

# Touchplan

## **Implementation Handbook For Specialty Contractors**

# Introduction

The Touchplan Implementation Handbook for Specialty Contractors provides the team with additional knowledge on how they can best set up their projects in Touchplan. Planning across multiple projects is difficult when teams need to reach milestones or revenue goals while managing their portfolio and durations with varying crew sizes. By setting up a project that is designed around the team's planning process, teams can create more collaborative plans and they can continuously improve their planning efforts. This handbook will teach specialty contractor teams how to set up their plans, a quantity tracking dashboard, and more. With Touchplan specialty contractors can:



**Easily Adjust Plans**  
Make edits to tickets in a plan and have the team view the changes in real time.



**View Crew Size**  
Monitor the crew size across multiple projects to ensure there are no unattainable numbers.



**Track Materials Used**  
Track quantity usage across projects and visualize planning against the actual data.

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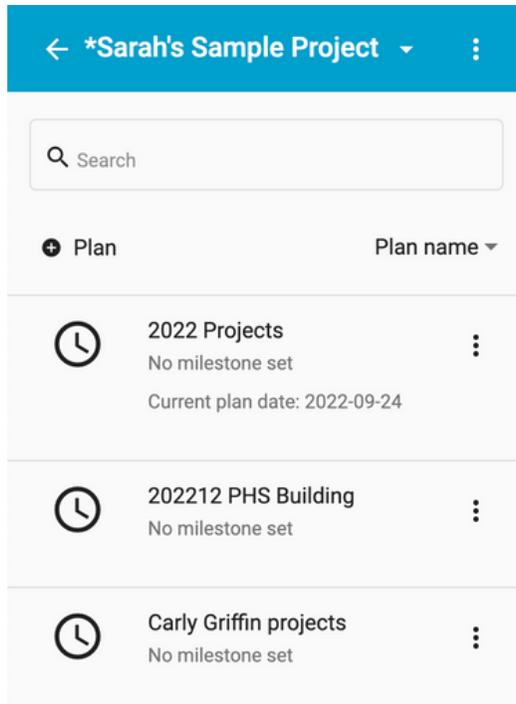
## Setting Up a Project in Touchplan

Specialty contractors must think about their planning goals as they set up their Touchplan project to ensure that they are creating a collaborative planning space. Below are some suggestions about how to set up a Touchplan project based on the project team's planning goals.

