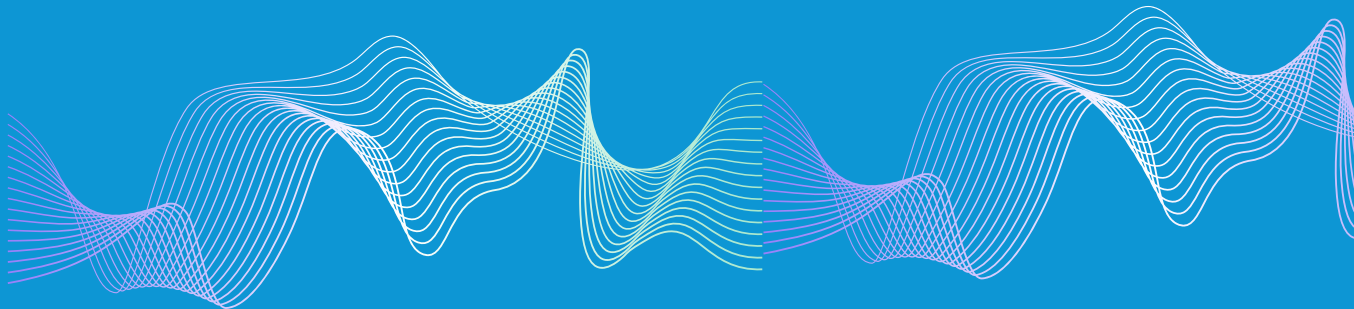


**Ebook**

# **APS READINESS SCORE**

**Evaluate your readiness to move beyond spreadsheets**



## Introduction and Purpose

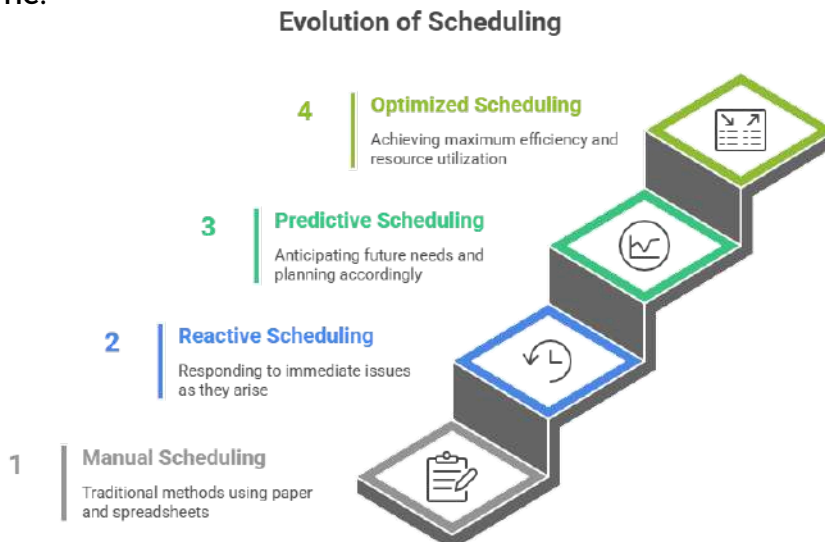
Implementing Advanced Planning and Scheduling (APS) software is a turning point for manufacturers. It is the moment when operations move from surviving the day to mastering the process. For years, teams have battled with spreadsheets that multiply like weeds, each one offering a partial truth about what is really happening on the shop floor. An APS replaces those static tools with a living system that connects people, data, and decisions which bring clarity where confusion once ruled.

Readiness, not simply technology, determines success. Many manufacturers begin their APS journey full of energy, only to discover that enthusiasm cannot overcome disorganization. Readiness is not perfection; it is awareness. It is knowing where your data lives, how your people communicate, and which habits must change before progress can take hold.

This guide is your map for that transformation. It brings together lessons from hundreds of real implementations and turns them into actions you can take today. Think of it as both a mirror and a compass: the mirror shows where you stand, and the compass points toward the next right step.

