



Effective Shutdown Planning & Turnaround Management

A DEEP-DIVE, 5-DAY VIRTUAL WORKSHOP OFFERED IN PARTNERSHIP
WITH STONavigator

Course Available for Private Live-Virtual

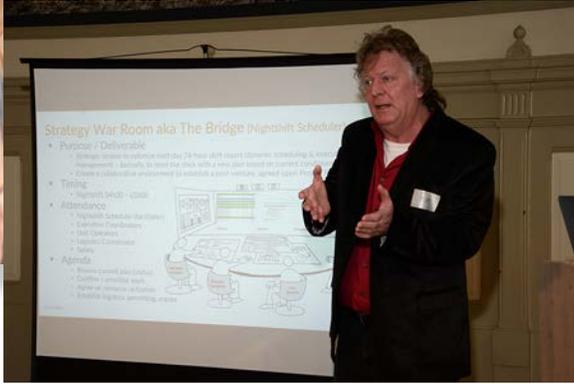
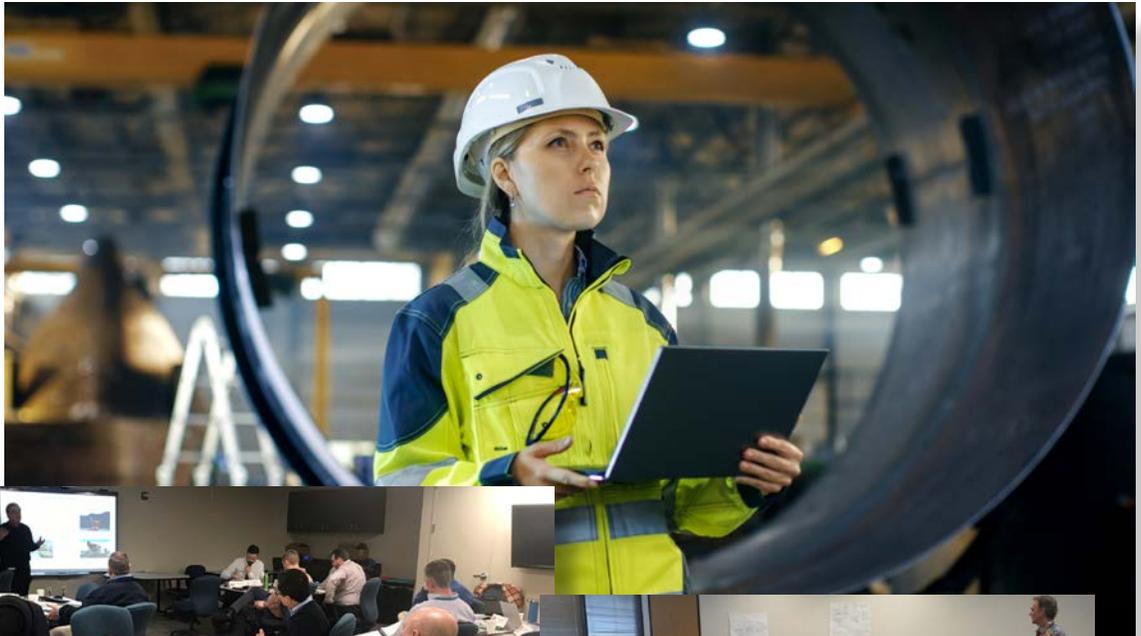


"Impressive. P6 STO course should be extended to middle managers to help with better understanding of project planning"

"Instructor explained so much in a real world style and application"

"Excellent presentation, tips and secret information on STO project planning"

"Ted Lister provided practical insight for the areas we struggle with."



"I have sat in a lot of workshops in my career, but this one was so valuable and approachable"

"I got a whole different perspective on our shutdowns - we were really missing the mark and now I feel that I can take the team to a new level."



