



Strategy Blocks

Training Guides

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Technology
Introduction

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1.1

What is it?

What is StrategyBlocks? _____

A StrategyBlocks model is an [online collaborative strategic business plan](#).

Hosted in the cloud the software platform is designed to help organizations deal with the challenges of strategic planning, portfolio and execution management. It is a highly graphical, live, strategic communication and monitoring system to help people stay aligned and involved in their company's strategy. The solution can allow stakeholders to [track progress \(outputs\) and results \(outcomes\)](#) as they happen. Its aim is to turn strategic vision into operational success.

1.2

What does it do?

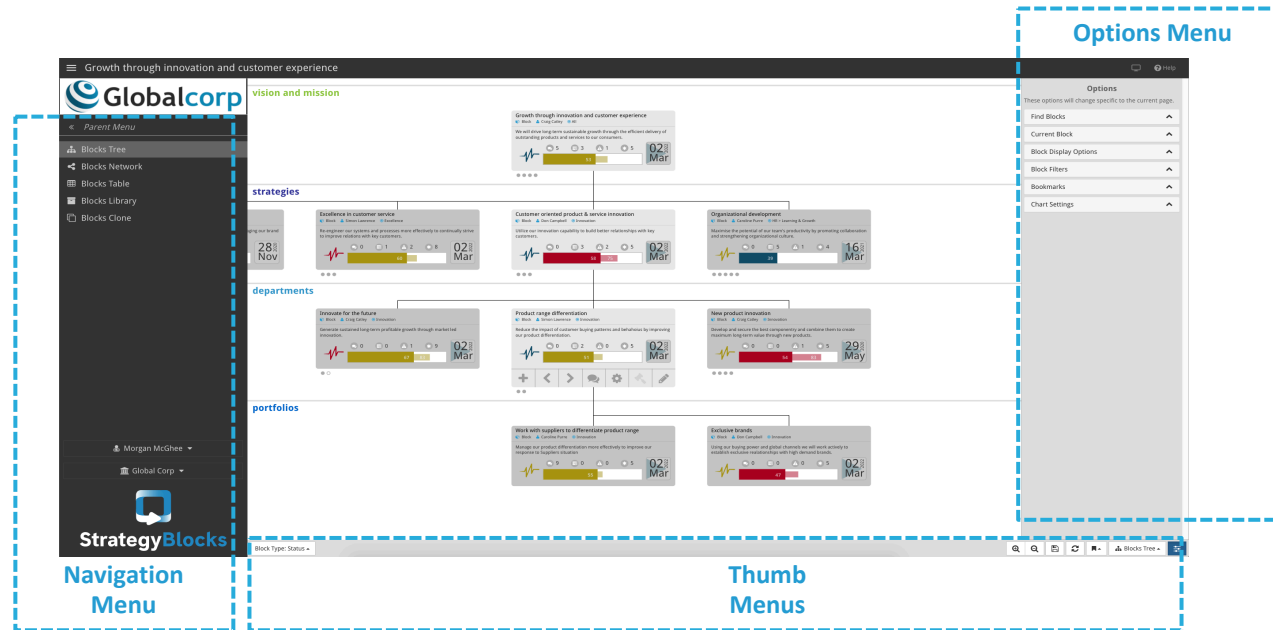
What does StrategyBlocks do? _____

StrategyBlocks works by blending qualitative delivery performance updates (outputs) and quantitative data (outcomes), as well as, risk management to achieve enterprise-wide insight. The platform presents the company's strategic plan as an easily-digestible, visual representation of activity delivered through a series of cascading 'blocks'.

- A **Block** is used to describe activity (outputs) - key result areas, portfolios, projects etc., measured subjectively.
- A **Metric** is a numeric value that needs to be monitored (outcomes), often known as a key performance indicator or measure.
- A **Risk** can be used to describe a strategic event that may affect the business, internal (failure to deliver) or external (outside of your control).

1.3

How does it work?



How does StrategyBlocks work?

