



Checklists

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One simple Improvement saves thousands of lives and billions of dollars.

We all know that checklists are widely used in settings where the outcome is critical (aviation, power plants, medicine or military operations).

What we might not know is that the use of checklists has been proven useful in widely different situations. In as different environments as production floors, day care centers and political campaigns checklists play a prominent role.

The idea is simple: Design a checklist for any repetitive activity, distribute, post and use it. Here are a few tried and true simple rules to make it work best.

- ✓ The list should be on a single side of paper. Use large font that is easy to read.
- ✓ The most effective checklists are short and quickly completed. Many can be run through in under a minute.
- ✓ They would typically have 7-10 or so items on them.
- ✓ Post them and use them!

A checklist is simply a reminder system. It consists of things that you already know (hopefully) but might forget for a particular event. Whenever something new goes wrong you can review it to see if it is likely to happen again.

The checklist keeps the practices that make a successful event (like a meeting) right there in front of you. That way even if you are tired, have a headache or are preoccupied you won't miss something important.

Try Checklists for some of these:

- Meeting prep
- Safety walkdown
- Job scoping
- Job planning
- Scheduling

Meeting Checklist		Title of meeting:	
Purpose of meeting:			
Date:	Facility:	Ad hoc?	Scheduled
Done	When	Idea to improve meeting	
	Few days before meeting	Have agenda sent out well before meeting with meeting day, time, location objective and topics, arrange catering if any	
	Few days before meeting <i>and</i> maybe the day before the meeting	Remind people who have promised to complete some work for the meeting. The reminder should be at the top of the communication (like the email) and made bold so it is very hard to miss.	
	10-20 minutes before meeting	<p>Check that:</p> <ul style="list-style-type: none"> • Room is actually available. • Check to see if the room is clean, • Easel has paper (if needed), white board is there, with markers, • Any other aids (like pens and pads), catering • Check out the AV before the meeting. Verify connections (Laptop to LCD projectors and thumb drives) are useable <p>on the computer in the conference room.</p> <ul style="list-style-type: none"> • You have the latest presentations, graphs, charts • Printed materials are complete and enough are printed 	
	Just before the meeting starts	Assign (or request) someone to take minutes (who is good at it).	
	Beginning of the meeting	<p>Have people introduce themselves and their role if people don't already know everyone.</p> <p><i>People come in the door with a variety of concerns and preoccupations. Start the meeting by asking if anyone has any concerns or worries that will interfere with concentrating on the business at hand.</i></p>	
	Throughout the meeting	When you assign tasks and responsibilities, be sure to include in the minutes who is to carry out what and by when (Who-What-By when).	
	At the end of the meeting	The chair should wrap up the meeting with a summary of any agreements or assignments of tasks, plus any agreement for future meetings, etc.	
		<i>At the end of the meeting ask people if the meeting achieved the objectives and to write down any ideas for improvement.</i>	

Examples for meetings

You can also use the checklist to remind yourself to try new ideas, techniques or practices. For example, you could rotate items into the list that you would like to try out (such as some of the more exotic solutions or products)

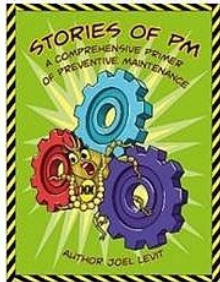
The power of the checklist is in the execution. It only has positive effect if we use it! There is a whole chapter on checklists for meetings in the book "10 Minutes a Week to Great Meetings"

[Reference:](#) The Checklist Manifesto: How to Get Things Right Paperback
by Atul Gawande ISBN-13: 978-0312430009

Good luck, be well, stay safe! Thanks for reading. Cheers, Joel

Clever sales message follows. No, really clever, you'll enjoy it!

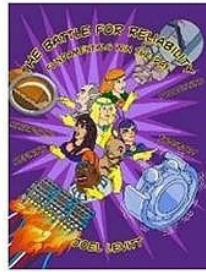
You can tell from the covers these books are different than everything else you've seen.



