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COURSE BROCHURE

# Annual Maintenance Plan and Spares Forecasting Training Course

20 June – 1 July 2027
Manama

# Annual Maintenance Plan and Spares Forecasting Training Course

**Ref:** 432_15492 **Date:** 20 June – 1 July 2027 **Location:** Manama **Fees:** 8000 GBP

Annual Maintenance Plan and Spares Forecasting is a 2-week advanced training course for maintenance planners and planning supervisors who build the twelve-month view of preventive tasks, craft hours, materials and spare parts for a site, ending with an Annual Maintenance Plan. Finance teams now ask planners to justify every task, part and contractor hour before the year begins. Jupiter Prime Training offers this course for planners who own the long-range horizon.

## Why Annual Maintenance Plan and Spares Forecasting Matters Now

Long-range maintenance planning is shaped by finance teams that set annual budgets months in advance, by supply chains whose lead times for critical spares have grown less predictable, and by operations leaders who need access windows fixed well before production plans are issued. Sites that plan the year well hold the right parts, level their craft workload and defend their budgets; sites that do not overspend on emergency purchases and leave preventive tasks undone. The course uses EN 13306 to classify maintenance types in the plan and ISO 55001 to link the annual plan to asset management objectives.

## Who Gains Most from Annual Maintenance Plan and Spares Forecasting

- Planners who prepare the twelve-month preventive and predictive task calendar
- Supervisors who forecast craft hours and contractor support for the year
- Materials planners who set stock levels for maintenance spares and consumables
- CMMS administrators who maintain task libraries, asset hierarchy and history quality
- Planning leads who present the annual maintenance budget to finance and operations

A planning group gains most when its senior planner, a materials planner and the CMMS administrator attend together and agree one set of forecasting rules.

## Annual Maintenance Plan and Spares Forecasting Capabilities

Participants turn task libraries, failure history and lead-time data into a year-long plan that finance can fund and stores can supply.

- Design preventive task sets with intervals based on failure behaviour and manufacturer guidance — the reliability engineer approving the library
- Calculate annual craft-hour demand by trade and month — workforce and contractor sizing
- Specify spare parts stock levels using demand history and criticality — the stores and procurement team
- Build a twelve-month maintenance calendar levelled across production windows — the operations planning meeting
- Assess CMMS data quality and close the gaps — trust in the forecasts presented to leadership

- Communicate the annual maintenance budget with clear assumptions — finance approval

## Key Annual Maintenance Plan and Spares Forecasting Terms

- Annual maintenance plan — a twelve-month schedule of preventive, predictive and known corrective work with hours, materials and budget.
- Task library — the standard set of preventive and inspection tasks, with steps and intervals, stored in the CMMS.
- Insurance spare — a costly, slow-moving part held because its absence would cause long and expensive downtime.
- Reorder point — the stock level at which a new purchase is triggered to arrive before the part runs out.
- Workload levelling — spreading maintenance hours across months so that crews are neither idle nor overloaded.
- Lead time — the time between raising a purchase request and receiving the part on site.

## Annual Maintenance Plan and Spares Forecasting Day by Day

## Day 1: The Long-Range Planning Horizon

- Planning Horizons Compared — Annual, Quarterly and Weekly Views
- Annual Plan Inputs — Strategy, Budgets, Production Plans and Statutory Work
- EN 13306 Maintenance Types in the Plan — Consistent Classification
- ISO 55001 Line of Sight — Linking the Annual Plan to Objectives
- Planning Calendar and Approval Cycle — Who Signs Off and When

## Day 2: Preventive Task Library Design

- Task Selection From Failure Modes — Tasks That Address Real Risks
- Interval Setting Methods — History, Manufacturer Advice and Condition
- Task Grouping by Route and Shutdown — Reducing Access Costs
- Statutory and Insurance Inspections — Mandatory Items in the Library
- Task Library Review — Removing Duplicate and Low-Value Tasks

## Day 3: Predictive Tasks and Condition-Based Work

- Condition Monitoring Routes in the Annual Plan — Frequencies and Owners
- Follow-Up Work Allowances — Hours Reserved for Findings
- Lubrication Schedules — Route Design and Consumable Forecasts
- Calibration and Instrument Checks — Regulated and Quality Requirements
- Seasonal Work Patterns — Heat, Sand and Peak Demand Effects

