

Overview

This Job Aid defines the steps to follow for creating and maintaining Strategic Themes and Goals in the platform.

There are three (3) core actions required for creating and maintaining strategic themes and goals.

1. Creating and maintaining strategic themes
2. Creating and maintaining goals
3. Associating goals with benefits.

Strategic Goals, while only available to Strategy customers, covers all three levels of the platform Strategy where the Strategic Themes and Goals are defined and managed and Portfolios and Projects where the goals are delivered or realised via association with portfolios, programs, and projects. We will be covering all components of managing themes and goals in this Job Aid.

Therefore, goals can be defined and updated across all three levels. For simplicity, we will create and maintain goals directly in Strategy to simplify the navigation to select and open themes, but you can perform the identical actions in Portfolios and Projects after selecting the appropriate portfolio, program, or project and selecting the Strategic Goals tab.

Creating and maintaining Strategic Themes



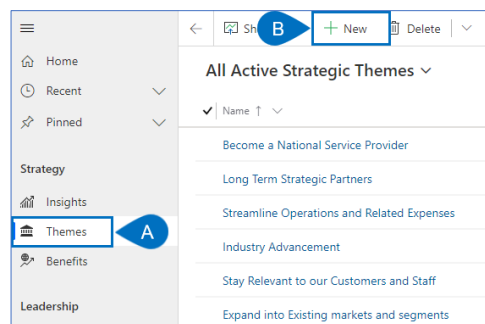
Strategy Manager



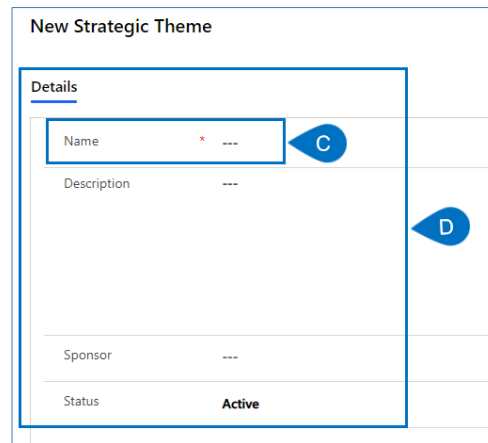
Strategy – New Theme

1. DEFINE A STRATEGIC THEME

- a. Ensure you are in **Strategy**, click Themes in the **Strategy** section.
- b. Click **+ New** from the command bar.



- c. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the theme in screens, reports, and dashboards.
- d. Complete the remaining fields in the **Details** pane.



New Strategic Theme

Details

Name * --- C

Description --- D

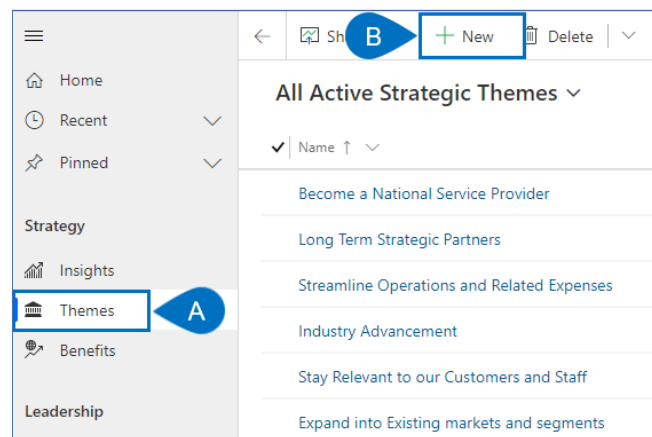
Sponsor ---

Status **Active**

- e. Click **Save & Close** to save the new Theme.

2. UPDATING A STRATEGIC THEME

- Ensure you are in **Strategy**, click **Themes** in the **Strategy** section. Find and select the Theme you wish to update in the list.
- Click on the **appropriate theme** from the list.