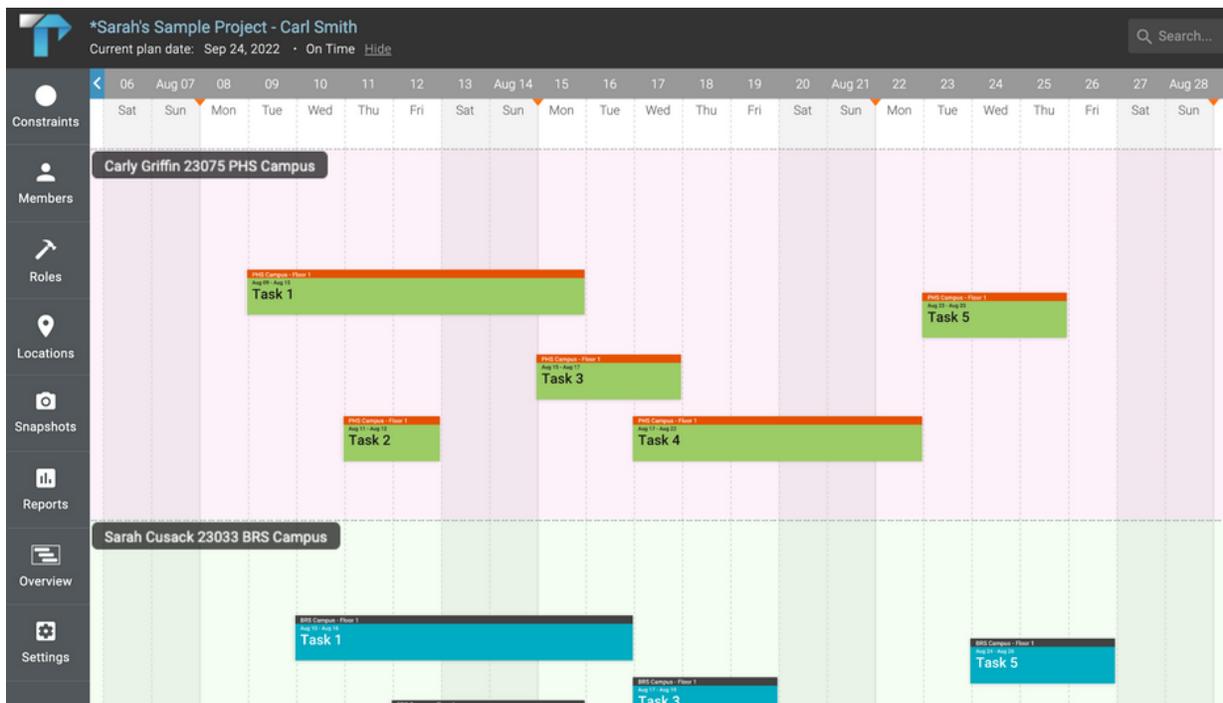
### Phase Plans and Swim Lanes

The best way to set a project up for success is to create phase plans and swim lanes that best represent the project team's goals, scope, and more. In this section there are three options on how to set up the project, these are suggestions to get the project team started and able to create the most effective project for them. Before diving into how to set up each different phase plan and swim lane options, it is important to understand what a phase plan and swim lane are and how to create them.

Phase Plans are separate planning boards that allow project members to know where to put certain areas of work. While swim lanes are visual boundaries or areas in the plans that allow users to understand where they should be placing work.



To create a new phase plan, select the **+ Plan** in the top left corner of the Phase Plan List, and add the phase plan name and the start and end date. Click **Save** and the new Phase Plan will be added to the project.



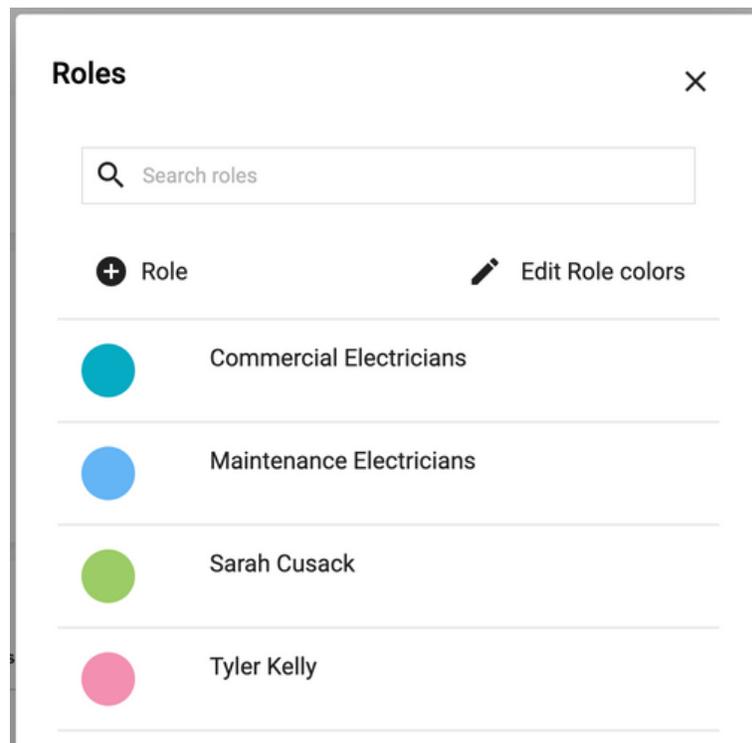
To create a Swim Lane, click on the **Plan Actions** tab on the top right side of the plan view. In the drop-down menu, select **Add swim lane**, and a shaded row will appear in the plan view. Enter the Swim Lane name and choose a color, click **Save** to save all changes.

