

Touchplan

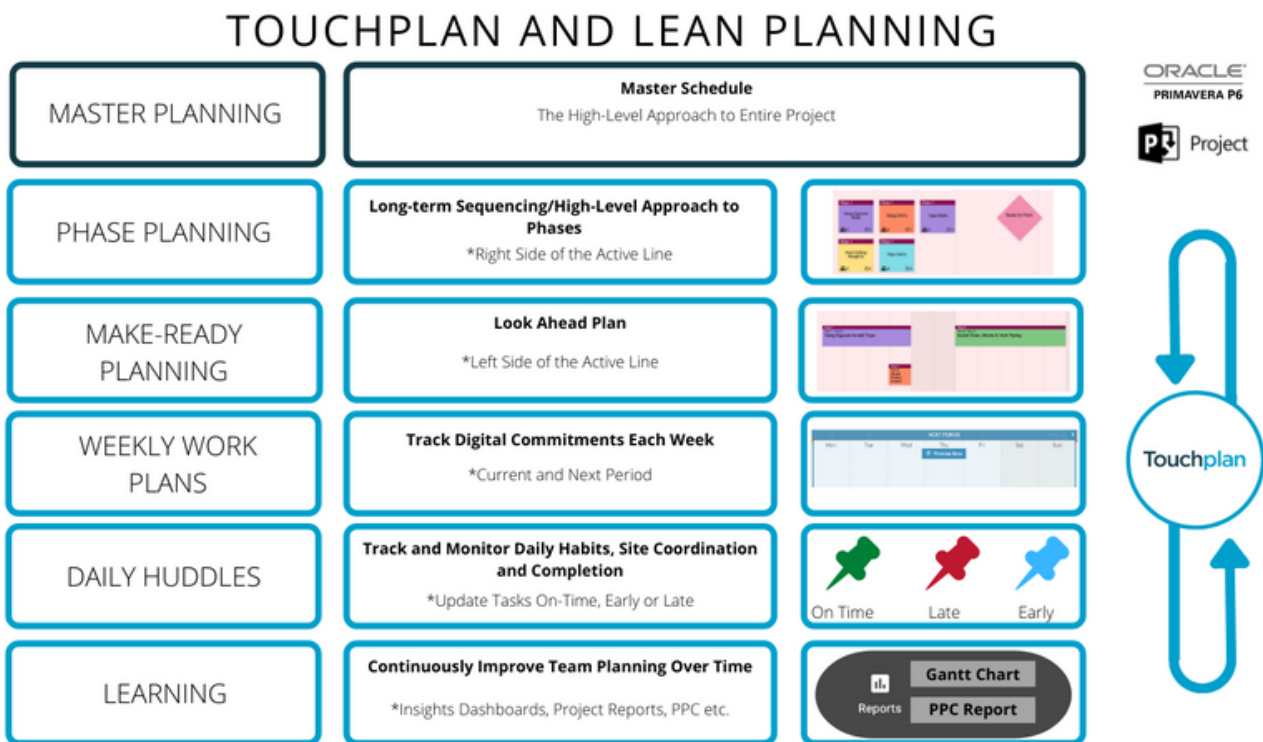
Implementation Handbook For Superintendents and General Contractors

Introduction

The Touchplan Implementation Handbook allows Superintendents to understand how they can best use Touchplan throughout the Lean Planning Process. By having teams work collaboratively throughout the planning process, project teams will be able to understand the key milestones, and continuously improve their planning efforts. This document is meant to serve as a playbook for a lead superintendent to establish a rhythm for planning and communication to facilitate successful projects.

Lean Planning and Touchplan

Touchplan can help superintendents take their lean planning initiatives to the next level. By bringing the master schedule into Touchplan, superintendents can allow their trades to collaborate and take ownership of the plans. Having clear meeting schedules and initiatives enables superintendents to run concise meetings and create common ground from which the rest of the team can align and execute.



Now we will explore the stages of planning in more detail. First up- phase planning, this is where teams will be planning long term and taking a high level approach to their planning.

Phase Planning



Who

- GC leadership
- Trade General Superintendents
- Project Managers



Prep

- Milestones are communicated no less than 1 week beforehand



When

- Typically done at least a month in advance of starting a new phase of work



Deliverables

- High-Level Framework for Make-Ready Planning and Accurate Master Schedule



Where

- Big Room with chairs, tables, projector
- Large, Common Visual Aide is a must



Meeting Schedule

- 4-6 hours
- Introduce everyone, explain the milestones and facilitate collaboration

The primary goal of a phase plan meeting is to create a high-level sequence of work that is 'pull planned' backward from the major milestones in the phase. The team collaboratively breaks work down into task tickets to identify handoffs between trades, crew size, and material requirements. This is a loosely structured meeting that works backward from a project schedule milestone and focuses primarily on tasks that release more work.

