Mastering Touchplan: A Comprehensive Guide

Touchplan®

by MOCA Systems, Inc.

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What is Touchplan?

Touchplan is a collaborative construction planning platform that enables project teams to leverage data to optimize planning and execution. The software allows teams to visualize workflows, prioritize tasks, and align efforts in real-time, fostering accountability and continuous improvement.

By incorporating the Last Planner System® into an intuitive interface, Touchplan helps teams identify and address constraints early, ensuring commitments are realistic and achievable. Teams can easily track progress, replicate successful processes, and collaboratively work through roadblocks, creating a feedback loop that drives project excellence.

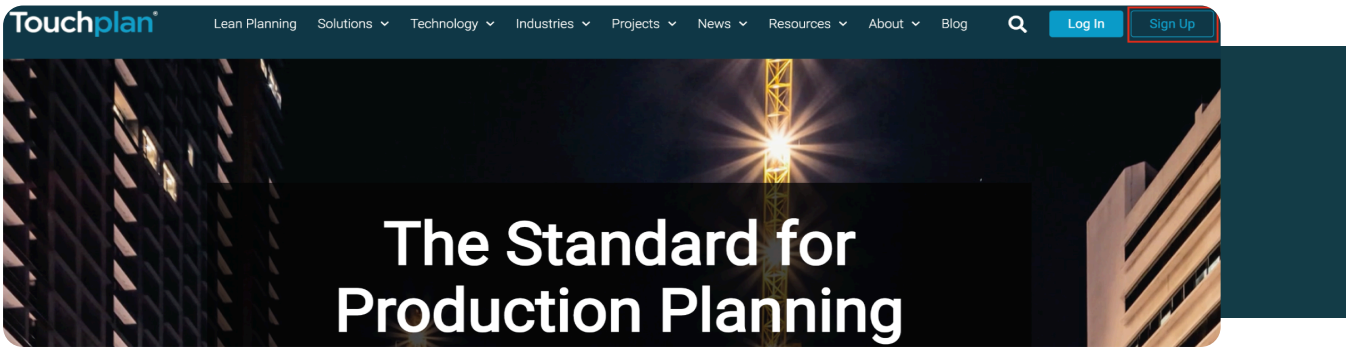
We are committed to transforming project planning, helping teams work more cohesively and efficiently. With Touchplan, your team can maximize productivity, enhance collaboration, and achieve exceptional results on every project.

Collaborative Planning

Planning Board Set Up

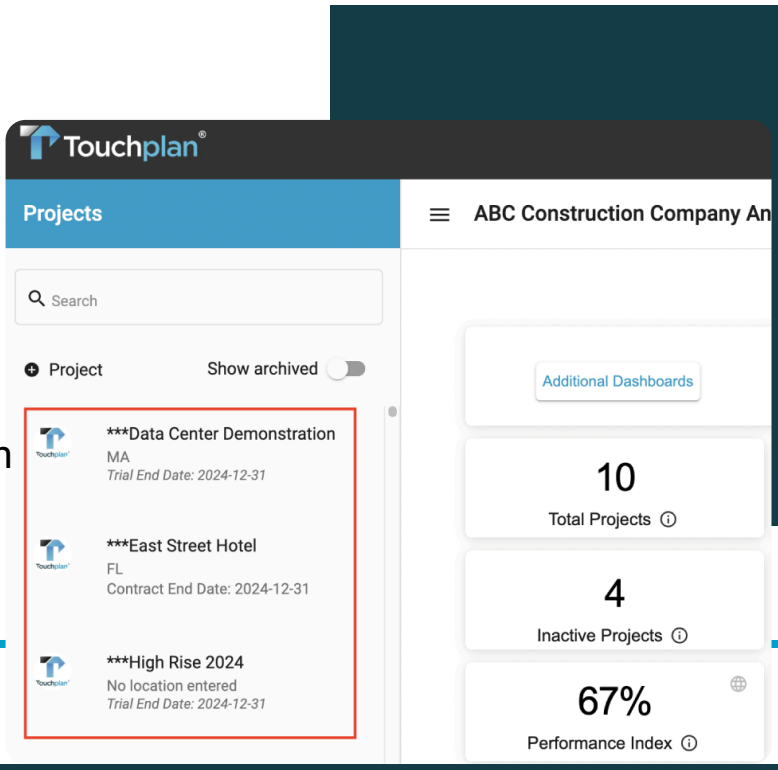
Create an Account

To start planning, create an Account using your company email.



Project List

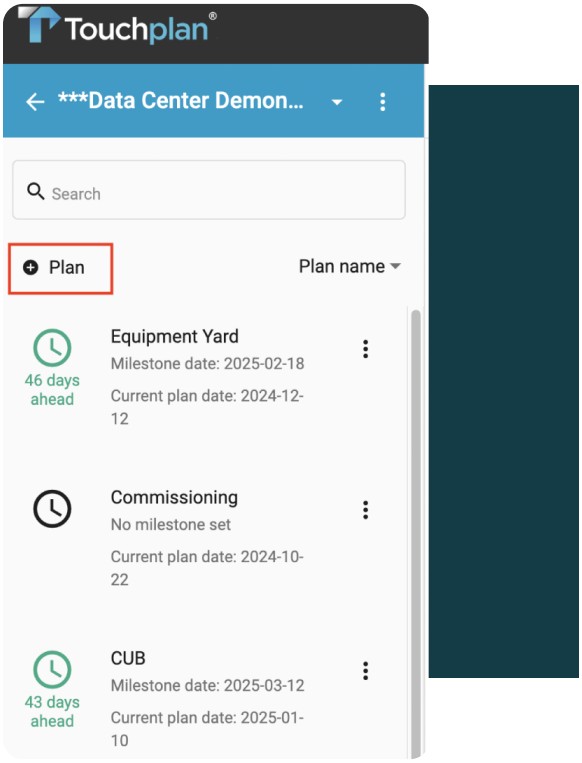
Upon creating an account and logging into Touchplan, a comprehensive list of your projects will display on the left-hand side of the screen. Should you receive invitations to additional projects, they will appear alongside your existing ones in the same location.



By clicking on a project name, you can access a project's planning space. Teams can add additional Project Members to projects in Touchplan to give them access to start planning.

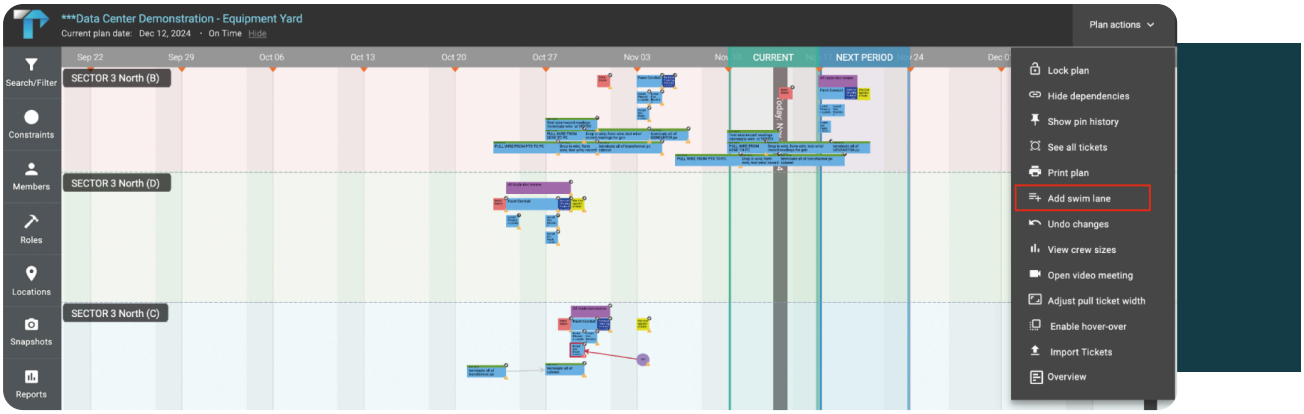
Phase Plans

Once inside the project, phase plans are on the left-hand side. Phase Plans are planning boards within the project, allowing project teams to break up their planning based on the project's unique needs. There are many different ways teams can break up planning using planning boards, including the phases of a project or by location. To create a new plan, click on +Plan at the top of the Phase Plan list.



