — Run the intake rubric on every incoming WO

For 14 consecutive days, every incoming WO goes through the four-question test at intake. Record the answers on this sheet (or a CMMS field if available).

The four-question rubric

Q1. Did this failure put the plant, a production line, or a person in immediate danger? (Y/N)

Q2. Is this failure preventing operation right now, with no duplicate capacity available? (Y/N)

Q3. If this work waited 48 hours, would it cause safety, environmental, or regulatory exposure? (Y/N)

Q4. Was this condition detectable 7 or more days ago via inspection, condition data, or operator observation? (Y/N)

Classification rule

- **Any YES to Q1, Q2, or Q3 -> TRUE EMERGENCY.** Legitimate reactive work. Break-in process (Chapter 10).
- **YES to Q4 only -> PREVENTABLE REACTIVE.** The condition was detectable earlier. Flag for PM/CBM feedback.
- **YES to Q1-3 AND YES to Q4 -> both flags apply: true emergency AND preventable.** Log in both buckets.
- **NO to all four -> PSEUDO-EMERGENCY.** Not reactive. Goes into the regular backlog.

- **Operator-environment**WO (sanitation, setup, production-driven request) -> log as **OPERATOR-ENVIRONMENT**, separate from the reactive taxonomy.

Step 3 — Audit log

Fill one row per incoming WO. Add pages as needed.

WO #	Date	Shift	Zone / line	Asset	As-entered priority	Q1	Q2	Q3	Q4	Hours	True classification

(Extend as needed — expect 40-80 rows for a 14-day audit on a typical 150-asset plant.)

True classification values: TRUE EMERGENCY / PREVENTABLE / BOTH / PSEUDO-EMERGENCY / OPERATOR-ENVIRONMENT / PLANNED (Q1-4 all no AND no urgency claim)

Step 4 — Tally

Classification	WO count	Total hours	% of audit WOs	% of audit hours
TRUE EMERGENCY				
PREVENTABLE (Q4 yes, Q1-3 no)				
BOTH (urgent AND preventable)				
PSEUDO-EMERGENCY				
OPERATOR-ENVIRONMENT				
PLANNED (non-reactive)				
TOTAL				100%

Reactive total (true + preventable + both + pseudo + operator-environment) = _____ %

Step 5 — As-entered vs true priority mismatch

For every WO where the as-entered priority differed from the rubric-assessed true priority, log the mismatch.

WO #	As-entered	True	Direction (inflated / deflated)

Mismatch rate = _____ % of audited WOs

Healthy: <20%. Concerning: 20-40%. Action: >40% (the escalation culture is strong).

Most mismatches in a plant running above 40% reactive are INFLATED — the operator called it an emergency when the rubric says it is not. Deflated mismatches (real emergencies called routine) are rare but dangerous; investigate each one.

Step 6 — Top-cause analysis

Rank the classification categories by hours consumed, highest first. Pick the **top one** (by hours) as the primary target for the day 14-60 attack.

Rank	Category	Hours	% of reactive hours	Attack channel
1				
2				
3				
4				

Attack channel values:

- PREVENTABLE -> PM procedure update / CBM install / frequency adjustment
- PSEUDO-EMERGENCY -> supervisor retraining / weekly metric share / intake rule enforcement
- OPERATOR-ENVIRONMENT -> SOP change / operator training / environmental fix

Step 7 — Zone breakdown

If the audit covered multiple production lines or systems, break out the reactive percentage by zone.

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Zone / line	WO count	Reactive hours	Total hours	Zone reactive %

Look for zones significantly above the plant-wide average. Those are the real install targets — the plant-wide number hides them.

Step 8 — Sign-off

Role	Name	Signature	Date
Planner (lead)			
Maintenance supervisor			
Reliability engineer			
Plant manager (sign-off on in-take rubric and attack plan)			

What to avoid

- **Running the audit for less than 14 days.** Shorter windows miss the weekly cycle of production-driven calls.
- **Letting the operator classify.** The maintenance group classifies against the rubric. Operators can flag urgency; they do not set it.
- **Skipping the zone breakdown.** A plant at 22% plant-wide with one line at 47% needs the zone-level attack, not the plant-wide one.
- **Picking more than one top-cause attack.** Three attacks at once collapse the install discipline. One per quarter.
- **Treating pseudo-emergency as cultural, therefore unfixable.** The culture is a lever, and it is the single biggest one. Attack it.

End of worksheet. File with the install plan from Day 21-30. Re-run at day 60 and quarterly.