By completing this guide, you will:

- Understand the organizational and cultural factors that influence APS success.
- Identify the data and process documentation required for effective configuration.
- Define measurable metrics and success criteria tied to business goals.
- Establish change management practices that support long-term adoption.
- Create a continuous improvement plan that enhances scheduling performance over time.



## Why APS Implementations Struggle

Across every industry, manufacturers tell the same story in different voices. The decision to adopt APS usually begins with good intentions: faster deliveries, fewer surprises, and clearer visibility into what is really happening on the floor. It starts with optimism, sometimes even excitement. Then the reality of implementation arrives, and that optimism begins to fade.

Picture this. A mid-sized manufacturer invests in an APS system after years of managing production with spreadsheets and tribal knowledge. The schedulers are hopeful. They can almost see the promise of automation, a future where data does the heavy lifting. But as the work begins, the cracks start to show. Routings, setup times, and BOMs exist in different systems, none of them matching. Shift calendars are buried in Excel. Downtime logs are tucked into binders. The implementation team works to piece it all together, but every fix seems to uncover another issue waiting beneath the surface.

Meanwhile, the schedulers begin to worry. They have built their reputations on intuition and experience, and now they are being asked to trust a machine. Training focuses on software features rather than workflow, leaving a gap between understanding and confidence. When pressure rises, they return to what they know best: manual scheduling.

Leadership has its own perspective. Executives measure success through growth, profitability, and customer satisfaction. Schedulers focus on on-time delivery, resource efficiency, and setup reduction. Both groups are right, yet they are rarely aligned. One speaks the language of strategy, while the other speaks the language of operations. Without a shared definition of success, even a fully functioning system can feel like a failure.

Months later, the APS software is running, but the organization is not. Schedulers use it only as a checkpoint instead of a control center. Leadership begins to question the return on investment. The truth is not about the software at all. The project did not fail because the technology was wrong. It failed because the company was not ready to change.

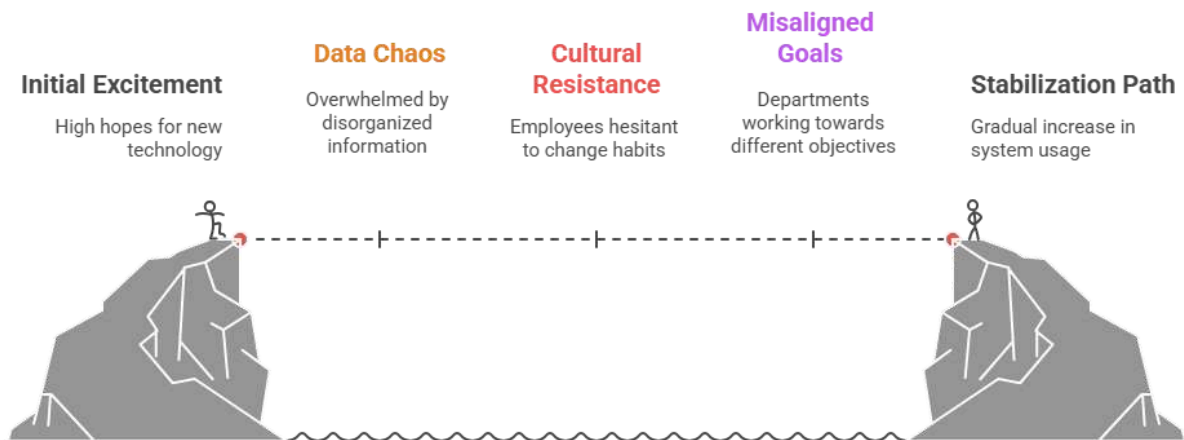


## Lessons from This Story

Readiness is about documentation, not centralization. Companies often mistake having data in multiple systems as a failure. The real issue is whether they can locate and understand their data when needed.

