Strategy Blocks

Training Guides

1.0 | Technology Introduction

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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.
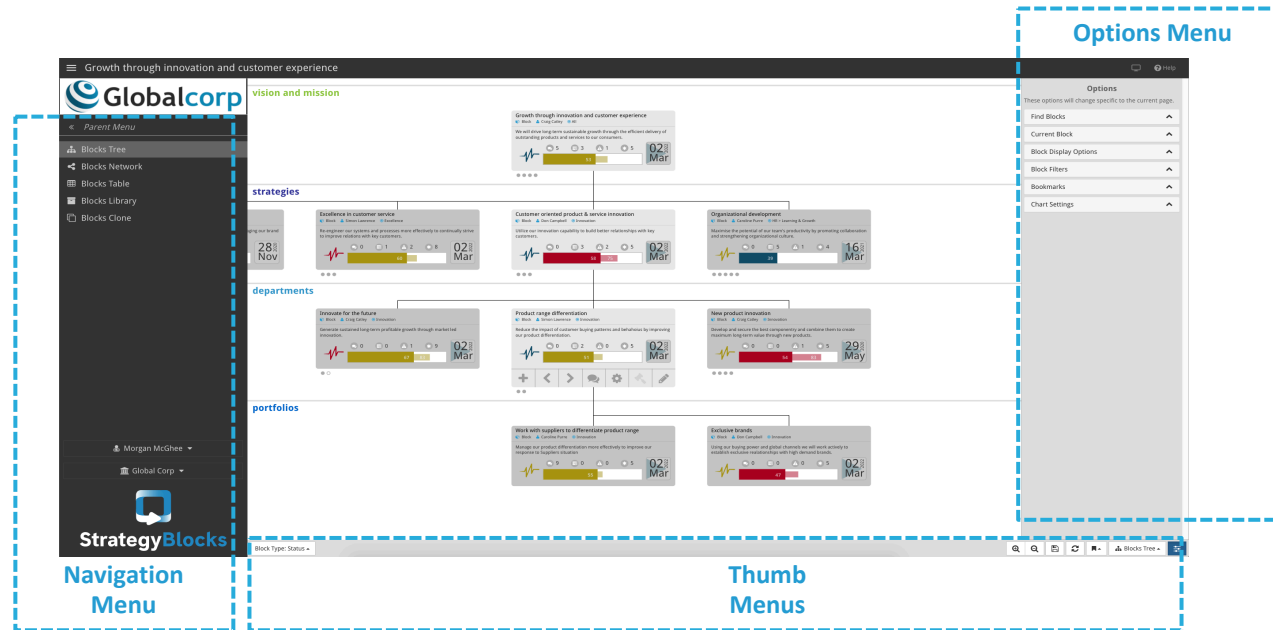
What does StrategyBlocks do?

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).

