



# Supporting Your Lean Project Lifecycle Real-Time Analytics Meets Patented Pull Planning

October 12, 2023

# Before We Begin: Be sure to check out Touchplan's...

- Demo On-Demand
- Live Demo
- Free Trial

# Meet the Panelists



**Andrew Piland**  
Product Manager  
*Touchplan*



**Sarah Cusack**  
Customer Success Manager  
*Touchplan*

# What is Touchplan?

Touchplan is a live collaborative software that empowers teams to implement Lean principles into their planning process in an approachable way.

Teams can work together to address changes in their schedule and generate data as they plan so they can finish on time and under budget.



# Why use Touchplan?



## Plan using Lean Principles

Meet teams where they are in their learn journey

Help teams break down their project all the way from the master schedule down to daily planning

Easily apply lessons learned to future planning session



## Planning & Daily Recovery

Supports multiple collaborative planning methods

Empowers teams to commit to an outcome, not to implementing the solution

Easily identify constraints to better manage roadblocks



## Collaboration

Empower users to own their schedule

Track who's doing what and when tasks are getting done in a clear view

From trades, to the owner, get buy-in and engagement from all stakeholders



## Project Data & Analytics

Provides robust analytics that is missed with manual planning

Data-driven insights to get constant updates on how teams can improve for the future using:

- Enterprise Analytics
- Management Index

# Customer Success: Who are we?

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- As Touchplan Experts we can help you navigate your planning journey.
- Your Customer Success Manager works with your project team throughout the entire duration of the project.
- Changing routines can be difficult. Our support goes well beyond initial training:
  - Pull plan prep and debrief calls
  - Best Practice Review calls
  - New Feature Adoption suggestions
  - And more!

# Customer Success Project Life Cycle



## Onboarding

Execute first planning session in Touchplan

**Result:** more efficient meetings, reduced rework rates, fewer planning delays

**MOCA + Touchplan**

MOCA Systems, Inc.

## Adoption

Understand how to look at project data and analyze planning habits

**Result:** reduce the time spent aggregating, analyzing, and reporting

## Value Realization

Learn how to customize and enhance the planning process

**Result:** reach planning specific goals

# The In-Between

- Touchplan Knowledge Base
  - Webinars
  - Introduction Videos
  - Help Center Articles
  - Touchplan Academy
  - Downloadable Resources
    - Checklists
    - One pages
    - Implementation Guides
- New Feature Alerts
- Support Emails
- Live Chat