Example:

For site work, a key handoff milestone in this phase is typically 'ready for foundations'. Planning backward from 'pad prep' to the first mobilization ticket is the goal.

There should be a good deal of flexibility for divergent collaboration as the team continues to learn about the project. Allow for some flexibility and a few tangents, but come into it with defined deliverables. Deliverables and expectations should be communicated via email approximately one week before the phase planning session is scheduled.

Example:

Team –

All of you have received invites to Touchplan. We'll be conducting our pull planning session DATE for our upcoming sequences of construction (CLARIFY SCOPE OF WORK). The key to a successful pull planning session is to BE PREPARED. Have your tickets, and milestones ready to go.

Meeting timeline: ADD AGENDA - How long the meeting will be etc

Meeting location: ADD

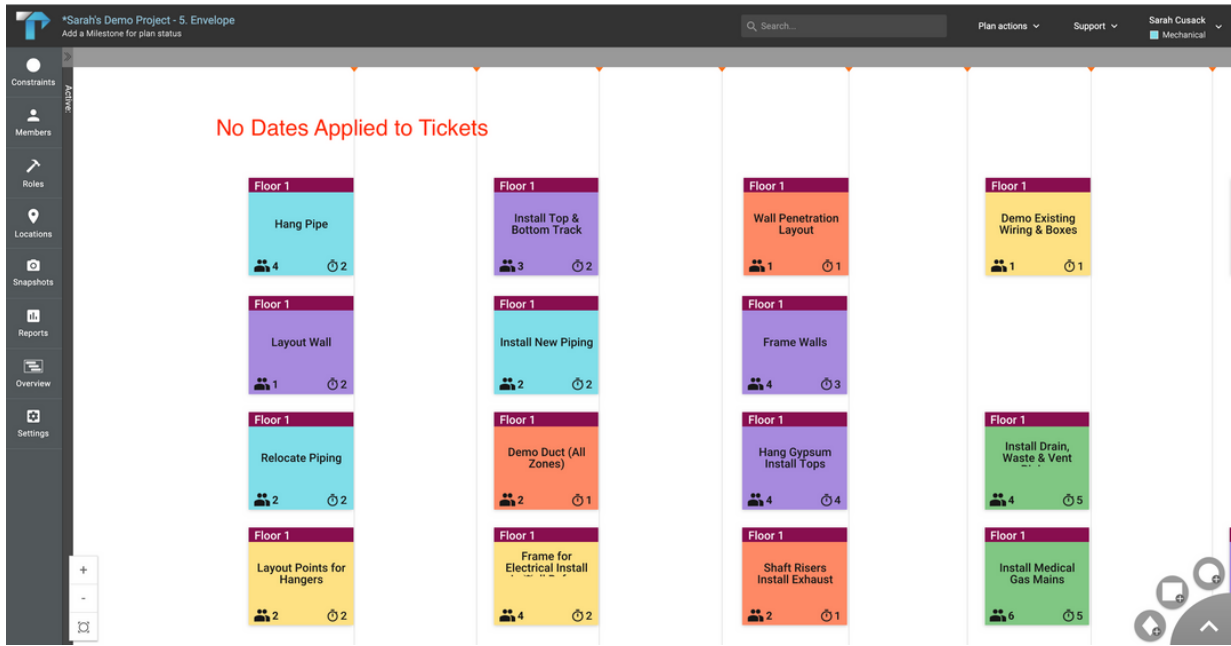
Come prepared with the following:

- Anticipated delivery-to-job dates of your (and your subcontractor's) material
- Pre-populated task in Touchplan which will include the following:
- Durations of time for your (and your subcontractor's) specific work activities
- Crew size you intend to dedicate to each activity
- List of constraints that typically hold you up

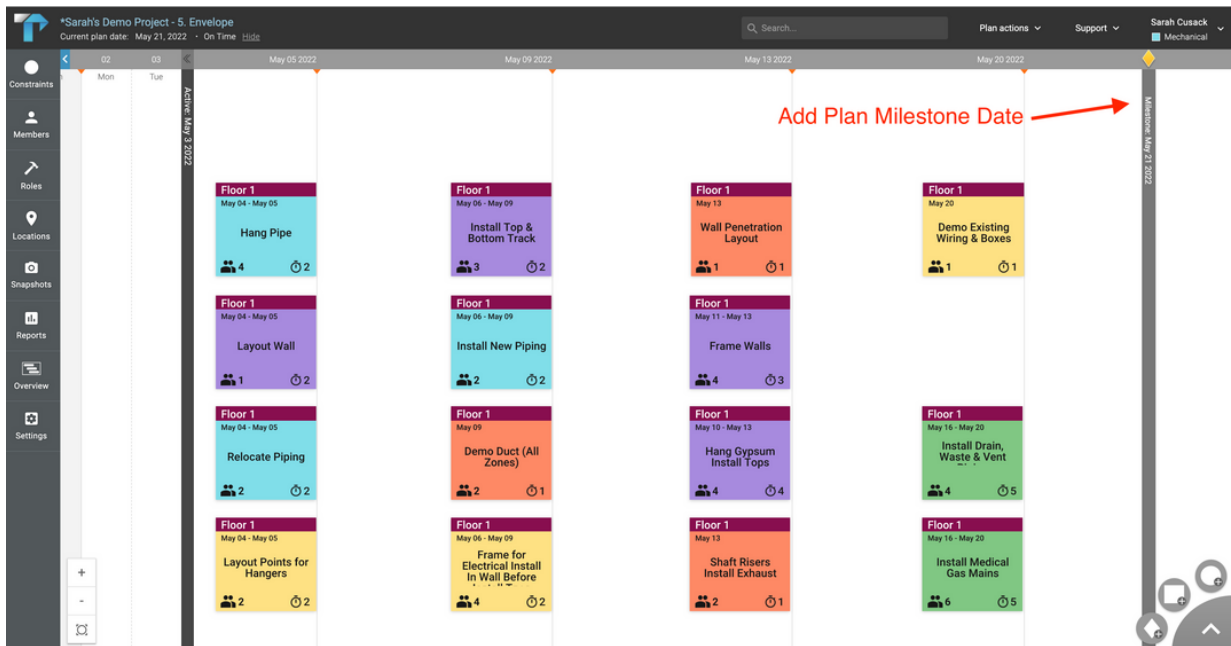
Thanks

All stakeholders, including the General Superintendent and Project Managers, should attend the Pull Planning session. It is important to have a presentation ready with visual aids that help reinforce specific deliverables to kick off the meeting. The team has a set of drawings pulled up next to Touchplan, while everyone in the meeting adds tickets directly from their own device in real-time.

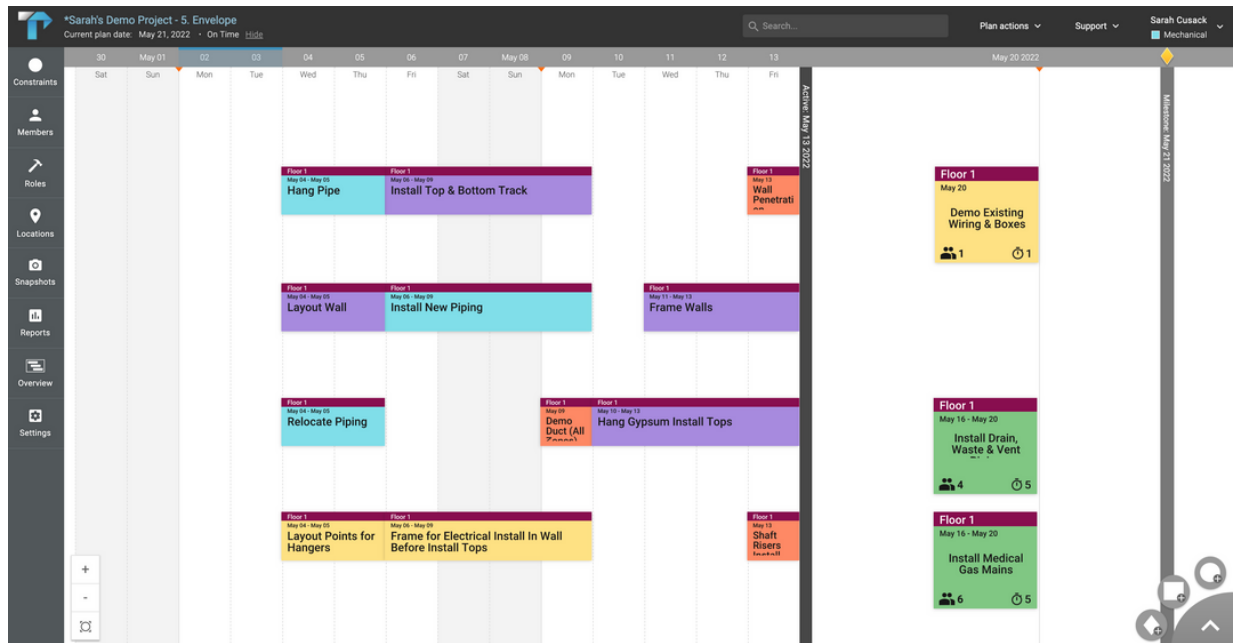
Before the meeting starts, add the final milestone to the plan on the high-level sequencing side or right side of the Active Line. The final milestone will be the point that all project members will be planning backward from.



