



# PM Audit Checklist

A structured checklist for evaluating your preventive maintenance program

Use this checklist to evaluate the health of your preventive maintenance program. Each item reflects an established reliability best practice drawn from SAE JA1011, SMRP metrics, Moubray's RCM methodology, and industry standards (API, DOE, ISO 55001). Check every item that is true for your facility, then use the scoring guide at the end to identify where to focus improvement efforts.

## Section 1 — PM Task Relevance

*Based on SAE JA1011 RCM criteria & Moubray's RCM II methodology*

- Does each PM task explicitly link to at least one documented failure mode?
- Are tasks derived from RCM / FMEA analysis — or copied verbatim from OEM manuals without review?
- Has every PM task been reviewed for continued applicability within the last 2 years?
- Are there PM tasks that have never found a defect? (If so, they may be candidates for elimination.)
- Is each task's expected outcome clear — what should the technician find, measure, or verify?

## Section 2 — Failure Mode Coverage

*Aligned with NASA RCM Guide & SMRP Body of Knowledge Pillar 1*

- Are your top 10 "bad actors" (highest-downtime assets) each covered by targeted PM tasks?
- Do critical assets have condition-monitoring tasks (vibration, thermography, oil analysis) where technically feasible?
- Have hidden-failure modes (protective devices, alarms, relief valves) been identified with scheduled functional checks?
- Is there a documented criticality ranking (e.g., API 580 risk matrix) driving PM scope and priority?
- Are age-related and random failure patterns distinguished — so time-based tasks are only used where wear-out dominates?

### Section 3 — Frequency & Interval Validation

*References DOE O&M Best Practices Guide & SMRP Metric 5.5.6*

- Are PM intervals based on equipment failure data (MTBF, Weibull) rather than arbitrary calendar schedules?
- Have you evaluated whether each calendar-based task should instead be condition-based or usage-based?
- Do you adjust intervals when operating context changes (e.g., throughput increase, feedstock change)?
- Is the 10% SMRP compliance window applied — tasks executed within  $\pm 10\%$  of the scheduled interval?
- Are there PMs performed too frequently, consuming labor with no measurable reliability benefit?
- Do you have a formal process to extend or reduce intervals based on findings history?

### Section 4 — PM Execution Quality

*ISO 55001 asset management principles & SMRP Pillar 5*

- Do PM work orders include clear task descriptions, acceptance criteria, and required tools/parts?
- Are technicians trained and competency-verified for the specific tasks they perform?
- Is there a feedback loop — can technicians flag tasks that are unclear, unnecessary, or missing scope?
- Are PM findings recorded in a structured format that feeds back into reliability analysis?
- Is PM compliance tracked as a KPI? (SMRP best practice target:  $\geq 90\%$  schedule compliance.)

### Section 5 — PM Effectiveness Measurement

*SMRP Metrics 5.5.1–5.5.8 & Moubray's "safe minimum maintenance" principle*

- Can you demonstrate a correlation between PM tasks performed and failure rate reduction?
- Do you track both PM compliance (did we do it?) AND PM effectiveness (did it prevent failures)?
- Is reactive maintenance ratio tracked? (SMRP benchmark:  $< 20\%$  reactive,  $\geq 80\%$  planned.)
- Do you measure the ratio of corrective work orders generated per PM? (Benchmark:  $\sim 1$  per 6 PMs.)
- Are PM costs tracked per asset — and compared against the cost of failure they prevent?
- Is there a periodic PM optimization review (PMO) to eliminate, consolidate, or improve tasks?

## Section 6 — Program Health & Governance

*Aligned with ISO 55001 continual improvement & SMRP Pillar 4*

- Is your total PM count growing without corresponding review? (PM bloat is a leading indicator of inefficiency.)
- What percentage of total maintenance labor hours are PM? (SMRP benchmark: ~15% of total labor.)
- Is there an owner accountable for the PM program — not just execution, but strategy and optimization?
- Do you conduct an annual PM program audit with cross-functional input (operations, reliability, maintenance)?
- Is there a management-of-change process for adding, modifying, or removing PM tasks?

### Quick Scoring Guide

Count the total items you checked across all sections, then find your range below. (Total possible: 32 items.)

#### 0 – 10 checks — Critical

Your PM program likely has major gaps. Reactive maintenance is probably dominant. Start with a failure-mode review of your top 10 bad actors.

#### 11 – 20 checks — Needs Work

You have foundations, but significant optimization opportunities exist. Focus on interval validation and effectiveness measurement.

#### 21 – 26 checks — Solid Foundation

Your program is well-structured. Target the unchecked items for continuous improvement and consider a formal PMO review.

#### 27 – 32 checks — Best-in-Class

Excellent discipline. Ensure you maintain rigor with annual audits and keep adapting to changing operating contexts.

### Want to know where your reliability program stands?

This checklist helps you evaluate your PM program. To get the full picture across all five dimensions of reliability, take the free assessment:

[reliabilitysimplified.com/assess](https://reliabilitysimplified.com/assess)

Find more free tools at [reliabilitysimplified.com/resources](https://reliabilitysimplified.com/resources)

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