After reviewing phase plans and swim lanes, it is time to decide how they should be utilized in the project. Below are three different suggestions on how to set up a project's phase plans and swim lanes:

- **Option 1:** This option is best for foremen who are working on multiple long projects, projects that have a 6+ month timeline. By structuring projects with this option, each foreman will be able to easily view the specific projects that they are working on in one place without having to view any other foremen's work.
  - **Phase Plan:** name the phase plans after each of the foremen on the project.
  - **Swim Lane:** name the swim lanes after the projects the foremen are working on.
- **Option 2:** This option is best for teams that want to be able to look closely at individual projects they are working on and want to take a deep dive into their projects and metrics. By having each plan be named after projects the team is working on, teams can build reports that span across one or multiple projects and can compare metrics with each project.
  - **Phase Plan:** name the phase plans after each project the company is currently working on.
  - **Swim Lane:** name the swim lanes after the locations within the project.
- **Option 3:** This option is best for teams that want to have visibility over all the smaller projects that they are all working on throughout a set time frame (ex. a year or a quarter). Since the team's projects are smaller, there can be multiple projects in one plan and the team can cycle through them. As the team looks at all their upcoming work at once, they will be able to better schedule other projects by looking at the available crew size in the plan.
  - **Phase Plan:** name the phase plans after set durations of time such as years or months (ex. 2022 projects)
  - **Swim Lane:** name the swim lanes after the projects that are happening within that period.

Please keep in mind, that these are not hard and fast rules, but rather suggestions worth considering. Each project is unique but these guidelines should help ensure admin users don't set up the project in a way that will make it harder to collaborate. The key to setting up Touchplan is to foster collaboration and make it easy for the team to navigate and participate in the process.

## Roles



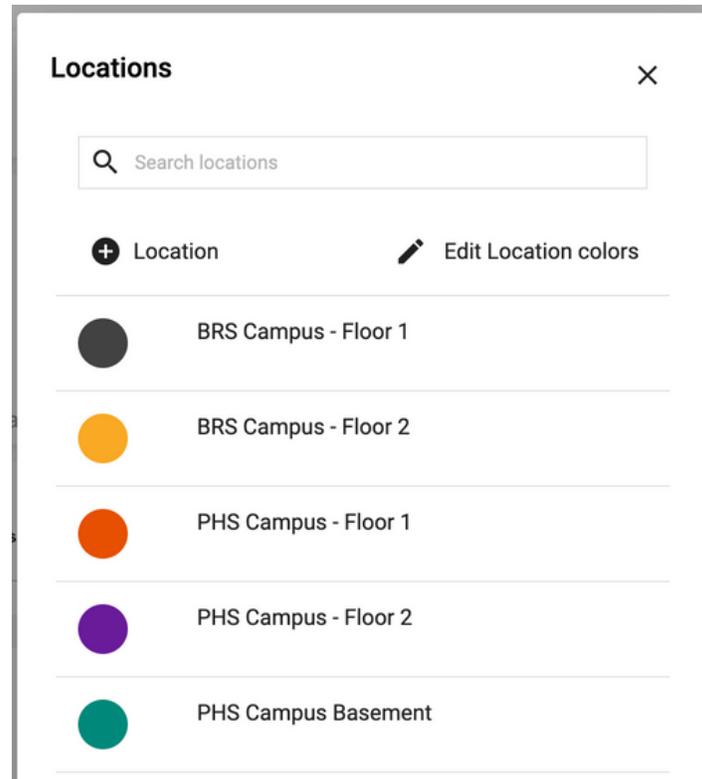
Roles can be named after specific project members (ex. Project Managers, Foremen, etc.) or after a discipline (ex. Commercial Electrician, Maintenance Electrician). Project Managers should be given admin access to the project, allowing them to invite users, create plans, and more. Project Managers should encourage their crew to create, update and edit their roles tickets.

To add or edit roles in a Project, click on the **three-dot button** at the top of the phase plan list. Click **Roles** in the three-dot drop-down menu, and select **+Role** to create a role for each team member — assign the role a name and role color to be easily identified in each plan. Click **Save** to save all changes.

### Tip:

If project members belong to one team, assign their different roles the same role color to make it easier to identify tasks happening within that team.