Home Recent Pinned Strategy Insights Themes Benefits Leadership

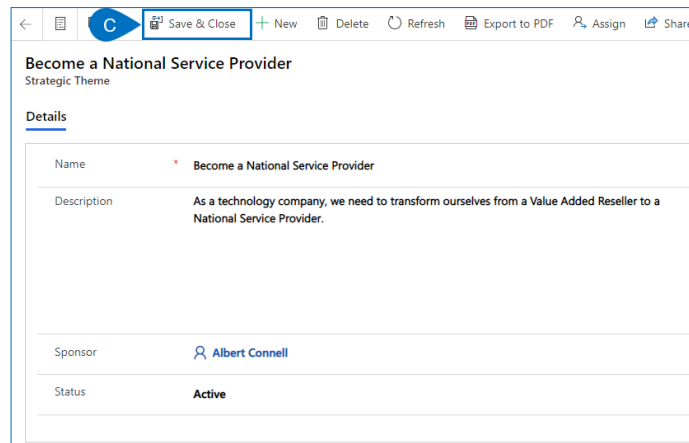
← Show B + New Delete

All Active Strategic Themes ▾

✓ Name ↑ ▾

- Become a National Service Provider
- Long Term Strategic Partners
- Streamline Operations and Related Expenses
- Industry Advancement
- Stay Relevant to our Customers and Staff
- Expand into Existing markets and segments

- c. Update appropriate fields and select **Save & Close**.



Become a National Service Provider
Strategic Theme

Details

Name	* Become a National Service Provider
Description	As a technology company, we need to transform ourselves from a Value Added Reseller to a National Service Provider.
Sponsor	Albert Connell
Status	Active

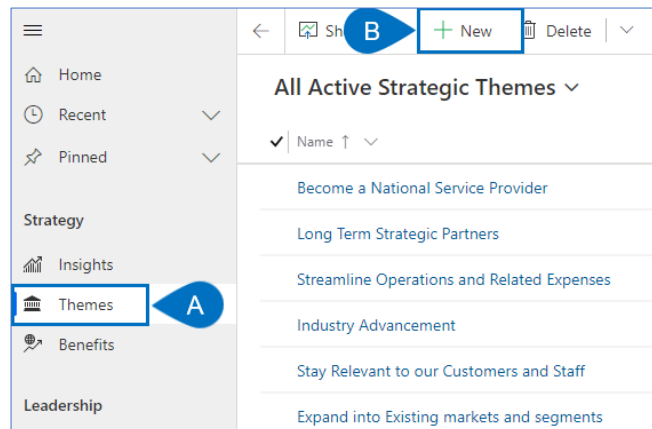
Creating and maintaining Strategic Goals

 Strategy Manager

 Strategy – Themes

1. DEFINE A STRATEGIC GOAL

- Ensure you are in **Strategy**, click **Themes** in the Strategy section.
- Find and select the **theme** that you wish to add a **Strategic Goal** to.



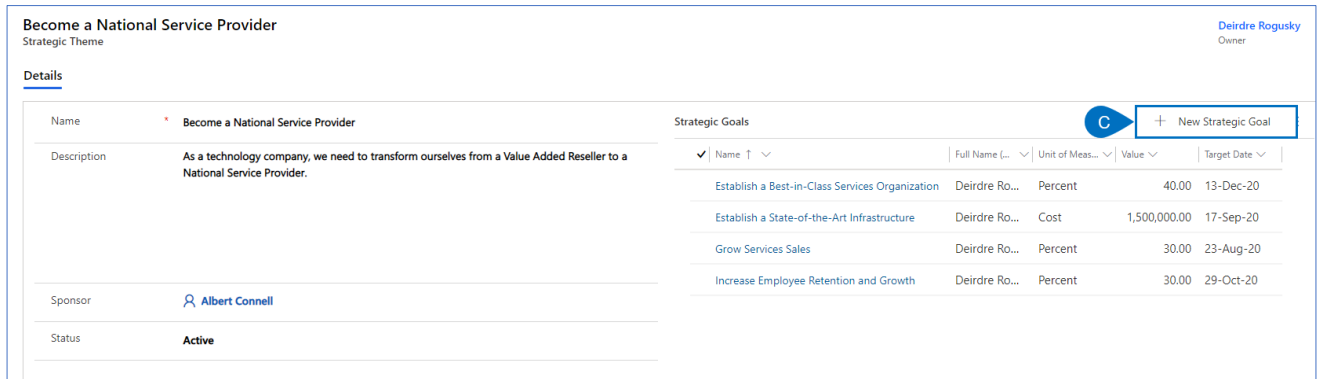
Home Recent Pinned Strategy Insights Themes Benefits Leadership

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All Active Strategic Themes

- Become a National Service Provider
- Long Term Strategic Partners
- Streamline Operations and Related Expenses
- Industry Advancement
- Stay Relevant to our Customers and Staff
- Expand into Existing markets and segments

- Click **+ New Strategic Goal** from the sub-ribbon.



