

13-Step Checklist for Creating a Preventive Maintenance Plan



1. Select assets for the PM plan

Follow these steps to choose the best assets for your preventive maintenance plan.

- Make a list of all the assets that play an important role in your day-to-day operations.
- Remove assets that don't require regular maintenance.
- Remove assets with low repair and replacement costs.
- Remove assets that will be replaced soon.

Tip 1 Following these steps will ensure that you first focus on critical assets. Keeping these operational will generate the greatest ROI. When you establish a good preventive maintenance workflow, there is nothing stopping you from adding additional assets to your preventive maintenance program.

2. Gather necessary information

For each asset, make a list of necessary preventive maintenance actions and their frequency.

- Record relevant information from OEM recommendations.
- Review maintenance logs and reports for each asset. Record failures and their frequency.
- Talk with maintenance technicians and machine operators to learn if your selected assets are operating normally or experiencing problems.

Tip 2 While OEM recommendations are an excellent starting point, you shouldn't take them at face value. If your assets operate outside of their prescribed working conditions, you need to take that into consideration and adjust the plan accordingly.

Tip 3 The goal of talking with the technicians and machine operators is to find out any pertinent information that might not be visible in the maintenance logs and reports but could have an impact on the preventive maintenance schedule.

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3. Create your PM plan

Begin compiling your preventive maintenance tasks and schedules into checklists for each assets.

- Write down the list of tasks and their frequency, or enter this information in your CMMS.
- Add descriptions/additional instructions.
- Add due dates.
- Add priority levels.
- Assign tasks to specific technicians.

Tip 4 Don't waste your time trying to perfect every single detail. The only way to know for sure if your schedule needs adjusting is to put it into practice and track how it performs.

Tip 5 To maximize the effect of your PM plan, you need to make sure that you are not doing unnecessary preventive work. A **modern CMMS** is the best source of reliable information and detailed insights into your preventive maintenance efforts which makes it a must-have tool for anyone looking to start and run an effective PM program.

Disclaimer

This checklist is designed to help you streamline the process of creating your first preventive maintenance plan. While you can decide to skip certain steps, we believe that following this checklist is a big step towards ensuring the success of your plan.



Complete Guide

If you need more information on how to start a preventive maintenance plan, here is a link to our detailed guide: [How to Start a Preventive Maintenance Plan.](#)

Congratulations! Your PM plan is good to go.