- Cultural alignment matters as much as configuration. Successful implementations balance bottom-up ownership from schedulers with top-down sponsorship from executives.
- Success criteria must connect business goals to operational metrics. Without shared measurement, teams optimize for different outcomes.
- Change management must be prescriptive, not passive. Schedulers need a clear roadmap showing exactly how their day-to-day workflow will evolve.

### Achieving Successful Technology Adoption



## Challenges and Struggles – Your Mirror

This section is your mirror. It reflects where your organization stands today, without judgment or polish. Every company faces obstacles when preparing for APS, and these challenges often reveal the difference between what looks organized on paper and what truly works in practice. By recognizing yourself in this reflection, you can begin to see which areas are ready for transformation and which still need attention.

Across hundreds of implementations, the same themes appear again and again. They are not signs of failure; they are signals that readiness requires more than good intentions. Each challenge tells a story about habits that have formed over years of getting things done, even when the tools were limited.

## Data Fragmentation

The first challenge is data fragmentation. In many organizations, information lives in different places, each one holding a fragment of the truth. One system tracks routings, another manages forecasts, and a dozen spreadsheets fill in the gaps. None of this is inherently wrong. The real challenge is that too few people know where all the pieces are, and too much of that knowledge exists only in someone's head. APS does not need every dataset to live in one system, but it does require that those datasets be visible, understood, and documented. When knowledge is scattered or undocumented, even the most advanced planning tool cannot see what your people already know.

### Reflection Checklist

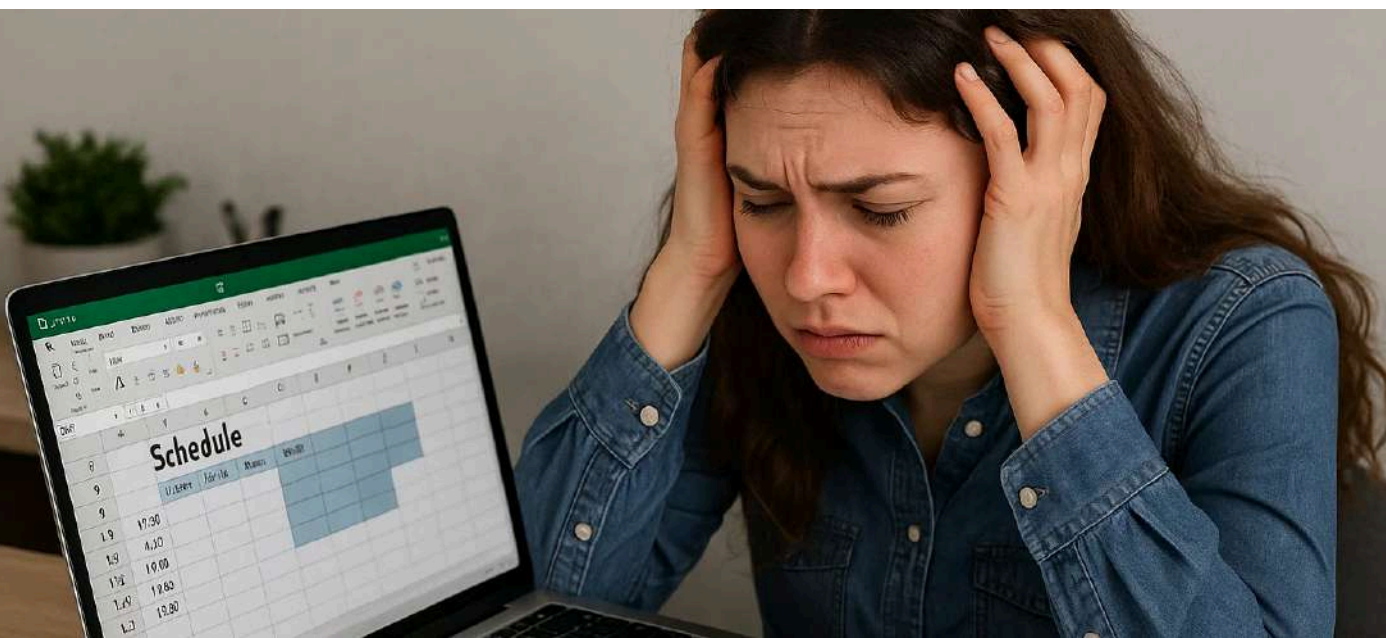
- Data exists in multiple systems (ERP, Excel, tribal knowledge).**