Become a National Service Provider
Strategic Theme

Deirdre Rogusky
Owner

Details

Name: **Become a National Service Provider**

Description: **As a technology company, we need to transform ourselves from a Value Added Reseller to a National Service Provider.**

Sponsor: **Albert Connell**

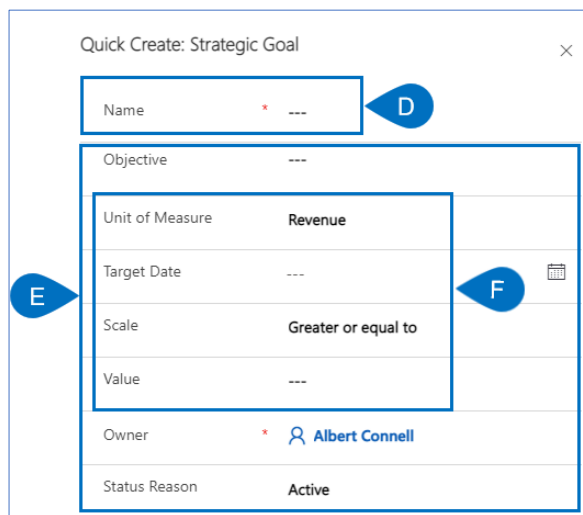
Status: **Active**

Strategic Goals

✓ Name ↑ ↓	Full Name [...]	Unit of Meas...	Value	Target Date
Establish a Best-in-Class Services Organization	Deirdre Ro...	Percent	40.00	13-Dec-20
Establish a State-of-the-Art Infrastructure	Deirdre Ro...	Cost	1,500,000.00	17-Sep-20
Grow Services Sales	Deirdre Ro...	Percent	30.00	23-Aug-20
Increase Employee Retention and Growth	Deirdre Ro...	Percent	30.00	29-Oct-20

+ New Strategic Goal

- Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the goal in screens, reports, and dashboards.
- Complete the remaining fields in the **Quick Create** pane.
- Define the quantitative measures for the goal using the **Unit of Measure, Target Date, Scale and Value** fields to define the expectations for the goal.



Quick Create: Strategic Goal

Name: --- (D)

Objective: ---

Unit of Measure: **Revenue**

Target Date: --- (F)

Scale: **Greater or equal to**

Value: ---

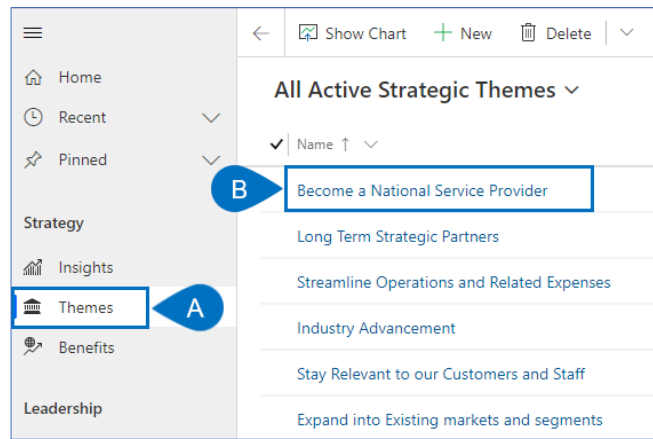
Owner: **Albert Connell**

Status Reason: **Active**

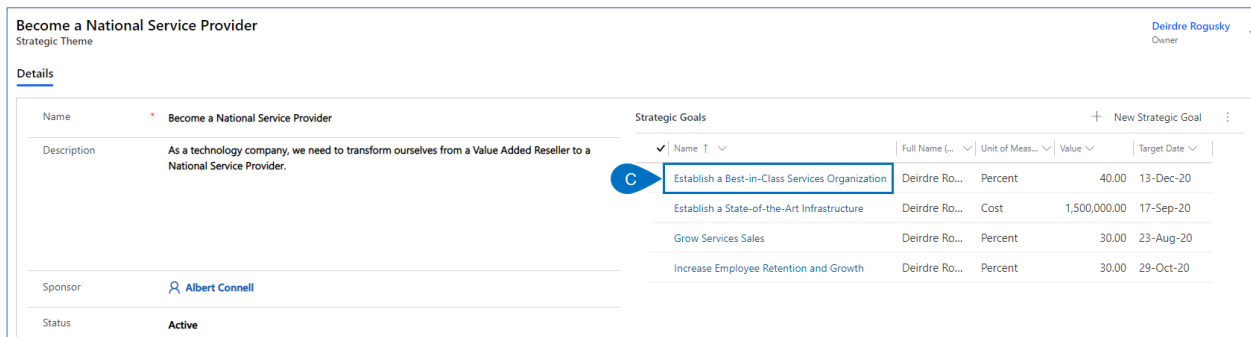
- Click **Save & Close** to save the new goal.

