

Creating and Maintaining Strategic Themes and Goals



Strategy Manager



Strategy

Instructions: Use this lab work sheet to complete a set of short and meaningful tasks at your own time and pace to complement your formal learning of the platform in the classroom. While the examples used herein may be different from (or not available) in your organisation's platform instance, you can populate the system with your own data and follow the exercises. Ensure that you are already an enabled user in the platform.

Please note the Job Aid for **Creating and Maintaining Strategic Themes and Goals** within the Learning section compliments the following lab sets, each of which contains two sets of data; Set A and Set B.

Lab Exercise 1.

Create a

Lab Exercise 2.

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1. Create a Strategic Theme

Set A




Name	Industry Advancement
Description	Through Innovation we provide to most Productive Work and PPM Solutions to our Customers and advance our industry by providing industry standards and best practices.
Sponsor	Select from the list 🔍
Status	Active
Strategic Goals	Select from the list 🔍

Set B



Name	Long Term Strategic Partners
Description	Long Term mutual beneficial Partnership with our customers ensuring that we remain highly valuable and relevant
Sponsor	Select from the list 🔍
Status	Active
Strategic Goals	Select from the list 🔍

2.Create a Strategic Goal

Set A

Name	95% Customer Subscription Retention
Objective	Customer Subscriptions renewal rate is at 95% or higher from previous year
Unit of Measure	Percent
Scale	Greater or equal to
Value	95.00
Target Date	Select March of the current year from the date picker 
Owner	Select your name or another user from the list 
Status Reason	Active
Strategic Theme	Select from the list 

Set B

Name	Establish a State-of-the-Art Infrastructure
Objective	As a technology company, we should have the best in class for both internal use and demonstration to our customers.
Unit of Measure	Cost
Scale	Less than or equal to
Value	1,500,000.00
Target Date	Select March of the current year from the date picker 
Owner	Select your name or another user from the list 
Status Reason	Active
Strategic Theme	Select from the list 