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COURSE BROCHURE

# Advanced Maintenance Budgeting, KPIs and Workforce Leadership Training Course

22 February – 5 March 2027
Amsterdam

# Advanced Maintenance Budgeting, KPIs and Workforce Leadership Training Course

**Ref:** 892_33695 **Date:** 22 February – 5 March 2027 **Location:** Amsterdam **Fees:** 11100 GBP

Maintenance Budgeting, KPIs and Workforce Leadership is a 2-week training course for engineering managers and maintenance department heads, built around one work product: a Maintenance Performance and Budget Roadmap. Asset owners now expect maintenance leaders to defend every spending line with evidence, to report performance in agreed metric definitions and to retain scarce technicians. Jupiter Prime Training delivers this course for leaders who answer to both finance and operations.

## Why Maintenance Budgeting, KPIs and Workforce Leadership Matters Now

Three pressures meet on the maintenance manager's desk. Finance directors scrutinise operating budgets line by line, ageing plants push corrective spending upward, and experienced craftspeople retire faster than apprentices qualify. An organisation that links spending to asset risk, measures performance consistently and plans its craft capacity keeps availability high and avoids emergency outsourcing; one that does not drifts into reactive firefighting and budget overruns. The course draws on ISO 55001 Asset Management Systems, EN 13306 maintenance terminology and the Society for Maintenance and Reliability Professionals SMRP Best Practices metric definitions.

## Who Gains Most from Maintenance Budgeting, KPIs and Workforce Leadership

- Leaders accountable for an annual maintenance budget and its variance reporting
- Heads of maintenance who set craft headcount, shift patterns and contractor ratios
- Engineering managers who present plant performance to executive committees
- Reliability leads who must justify improvement initiatives in cost terms
- Asset management coordinators aligning maintenance practice with ISO 55001

The strongest results come when a maintenance head, a finance business partner and a reliability lead from the same site attend together and leave with one shared roadmap.

## Maintenance Budgeting, KPIs and Workforce Leadership Capabilities

Participants move from defending last year's spend to building a budget, a metric set and a craft plan that explain each other.

- Build a zero-based maintenance budget from asset criticality and task frequencies — finance approval
- Calculate leading and lagging indicators using standard metric definitions — executive reporting
- Design a craft capacity model covering skills, backlog and contractor mix — headcount decisions
- Weigh life-cycle cost options for repair, refurbishment or replacement — capital committee
- Align maintenance policies with ISO 55001 asset management objectives — audit readiness
- Communicate performance gaps and improvement priorities in business language — plant leadership

## Key Maintenance Budgeting, KPIs and Workforce Leadership Terms

- Zero-based maintenance budget — A budget rebuilt each cycle from required tasks, frequencies and labour hours rather than adjusted from the previous year's spend.
- Replacement asset value RAV — The estimated cost of replacing installed assets today, used to express maintenance spend as a comparable percentage.
- Ready backlog — Planned work orders with materials, permits and labour ready, measured in crew-weeks to show whether craft capacity matches demand.
- Wrench time — The share of a technician's paid shift spent on hands-on maintenance tasks, excluding travel, waiting and administration.
- Schedule compliance — The proportion of scheduled work completed as planned within the agreed weekly window, a key indicator of work control.
- Line of sight — The traceable link from organisational objectives through asset management goals down to individual maintenance tasks and metrics.

## Maintenance Budgeting, KPIs and Workforce Leadership Day by Day

### Day 1: The Maintenance Leader's Operating Context

- Maintenance Spend as Percentage of RAV — Benchmarking Budget Position
- Reactive Versus Planned Work Ratios — Diagnosing Departmental Maturity
- Stakeholder Map of Finance, Operations and HSE — Reporting Lines
- EN 13306 Maintenance Terminology — Shared Language Across Departments
- Current-State Assessment Scorecard — Setting the Improvement Baseline

### Day 2: Asset Management Alignment

- ISO 55001 Clauses on Objectives and Planning — Policy Alignment
- Strategic Asset Management Plan Structure — Linking Plant to Business
- Line-of-Sight Mapping Exercise — Connecting Tasks to Corporate Goals
- Asset Criticality Ranking Matrix — Where Budget Attention Goes First
- Risk-Based Maintenance Policy Selection — Choosing Strategy per Asset Class

## Day 3: Building the Maintenance Budget

- Zero-Based Task Costing Method — Defensible Annual Budget Lines
- Labour, Materials and Contractor Cost Pools — Budget Structure Choices
- Spares Holding Cost and Min-Max Levels — Inventory Investment Trade-Offs
- Shutdown and Turnaround Provisions — Separating Periodic From Routine Spend
- Budget Variance Analysis Template — Monthly Explanation to Finance