2. UPDATING A STRATEGIC GOAL

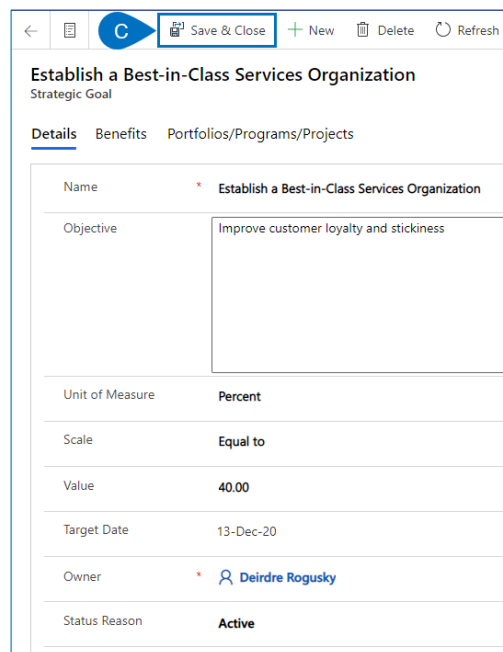
- Ensure you are in **Strategy**, click **Themes** in the **Strategy** section.
- Find and select the **Theme** that has the **Strategic Goal** you wish to update.



c. Find and select the appropriate **Strategic Goal** from the list.



d. Update appropriate fields and select **Save & Close**.