## Day 4: Craft Resource Forecasting

- Annual Hours Demand by Trade — Mechanical, Electrical and Instrument
- Available Hours Model — Leave, Training and Shift Patterns
- Gap Analysis — Overtime, Contractors or Re-Phasing
- Multi-Skilling Options — Flexible Crews for Peak Months
- Contractor Call-Off Planning — Framework Hours and Notice Periods

## Day 5: Workload Levelling and the Annual Calendar

- Twelve-Month Calendar Construction — Placing Tasks Across the Year
- Levelling Techniques — Smoothing Peaks Without Breaking Intervals
- Production Window Alignment — Coordinating With Operations Plans
- Major Event Placement — Overhauls and Campaigns in the Year
- Calendar Change Control — Handling Shifts in Production Plans

## Day 6: Spare Parts Classification

- ABC Classification by Usage Value — Focusing Effort Where Spend Is
- Criticality Classification for Spares — Vital, Essential and Desirable
- Insurance Spares Justification — Risk Versus Holding Cost
- Bill of Materials per Asset — Linking Parts to Equipment
- Obsolescence Tracking — Parts Approaching End of Supply

## Day 7: Spares Forecasting and Stock Levels

- Demand Forecasting From History — Moving Averages and Intermittent Demand
- Poisson Models for Slow Movers — Probability of Stock-Out
- Reorder Point and Safety Stock Calculation — Lead Time and Variability
- Min-Max Settings in the CMMS — Automating Replenishment
- Planned Demand From the Annual Plan — Reserving Parts Ahead

## Day 8: CMMS Data Quality

- Asset Hierarchy Health Check — Missing and Duplicate Records
- Failure and Cost Coding Accuracy — Usable History for Forecasts
- Task Library Data Standards — Consistent Steps, Hours and Parts
- Data Cleansing Campaign Design — Priorities and Owners
- Data Governance Rules — Who Creates and Changes Master Data

## Day 9: Budget and Approval

- Annual Maintenance Budget Build-Up — Labour, Materials, Contractors and Services
- Budget Assumptions Register — Making Forecast Logic Visible
- Scenario Comparison — Deferring Tasks Versus Risk Accepted
- Plan Presentation to Finance and Operations — Securing Sign-Off
- Monthly Plan Versus Actual Tracking — Early Correction of Drift

## Day 10: Practising the Annual Maintenance Plan

- Task Library and Interval Findings Applied — Confirming the Year's Tasks
- Craft Resource Forecast Applied — Matching Hours to Capacity
- Spares Classification and Stock Levels Applied — Planning Material Demand
- Budget and Assumptions Applied — Preparing the Approval Pack
- Annual Maintenance Plan Completion — Calendar, Resources, Spares and Budget

## Applying Annual Maintenance Plan and Spares Forecasting After the Course

- Review the task library for one plant area, remove duplicate tasks and reset intervals using failure history.
- Recalculate reorder points and safety stock for the twenty most critical spares using actual lead times.

## Annual Maintenance Plan and Spares Forecasting Questions FAQ

### What is annual maintenance plan and spares forecasting and why does it matter now?

Annual maintenance plan and spares forecasting is the practice of setting a year of tasks, craft hours, parts and budget before the year begins. It matters now because longer supply lead times and tighter budgets punish sites in refineries, utilities and factories that plan only week by week.

### Which roles gain most from annual maintenance plan and spares forecasting?

Maintenance planners and planning supervisors gain most. They own the task library, the craft forecast and the parts demand, so methods for interval setting, workload levelling and stock calculation improve every budget and calendar they prepare.

### How does annual maintenance plan and spares forecasting differ from a weekly planning and scheduling course?

It works on a twelve-month horizon. A weekly planning and scheduling course prepares individual jobs and loads crews for the next week; here participants design task libraries, forecast annual hours and spares, and build the budget the weekly work draws from.

### What do you bring back from annual maintenance plan and spares forecasting training?

You bring back a draft annual plan for your area. It includes a reviewed task library, a levelled twelve-month calendar, craft-hour and contractor forecasts, spare parts stock settings and a budget with stated assumptions.

## Annual Maintenance Plan and Spares Forecasting: The Way Forward

The Annual Maintenance Plan gives finance, operations and stores one agreed view of the year's maintenance work, hours, parts and spend. Its first decision is the approved annual budget. Planners and materials planners use it every month to track progress. After the first quarter, revisit the spares forecasts against actual usage to tune stock levels.