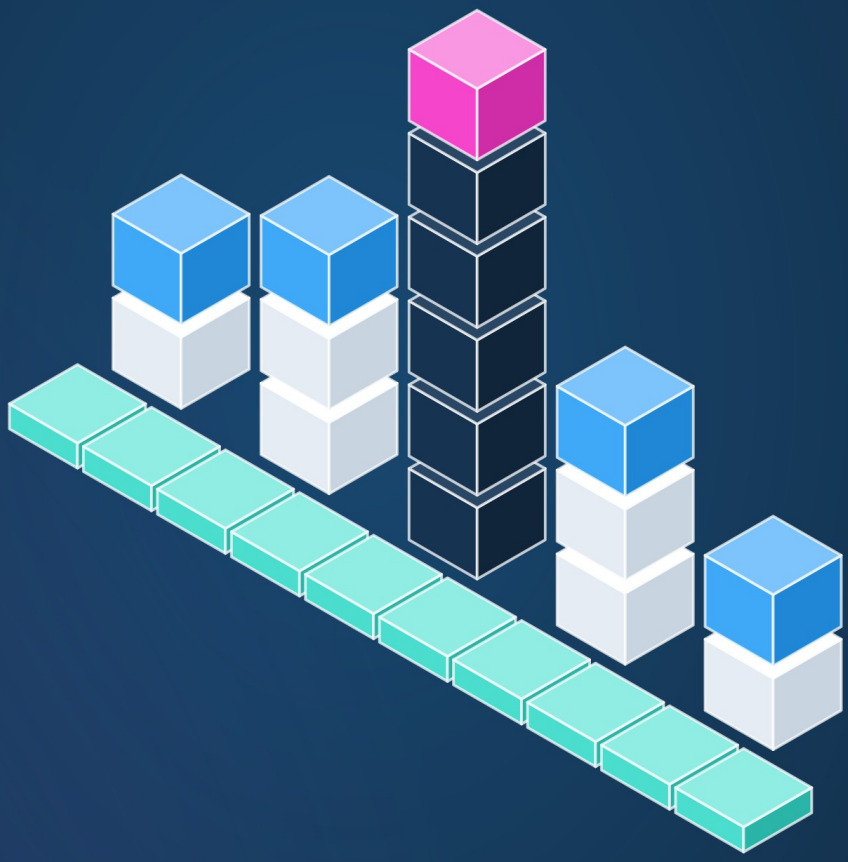
OPERATIONS INSIDER

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THE MANAGER'S PRODUCTION PLANNING AND CONTROL QUICK START CHECKLIST

Score one value stream in twenty minutes, with evidence you can point at.



SEE THE LOAD. PROTECT THE BOTTLENECK.

START HERE

How to Use This Check

One plant or one value stream, one hour with the planner and the supervisor, twenty-five statements, one number.

01 LOOK	02 SCORE	03 ACT
Sit with the planner and a supervisor and open the real plan, the load view, the dispatch list and last week's numbers. Do not score from memory.	Score each statement from 0 to 4. Without a plan, a board or a number you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Happens occasionally, depends on individuals.
2	Partly in place, not consistent across shifts or work centers.
3	Mostly in place and visible on the floor.
4	Consistently in place, visible, reviewed and improved.

> **WHY ONE VALUE STREAM**
>
> **Planning and control are only as good as the flow they steer. Score one value stream from material release to shipping, including its bottleneck, then repeat the check every quarter.**

Before You Start

- **Scope:** one plant or one value stream with several work centers and a mix of products or variants.
- **Evidence:** the monthly and weekly plan, the load per work center, the dispatch list, on-time delivery and schedule adherence of the last four weeks, the disruption log.
- **Tone:** you check the planning system, not the planner. Ask how a date was promised, not who promised it.

THE CHECK

01 Planning Levels and Rhythm

NO.	CHECK	SCORE 0 TO 4
01	Planning runs on three levels, monthly, weekly and daily, and each level has a named owner, a fixed date and a frozen horizon.	
02	The monthly plan is agreed with sales and finance in one meeting, and production commits to volumes it has checked against capacity.	
03	The weekly plan is released on a fixed day and is not changed inside the frozen period without a recorded decision.	
04	Master data for routings, standard times and setup times is checked at least once a year and corrected when actual times differ by more than 10 percent.	
05	Planners, supervisors and the materials team look at the same plan in one system or on one board, not in private spreadsheets.	