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- Routings and cycle times are not up to date.**
- Labor and shift information is tribal knowledge.**

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- Material availability data is unreliable.**



## Process Silos

Then there is the problem of process silos. Each department has its own rhythm, its own sense of priority. Sales promises delivery dates without checking available capacity. Procurement reacts to shortages after they happen. Operations adjusts schedules manually to meet impossible timelines. When each group works in isolation, even small misalignments can ripple through the entire business.

### Reflection Checklist



**Sales promises delivery dates without capacity visibility.**

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**Purchasing reacts to changes instead of anticipating needs.**



**Production and planning communicate through email instead of integrated systems.**

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## Cultural Resistance

The third challenge lies in culture. Schedulers are often unsung experts who have built entire systems of logic in their heads. They know which machines are temperamental, which products take longer than planned, and which workarounds keep the floor moving. When an APS enters the picture, it can feel like an outsider telling them how to do their job. Without trust and involvement from the start, even the best technology can become a point of resistance.

### Reflection Checklist



**End users have not been involved in defining the new process.**

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**Training tends to focus on features, not workflow.**



**There is limited understanding of how APS changes day-to-day operations.**

## Unclear Metrics

Finally, there is the issue of measurement. Many companies know they want to improve, but they have never defined what improvement means. Executives talk about growth and profitability, while planners talk about changeovers and lead times. Both are valid, but without shared metrics, success becomes a moving target.

These challenges are not unique. They are the patterns that every manufacturer must confront before real progress can begin. By looking into this mirror honestly, you can see not only where the problems lie, but also where the opportunities begin.

### Reflection Checklist



**No defined targets for scheduling performance.**

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**KPIs are tracked inconsistently.**



**Executives and planners measure success differently.**

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## Distribution of Readiness Dimensions



## Data Collection Preparation – Your Compass

Data is the backbone of any APS implementation, but it is rarely neat or convenient. Every manufacturer knows that the information needed to schedule accurately already exists somewhere; it just doesn't always live in one place. The goal at this stage is not to clean, centralize, or perfect it. The goal is to make it visible and traceable. Think of this step as taking inventory of your knowledge. You are identifying what you know, where that knowledge lives, and who owns it. For most organizations, the answers point to a familiar reality: some data sits inside the ERP system, some in spreadsheets, and some in the heads of experienced planners. None of that is inherently a problem. APS readiness does not demand a single system of record on day one; it requires awareness and documentation.

### Data Collection Checklist

As you gather the below information, remember that the goal is not to fix everything immediately. Instead, it is to shine light into every corner of your scheduling process. The first draft of that picture will never be perfect. It doesn't have to be. What matters most is that everyone on the team begins to see the same landscape. When the full picture comes into view, your organization will be ready to move from awareness to improvement. Prepare or document the following:



**Overview of finished goods and product mix**



**Shop floor layout diagram**



**Process flowchart or value stream map**



**Sample production orders**



**Routing and setup data**



**Resource and machine details (cycle times, priority ranking, etc.)**



**List of bottlenecks and critical resources**



**Existing scheduling spreadsheets or tools**



**Examples of BOMs**



**Labor constraints and shift patterns**

## Configuration Readiness Questions

These short questions help determine whether your data is ready for APS.

### Product and BOM Structure

Are BOMs accurate and complete?

What percentage contain alternates?

None

25

25-75

75

Where are BOMs stored?

ERP

Excel

Tribal knowledge

Frequency of revision updates

Real time

Weekly

Monthly

As needed

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### Routing, Resources, and Constraints

Number of primary resources or machines

<20

20-100

100+

Are setup and run times accurate?

Yes

Partial

No

Are alternate routes used?