Options Menu

Navigation Menu

Thumb Menus

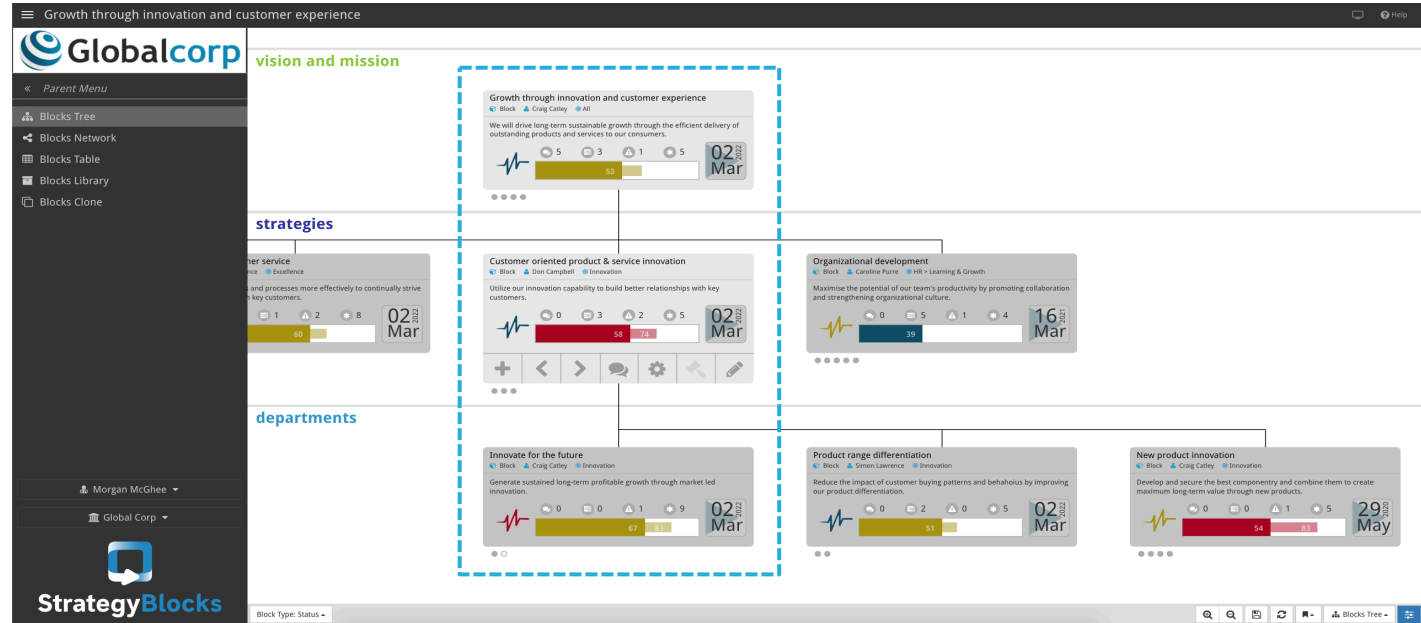## How does StrategyBlocks work?

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.
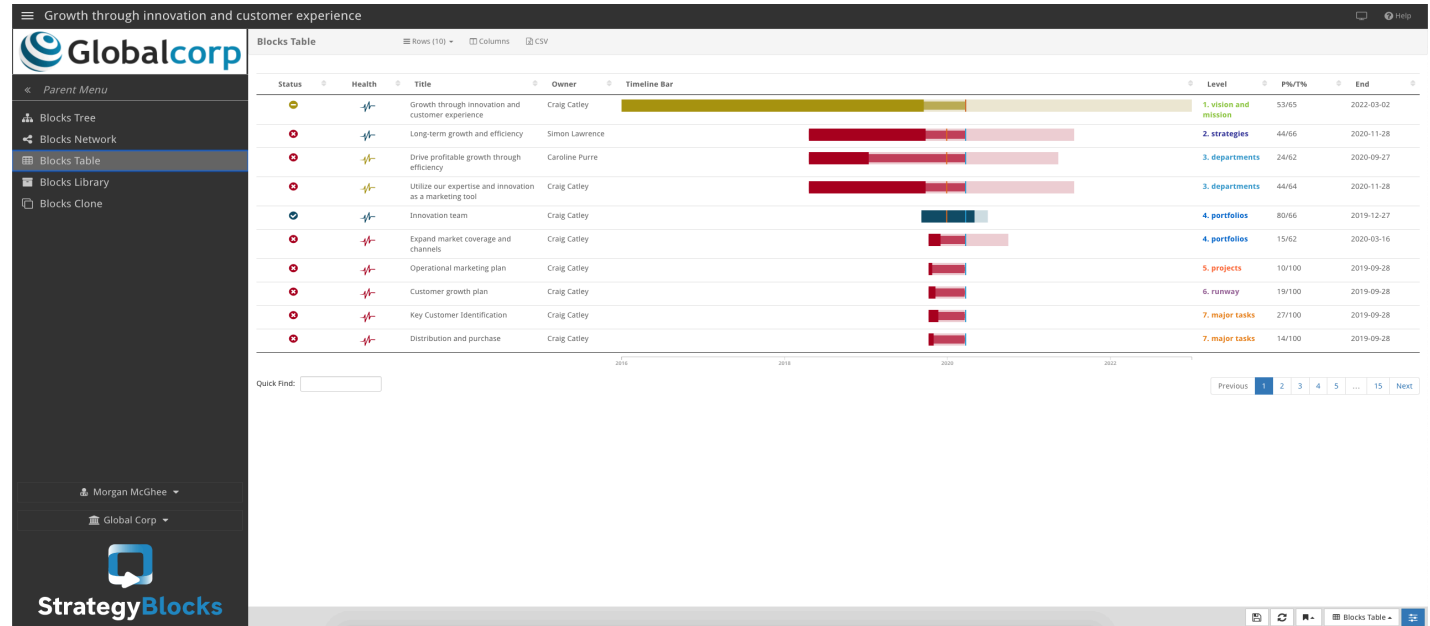
Blocks Tree