Swim Lanes

When creating a new plan, it is important to ensure that the board is organized. Swim Lanes can help visually organize tickets within Phase Plans by highlighting specific locations, areas, or disciplines of work.

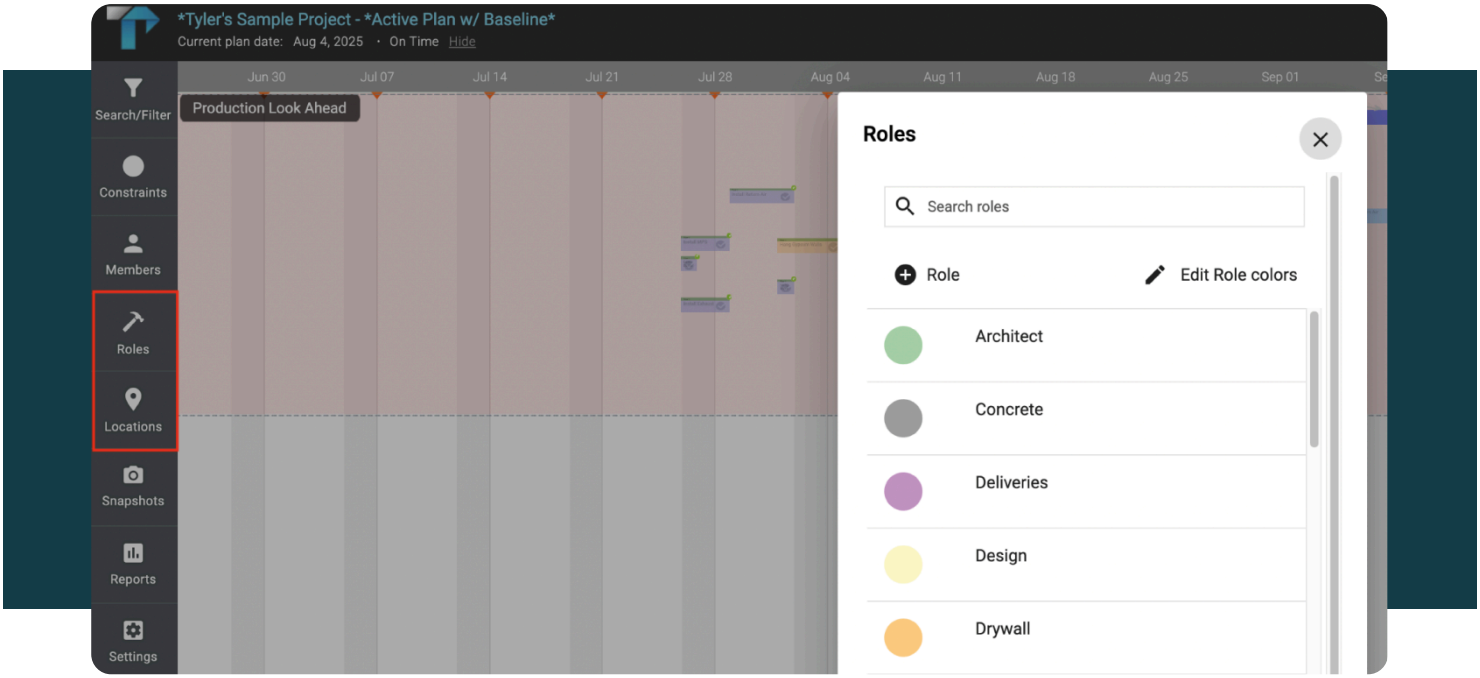


Roles and Locations

Roles and Locations are assigned to tickets at the time of their creation. Therefore, it is crucial to ensure that these elements are properly set up before planning starts.

- Roles: Are associated with the different trades or disciplines in a project, giving those groups their own ticket colors inside of the planning space.
- Locations: Are customizable tags that can be assigned to tickets, allowing teams the flexibility to track specific locations and generate reports based on these assignments.

Both can be created by choosing Role/Location on the left-hand side of the planning space.



Tickets

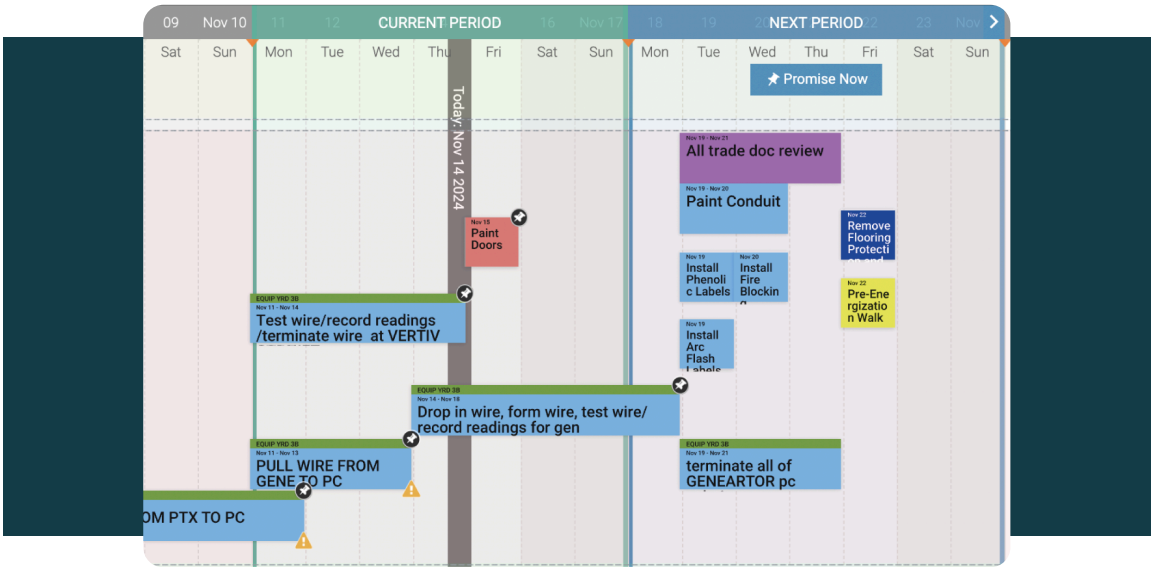
Once projects are set up, teams can collaboratively add tickets to build the Look Ahead plan, reflecting the work to be completed on the job site. Three different ticket types can be added to the planning board:

- Milestones: Represented by diamond-shaped tickets, these indicate key milestones in the project schedule. They are also useful for pull planning, as identifying a milestone allows teams to work backward and outline the tasks required to achieve it.
- Tasks: These square or rectangular tickets represent the physical work on the project. Tasks include details such as location and crew size, supporting various aspects of production planning.
- Constraints: Depicted as circular tickets, these represent issues that delay activities or have the potential to cause delays, impacting the project schedule.