Yes

No

Are maintenance windows visible in data?

Yes

No

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### Scheduling Rules and Objectives

What rules govern scheduling?

Earliest Due Date

FIFO

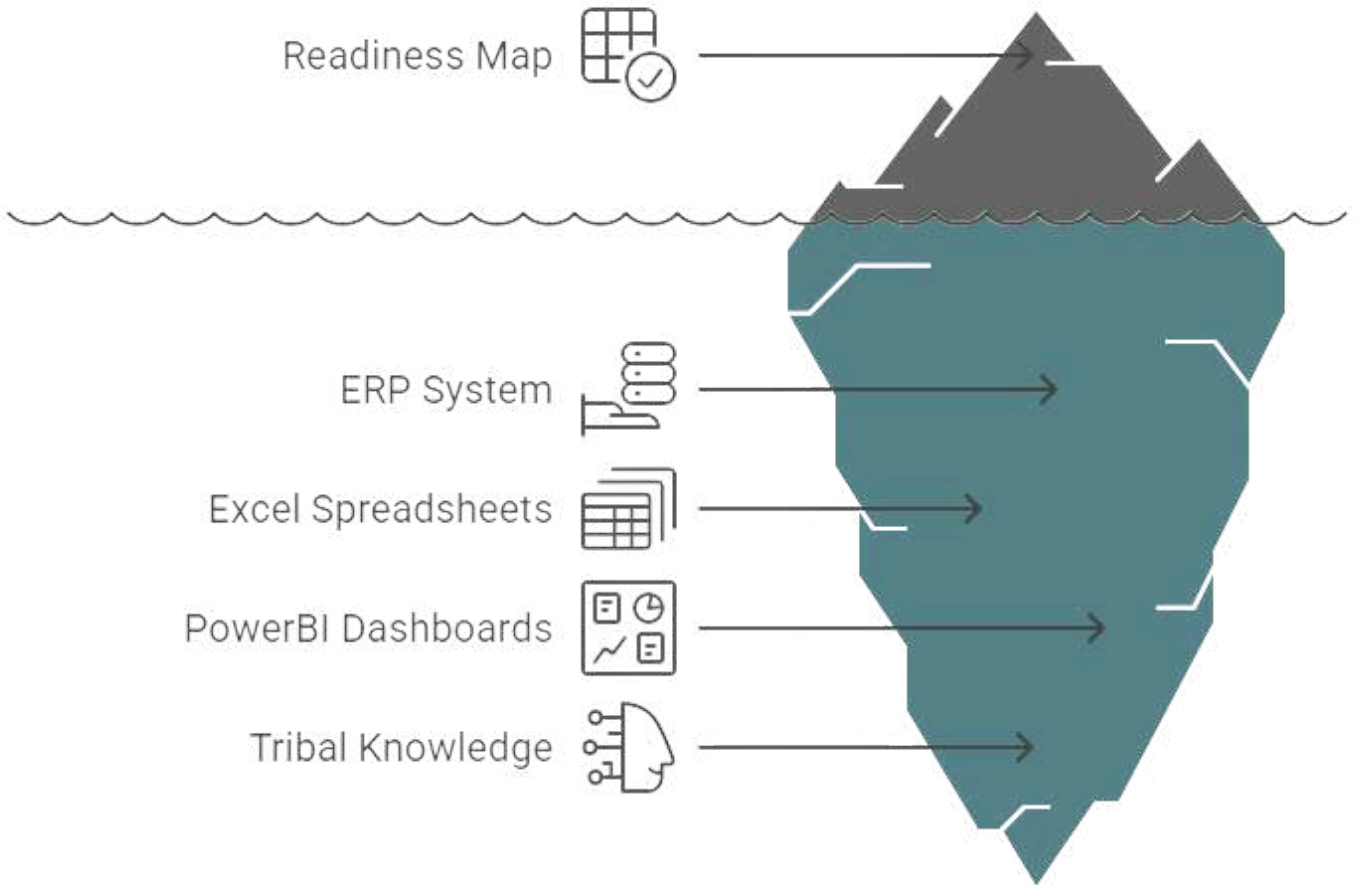
Priority

Others

Are bottlenecks defined?  Yes  No

Are work shifts standardized?  Yes  Partial  No

## Layered Data Sources



## Business Success Criteria and Baseline Metrics

Establishing baseline metrics defines what success looks like and enables teams to measure the real impact of APS. The following metrics are adapted from best practices and PlanetTogether's scheduling frameworks.