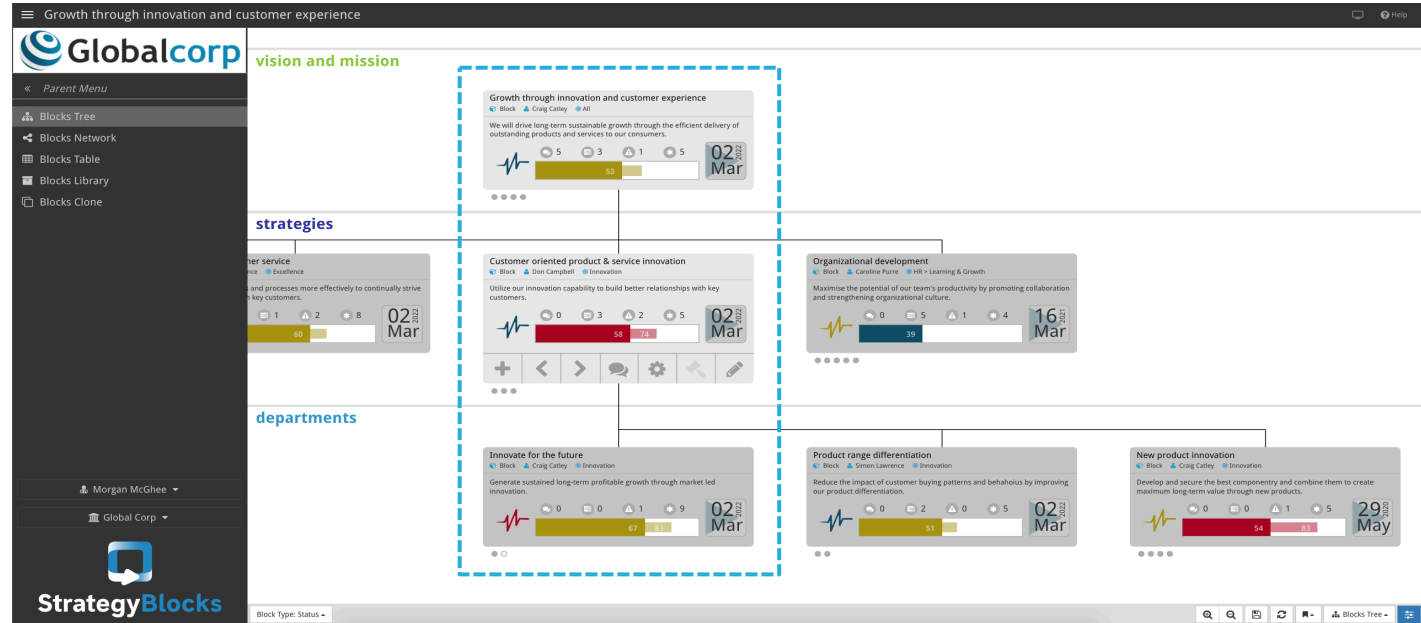
StrategyBlocks' user interface has a straightforward simple layout. All user functionality is contained in only 3 menus on the left-hand navigation menu;

- Dashboard (just information relating to the user)
- Blocks (portfolio and strategy maps)
- and Monitor (scorecard and risk register).

Additional detail can be reached through the left and right Thumb Menus (to ensure a consistent user experience between a desktop browser and a tablet), and the left-hand Options Menu which offers a range of filtering tools.