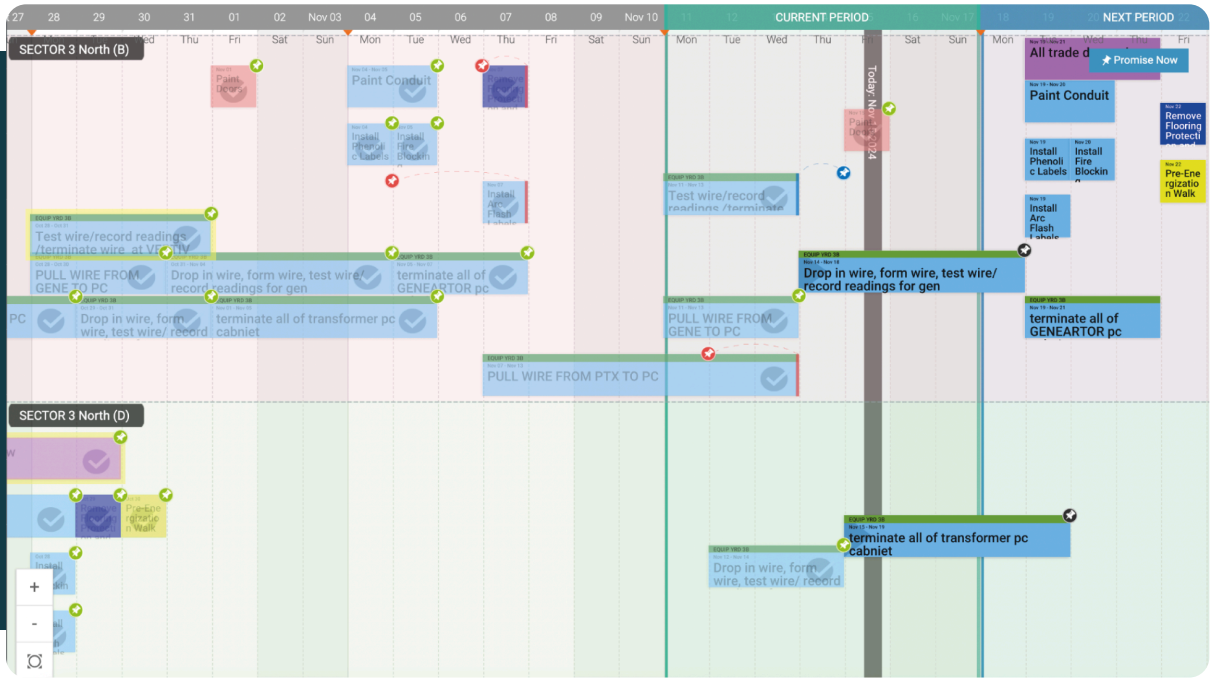
Commitment Tracking

Touchplan offers a best-in-class platform renowned for its ease of use in building production schedules. However, given the inevitable changes that will arise for the project team, it is essential to meticulously track these plan modifications throughout the project.

- Teams can use the Promise Period to commit to completing tasks by their planned finish dates. This promotes accountability, allowing teams to monitor progress, improve task scheduling, and track metrics such as Percent Planned Complete (PPC) on a weekly basis.
- These commitments are displayed as black pins on the planning boards, enabling teams to easily track changes to each task.

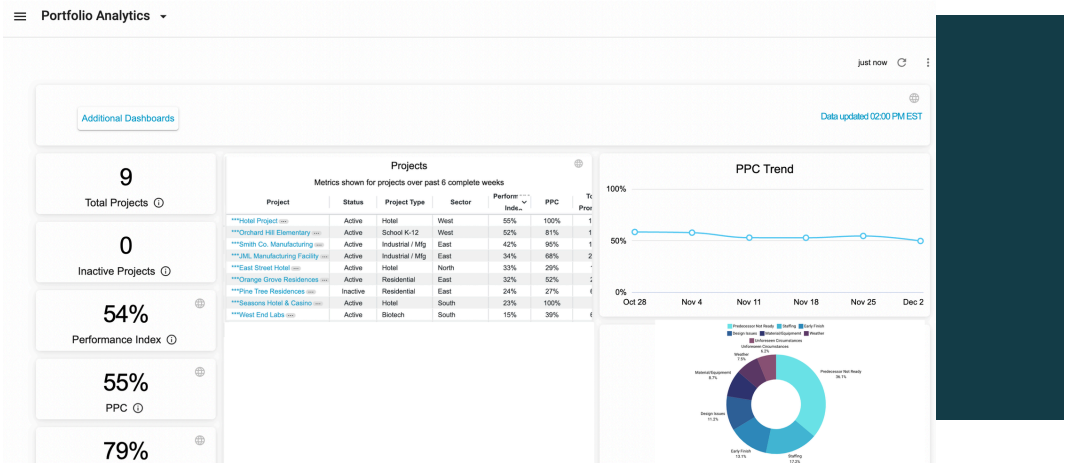


- Once commitments are added to tickets, indicated by black pins, the project team can update tickets daily. This allows teams to track whether tasks are completed on time, early, or late, fostering accountability and providing valuable data metrics for the project dashboard to identify areas for improvement.
- When tickets are updated, the pin color will change accordingly: green pins indicate tasks completed on time, red pins signify late tasks, and blue pins represent early completions.