### Scheduling Efficiency

- Time required to create a feasible schedule: How long does it take to produce a plan that meets basic feasibility (no overloads, all orders assigned)?
- Frequency of schedule revisions: How often is the schedule reworked in a typical week?

### Schedule Quality and Stability

- Number of late orders: How many orders miss due dates?
- Schedule stability: How often do plans change after release?
- Adherence to constraints: How frequently are capacity or sequencing rules overridden?

### Resource Utilization

- Machine utilization: Average runtime percentage of key machines.
- Overtime and idle time: Frequency and cost of labor imbalance.

### Material and Inventory Alignment

- Schedule delays due to shortages: How often must plans change for missing materials?
- Inventory buffer levels: How much safety stock is held to cover uncertainty?

### Communication and Collaboration

- Time to communicate schedule changes: How quickly are updates shared across departments?
- Scheduling-related escalations: How often do conflicts require management intervention?

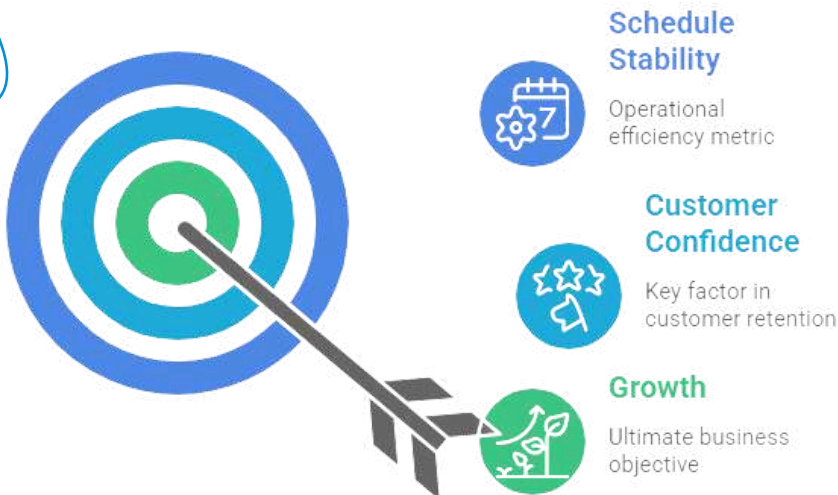
### Business Impact Metrics

- On-time delivery (OTD): Percentage of orders shipped on time.
- Expedited order frequency: Number of rush jobs disrupting standard flow.
- Capable-to-Promise (CTP): Are you able to confidently commit to new orders based on capacity?

## Executive Alignment Exercise

Document your executive stakeholders' top three business initiatives and map them to the above metrics.

Executive Priority	Description	Related Metric(s)	How APS Helps
Improve Customer Responsiveness	Reduce lead time variability	OTD, Schedule Stability	APS provides real-time visibility into capacity for new order commitments
Improve Overall Equipment Effectiveness Rates	Increase throughput without new capital	Machine Utilization, Overtime	APS synchronizes constraints and improves flow efficiency
Support Business Growth	Enable 5% capacity expansion with existing assets	CTP, Resource Utilization	APS quantifies available capacity and identifies growth potential



## Change Management and Culture Transformation

Technology can improve a schedule, but it cannot change a culture. That part still belongs to people. Real transformation begins when employees understand how their work will become easier, when leaders hold the vision steady, and when the organization recognizes that learning is not an event but a continuous process.