1.4

Blocks views



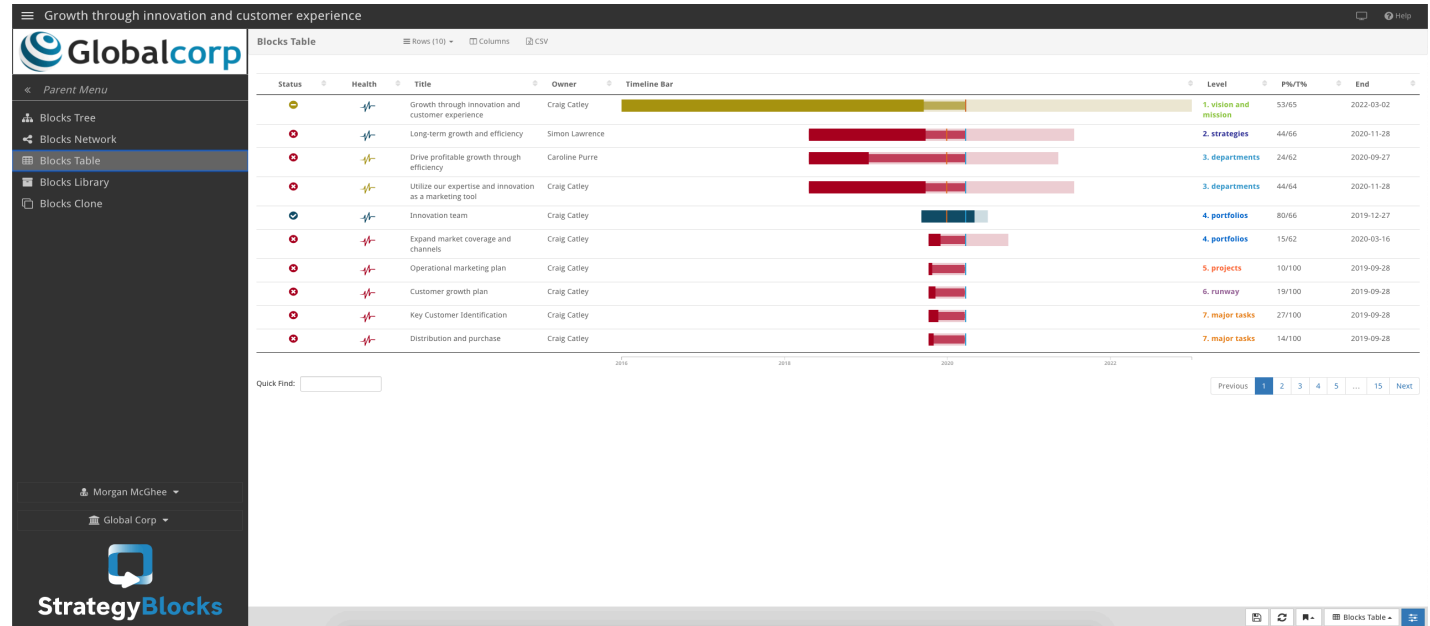
Blocks Tree

Path: BLOCKS > BLOCKS TREE

The strategic plan needs to be organized in a clear, consistent and logical way. All organizations consistently describe their strategic plan as a hierarchy. The **Blocks Tree** aligns the organization around vision top to bottom and bottom to top. Every piece of strategic activity (outputs) must align with vision and are described in the context of a Block. It is a **primary operational interface** for the management of the model.