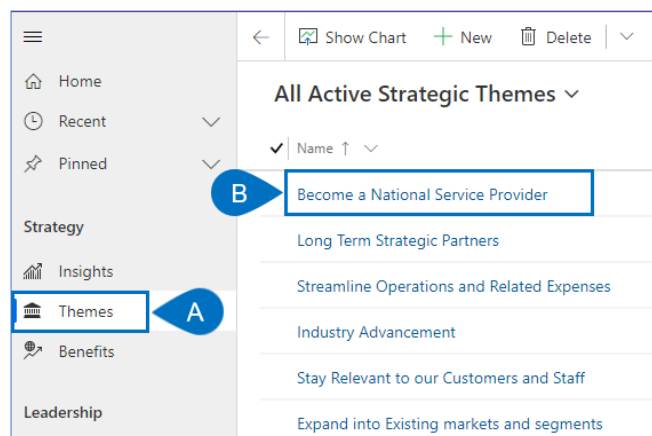
Associating goals with benefits

Strategy Manager

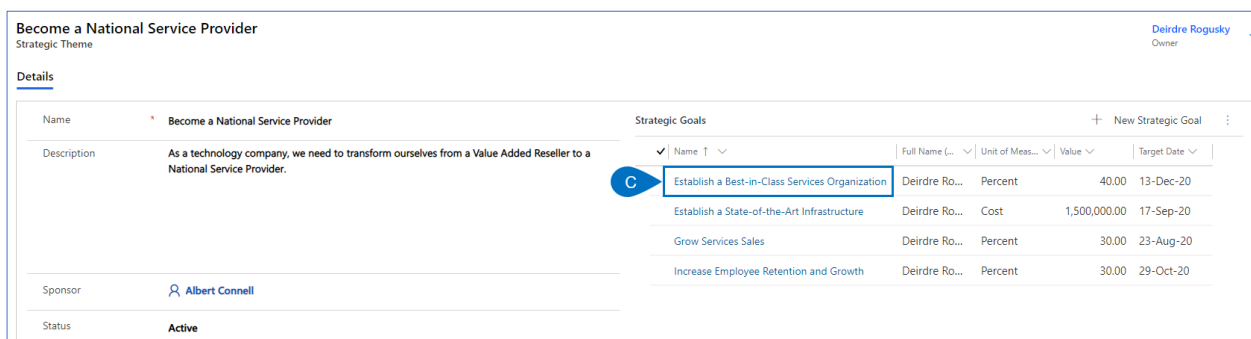
Strategy – Themes

1. ASSOCIATE GOALS WITH BENEFITS

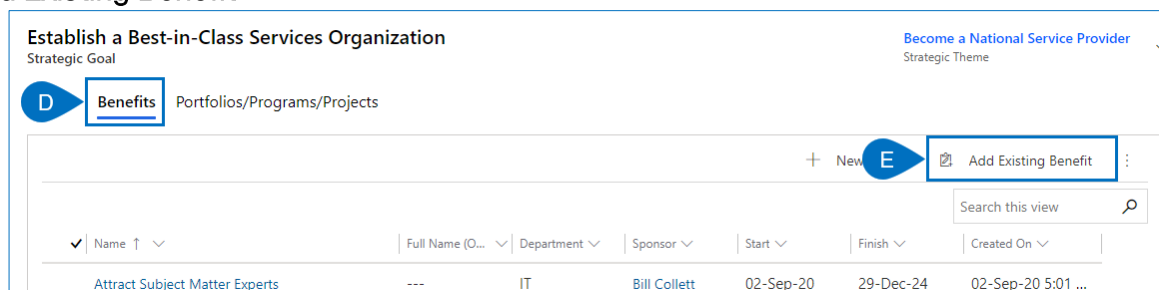
- Ensure you are in **Strategy**, click **Themes** in the **Strategy** section.
- Find and select the **Theme** that has the **Strategic Goal** that you wish to add the benefit to.



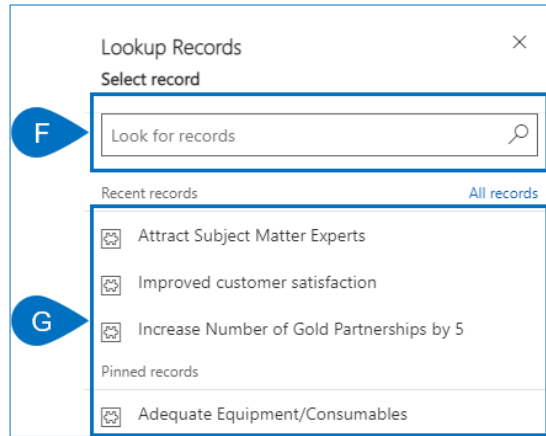
- Find and select the appropriate **Strategic Goal** from the list.



- Click on the **Benefits** tab.
- Click **Add Existing Benefit**.

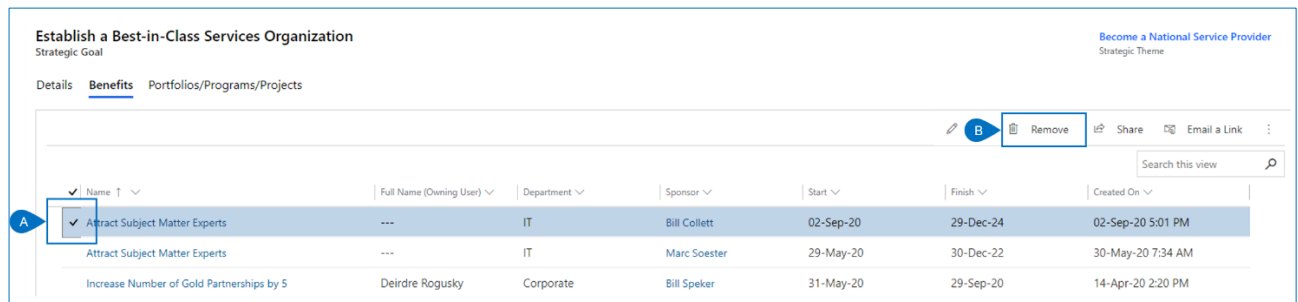


- f. Click in the **Search** box.
- g. Search for and **select the appropriate item** from the list.



2. DISASSOCIATE GOALS WITH BENEFITS

- a. Select the **area to the left** of the benefit to select it.
- b. Click **Remove** from the sub-ribbon.



Name	Full Name (Owning User)	Department	Sponsor	Start	Finish	Created On
Attract Subject Matter Experts	---	IT	Bill Collett	02-Sep-20	29-Dec-24	02-Sep-20 5:01 PM
Attract Subject Matter Experts	---	IT	Marc Soester	29-May-20	30-Dec-22	30-May-20 7:34 AM
Increase Number of Gold Partnerships by 5	Deirdre Rogusky	Corporate	Bill Speker	31-May-20	29-Sep-20	14-Apr-20 2:20 PM