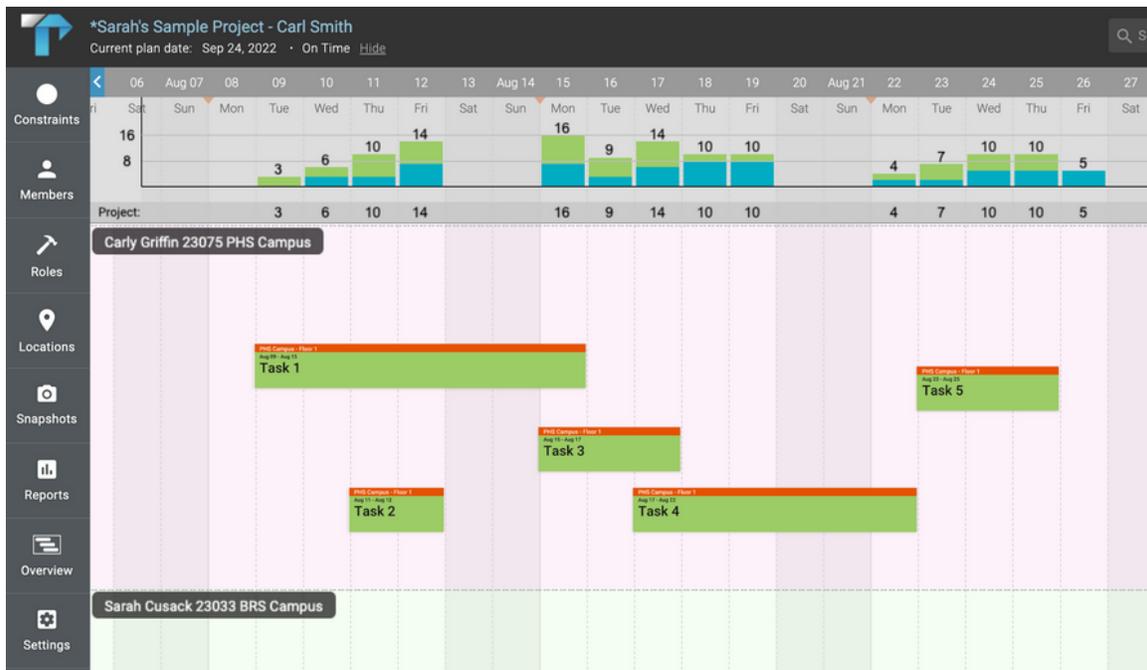
## Locations



Locations represent the area or location where work is happening and offer teams an additional way to filter reports in Touchplan. Users must use the proper locations when they are making tickets to create the most accurate reports. When creating locations in a project, have them match the swim lanes within each plan. This will make it easier for teams to filter and create reports.

To add or edit roles in a Project, click on the **three-dot** button at the top of the phase plan list. Click **Locations** in the three-dot drop-down menu, and select **+Location** to create a Location for the location in the project. Click **Save** to save all changes.