Workshop has been held publically and privately in:

- Canada
- USA
- South America
- Asia
- Malaysia
- Australia

About the Program and How to Register

Introduction to Effective Planning and Turnaround Management
Who Should Attend
The Extraordinary Value of This Program
Tuition Fees

Content Overview: Module 1

Asset Management (Workscope & Budget Optimization)

Content Overview: Module 2

Strategic Planning & Plan2Plan

Content Overview: Module 3

Work Package Planning

Content Overview: Module 4

DSM (Dynamic Scheduling Methodology)

Content Overview: Module 5

DEC (Dynamic Execution Control)

Content Overview: Module 6

Flawless Start-up, PSSR (Pre-start-up Safety Review), Closing & Lessons-learned

How You Will Learn

Deliverables



About the Program

Introduction: Effective Shutdown Planning and Turn- around Management

This **Effective Shutdown Planning and Turnaround Management** workshop will walk you through key concepts and strategies to manage effective plant shutdowns and turnarounds. Individuals or teams will learn how to create a shutdown and turnaround roadmap and a clear assurance process plan, aligned with your organization's key business objectives. Thorough understanding of the full equipment life cycle, you will be able to identify gaps in your preparation and execution and plan safe and productive turnarounds, with optimized scheduling and cost control that enable you to deliver both on time and on budget. Additionally, you will also learn to drive and navigate your shutdown, turnaround & outage (STO) events by using DSM (Dynamic Scheduling Methodology) and Primavera™ P6 tools.

Who Should Attend

The Effective Shutdown Planning and Turnaround Management workshop is suitable for professionals that are involved in the planning, co-operation, and execution of plant shutdowns and turnarounds. This includes practitioners who are Senior Managers, Managers, Engineers, Supervisors, and Coordinators.

- Plant Managers
- Asset Management
- Procurement
- Shutdown or Turnaround Planner
- Planners & Schedulers
- Operations Shutdown / Outage
- Construction Superintendents
- Inspection & Materials
- Health, Safety & Environment
- Reliability/Inspection
- Testing and Commission
- Mechanical & Electrical Engineering
- Production
- Project Management
- Facilities Management
- Planning, Scheduling and Cost Control

Extraordinary Value of this Program

Go2Learn offers the 5-Day **Effective Shutdown Planning Turnaround Management** workshop with globally recognized STO subject-matter expert, E. J. (Ted) Lister.

Ted brings a wealth of experience to the classroom:

- A mastery of the subject matter; ability to relate theory & practice
- Real-world experience with corporations and organizations
- Ability to deliver material in an exciting and clear manner
- A clear understanding of what elements should be prioritized to leverage the key concepts and strategies for planning and managing large events.

The program combines fundamental need-to-know material, tried-and-true methodologies and processes, and proven leading-edge approaches that have shown measurable business benefits from hundreds of STO events globally.

Participants receive five virtual half-days of instruction over five weekdays, including a wide range of case studies demonstrating how these principles have been successfully and widely applied. Discussion, debate, individual and group exercises are all done in an interactive, educational, realistic, and entertaining format.

This workshop is an unparalleled learning experience.

Logistics: Program Dates, Location, Tuition Fee & Registration

Program Availability

Live virtual workshops are available throughout the year. 8 weeks lead-time required. Scheduling can be tailored to the participants' availability.

- 5 consecutive days (2-3 hours each)
- 5 days over 2-3 weeks (2-3 hours each)
- 2.5 full days (6 hours x 2 + 3 hours)

Location

The 5-day course will be held:

- **Virtual** via Zoom or TEAMS
- **On-site** when it's safe to do (2-3 days)
- **Tailored** to fit your schedule, the course can be delivered over time

Virtual Tuition \$USD

Private Workshop for up to 16 - \$15,750
Public Workshop:

1 attendee: \$1,495.

2+ attendees: \$1,295.

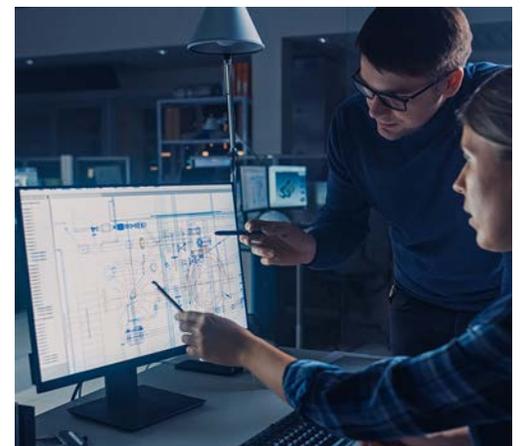
Public Sector: \$ 995.