Change management starts before a single user logs into APS. It begins when the organization decides how its systems, data, and people will work together. Every team needs a clear data aggregation strategy, a plan for how information will flow once APS is introduced. If all scheduling data already lives in one system, integration can be straightforward. But if key details are spread across multiple sources such as ERP, MES, or spreadsheets, the company must decide where that information will be aggregated.

Some organizations consolidate their data into a single location such as a data lake or middleware layer. Others rely on existing planning or MES tools as their hub. The decision matters. It defines how information will move, how quickly APS can access it, and how easily users can trust what they see on screen. Taking time to map this flow early in the process avoids confusion later and prevents change fatigue that often appears when technical decisions are made midstream.

This early planning also connects directly to culture. When people see that their data has a place, they start to believe that their work has one too. Clarity about where information lives builds confidence in how it will be used. APS implementation is not just a technical integration; it is an exercise in organizational alignment. Everyone, from schedulers to executives, should understand where their contribution fits into the larger picture. With a clear data strategy in place, teams can focus on the human side of change: how daily routines evolve, how roles shift, and how success is measured. That is where the Day-in-the-Life Mapping exercise begins.

### Mapping the Day-in-the-Life (DITL)

One of the most effective ways to build that trust is through the Day-in-the-Life Mapping exercise. It is a simple concept with powerful results. The DITL compares how schedulers work today to how they will work after an APS is introduced. Here are some recommendations on how to document this process and workflow change.



## How to Create Your DITL Map



### 1. Start with the Scheduler's Reality

Ask schedulers to list their typical workday, step by step. Capture the full journey from morning meetings to data collection, updates, team communications, and actions taken to maintain the schedule.



### 2. Spot the pain points

Highlight where challenges occur: manual tasks, duplicate data entry, uncertainty, or limited visibility. These will help illustrate the need for a smarter solution.



### 3. Label each step

Assign a unique ID or label to every pre-PlanetTogether step so it's easy to track and compare later.



### 4. Reimagine the Day with PlanetTogether

Rebuild the same workflow, but this time, integrate APS capabilities like automatic rescheduling, real-time visibility, and what-if simulations. Identify which steps can be streamlined, combined, or eliminated to show how PlanetTogether transforms the process into a more proactive, value-driven experience.



### 5. Map the Transformation

Create a simple mapping table connecting each "before" step to its new PlanetTogether-enhanced version.



### 6. Show the Impact

Present both workflows side by side to visually highlight improvements in efficiency, visibility, and strategic decision-making, showcasing the scheduler's evolution from tactical to strategic business driver.

This exercise creates empathy and ownership. Schedulers begin to see that an APS is not taking away their expertise; it is amplifying it. Their role becomes more strategic, less reactive, and far more visible across the business.

Current Scheduler Workflow	APS Enabled Workflow
[DITL-001] Check email for shop floor issues	★ [PT-001] Unchanged
[DITL-002] Standup meeting with schedulers from each department	★ [PT-002] Unchanged
[DITL-003] Gather demand updates from sales	★ [PT-003] Refresh data in PlanetTogether
[DITL-004] Gather activity reporting metrics from shop floor	
[DITL-005] Enter new scheduling data into Excel scheduling workbook	
[DITL-006] Update schedule gantt in Excel based on activity reported	★ [PT-004] Advance the clock in PlanetTogether

## Building Dual Buy-In

Change cannot happen in isolation. It needs commitment from both directions: those who lead and those who do the work every day.

Bottom-up engagement creates ownership. When schedulers and planners are part of designing the new process, they begin to see themselves in it. They test scenarios, suggest workflows, and take pride in the outcomes.

Top-down sponsorship creates accountability. Leaders must explain why APS matters, link it to strategic goals, and celebrate early wins. They set the tone that this is not an experiment but a new way of operating.

When both perspectives meet, adoption follows. The technology becomes part of how the organization thinks, not just another tool on the desktop.

## Establishing Change Champions

Every successful APS rollout needs people who keep the message alive. These are the change champions, individuals who understand the system, believe in its value, and know how to communicate both up and down the organization.

