

Appendix B

Master Scheduling Sample Implementation Task List

Task Number	Task Description	Responsibility	Commence	Complete
010	Project Administration in Place			
020	Process Owner Identified			
030	Process Operator Identified			
040	Process Operator in Place			
050	Create Master Scheduling (MPS) Team Reference Binder			
060	Master Scheduling Team Formed			
070	Select Subteam Members			
080	Subteam Members in Place			
090	Team Roles and Responsibilities Defined			
100	Team Roles and Responsibilities Assigned			
110	Weekly Meeting Scheduled			
120	Master Scheduling Team Charter			
130	Identify Tasks			
140	Identify Deliverables			
150	Write Charter			
160	Charter Approved			
170	Assess Master Scheduling Using Checklist			
180	Assessment One Report			

Task Number	Task Description	Responsibility	Commence	Complete
190	Assessment Review			
200	First-Cut Education			
210	Integrated Supply Chain Management Course			
220	Key Influencers to Master Scheduling Course			
230	Vision Statement for Master Scheduling			
240	Affinity Process Session			
250	Create Vision for Categories Identified			
260	Rework Individual Visions			
270	Tie Vision for Master Scheduling Together			
280	Final Draft of Master Scheduling Vision			
290	Submit Vision to Management			
300	Rework Vision with Management Feedback			
310	Resubmit Vision for Management Approval			
320	Publish Master Scheduling Vision			
330	Benefits Statement			
340	List of Benefits Developed			
350	Benefits Statement Draft			
360	Master Scheduling Task Team Discussion			
370	Benefits Statement Final Draft			
380	Submit Benefits Statement to Management			
390	Rework Benefits Statement with Management Feedback			
400	Resubmit Benefits Statement for Management Approval			
410	Publish Benefits			
420	Performance Goals and Measurements			
430	List of Accuracy and Performance Goals Developed			

Task Number	Task Description	Responsibility	Commence	Complete
440	Measurements Defined			
450	One-Page Definition Documents Created (One-Pagers)			
460	Master Scheduling Task Team Discussion			
470	One-Pagers Final Draft for All MPS Goals and Measurements			
480	Submit One-Pagers to Management			
490	Rework One-Pagers with Management Feedback			
500	Resubmit One-Pagers for Management Approval			
510	Publish One-Pagers			
520	Initial Education and Training			
530	Master Scheduling Education Workshop			
540	Supply Chain Management Library Established			
550	Determine How Mass Education Will Be Done			
560	Education/Training Plan Created			
570	Education/Training Plan Approved			
580	Session Schedule Created and Approved			
590	Broadcast of Education and Training Sessions			
600	Sessions Run (Education and Training)			
610	Attendance Documented			
620	High-Level Design			
630	Mindmap Master Scheduling Process			
640	Create Design Document Using Mindmap (MPS)			
650	Mindmap Rough Cut Capacity Process			

Task Number	Task Description	Responsibility	Commence	Complete
660	Create Design Document Using Mindmap (RCCP)			
670	Education for MPS Team on Flowcharting			
680	Flow Diagram Master Scheduling Process			
690	Create List of Policies Required			
700	Create List of Procedures Required			
710	Identify Main Reporting Requirements			
720	Highlight Master Scheduler's Responsibilities			
730	Glossary of Master Scheduling Terms Created			
740	Integrate Assessment, Vision, Benefits, Organization,			
750	Goals, Measurements, Education, Training, Mindmaps,			
760	Flow Diagrams, Policies, and Procedures into Master			
770	Scheduling High-Level Design			
780	Submit to Project Team for Feedback			
790	Rework High-Level Design with Project Team Feedback			
800	Prepare High-Level Design Presentation			
810	Present High-Level Design to Management			
820	Document Management Feedback from Presentation			
830	Create Action Plan for Management Feedback			
840	Secure Management Approval to Move to Detailed Design			
850	Detailed Design			