## Day 4: Life-Cycle Cost and Investment Cases

- Life-Cycle Cost Modelling — Repair, Refurbish or Replace Decisions
- Net Present Value for Maintenance Projects — Capital Committee Submissions
- Cost of Unavailability Estimates — Quantifying Production Loss Exposure
- Obsolescence Registers — Timing Equipment Renewal Requests
- Business Case One-Page Format — Winning Approval for Reliability Spend

## Day 5: Metric Definitions and Scorecards

- SMRP Best Practices Metric Pillars — Selecting Indicators per Audience
- Leading Versus Lagging Indicators — Balancing the Scorecard
- Overall Equipment Effectiveness Calculation — Production-Facing Performance Views
- Mean Time Between Failures and Repair — Reliability Trend Reporting
- Metric Definition Sheets — Ending Disputes Over Calculation Methods

## Day 6: Work Control Performance

- Schedule Compliance and Ready Backlog — Weekly Work Control Health
- Wrench Time Sampling Studies — Finding Hidden Craft Capacity
- Planned Maintenance Compliance Tracking — Preventive Routine Integrity Checks
- CMMS Data Quality Audits — Trusting the Numbers Reported Upward
- Performance Dashboard Design — Presenting Trends to Plant Leadership

## Day 7: Workforce Capacity Planning

- Craft Capacity Model — Matching Headcount to Backlog Demand
- Skills Matrix and Competency Gaps — Training Investment Priorities
- Contractor Versus In-House Mix — Cost and Knowledge Retention
- Shift Pattern and Call-Out Analysis — Overtime Control Options
- Succession Plans for Critical Trades — Protecting Retiring Expertise

## Day 8: Leading Maintenance Teams

- Supervisor Span of Control Review — Front-Line Leadership Structure
- Performance Conversations Using Craft Metrics — Fair Individual Reviews
- Planner-to-Technician Ratios — Staffing the Planning Function
- Change Readiness Assessment — Introducing New Work Practices
- Recognition Linked to Reliability Gains — Sustaining Team Engagement

## Day 9: Improvement Roadmaps and Governance Reviews

- Gap Prioritisation Using Effort-Impact Grids — Sequencing Initiatives
- Maintenance Management Review Cadence — Monthly and Quarterly Forums
- Internal Audit Against ISO 55001 Requirements — Readiness Evidence
- Benefit Tracking Registers — Proving Savings to Finance
- Executive Briefing Narrative — Securing Sponsorship for Change

## Day 10: Practising the Maintenance Performance and Budget Roadmap

- Applying Zero-Based Costing to a Refinery Case — Budget Defence
- Applying the Scorecard to a Water Utility Case — Indicator Selection
- Applying the Craft Capacity Model to Case Backlog — Headcount Proposal
- Peer Challenge Panel on Investment Cases — Strengthening Arguments
- Completing the Maintenance Performance and Budget Roadmap — Site Action Plan

## Applying Maintenance Budgeting, KPIs and Workforce Leadership After the Course

- Rebuild one cost centre's budget with zero-based task costing and compare it with the current allocation at the next finance review.
- Run a two-week wrench time sampling study on one craft group and use the result to set a realistic schedule compliance target.

## Maintenance Budgeting, KPIs and Workforce Leadership Questions FAQ

### What is maintenance budgeting, KPIs and workforce leadership, and why does it matter now?

It is the discipline of linking maintenance spend, performance metrics and craft capacity into one defensible plan. It matters now because finance scrutiny, ageing plant and skills shortages all land on the maintenance leader at once, in refineries and utilities alike.

### Which roles gain most from maintenance budgeting, KPIs and workforce leadership training?

Engineering managers and maintenance heads gain most. Reliability leads, asset management coordinators and the finance partners who review maintenance budgets also benefit, especially when they attend together and build one shared roadmap for their site.

### How does a maintenance budgeting, KPIs and workforce leadership course differ from a planning and scheduling course?

It works at department level rather than work order level. A planning and scheduling course trains planners to build weekly schedules; this course trains leaders to fund, measure and staff the whole maintenance function and to defend those choices before executives.

## What do you bring back from maintenance budgeting, KPIs and workforce leadership training?

You bring back a roadmap that ties your budget lines, scorecard and craft capacity plan together. It gives you a ready case for the next budget round and a set of indicators with agreed definitions for monthly reporting.

## Maintenance Budgeting, KPIs and Workforce Leadership: The Way Forward

The Maintenance Performance and Budget Roadmap first informs the next annual budget submission, where the maintenance head uses it to justify spend by asset risk. Finance partners and plant managers then use its scorecard each month. After the first budget cycle, revisit the craft capacity assumptions, because backlog and retirements shift faster than most organisations expect.