1.4

Blocks views



Blocks Table

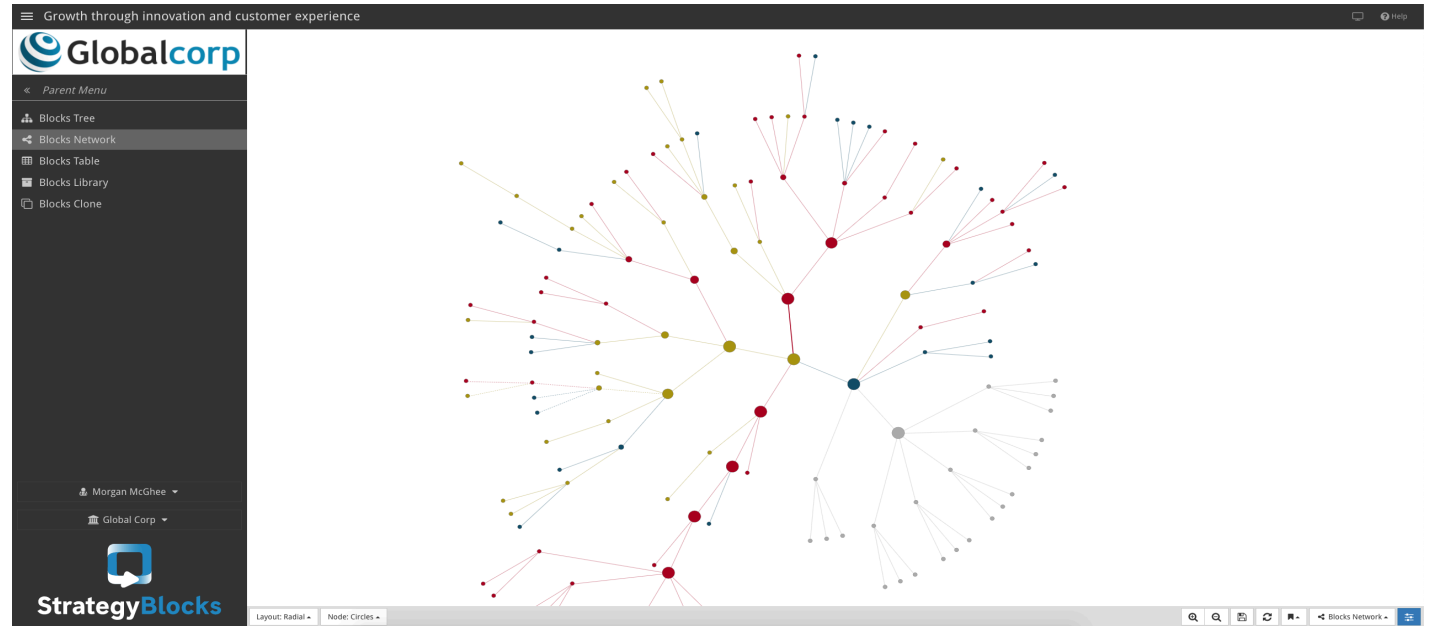
Path: BLOCKS > BLOCKS TABLE

The **Timeline View** displays data as a series of rows or swim lanes with configurable columns and column widths allowing the StrategyBlocks user to set up a view for their specific requirements.

This view can then be bookmarked for easy recall in the future. The Timeline Bar column displays the current level of progress in the context of the duration of the overall strategy and its expected completion as at today.

1.4

Blocks views



Blocks Network

Path: BLOCKS > BLOCKS NETWORK

The **Network** (spray) diagram presents all elements of the plan on a single page and includes color coding to display delivery status.

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Metrics Rows (10) Columns CSV

Parent Menu

Metrics

Risks

Documents

Morgan McGhee

Global Corp

StrategyBlocks

Type	Strategic	Status	Metric Title	Owner	Focus Area	Actual	Target	Blocks
Project expenditure	★	🟡	Project expenditure	Craig Catley	Finance	\$ 1,703	\$ 1,700	0
Employees	★	🟢	Employees	Craig Catley	HR	--	--	0
Projected resources	★	🟢	Projected resources	Craig Catley	HR	--	--	0
Phases delivered	★	🟢	Phases delivered	Craig Catley	Innovation	--	--	0
Expenses / Employees	★	🟢	Expenses / Employees	Caroline Purrie	All	\$0.00	\$0.00	0
Earnings in (USD)	★	🟢	Earnings in (USD)	Craig Catley	Finance	\$59.02	--	0
project team	★	🟢	project team	Craig Catley	All	--	--	0
Earnings in (USD)	★	🟢	Earnings in (USD)	Craig Catley	Finance	\$59.02	--	0
Test Cascade	★	🟢	Test Cascade	Julian Schurhammer	Integrity	--	--	0
Net Sales Calc	★	🟢	Net Sales Calc	Julian Schurhammer	Integrity	84,626.56 \$	--	0

Quick Find:

Previous 1 2 3 4 5 ... 12 Next

Metric: All Metrics

Metrics

Path: MONITOR > METRICS

The **Metrics** scorecard provides the ability to monitor and manage the performance of key financial and operational indicators. The scorecard displays the performance of all indicators and allows each to be expanded to reveal a chart displaying historic detail and for the manual entry of actuals (if necessary). Data points can be annotated to add additional detail if required to describe trends.