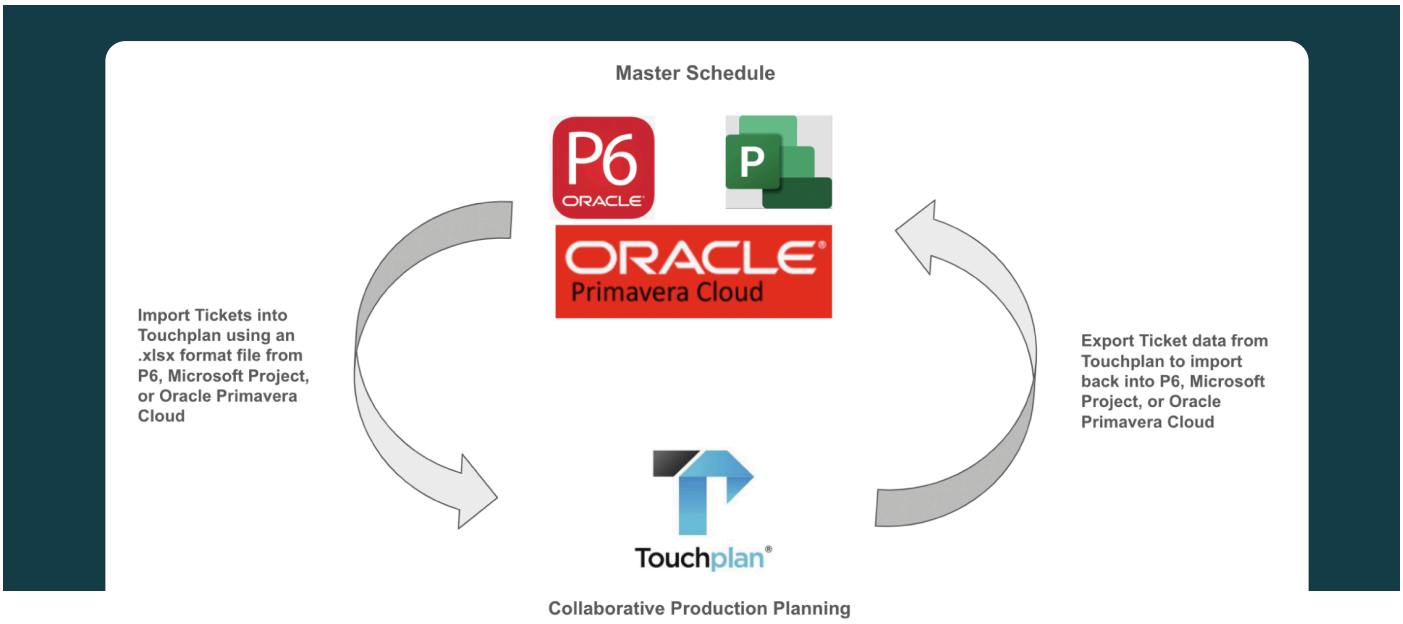


Project Dashboard

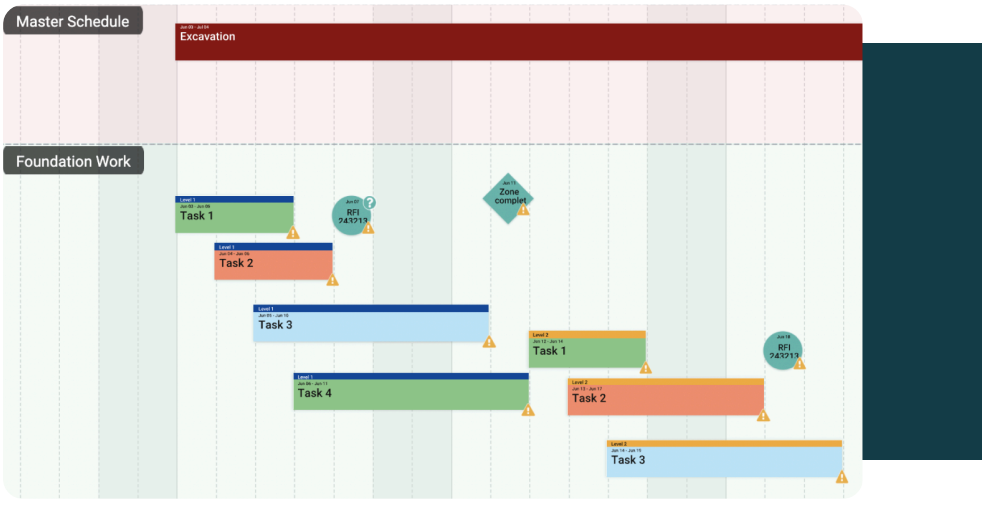
Project Analytics gives superintendents and project managers the insights needed to quickly anticipate and address leading indicators, trends, and blockers. It helps formulate effective strategies to stay ahead of challenges. Additionally, Project Analytics promotes a standardized approach to planning, making processes repeatable and performance measurable.



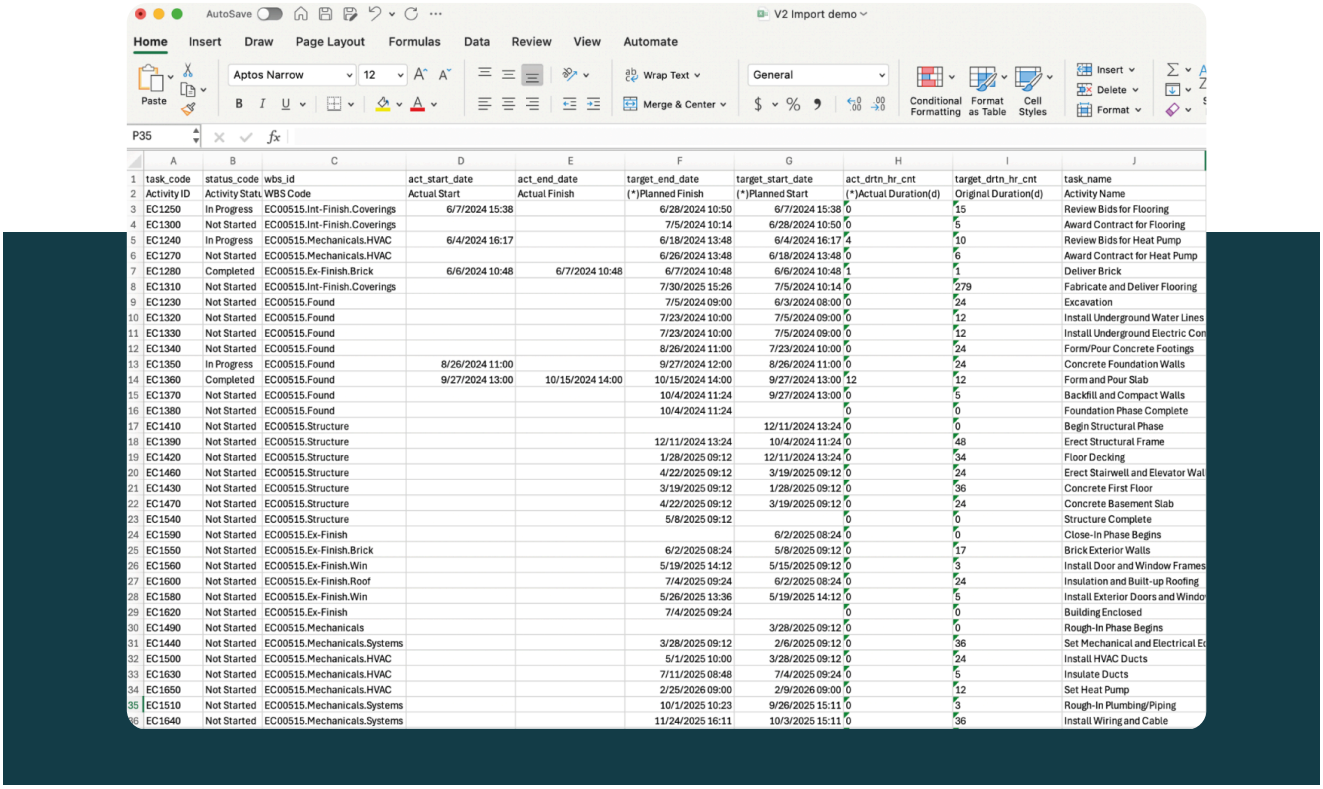
Master Schedule Synchronization



Touchplan's synchronization with P6, OPC, and Microsoft Project enhances Lean planning efforts by aligning live workflows in the field with the broader project timeline. By synchronizing the master schedule with Touchplan, superintendents can ensure continuous alignment between field activities and the schedule, empowering trades to collaborate more effectively and take ownership of the planning process. This synchronization helps eliminate schedule drift and improves overall project efficiency.



Easily align Touchplan and your master schedule with Touchplan's master schedule synchronization feature. Using a .Xlsx formatted file, users can import, export, and update their master schedule and incorporate valuable production planning data from Touchplan.