Introduction Videos



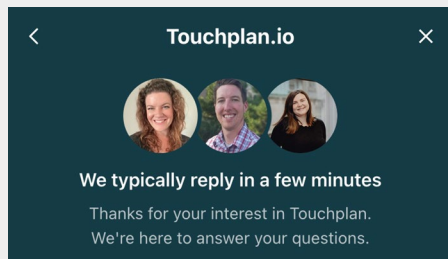
Help Center Articles



Webinars



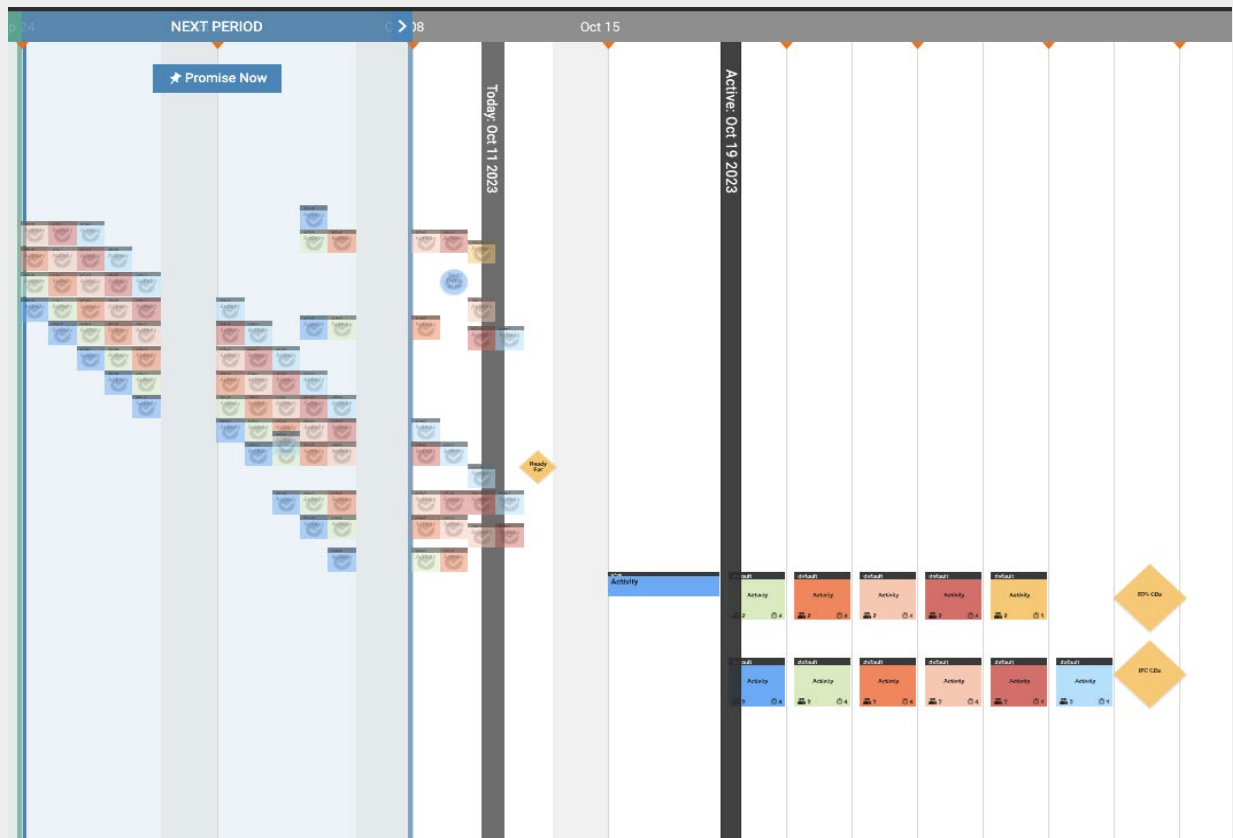
User Guide



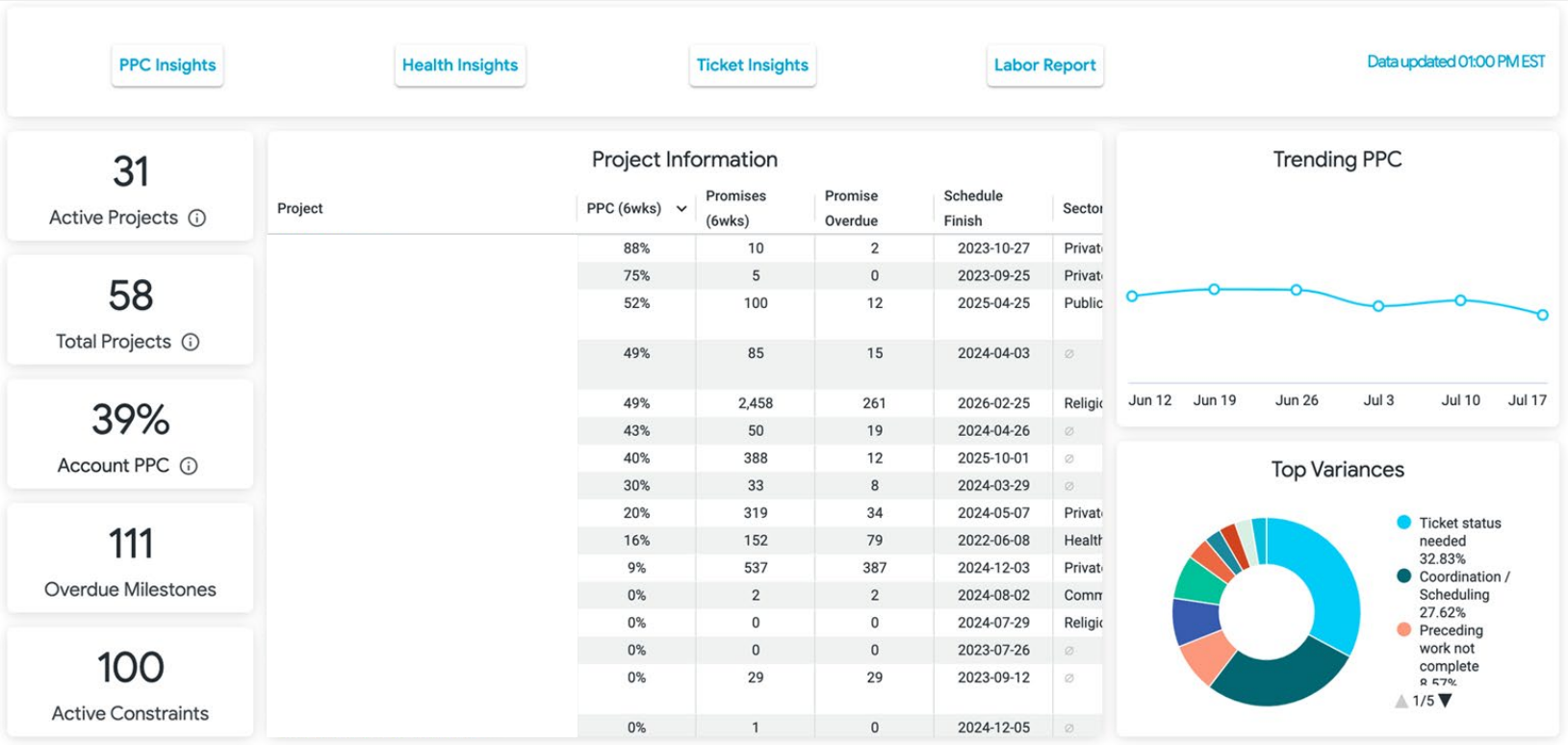
Touchplan Academy



# Patented Technology

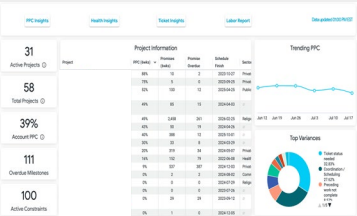


# Enterprise Analytics

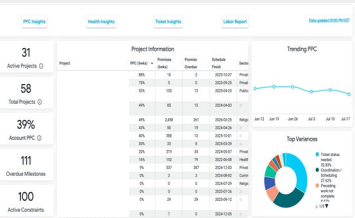
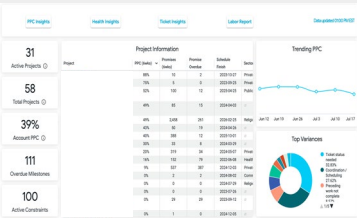


# Enterprise Analytics

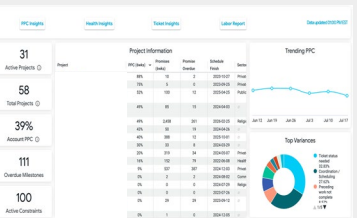
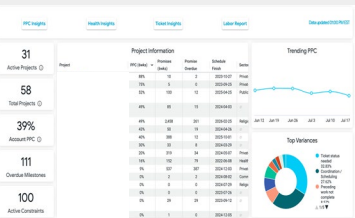