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Risks

Rows (10) Columns CSV

Strategic	Status	Title	Likelihood	Impact	Executive (owner)	Focus Area	Triggered Date	Status Date	Updated
	▲	Power outage & restoration	Medium	Medium	Craig Catley	IT	Never	6 months ago	14 days ago
	▲	IS skills shortage	Medium	Medium	Allen Keyte	HR	2 years ago	2 years ago	14 days ago
	▲	Communication failure	Medium	Medium	Craig Catley	HR	Never	2 years ago	14 days ago
	▲	Integrity and conduct failure	Medium	Medium	Caroline Purrie	Learning & Growth	Never	7 months ago	14 days ago
	▲	Cultural Shift	Medium	Medium	Caroline Purrie	HR	Never	2 years ago	14 days ago
	▲	Test Risk	Medium	Medium	Julian Schurhammer	Integrity	Never	7 months ago	14 days ago
★	▲	Technology infrastructure	Medium	Medium	Craig Catley	IT	2 months ago	2 months ago	14 days ago
★	▲	Retail pricing pressure	Medium	Medium	Caroline Purrie	Learning & Growth	Never	7 months ago	14 days ago
★	▲	Organisational change (market conditions)	Medium	Medium	Caroline Purrie	Excellence	Never	2 years ago	14 days ago
★	▲	Resource Availability	Medium	Medium	Craig Catley	HR	Never	2 years ago	14 days ago

Quick Find:

Previous 1 2 Next

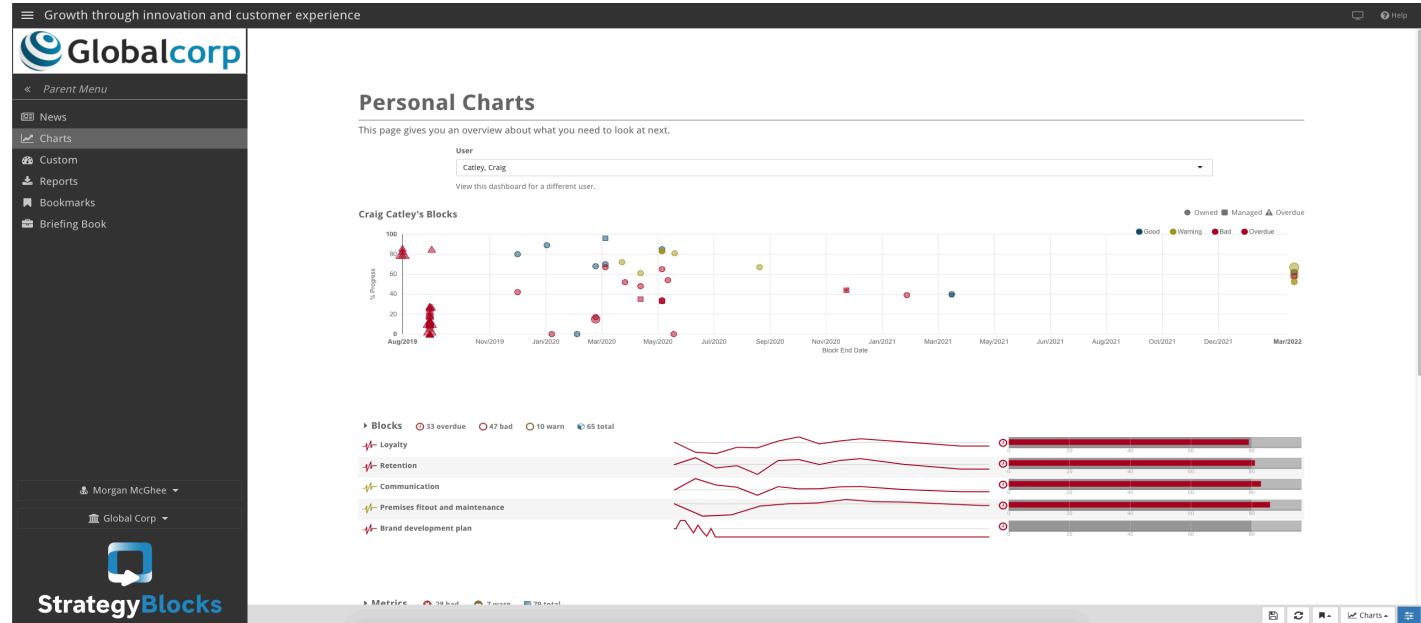
Risks

Path: MONITOR > RISKS

StrategyBlocks links [Risks](#) to the Health of activities. As the Health of a Block falls, two Trigger points can be setup to encourage resolution. The first Trigger automatically distributes pre-event mitigation steps to the Risk owner and the second sends post-event response steps.

1.6

Dashboard views



Charts

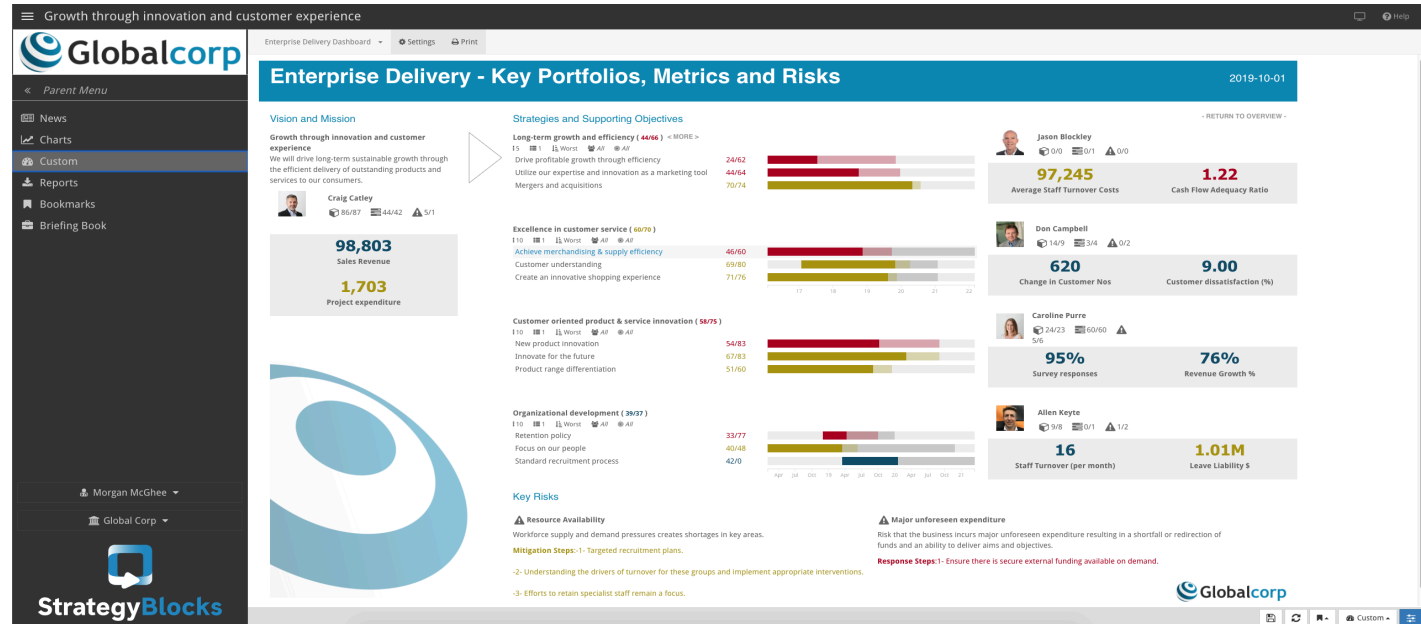
Path: [DASHBOARD](#) > [CHARTS](#)

The [Charts Dashboard](#) view provides a complete overview of each users strategic activity regarding their owned and managed Blocks.