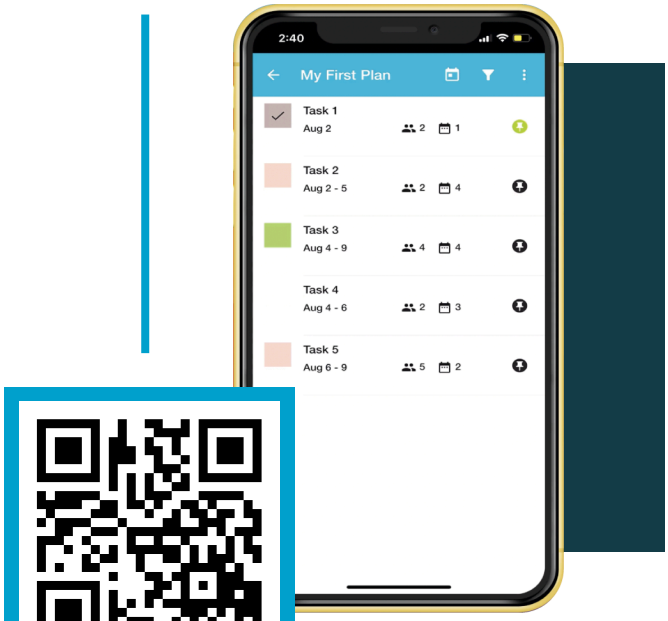


	A	B	C	D	E	F	G	H	I	J
1	task_code	status_code	wbs_id	act_start_date	act_end_date	target_end_date	target_start_date	act_drtn_hr_cnt	target_drtn_hr_cnt	task_name
2	Activity ID	Activity Statu	WBS Code	Actual Start	Actual Finish	(*)Planned Finish	(*)Planned Start	(*)Actual Duration(d)	Original Duration(d)	Activity Name
3	EC1250	In Progress	EC00515.Int-Finish.Coverings	6/7/2024 15:38		6/28/2024 10:50	6/7/2024 15:38	0	15	Review Bids for Flooring
4	EC1300	Not Started	EC00515.Int-Finish.Coverings			7/5/2024 10:14	6/28/2024 10:50	0	5	Award Contract for Flooring
5	EC1240	In Progress	EC00515.Mechanicals.HVAC	6/4/2024 16:17		6/18/2024 13:48	6/4/2024 16:17	4	10	Review Bids for Heat Pump
6	EC1270	Not Started	EC00515.Mechanicals.HVAC			6/26/2024 13:48	6/18/2024 13:48	0	6	Award Contract for Heat Pump
7	EC1280	Completed	EC00515.Ex-Finish.Brick	6/6/2024 10:48	6/7/2024 10:48	6/7/2024 10:48	6/6/2024 10:48	1	1	Deliver Brick
8	EC1310	Not Started	EC00515.Int-Finish.Coverings			7/30/2025 15:26	7/5/2024 10:14	0	279	Fabricate and Deliver Flooring
9	EC1230	Not Started	EC00515.Found			7/5/2024 09:00	6/3/2024 08:00	0	24	Excavation
10	EC1320	Not Started	EC00515.Found			7/23/2024 10:00	7/5/2024 09:00	0	12	Install Underground Water Lines
11	EC1330	Not Started	EC00515.Found			7/23/2024 10:00	7/5/2024 09:00	0	12	Install Underground Electric Con
12	EC1340	Not Started	EC00515.Found			8/26/2024 11:00	7/23/2024 10:00	0	24	Form/Pour Concrete Footings
13	EC1350	In Progress	EC00515.Found	8/26/2024 11:00		9/27/2024 12:00	8/26/2024 11:00	0	24	Concrete Foundation Walls
14	EC1360	Completed	EC00515.Found	9/27/2024 13:00	10/15/2024 14:00	10/15/2024 14:00	9/27/2024 13:00	12	12	Form and Pour Slab
15	EC1370	Not Started	EC00515.Found			10/4/2024 11:24	9/27/2024 13:00	0	5	Backfill and Compact Walls
16	EC1380	Not Started	EC00515.Found			10/4/2024 11:24		0	0	Foundation Phase Complete
17	EC1410	Not Started	EC00515.Structure				12/11/2024 13:24	0	0	Begin Structural Phase
18	EC1390	Not Started	EC00515.Structure			12/11/2024 13:24	10/4/2024 11:24	0	48	Erect Structural Frame
19	EC1420	Not Started	EC00515.Structure			1/28/2025 09:12	12/11/2024 13:24	0	34	Floor Decking
20	EC1460	Not Started	EC00515.Structure			4/22/2025 09:12	3/19/2025 09:12	0	24	Erect Stairwell and Elevator Wal
21	EC1430	Not Started	EC00515.Structure			3/19/2025 09:12	1/28/2025 09:12	0	36	Concrete First Floor
22	EC1470	Not Started	EC00515.Structure			4/22/2025 09:12	3/19/2025 09:12	0	24	Concrete Basement Slab
23	EC1540	Not Started	EC00515.Structure			5/8/2025 09:12		0	0	Structure Complete
24	EC1590	Not Started	EC00515.Ex-Finish				6/2/2025 08:24	0	0	Close-In Phase Begins
25	EC1550	Not Started	EC00515.Ex-Finish.Brick			6/2/2025 08:24	5/8/2025 09:12	0	17	Brick Exterior Walls
26	EC1560	Not Started	EC00515.Ex-Finish.Win			5/19/2025 14:12	5/15/2025 09:12	0	3	Install Door and Window Frames
27	EC1600	Not Started	EC00515.Ex-Finish.Roof			7/4/2025 09:24	6/2/2025 08:24	0	24	Insulation and Built-up Roofing
28	EC1580	Not Started	EC00515.Ex-Finish.Win			5/26/2025 13:36	5/19/2025 14:12	0	5	Install Exterior Doors and Windo
29	EC1620	Not Started	EC00515.Ex-Finish			7/4/2025 09:24		0	0	Building Enclosed
30	EC1490	Not Started	EC00515.Mechanicals				3/28/2025 09:12	0	0	Rough-In Phase Begins
31	EC1440	Not Started	EC00515.Mechanicals.Systems			3/28/2025 09:12	2/6/2025 09:12	0	36	Set Mechanical and Electrical Eq
32	EC1500	Not Started	EC00515.Mechanicals.HVAC			5/1/2025 10:00	3/28/2025 09:12	0	24	Install HVAC Ducts
33	EC1630	Not Started	EC00515.Mechanicals.HVAC			7/11/2025 08:48	7/4/2025 09:24	0	5	Insulate Ducts
34	EC1650	Not Started	EC00515.Mechanicals.HVAC			2/25/2026 09:00	2/9/2026 09:00	0	12	Set Heat Pump
35	EC1510	Not Started	EC00515.Mechanicals.Systems			10/1/2025 10:23	9/26/2025 15:11	0	3	Rough-In Plumbing/Piping
36	EC1640	Not Started	EC00515.Mechanicals.Systems			11/24/2025 16:11	10/3/2025 15:11	0	36	Install Wiring and Cable

Mobile

Touchplan's mobile interface lets you access your project plan anytime, anywhere. You can view and update tickets, add photos, and collaborate with other teams on-site.