Task Number	Task Description	Responsibility	Commence	Complete
860	Identify Master Scheduling Process Flows Required			
870	Create Detailed Process Flows			
880	Update List of Policies and Procedures Required			
890	Assign Responsibilities for Policies and Procedures Creation			
900	Identify Policy and Procedure Format to Be Used			
910	Write Key Policies (See List in Effective Implementation Chapter)			
920	Submit Key Master Scheduling Policies to Management			
930	Rework Policies with Management Feedback			
940	Resubmit Policies for Management Approval			
950	Identify Key Decisions That Need to Be Made			
960	Integrate Vision, Organization, Measurements, Flow Diagrams,			
970	Policies, Procedures, Decisions Needed, and Implementation			
980	Implications into Master Scheduling Detailed Design			
990	Submit to Project Team for Feedback			
1000	Rework Detailed Design with Project Team Feedback			
1010	Prepare Detailed Design Presentation			
1020	Present Detailed Design to Management			
1030	Document Feedback from Presentation			

Task Number	Task Description	Responsibility	Commence	Complete
1040	Create Action Plan for Management Feedback			
1050	Secure Management Approval to Move to Analysis Work			
1060	Determine What to Master Schedule			
1070	Review Typical Product Profiles			
1080	Discuss Where to Meet the Customer			
1090	Generate Indented Bill-of-Material (BOM) for Pilot Product Family			
1100	Add Lead Times to Indented Bill-of-Material (BOM)			
1110	Create Time-Phased Bill-of-Material			
1120	Secure Customer and Marketplace Lead Time Expectations			
1130	Overlay Customer/Marketplace Expectations on Indented BOM			
1140	Identify Point on Indented BOM to Meet the Customer			
1150	Define What to Master Schedule for Pilot Product Family			
1160	Repeat Steps Above for All Product Families			
1170	Master Scheduling Preparation			
1180	Assign the Master Scheduler(s)			
1190	Define Roles and Responsibilities of the Master Scheduler			
1200	Determine Planning Horizon Length			
1210	Determine Master Scheduling Period (Bucket) Size			
1220	Identify Where to Place the Planning Time Fence (by Item)			

Task Number	Task Description	Responsibility	Commence	Complete
1230	Assign Responsibility for Maintaining Planning Time Fence			
1240	Determine How to Use Firm Planned Orders (FPOs)			
1250	Create Planning Bills to Support Disaggregation of Product Families			
1260	Develop Long-Term MPS Requirements for Software			
1270	Complete Policies Creation			
1280	Submit All Policies to Management			
1290	Rework Master Scheduling Policies with Feedback			
1300	Resubmit Policies for Management Approval			
1310	Publish Master Scheduling Policies			
1320	Write All Procedures Identified in Design Documents			
1330	Submit to Project Team for Feedback			
1340	Rework Procedures with Project Team Feedback			
1350	Submit Procedures to Management for Approval			
1360	Publish Master Scheduling Procedures			
1370	Educate and Train Personnel on Policies and Procedures			
1380	Data Integrity			
1390	Create List of Planning Parameters Used in Master Scheduling			
1400	Assign Responsibility for Data Cleanup			
1410	Clean Up Database Planning Parameters (Lead Times, Lot Sizes, etc.)			

Task Number	Task Description	Responsibility	Commence	Complete
1420	Print Report Showing Changes			
1430	Review All Changes Made to Database			
1440	Update Database Parameters as Required (Based on Review)			
1450	Database Ready for Use			
1460	Audit Bills-of-Material for Accuracy (Sample Size)			
1470	Audit Planning Bills for Accuracy (Sample Size)			
1480	Bills-of-Material Data Base Ready for Usage			
1490	Cycle Count Inventory (Master Scheduling Items Sample)			
1500	Audit MPS Finished-Goods Locations			
1510	Inventory Records Database Ready for Use			
1520	Software Selection for Master Scheduling			
1530	Complete Software Requirements Document			
1540	Review and Critique Master Scheduling Software Solutions			
1550	Select Master Scheduling Software (if Required)			
1560	Information Technology Computer Pilot			
1570	Conversion Checklist Defined and Delivered			
1580	Identify All Systems That Need Interfaces			
1590	Create All Interfaces/Conversion Tools			
1600	Interface Architecture and Methodology Complete			
1610	Interfaces Developed and Delivered			