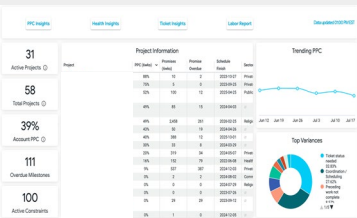
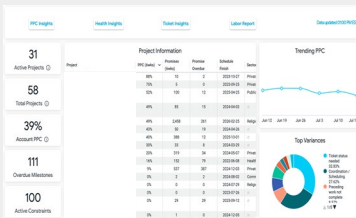
C-Suite



PX / Regional Manager

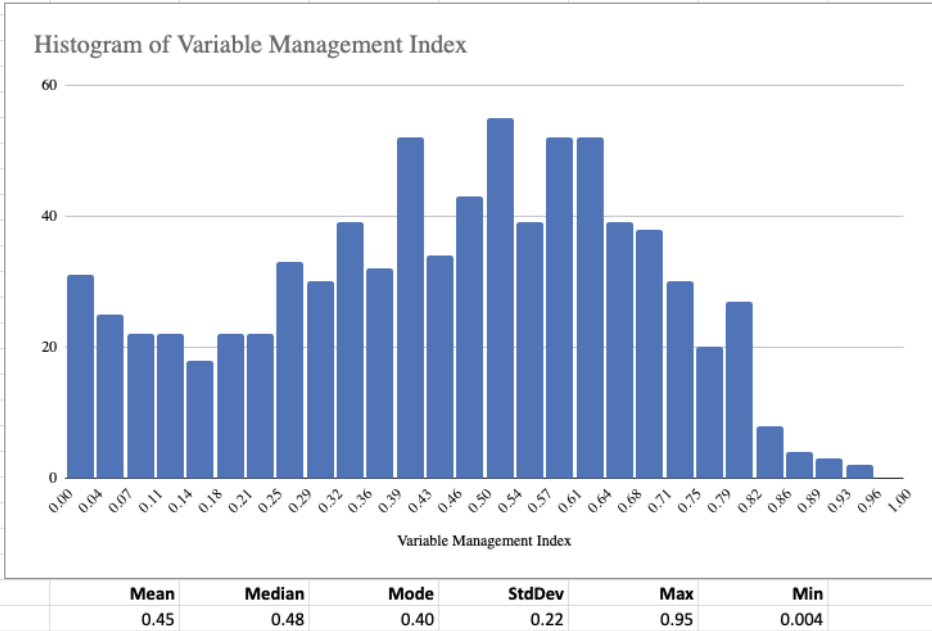


PM / Super



# Management Index

- New Component of Touchplan Analytics
- “Are Teams doing everything in their control?”
- Makeup
  - 20% Activity PPC
  - 20% Constraint PPC
  - 20% Milestone PPC
  - 40% Ticket Status Performance



# Audience Q&A

# Thank You for Attending!



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