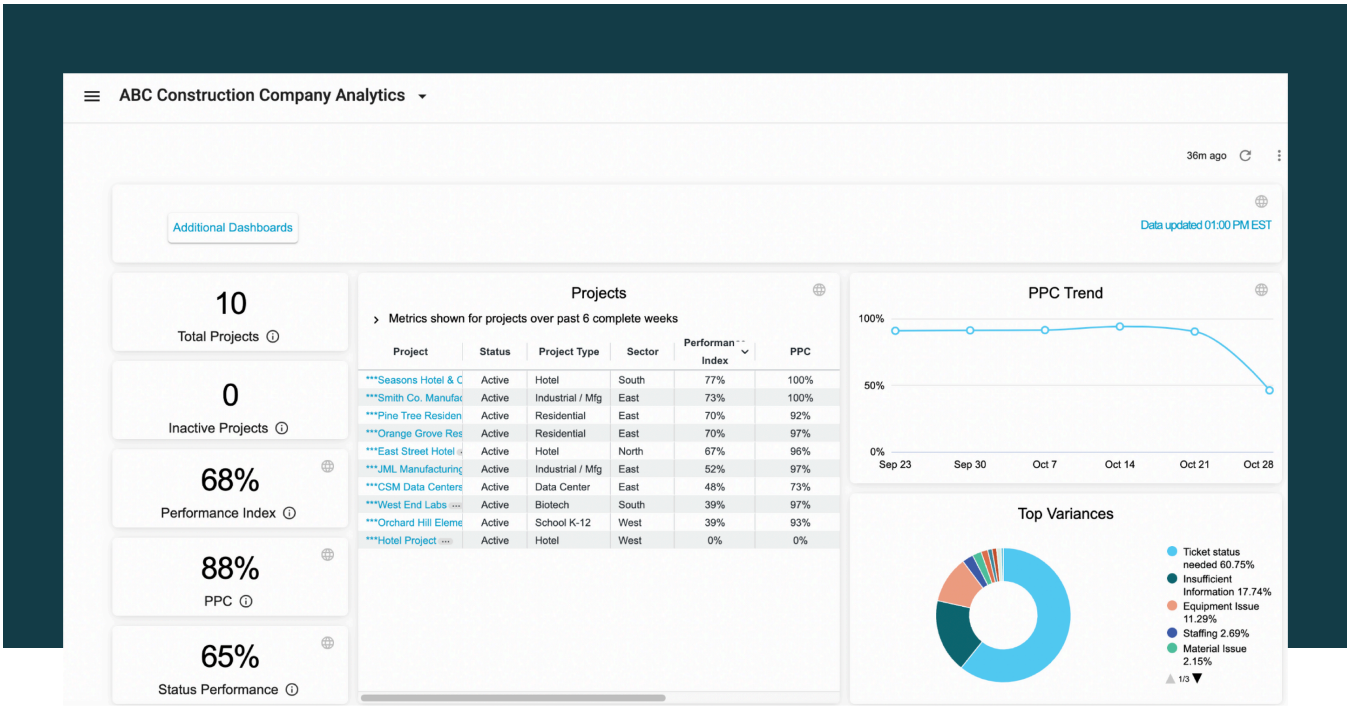
Simply visit m.touchplan.io on your phone's internet browser or scan the QR code to get started.



Reporting Analytics

Company Analytics

Company Analytics gives executives and corporate managers essential insights to assess the overall status of all company projects using Touchplan. With this data, they can develop and implement strategies and best practices to enhance ongoing project performance and ensure the smooth, consistent launch of new company-wide initiatives.



Below are the key metrics that Touchplan's Company Analytics dashboard displays:

PPC (Percent Plan Complete):

A reliability metric that calculates what percentage of weekly commitments (pinned task tickets) were met 'On Time' in Touchplan over the past 6 weeks.

Status Performance:

Measures the number of tickets that have been statused (marked as completed early, on time, or late) versus the total number of tickets created in the past 6 weeks.

Performance Index:

Measures a team's use of tasks, milestones, and constraints. These metrics will indicate how well the team is maintaining its plans. The Performance Index includes metrics on the company's PPC, Milestone PPC, Constraint Performance and Status Performance.

Labor Insights:

Monitors and manages past and future crew sizes across company projects.

Sector Insights:

Displays the company’s projects by unique business sectors.

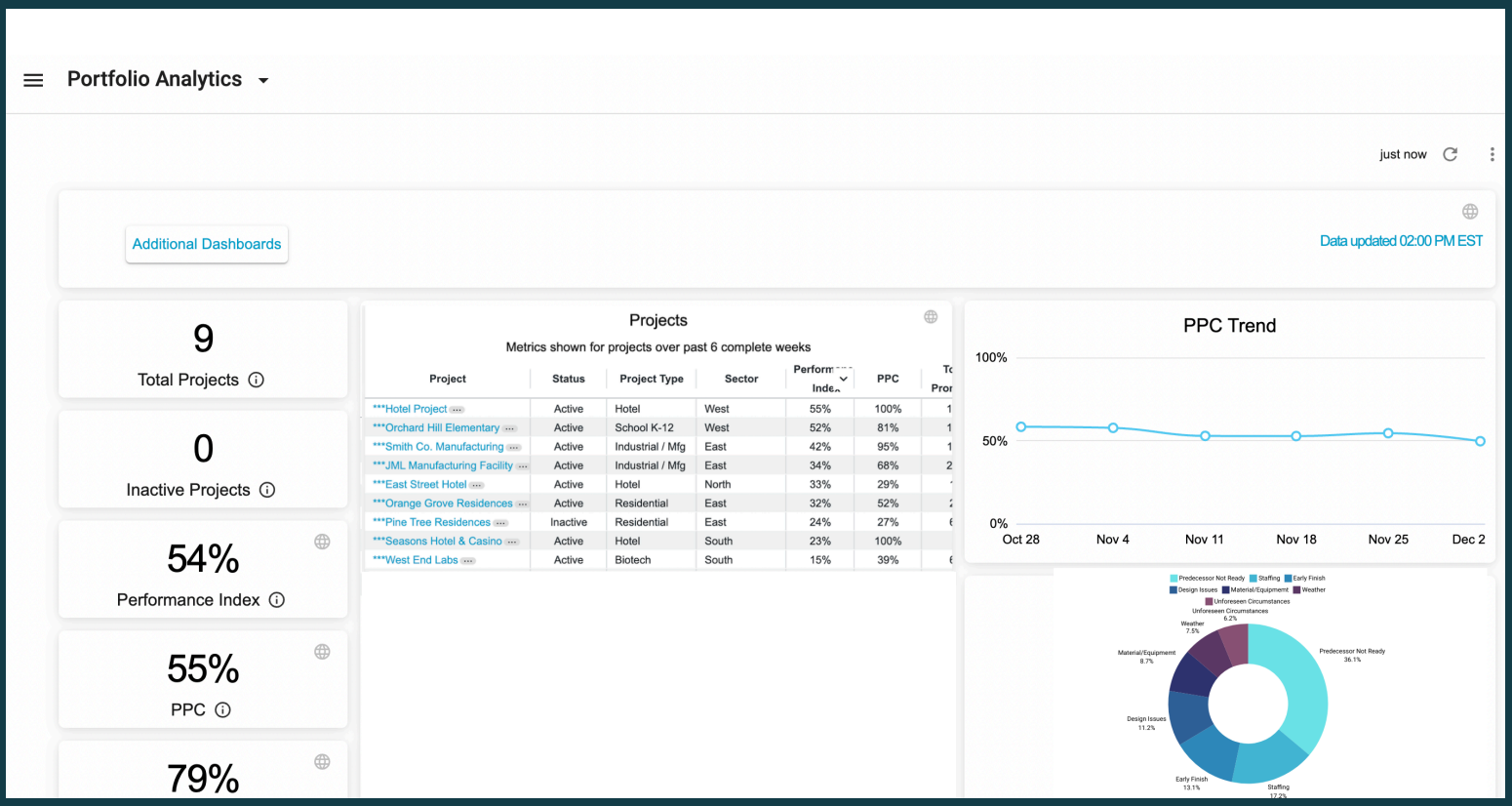
Milestone PPC:

Measures the milestone metrics in projects for milestone completion and variance reasons. This Dashboard will display a collection of data specific to the PPC and Variance Reasons for pinned milestone tickets (diamond tickets) across the project portfolio.