On-site pricing: **Call for information**

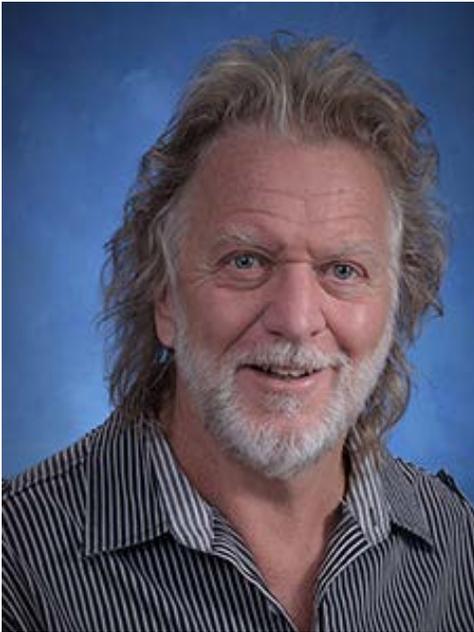
How to Register

Call 917 554-3444 or visit

[STO Planning & Management](#)



Instructor: E. J. (Ted) Lister



E. J. Lister, Managing Director, STONavigator

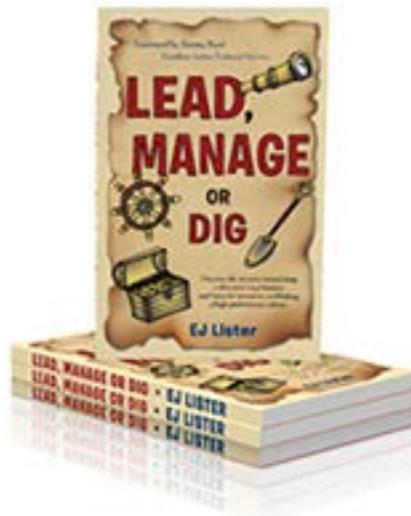
- Over 30 years of combined hands-on & consulting experience in the planning & execution of plant shutdowns & turnaround
- Trained, mentored and consulted various clients across over 40 countries on 5 continents, among his clients includes Shell, Husky Oil, Jacob Oil, Mobil Oil, Petronas Carigali, Terra Nova, Gulf Canada, Petroleos de Venezuela and more
- Certified Management Consultant since 2001 and an accredited Red Seal Electrician & Instrumentation Technologist and PMP Certified (PMI) Instructor
- Author of “Dynamic Schedule Management (DSM)” for Primavera™ P6 and MS Project, “Stepby-Step” Primavera™ P6 for STO Training Manual and “Successful Change Management”

EJ (Ted) Lister is a specialist in the field of Asset & Resource Performance in the oil & gas, petrochemical, mining, and energy sectors-specific to Maintenance-Reliability, Shutdowns, Turnarounds, and Outages, with a passion for people and change management. With years of international lessons-learned experience and best-practice knowledge, Ted works to educate stakeholders on Effective Shutdown Planning and Turnaround Management through a series of lessons on best-practice methodologies, supported by digitalization and technology, with a keen interest in establishing a collaborative work environment through digitalization of business processes to reduce risk, cost and production losses.

For the past 30 years, he’s traveled to more than 40 countries on 5 continents, instructing, mentoring, and consulting to top organizations, helping to improve employee and contractor competencies, enhance production, reduce risk, and save millions in operating expenses for multi-national companies.

Ted is the creator of several best-practice methodologies and the author of publications and materials for driving business performance. Ted’s latest book, **Lead, Manage or Dig** (cultivating an HpO) is a culmination of his brilliant thinking.

Ted is as comfortable and confident in the boardroom as he is in the lunchroom and the shop floor—his background is in the field of Electrical/Instrumentation with accredited Project Management and HR skills—which he attributes to his success as a business performance/operational excellence consultant. Ted’s presentation and speaking style are inspirational, educational, and entertaining.



Module 1

Asset Management

(Workscope & Budget Optimization)

In this session, participants will learn to establish the most optimized Scope of Work & Budget for their event using RBSR (Risk-based Scope Review) methodology and budgeting tools. The goal here is to focus on effectiveness and the 2 key indicators of Cost and Schedule Duration (timeline with minimal production loss). Participants will learn to:

- Establish a 5- 10- 15-year STOp plan for sustainable & profitable operation
- ERP/CMMS data management with industrial digitalization and data management
- RBSR (Risk-based Scope Review)
- Establishing a 3-phase budget
- Establish STO event kick-off
- Establish goals & objectives
- Establish realistic KPI’s (Key Performance Indicators) & targets
- Establish vision & mission
- Establish the STO organization with roles & responsibilities
- Establish WBS (Work Breakdown Structure)

Module 2

Strategic Planning & Plan2Plan

In this session, participants will learn to facilitate Strategic Planning Workshops as part of the Plan2Plan (milestone schedule) from event kick-off to feed-out date (T-minus Zero). Methodology, Navigational Roadmap, and tools will be provided. Participants will learn to collaborate in a transparent manner, using MS Teams® or other digital solutions to ensure everyone contributes to the planning of the event with 3 key indicators in mind: Safety, Quality, and Worker Wrench-time Efficiency.