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.
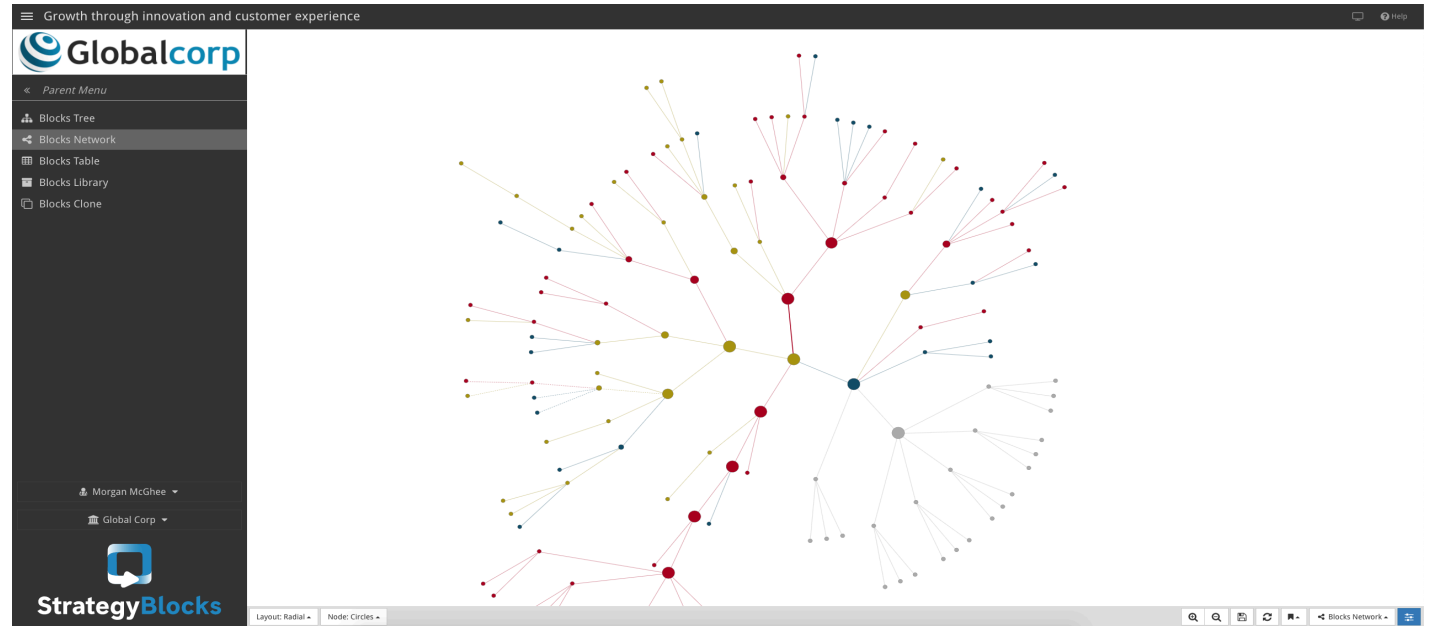
Blocks Table

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.

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.