Constraint Insights:

Allows admin users to closely track and analyze the company constraints and their performance all in one place.

Portfolio Analytics

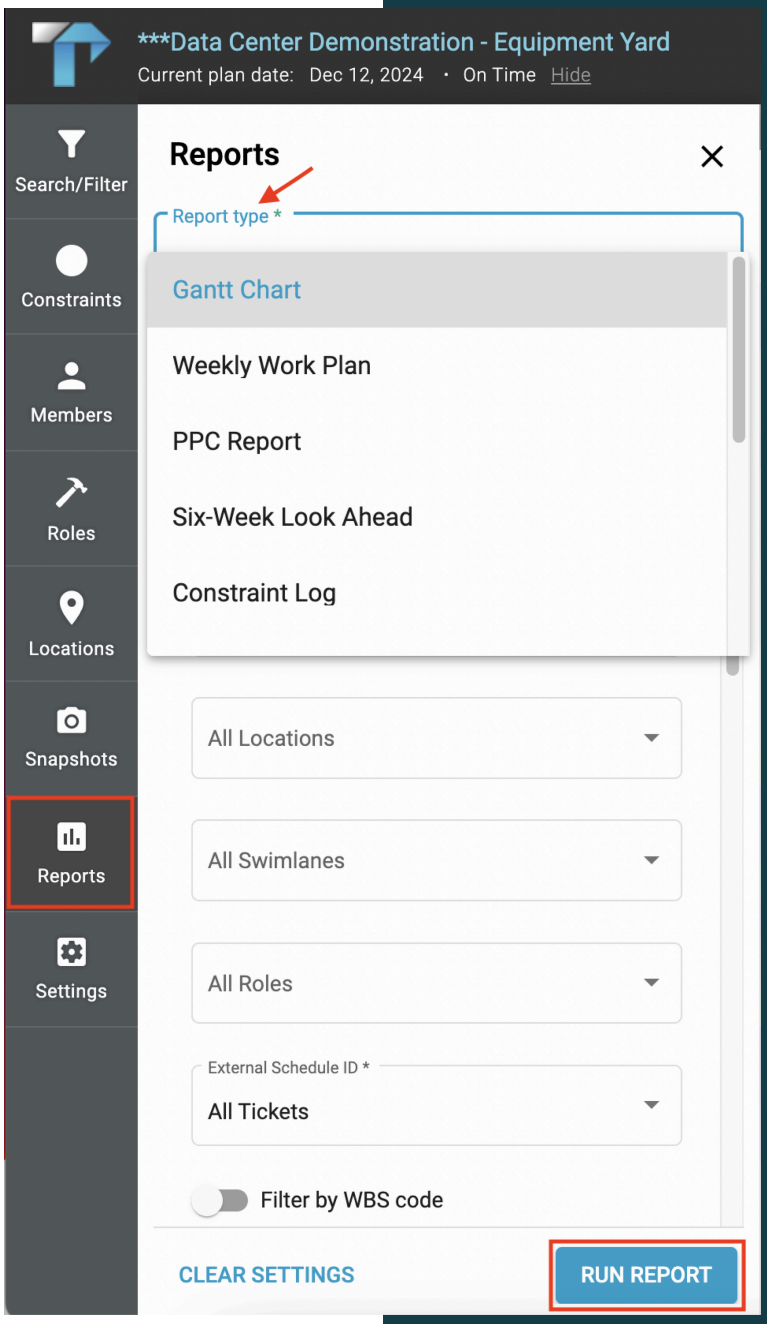


[Portfolio Analytics] offers regional and division managers a comprehensive analysis of project data, enabling them to assess multiple projects and address any that are falling short of their KPIs. It also allows for easy comparisons between projects using metrics such as PPC, reasons for variance, and constraint utilization, supporting better-informed decision-making.

Project Reporting

Touchplan offers a variety of reporting options for teams to extract project data. Whether generating a 6-week look-ahead or analyzing PPC metrics, teams have access to multiple report types and filtering options. The filters enable teams to personalize reports based on date range, roles, locations, and swimlanes within the project.

All reports can be easily saved as PDFs, simplifying the distribution of project information and metrics for teams that need to share updates.

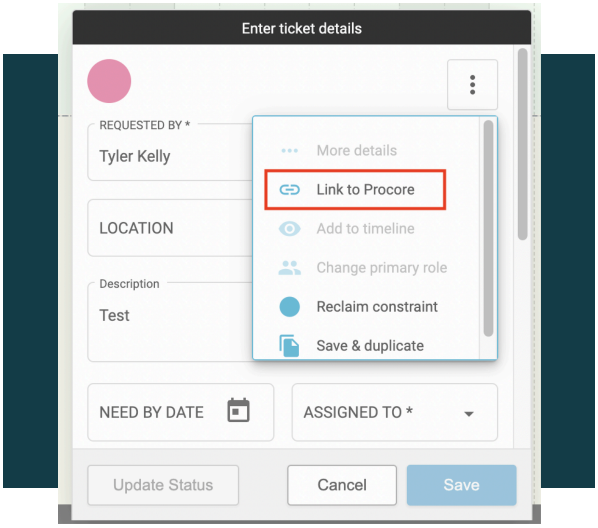


Integrations

Procore-RFI

Touchplan® ⟷ PROCORE®

Touchplan offers a powerful integration with Procore that enables project teams to seamlessly connect constraints in Touchplan to RFIs in their Procore accounts. This integration streamlines communication and enhances project management by allowing teams to track and address issues more effectively, ensuring smoother workflows and improved project outcomes.