## View Crew Size



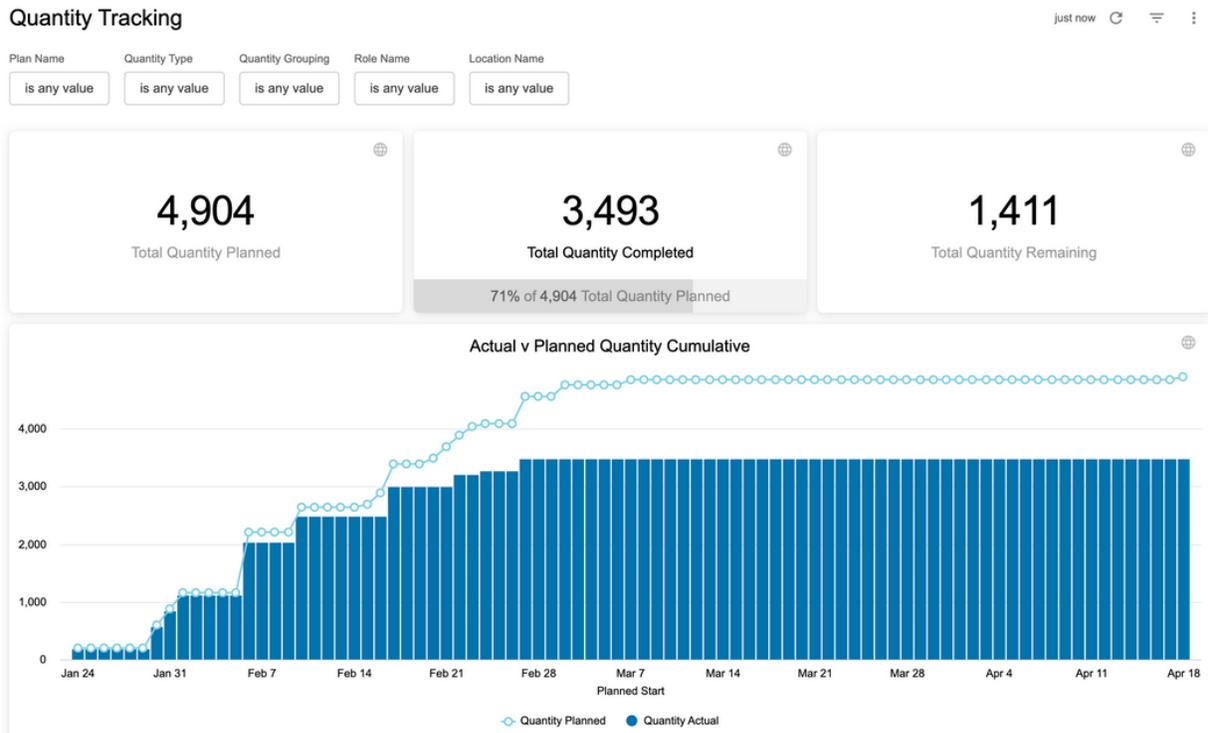
Easily monitor and manage a plan's crew size to ensure that there are no unattainable numbers using the View Crew Size feature. This feature allows teams to monitor current staffing utilization and availability so they can identify days when there are too many people scheduled to work versus when there are lighter work days. Teams can then identify if they have enough available crew to take on different jobs.

### Example:

Using the View Crew Size feature, a team can easily view that they have a full schedule that requires all 14 crew member's jobs on sites on Monday, Tuesday, and Wednesday. On Thursday and Friday, there are only 9 crew members scheduled to be on job sites. The Project Managers can tell schedule additional work for the two days to ensure the entire crew is working.

To access the View Crew Size feature, click on the **Plan Action** tab, and select **View Crew Size**.

# Quantity Tracking Dashboard



Track quantity usage and visualize planning against the actual data within the project using the quantity tracking dashboard. This Dashboard allows users to easily view and track the materials used on site. Teams will also be able to see what the demand for materials will be and proactively plan what's needed. Use the Quantity Tracking Dashboard to track the amount of materials put in place. This Dashboard allows users to easily view the planned versus actual quantities and more.

Drill deeper into the metrics by using the filter options available at the top of the Dashboard. Filter the Quantity Tracking Dashboard by Plan, Quantity Type, Quantity Grouping, Role, and Location.

To use the Quantity Tracking Dashboard an admin on the team must add quantity tracking to custom fields. To enable quantity tracking, click on the **Settings** tab in the plan view and select **Advanced Settings**. Select **Enable Quantity Tracking** to add the four quantity tracking custom fields to the project. Go back to the **Settings** tab and select **Custom Fields**, there will be four new custom fields available:

- **Quantity Type:** the type of material being used. Ex. Pipe, Concrete, etc.
- **Quantity Grouping:** the group or area these materials are being used. Ex. Floor 1, Floor 2, etc.

- **Quantity Planned:** the planned amount of material used for the task.
- **Quantity Actual:** the actual amount of material used for the task.

Throughout the planning process have users add and update the quantity metrics for the tickets that they are responsible for. Data will start appearing in the Dashboard the next day, after the Dashboard refresh.

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## Exercise

Gain a better understanding of the planning process in Touchplan before the first team meeting by running a “build the plan” exercise. Practice the planning process by breaking out a plan, and creating roles, locations, and swim lanes. Work through building a sequence of tickets and answer any questions that arise during the meeting. As a team add metrics to the Quantity Tracking Dashboard and analyze the results the next day to gain an understanding of what the Dashboard will look like.

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## Summary

By setting up a project that best reflects the workflow of specialty contractors in Touchplan, teams will be set up for success. The goal of Touchplan is to help teams create a standardized planning process where they can store all of their information to ensure that the project is completed on time and on budget. By using the implementation Handbook for Specialty Contractors, teams can gain a deeper understanding of how to build a project that increases productivity and team participation.