[Blocks](#), [Metrics](#), and [Risks](#) are also displayed, showcasing the Health and Progress shown in Milestone sequences and the different stages of each Risk.

1.6

Dashboard views

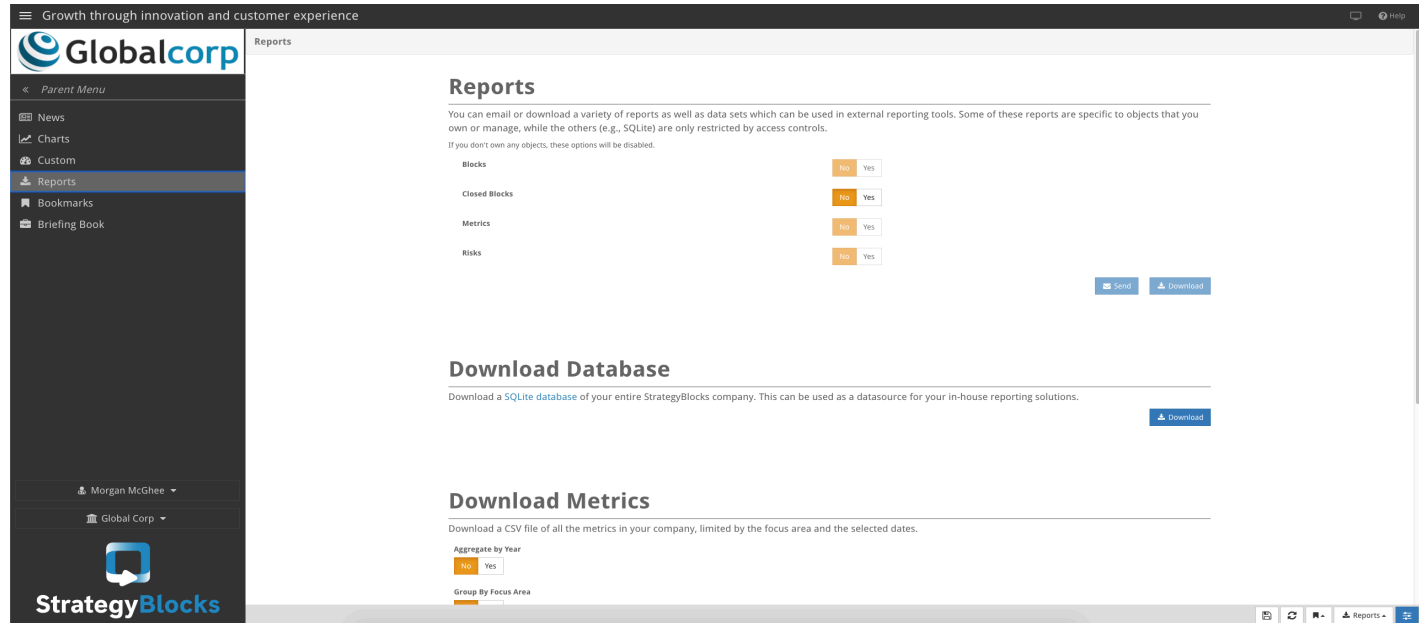


Custom

Path: DASHBOARD > CUSTOM

The **Custom Dashboard** view is a layout tool for creating highly graphical, multipage reports updated in real-time, allowing for the creation of personalized custom Dashboards via a simple drag and drop UI.

Users can customize information to individual preferences, with data that is updated in real-time.



Reports

Path: DASHBOARD > REPORTS

There are several ways to prepare data for output to meet a desired reporting need from the [Reports Dashboard](#) view.

These Reports can be emailed or downloaded and will be sent to the email under:

[Your Settings > Account.](#)

Export formats for Reports and output include the following standard file formats:

- JPG
- CSV
- PDF
- HTML
- SQL (also enables integration into DOCX, PPTX, XLSX)



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