02 Capacity and Load

NO.	CHECK	SCORE 0 TO 4
06	Available hours per work center are calculated from shifts minus planned stops, maintenance, breaks and absence, not from nominal hours.	
07	Load per work center and week is calculated from orders and routings for at least the next six weeks and compared with available hours.	
08	Overloads above 100 percent are resolved before release by shifting orders, adding shifts or agreeing new dates, never by hoping.	
09	Leveling spreads volume and product mix over the weeks so that the bottleneck runs between 85 and 95 percent.	
10	Capacity changes such as extra shifts, overtime or outsourcing are decided at least two weeks ahead by a named person.	

THE CHECK

03 Bottleneck and Flow

NO.	CHECK	SCORE 0 TO 4
11	The bottleneck is known by name, confirmed with load data, and every supervisor can explain why it sets the output of the plant.	
12	The bottleneck has a time buffer of work in front of it and never waits for material, operators, tools or programs.	
13	Lot sizes and setup frequency at the bottleneck are set deliberately, and lot sizes at non-bottlenecks are reduced to cut lead time.	
14	Work in progress is limited, for example with CONWIP or Kanban, and the limit is visible on the shop floor.	
15	Lead time is measured per order from release to completion, and it is explained with Little's Law: work in progress divided by output.	

04 Sequencing and Release

NO.	CHECK	SCORE 0 TO 4
16	Orders are released to the shop floor only when material, tools, programs and capacity are confirmed.	
17	Release follows the schedule of the bottleneck: material enters the first operation a fixed buffer time before the bottleneck needs it.	
18	The sequence at each work center follows a written priority rule, for example earliest due date, and exceptions are recorded.	
19	Rush orders follow a defined process with a limit per week and a decision by a named person.	
20	Every order has a promised date that was checked against capacity and material before it was given to the customer.	

THE CHECK

05 Control, Feedback and Disruptions

NO.	CHECK	SCORE 0 TO 4
21	Operations confirm start, quantity and completion at least per shift, so that the plan and the floor show the same state.	
22	Schedule adherence at the bottleneck and on-time delivery to the customer are measured weekly and discussed with causes.	
23	Disruptions such as breakdowns, missing material and quality holds are logged with duration and cause and analyzed monthly.	
24	A daily production meeting of fifteen minutes compares plan and actual, decides countermeasures and escalates within a set time.	
25	Planning performance is reviewed monthly with a small set of numbers, and the three largest causes of deviation get an owner and an action.	

Your Result

BLOCK	POINTS	OUT OF
01 Planning Levels and Rhythm		20
02 Capacity and Load		20
03 Bottleneck and Flow		20
04 Sequencing and Release		20
05 Control, Feedback and Disruptions		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you how much your delivery depends on firefighting. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Firefighting. The sequence is decided by whoever shouts loudest, dates are guesses.	Calculate available hours and load per work center for six weeks. Name the bottleneck.
40 to 59	Planned, not controlled. A plan exists, but the floor runs its own priorities.	Release orders only when ready, write one priority rule, confirm per shift.
60 to 79	Controlled. Plan and floor match most days, the bottleneck is protected.	Limit work in progress, level the bottleneck, review deviations monthly.
80 to 100	Capable. Dates are kept by a system, not by heroes.	Hold the level. Shorten lead time further and connect the plan with sales and operations planning.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

THE RULE FOR EVERY ACTION

Owner and date, or it did not happen. Repeat the check after ninety days and compare the blocks, not the feeling.

What to Do Next

NEXT STEP	WHAT YOU GET
PRODUCTION PLANNING AND CONTROL STARTER KIT	The guide for the first 30 days, plus the capacity and sequence planner with load per work center, bottleneck, priority rules, lead time and on-time delivery.
PRODUCTION PLANNING AND CONTROL EXCELLENCE BUNDLE	The full playbook, a two-day workshop pack, eight planning templates, the twelve-week Excel system and a ready-to-use workshop deck.

Both are available at operationsinsider.com.