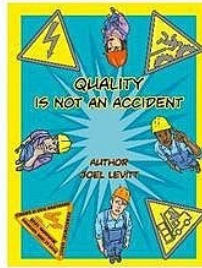
Preventive Maintenance



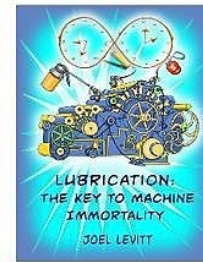
Defect Elimination



Reliability and fundamentals



Maintenance quality



Lubrication



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New Series: **Elements of Great Maintenance Management**. The Elements are written and illustrated (color pictures, stories, snarky comments) to appeal to maintenance folks to teach some basics and even some engineering. These books are different. I admit they are pretty colorful, funny, and weird.



Visit us at WWW.MaintenanceTraining.com for details

Quest for Defect Elimination (ISBN 979-8627700458) is a full-color graphic novel that provides the basics of defect elimination and shows the quest to achieve fewer defects.

Battle for Reliability, Fundamentals Win the Day (ISBN: 9798598795286)

The Battle for Reliability is a graphic novel teaching the critical need for all industries to focus on maintenance fundamentals to avoid unscheduled shutdowns from breakdowns.

Stories of PM, A Comprehensive Primer of Preventive Maintenance (ISBN: 979-8496071154)

PM is the primary way to ensure the reliability of machines, buildings, or other physical assets. Ultimately, even the most rigorous reliability techniques, RCM and PMO, rely on effective PM.

Quality is Not an Accident, The Challenge of Managing Maintenance Quality (ISBN: 9798842723751)

Quality of work depends on everything going right. For years we've tended to blame the maintainers when quality suffered. Now we realize there are barriers to quality, independent of the person.

LUBRICATION: The Key to Machine Immortality (ISBN: 9798387529566)

How do we get our people to take lubrication seriously? Lubrication is the simplest and most effective way to ensure the smooth running of your equipment. Yet, many people don't understand what they are doing, how to lubricate correctly, and why they are doing it. They will after reading this!

More books in this series are on the way!



What other people say about **Elements of Great Maintenance Management**

Sanya Mathura, Author & Managing Director at Strategic Reliability Solutions Ltd

"A captivating novel of the battle that reliability faces within most industrial plants! Joel expertly maneuvers the challenges that teams struggle with daily and provides quick and cost-effective methods of implementing changes that can positively affect your equipment's reliability. Overall, a great way to foster camaraderie amongst peers and get everyone on board with reliability."

Ramesh Gulati Author, Speaker, Reliability Sherpa, ReliabilityX

"Very interesting, very easy to read with a lot of wisdom. Overall, a lot of good information was presented in a very simple language. So, the challenge is how can you make professionals read this?"

Don Fitchett, President - Maintenance, Engineering Training Co., Nevada

"Although we had heard many of those perspectives in Joel's book from the stakeholders before, it is nice to have them in one presentation to get a better sense of the big picture.

The 3D analysis lab was super cool! The real-world examples and learning process I watched (read?) play out was of great value to the story. Your book Joel is a real piece of art. You wrote it in such a way that it is relatable to everyone. It didn't hurt that I have a soft spot for superhero comics. :) Thanks for sharing."

Rolly Angeles, Consultant at RSA Reliability and Maintenance Consultancy Firm (Philippines)

Joel Levitt is one of the maintenance gurus I admire and have much respect for. I have purchased some of his books which I used for reference. There are many authors out there, which you will have a difficult time digesting the contents of the book. Joel has found a way of overcoming this by writing a book in an animated format where it is straightforward to understand.

If you are looking for a smart way to improve your plant, I highly recommend this book by Joel Levitt, which you can finish reading in one sitting. I give this book two thumbs up.

Doc Palmer MBA, Author, trainer, Managing Partner Richard Palmer & Associates, Inc.

Hey Joel, Thanks for letting me read this. You are one of my early career inspirations for helping people in maintenance. A long time ago, you sent me a cassette tape out of the blue that included "we remember Noah's flood because we just think about disasters, not the work of keeping them from happening." Many, many thanks

Daniel Daily, PE, CMRP Author, consultant and trainer

From a higher-level, I would say that I like the overall concept. I recall one of the presenters at the Las Vegas reliability convention saying that one of the biggest problems is that people are no longer readers. This approach might help solve that problem.

Alain Le Bon National Engineering and Maintenance Manager at Cheetham Salt

I am really finding the books quite useful. I think they are good base line educators and for the shop floor. simple easy to understand messaging and like the light read, comic book approach which seems to work to audience. We definitely have a battle for reliability on our hands! I really want to engage the shop floor and

These books are useful for that