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.
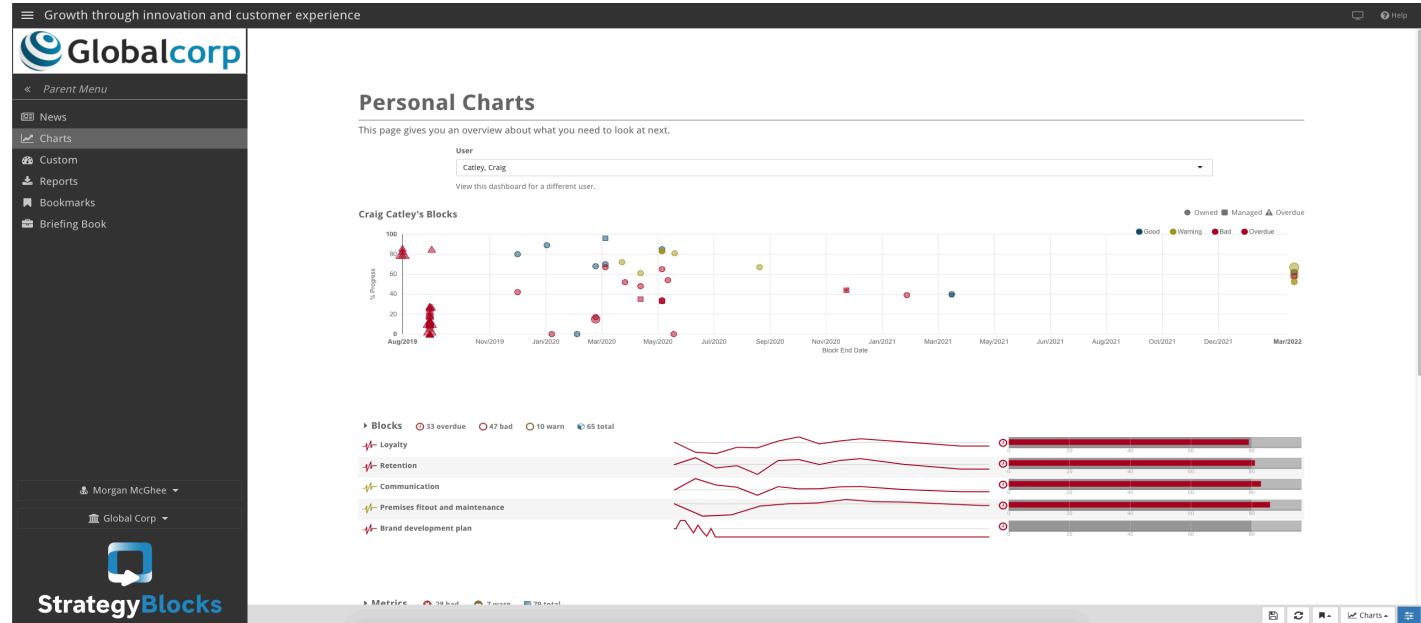
Risks

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.