Task Number	Task Description	Responsibility	Commence	Complete
1620	Master Scheduling Software Tool Configuration Complete			
1630	Master Scheduling Hierarchy Designed			
1640	Master Schedule Linked to Sales and Operations Planning (S&OP) Process			
1650	Product and Materials Configured			
1660	Running the Computer Test System			
1670	Input Planning Bills into Master Scheduling System			
1680	Create Master Schedule for Test Product Family			
1690	Run Test Case Using Planning Bills			
1700	Document Results from Test			
1710	Enter Customer order(s)			
1720	Determine Forecast Consumption Rules to Use			
1730	Review Forecast Consumption Results			
1740	Determine Available-to-Promise (ATP) Rules to Use			
1750	Update Available-to-Promise (ATP) and Check Results			
1760	Document Results from Test			
1770	All Policies and Procedures in Place (Checkpoint)			
1780	All Personnel Trained on Policies, Procedures, and System (Checkpoint)			
1790	Additional Preparation			
1800	Determine Safety Stock Level (Work with Demand Management)			
1810	Input Safety Stock Levels by Item Number into System			
1820	Use Planning Bills to Create Unit Demand at the Master Schedule Level			

Task Number	Task Description	Responsibility	Commence	Complete
1830	Tie Master Schedule to Sales and Operations Planning Output			
1840	Create Program to Aggregate MPS and Tie to S&OP Output			
1850	Tie Master Schedule to Demand Management			
1860	Tie Master Schedule to Detailed Daily Plant/Mill Schedule			
1870	Finalize ATP Rules to Be Used			
1880	Finalize Forecast Consumption Rules to Be Used			
1890	Scheduling in MPS Software Tool Configuration			
1900	Testing Procedures and Guidelines Available			
1910	Changes Requested as Needed			
1920	Modify MPS Software as a Result of Computer Pilot Test			
1930	Conference Room Pilot			
1940	Master Scheduling Process Modeled in MPS Software			
1950	MPS Software Refined as Necessary			
1960	Reports/Screens Modified, if Necessary			
1970	Task Team Ensures Process Is Working			
1980	Model Is Demonstrated to Broader Group			
1990	Testing Is Complete			
2000	Modify Model as a Result of Testing			
2010	Conference Room Pilot Is Complete			
2020	Update Implementation Plan			
2030	Refine Implementation as Necessary			
2040	Accountability for Scheduling System Assigned			

Task Number	Task Description	Responsibility	Commence	Complete
2050	Software Tool Training Program			
2060	Master Scheduling Software Overview to All Users			
2070	Master Scheduling Software Detail to All Key Users			
2080	Live Pilot and Cutover			
2090	Cutover Date Established and Approved			
2100	Go/No-Go Checklist Reviewed			
2110	Commence Scheduling with Pilot Items			
2120	Pilot Results Reviewed			
2130	Process Modifications Made as Necessary			
2140	Live Pilot Is Complete			
2150	Cutover All Products to New Master Scheduling Processes			
2160	Information Technology Support for Users as Required			
2170	Cutover Remaining Performance Measurements			
2180	Post-cutover Analysis			
2190	Master Scheduling Is Driving Material Planning and Production			
2200	Available-to-Promise (ATP) Is Functioning			
2210	Master Scheduling Is Running within S&OP Policy			
2220	Assess Master Scheduling Using Checklist			
2230	Self-Assessment Using Oliver Wight Class A Checklist			
2240	Weaknesses of Processes Identified			
2250	Process Improvements in Weak Areas			
2260	All Processes Are Strengths			
2270	Audit Shows Class A Results			

Task Number	Task Description	Responsibility	Commence	Complete
2280	Oliver Wight Class A Audit of Master Scheduling			
2290	Class A Achieved for Master Scheduling Portion of Checklist			