Participants will learn to:

- Establish a Plan2Plan milestone schedule
- Establish RACI Matrix and assign responsibility and accountability to key members of the STO event team (steering committee and core team)
- Create and facilitate strategic planning workshops for: permitting, tools & materials, planning, inspection, procurement/contracting, HSE, logistics, mobilization, communication & meetings, resource management, execution management & control, QA/QC, shutdown/start-up, LOTO, etc.
- Learn to establish a weekly core team meeting (create an agenda)
- Learn to create an Action Tracker (provided)
- Establish contract types based on work type; with terms & conditions
- Perform a Readiness Assessment (tool provided)
- Industrial digitalization for web- and cloud-based transparent, secure and collaborative teams
- Working remotely

Module 3

Work Package Planning

In this session, participants will learn the best practices for creating Work Packages, estimating, assembly, and tracking to ensure each package has its contributors involved and adds to the value of the 3 key indicators above. This will include Planning, Estimating, Bill of Materials, Equipment, Drawings, Photos, and preparing to upload to Primavera™ P6 or MS Project®. An example of a Work Package will be provided, along with best-practices, templates, and tools.

Participants lessons learned:

- Basis of Planning & Scheduling review (documents)
- How to establish a Planning Team
- Roles & responsibilities of Planning Team
- Create world-class Work Packages (examples provided)
- Track Work Package progress (tool provided)
- Benchmark estimating standards
- Understand PF (Productivity Factors) for non-productive time
- ITP (Inspection & Test Plans)
- MOC (Management of Change)

Module 4

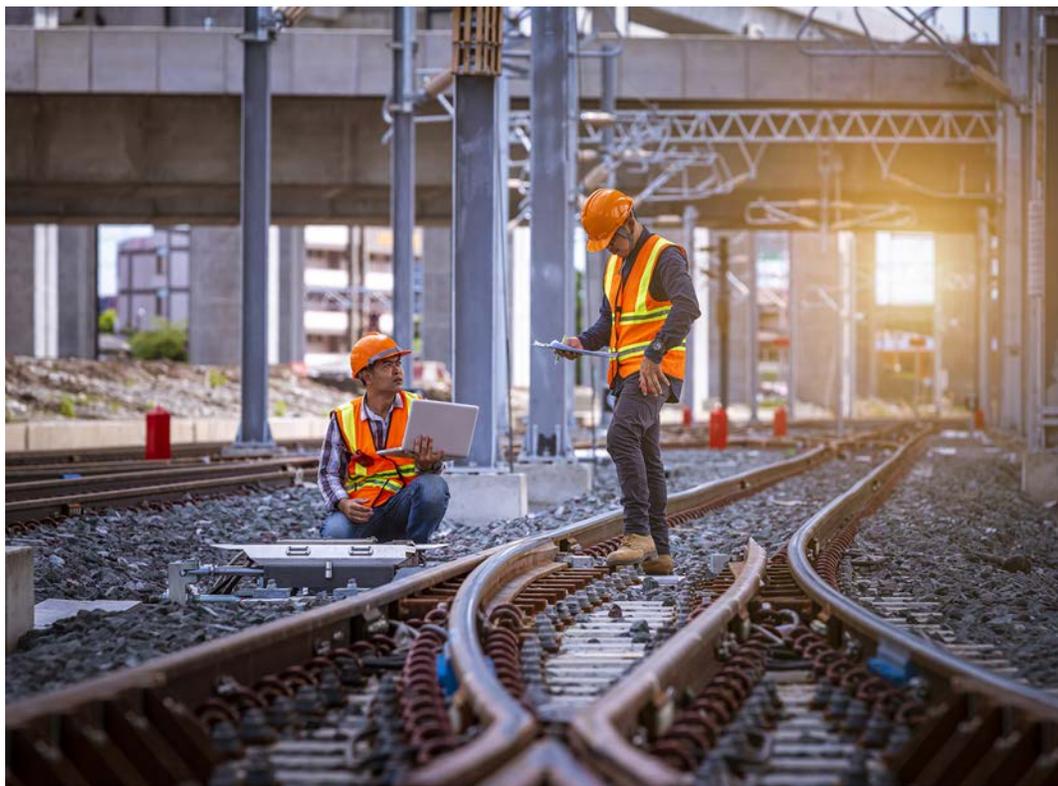
Dynamic Scheduling Methodology

(DSM)