A strong change champion monitors adoption and identifies when people start slipping back into old habits. They coordinate refresher training, translate technical updates into practical terms, and share stories of progress to keep momentum alive. Most importantly, they make change feel continuous rather than temporary.

Champions are not just advocates; they are connectors. They link the vision of leadership with the reality of the shop floor and help ensure that progress does not fade once the system goes live.

### Recommendations for the Change Champion

- Monitor adoption and user engagement.
- Facilitate refresher trainings.
- Communicate success stories and progress updates.

## Overcoming Resistance

Even the best projects encounter resistance. People may worry that an APS system will replace them or expose long-standing workarounds and ineffective scheduling practices. These fears are real, and they deserve respect.

Address them openly. Show how an APS system enhances decision-making rather than removing it. Use before-and-after examples to make the benefits visible. Provide space for feedback so users can shape improvements over time. When people feel heard, they begin to trust.

Resistance fades when confidence grows. Each success, no matter how small, reinforces that this is not just a software rollout but a cultural shift toward consistency and control.





## Operational Impact

APS systems enabled manufacturers to get

**250**  
unnecessary  
work orders **eliminated** in  
**60** days

### Case Study: Transforming Production Scheduling in the Medical Devices Industry

A global leader in neurosurgical and orthopedic instrumentation faced complex scheduling challenges managing over 11,000 SKUs and 2,000 concurrent orders. Scheduling was maintained on whiteboards and spreadsheets, making real-time coordination impossible.

The company selected PlanetTogether APS for its ability to make an integration with MySAP and its advanced scenario modeling tools. After implementation, planners could instantly test what-if changes and publish optimized schedules without disrupting production.

“

“We immediately appreciated the user-friendly interface. PlanetTogether promised fast integration, and they delivered. We flipped the switch, and it worked.”

— Director of Material Systems and IT

## Wrap-Up and Next Steps

APS readiness is about much more than technology. It is about clarity, alignment, and continuous improvement. The companies that succeed treat readiness as an investment in organizational maturity.

### Next Steps for Your Team

- Complete this Readiness Assessment. Fill out the checklists, answer configuration questions, and collect your baseline metrics.
- Conduct a DITL Mapping Workshop. Compare current workflows with your future APS process.
- Engage Executives Early. Align success metrics to business goals.
- Identify Change Champions. Empower them to lead adoption and continuous learning.
- Quarterly Continuous Improvement Reviews. Track improvements in data quality, process adherence, and user adoption.

When your team has completed these steps, you will have a clear picture of what's required for APS success and will be positioned to achieve measurable improvements in delivery performance, efficiency, and profitability.



## APS Readiness Self-Assessment Scoring Sheet

Use this scoring sheet to evaluate your organization’s overall APS readiness. Score each category from 1 (Not Started) to 5 (Fully Ready).

Category	1	2	3	4	5
<b>Data Preparedness</b>	Data scattered; no ownership	Partial documentation	Most key data located	Fully documented; partial validation	Fully validated & regularly maintained
<b>Process Maturity</b>	No defined workflows	Basic manual processes	Defined scheduling steps	Documented & standardized	Digitally managed & continuously improved
<b>Cultural Readiness</b>	Resistance to change	Limited user awareness	Initial training planned	Broad understanding and buy-in	Active engagement and advocacy
<b>KPI Tracking</b>	No defined metrics	Few metrics tracked	Basic scheduling KPIs defined	Metrics linked to improvement	KPIs integrated into business scorecard
<b>Continuous Improvement</b>	Reactive problem solving	Periodic reviews	Regular review cadence	Structured improvement plan	Continuous feedback and optimization loop

## Scoring Guide

### 5-10: Early Awareness

Begin documenting processes and data ownership.

### 11-18: Foundational Progress

Establish executive alignment and pilot readiness initiatives.

### 19-25: Implementation Ready

Proceed with APS configuration and phased rollout.



**No more spreadsheets  
No more guessing**

**See It in Action**



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