Charts

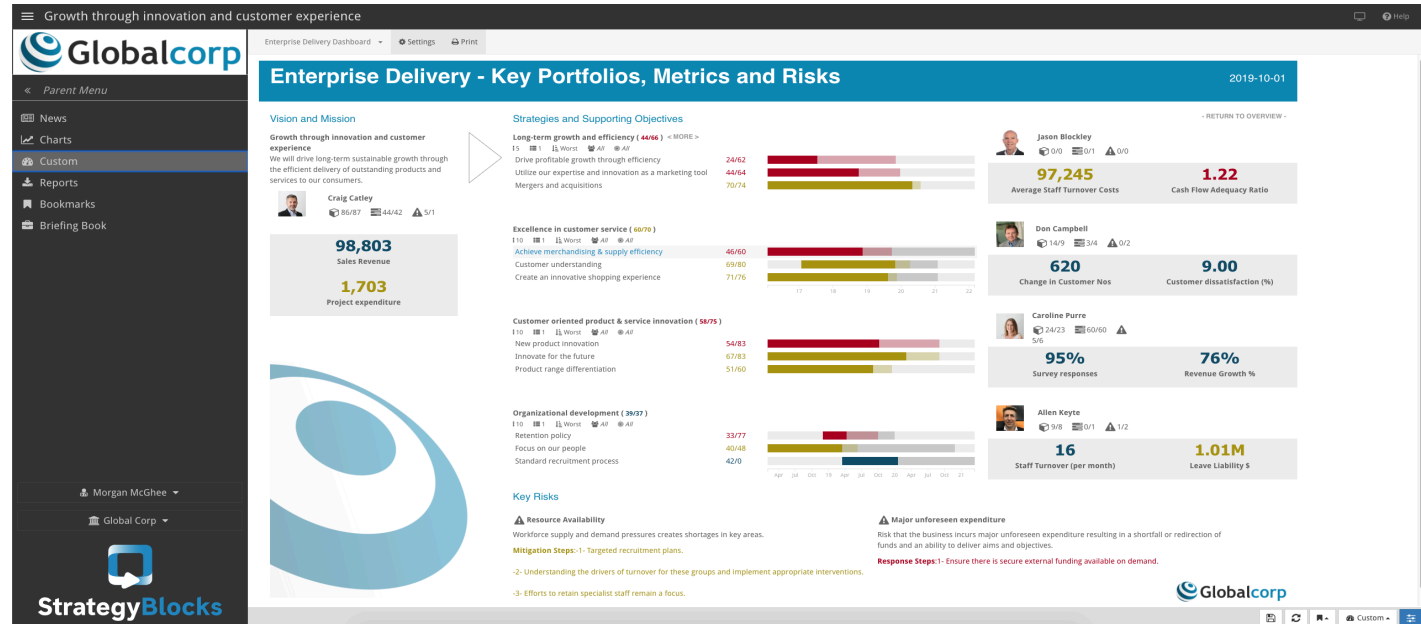### Path: DASHBOARD > CHARTS

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.
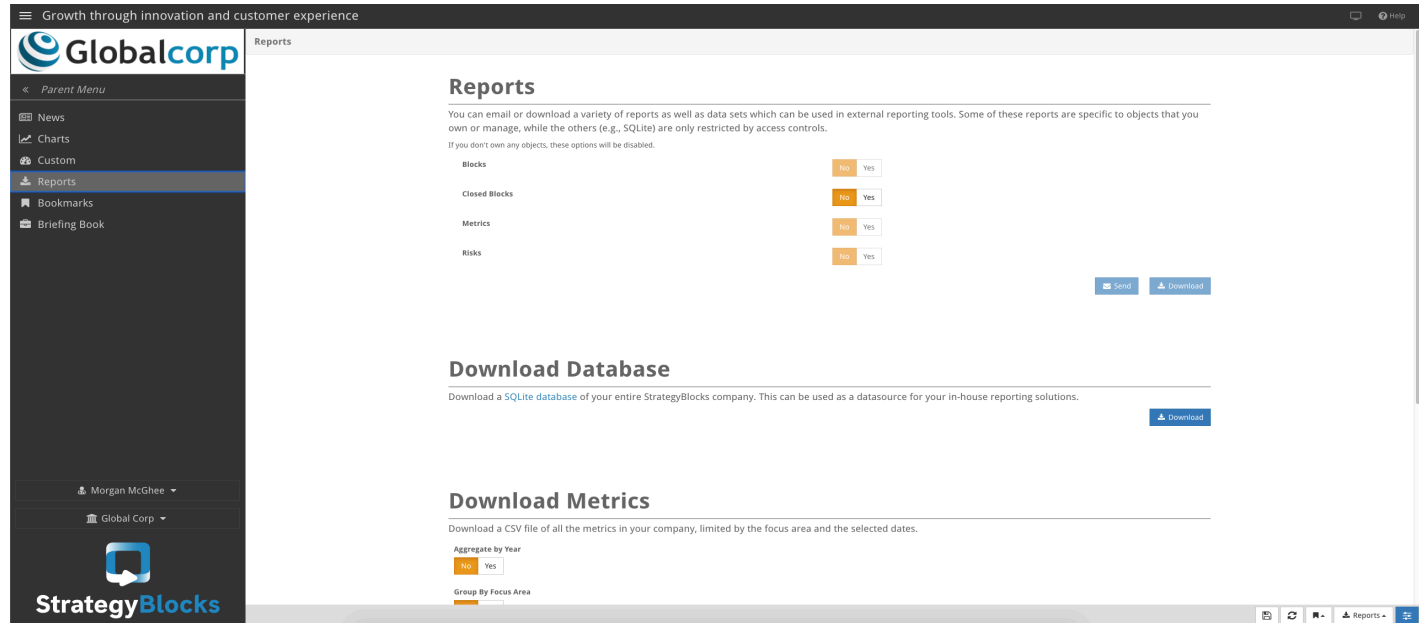
Custom

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)

Strategy Blocks

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