In this session, participants will learn the art of scheduling in Primavera™ P6 – also applies to MS Project® in order to produce the most optimized Project Plan: lowest cost, shortest duration, least amount of resources. A manual for P6 will be provided, along with lessons and links to download Oracle P6 and XER lessons.

Participants will learn to:

- DSM (Dynamic Scheduling Methodology) in Primavera™ P6 (examples provided)
- Schedulers' roles & responsibilities
- Scheduling techniques and best practices
- How to produce the most optimized Project Plan: lowest cost, shortest duration, least amount of resource (direct and indirect)
- Create Daily Shift Reports
- How to drive your STO event
- Receiving accurate and timely field updates



Module 5

Dynamic Execution Control

(DEC)

In this session, participants will learn how to drive & navigate their events using War Room strategic sessions and execution controls. This is the most important, valuable session to be presented. Demonstrations using Primavera™ P6 and a simulation exercise will be included.

Participants will learn to:

- How to establish the War Room
- War Room strategy sessions, attendance and agenda
- How to navigate your STO event
- LOTO (Lockout/Tagout) procedures and best practices (tool provided)
- Density modeling, risk mitigation and congestion management
- Using pf (performance) to measure wrench-time, float burn, planning effectiveness, and more
- Execution coordinators vs. field supervisors
- Measuring earned value vs. planned and actual (CPI/SPI) and project controls
- Measuring wench-time efficiency

Module 6

Start-up/Safety Review/Closing

Flawless Start-up PSSR (Pre-start-up Safety Review) Closing & Lessons-learned

In this session, participants will learn about flawless start-ups with PSSR and how to properly close out their event and use lessons-learned to create their subsequent events, with templates and tools (provided). We'll also do a review of previous sessions and Q&A period to finish off.

Participants will learn to:

- Flange Management strategies
- Using a world-class PSSR (Pre-Start-up Safety Review) process
- Commissioning and flawless start-up
- Capturing lessons-learned
- Closing and critiquing your STO event
- Preparing for your next STO event and review of training, with Q&A

Benefits of Attendance

- Demystify the key objectives of shutdown & turnaround to ensure teams align with organizational goals
- Plot out shutdown & turnaround scopes and manage the necessary contracts, materials, and procurement
- Grasp the principles of change management and ensure team safety and productivity throughout the turnaround process
- Control present and future maintenance costs through clear estimation and optimization processes
- Learn to drive & navigate your shutdown and turnaround event with DEC (Dynamic Execution Control) and a war room concept to finish early and under budget (high earn/low burn)



How you will learn

Real-world Experience

All six modules will feature a variety of instructional modes and interactivity. Dialogue is encouraged and individual objectives for the course are sought out relating to one's own challenges. These will be addressed (or responded to outside of classroom time) if we don't use them as examples during the session.

Case studies drawn from actual industry experience will be used extensively, supplemented by individual and group problem-solving sessions.

Unique elements will enhance the learning experience. For example, Ted Lister will show you how to drive and navigate your shutdown, turnaround or outage events by using DSM (Dynamic Scheduling Methodology) and Primavera™ P6 tools.

Deliverables

What you will receive in the five half-day virtual sessions is a view into your STO events that will put the puzzle pieces together in a way that can have an immediate positive impact on your business today, and a long lasting value going forward.

Areas covered:

1. Asset Management (Workscope & Budget Optimization)
2. Strategic Planning & Plan2Plan
3. Work Package Planning
4. DSM (Dynamic Scheduling Methodology)
5. DEC (Dynamic Execution Control)
6. Flawless Start-up, PSSR (Pre-start-up Safety Review), Closing & Lessons-learned

All students who successfully complete the workshop will receive a certificate of completion.

Course details are subject to change. For the most up-to-date information, please see our website at:

<https://go-2-learn.com/shutdown-optimization/>

Presented by:

