

Overview

This Job Aid defines the steps to define the hierarchical relationship between delivery initiatives and goals. There is only one action required for associating (and disassociating) projects, programs and/or projects with benefits and/or goals.

A theme can have many goals, and each goal can be delivered through multiple initiatives; or in other words, it could take multiple initiatives to realise the goal. As well, a goal can be measured through multiple benefits. Each benefit can be associated with only a single goal and a single initiative.

Each initiative can be associated with multiple goals and benefits, while still adhering to the rule that a specific benefit can be associated with only a single initiative.

While you can define these relationships top down from the goal to the portfolio, program, and project, most organisations do it from the bottom up by associating the projects, programs and portfolios with the appropriate goals and benefits. This Job Aid will review how to associate from the bottom up.

Associate (and disassociate) Benefits and Goals



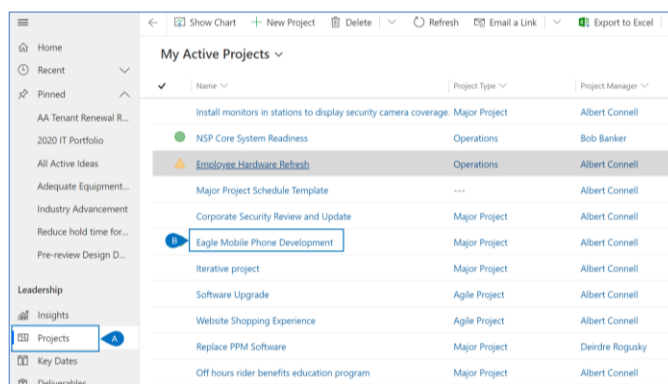
Strategy Manager



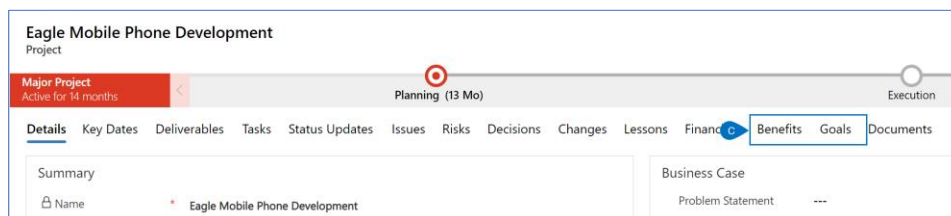
Projects, Portfolios

1. ASSOCIATE A BENEFIT OR GOAL

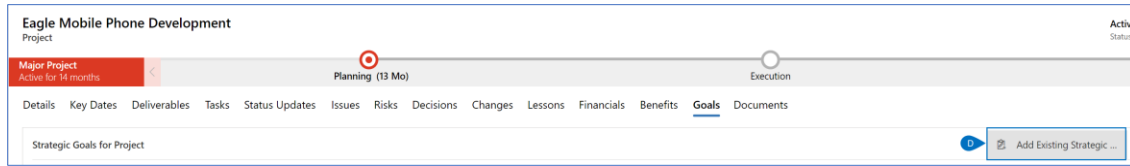
- Ensure you are in **Projects** (if associating a Project) or **Portfolios** (if associating a Portfolio or Program).
- Select and open the appropriate **project** (or portfolio/program).



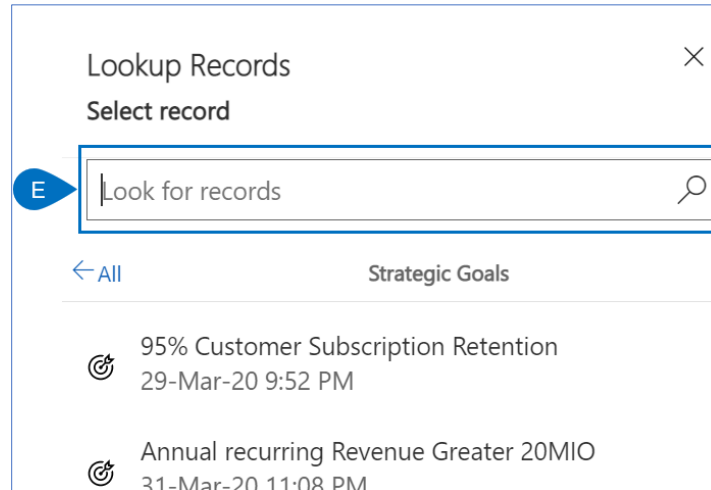
- Select the **Goals** (or **Benefits**) tab.



- Select **+ Add Existing Strategic Goals** (or **Benefits**) to the selected initiative.

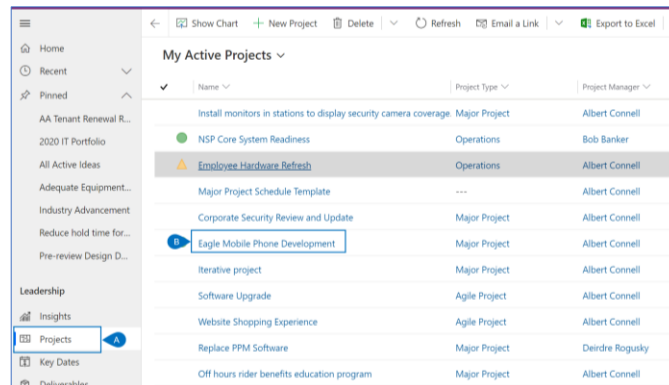


- e. Search for and select the appropriate **Goal** (or **Benefit**).

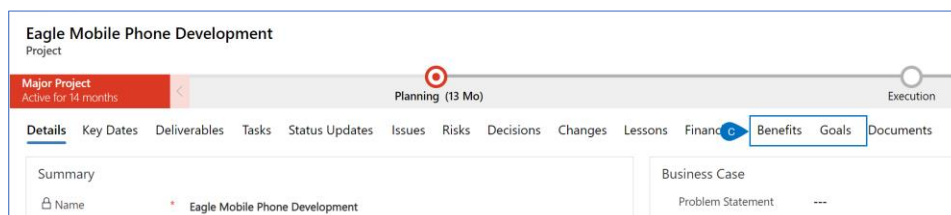


2. DIS-ASSOCIATE A BENEFIT OR GOAL

- a. Ensure you are in **Projects** (if associating a Project) or **Portfolios** (if dis-associating a Portfolio or Program).
b. Select and open the appropriate **project** (or portfolio/program).



- c. Select the **Goals** (or **Benefits**) tab.



- d. Select the **Goal** (or **Benefit**) you wish to disassociate.
- e. Select **Remove**.

Eagle Mobile Phone Development
Project

Active
Status

Portfolio

Major Project
Active for 14 months

Planning (13 Mo)

Execution

Details

Key Dates

Deliverables

Tasks

Status Updates

Issues

Risks

Decisions

Changes

Lessons

Financials

Benefits

Goals

Documents

Strategic Goals for Project

✎

E

Remove

⌵

✓ Name ↑	Full Name (Owning User) ↓	Unit of Measure ↓	Value ↓	Target Date ↓
<div><div>D</div><div>✓</div>95% Customer Subscription Retention</div>	Marc Soester	Percent	95.00	31-Mar-24