After the team has finished collaboratively building the sequence of tickets, it is time to add the Plan Milestone Date Line. The Plan Milestone Date Line will add a projected end date to each column of tickets based on how the task tickets are arranged.



Pull the tickets from the high-level sequencing area into the look-ahead schedule by dragging the Active Line across the tickets. All tickets will have a start and finish date applied to them based on where they are placed in the timeline and will be put into Gantt Bar form. Make adjustments to the tickets as needed and start wrapping up the meeting.



Make-Ready Planning



Who

- Lead Superintendents
- Area Superintendents



Prep

- Detailed knowledge of:
 - Owner changes
 - Constraints
 - Schedule



When

- Weekly meetings
- No less than 2 business days before weekly work plan meetings



Deliverables

- 6 week look ahead with deliverables for the next weekly work plan meeting
- Send no less than 2 working days before the next weekly work plan meeting



Where

- Space with minimal possibility for interruption



Meeting Schedule

- 2-3 hours, weekly
- Time can vary depending on week and team

The goal of the Make-Ready Planning Meeting also referred to as 'lookahead planning', is to identify and clear constraints or roadblocks so the team can successfully complete tasks. The focus should be to identify constraints such as RFIs, OFE, and getting ahead of roadblocks. This is where area superintendents start to build the six-week lookahead from the phase plan and get ahead of the job.

The area superintendent is the sole participant with trade partners and project managers being consulted on an as-needed basis. The primary objective for the superintendent is to build flow into the work plan and identify areas where a special 'pull plan' might be required. Flush out requirements for long-lead items (>2 weeks) and annotate these as constraints in Touchplan assigned to the work activity.

Tip:

Tickets should be 5 days or less, it is easier to track the task's progress week over week.

Weekly Work Plans



Who

- Lead Superintendents
- Area Superintendents
- Trade Field Leadership



Prep

- Detailed knowledge of:
 - Owner changes
 - Constraints
 - Schedule



When

- Weekly meetings



Deliverables

- 6 week look ahead with deliverables for the next weekly work plan meeting
- Send no less than 2 working days prior



Where

- Big Room
- Chairs available



Meeting Schedule

- 30 minutes - 1 hour
 - :00 - :01 - Attendance
 - :01 - :10 - Review milestones
 - :10 - :20 - Q&A, constraint review
 - :20 - :50 - Collaborative planning
 - :50 - :59 - Pin Tickets and Wrap Up

The weekly work planning meetings should be used to commit to the next week's tasks and refine the Make-Ready plan. During the Weekly Work Plan Meetings, the trade foremen should be guiding the discussion. The expectation is that they have reviewed the six-week lookahead and weekly milestones ahead of time and have pre-populated their tickets for the upcoming week into Touchplan. Assess for flow and make fine adjustments to get rid of float and clarify handoffs.

Tip:

Do not turn this into a schedule update meeting. It should be used to confirm next week's work plan.