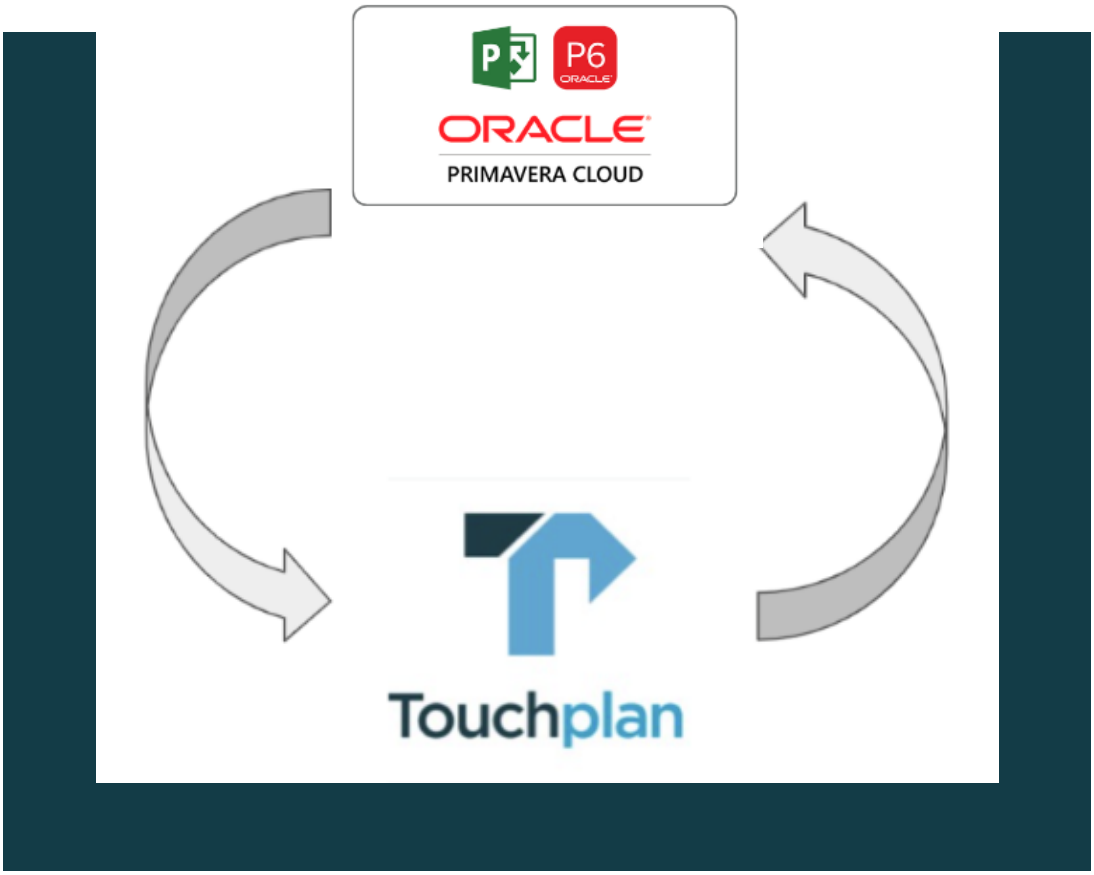


PowerBI

Touchplan® → Power BI

Touchplan provides a plug-in connector for Power BI, allowing project teams to easily transfer their data into Power BI. This integration enables teams to create customized dashboards that visualize and analyze project data from Touchplan, supporting enhanced insights and informed decision-making throughout the project lifecycle. Reach out to our Customer Success team to learn more about this integration.

P6, Oracle Primavera Cloud, Microsoft Project



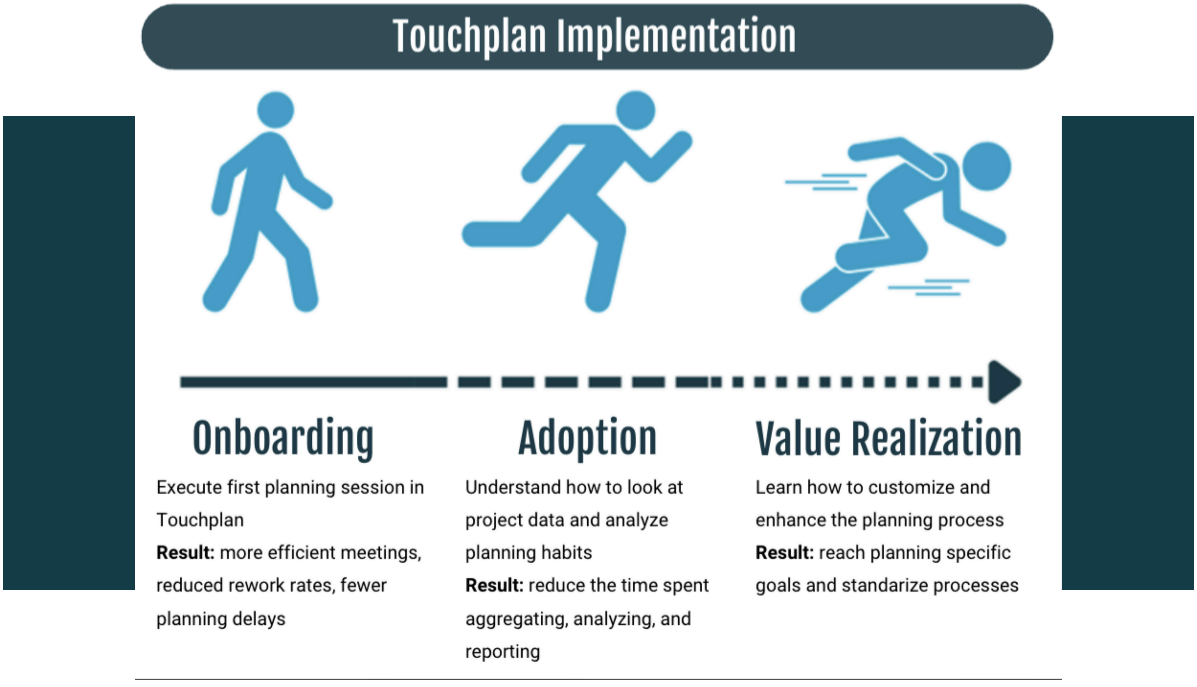
Easily align Touchplan and P6, OPC, or MS Project using Touchplan's master schedule synchronization features. Users can import, export, and update their master schedules and incorporate valuable production planning data from Touchplan.

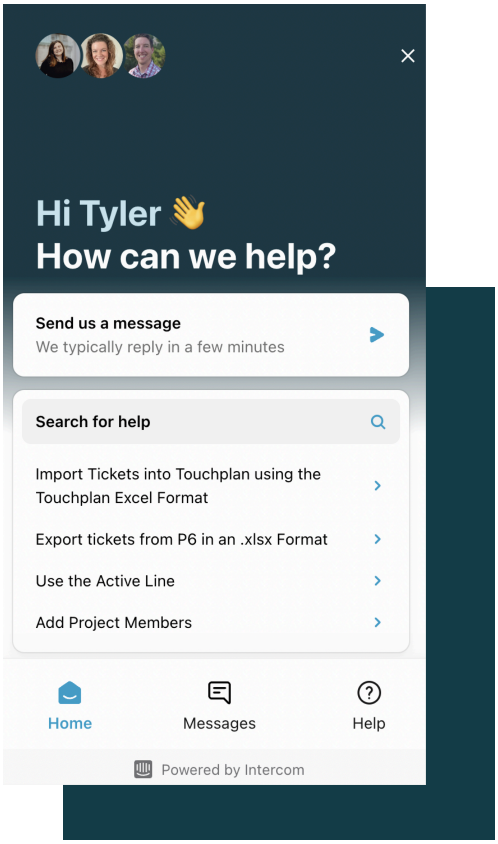
Support

Customer Success

With Touchplan, you gain more than just planning software—you receive the support of a team of planning experts dedicated to assisting your organization through adoption, implementation, and optimization. Our Customer Success team serves as your direct point of contact, ensuring effective integration of Touchplan across your company's portfolio of projects. The assigned Customer Success Manager works closely with each project team to establish efficient planning routines and ensure that all projects are positioned to achieve their goals.

Touchplan's signature Walk-Jog-Run approach guides customers through three key stages of adoption:





Live Chat

Live Chat in Touchplan will connect you with a member of the Customer Success team within seconds. This feature is accessible for all members on a project, providing real-time support to every member of a project. The team's response time averages only 36 seconds.

Touchplan Academy

Touchplan Academy is an educational resource available to all Touchplan users. It offers users the opportunity to deepen their knowledge of the platform through a variety of short courses. Upon completion, users receive a certification, enabling them to gain more from the platform and enhance their expertise.

Touchplan Academy

https://academy.touchplan.io/

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