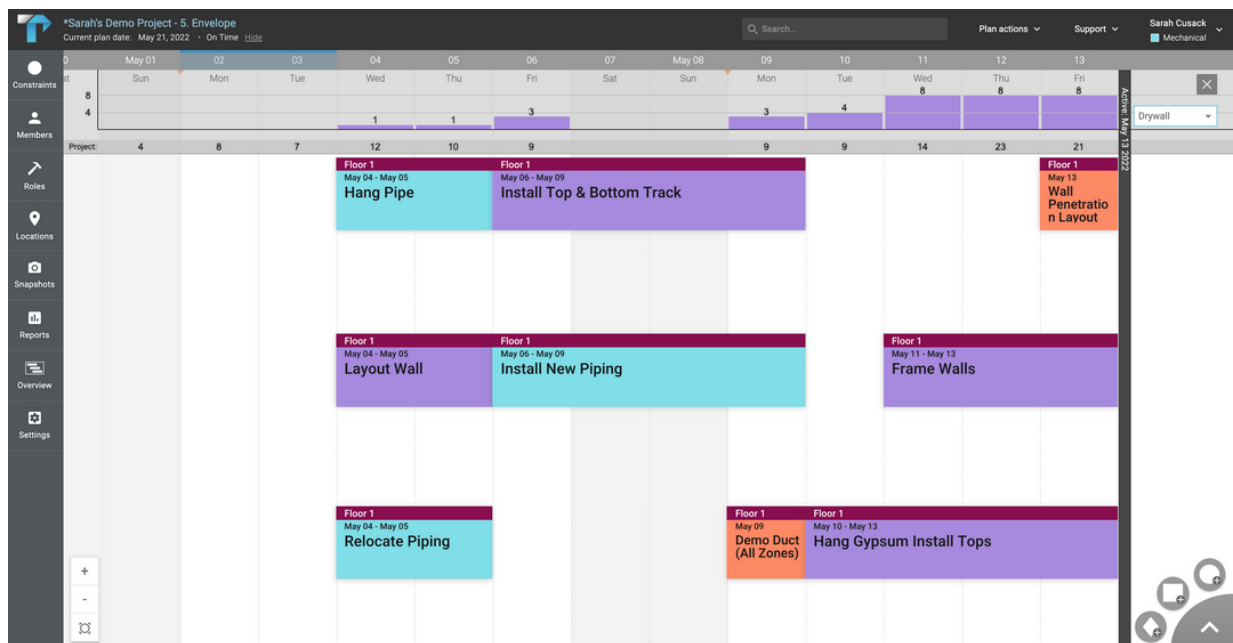
The meeting starts with a quick recap of the weekly milestones and then stakeholders are allowed to ask questions. Answer questions that can be handled quickly, while recording questions that may take longer to answer for follow-up later.

Tip:

Superintendents should guide the discussion and don't let anyone dominate it. This is everyone's turn to work together to build the plan.

Once everyone has asked their questions, open the meeting up for team collaboration. Everyone should add their tickets to the plan and be encouraged to collaborate for the next thirty minutes. Project visuals are going to be the focal point for this meeting, with Touchplan as a means to capture what is being planned.

During this planning session, assess for flow by using the 'View Crew Size' feature. Check for significant variation in crew sizes, trade-by-trade, and be sure that it matches the trade partners on-site. Admin users (foreman, superintendents, project managers, etc.) should pin the upcoming week's tasks so the team can track completed commitments throughout the week.



Daily Huddles



Who

- GC Facilitator
- Scribe
- Senior Superintendent
- Trade Field Leadership



Prep

- Knowledge of daily progress in the project



When

- Daily
- End of the day



Deliverables

- Accurate progress update
- Variance reasons for tickets that are not completed on time



Where

- Big Room
- Use of chairs is discouraged



Meeting Schedule

- 15 minutes or less
 - :00 - :01 - Attendance
 - :01 - :06 - Update or Add Jobsite Constraints (Risk to Execution)
 - :06 - :14 - Status Tickets by Trade in Touchplan
 - :14 - :15 - Wrap Up

Daily Huddles reinforce teamwork and collect accurate data on job site performance, this is not a coordination meeting. Pinned tickets must be checked daily and be marked as completed on time, early or late. It is here that production data is collected to be made useful later for learning.

In a deliberate and organized manner, have the facilitator ask about every commitment for that day. Use Touchplan Mobile to easily view and update pinned tickets while teams are out in the field.

Learning

At the close of the planning cycle, the team evaluates their past commitments and notes if they were completed according to plan. If a task was completed late or early, teams should identify the variance reason and discuss it. Plan breakdowns are then analyzed, trends identified, and the project team acts on the root causes of plan failures to prevent them from occurring again. Use Touchplan Reports to support discovery and conclusions.

Exercise

Practice this process and take some time to absorb it with the team before teaching the ins and outs of Touchplan to trades. A good way to do this is to do a 'build this room' exercise. Simulate creating a phase, make-ready, and weekly work plan by role-playing as a different

trade partner or GC role who would have taken part in building the room. Work through it and ask questions. Everyone on the GC team should start at a level of proficiency above trade partners before the project starts and the first planning session is held.

Summary

The goal is to create a workstream that allows the project team to design an effective plan while continuously improving. By bringing the lean process into Touchplan, teams can collaboratively build-out plans and meet milestones on time. The Touchplan Implementation Handbook can serve as a guide for Superintendents looking to create productive meetings with the project team.