



Strategy Blocks

Training Guides

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Navigation &
Creating a Block

3.0 | Navigation & Creating a Block

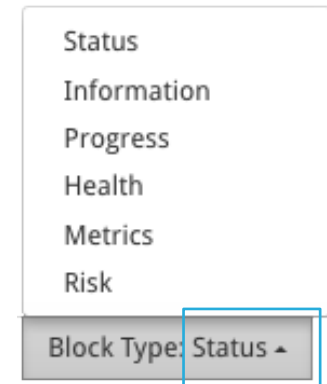
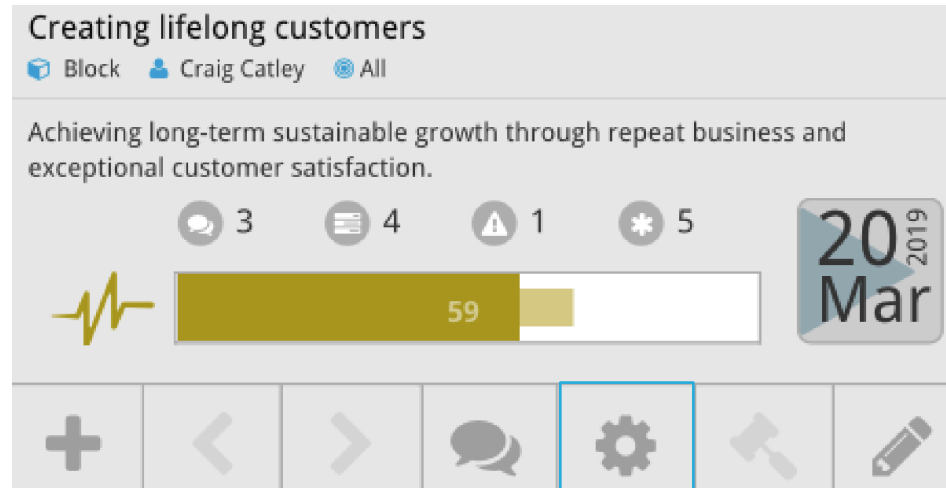
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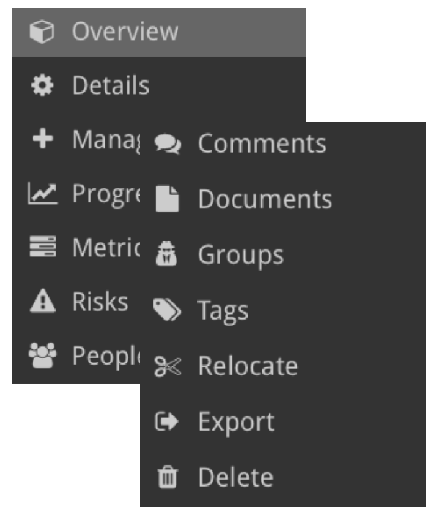
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3.1

Navigation



Navigation



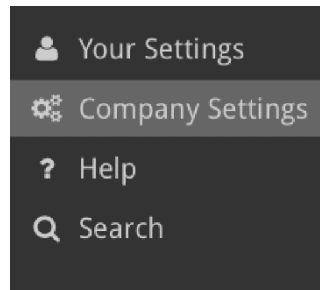
Here you can manage all the different attributes surrounding/within that specific Block. The gear icon takes you to the navigation tabs of that single Block.

If you are wanting to have an entire overview of every Block e.g. Risk or Progress at the same time, select a Block type located at the bottom of your screen.

The gear icon takes you to the navigation tabs of that single Block.

Navigation

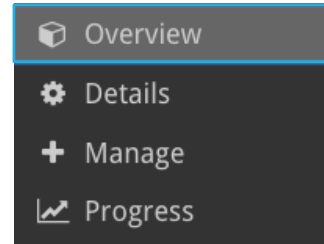
Within each Block, there are various functions that can only be created under the company settings tab.



These functions include:

- Creating groups under company settings that will then appear under each Blocks group tab.
- Assigning certain Metrics to a Block that have to be firstly created under Company Settings.
- Firstly created under Company Settings; assigning certain tags to individual Blocks that makes that Block easily identifiable when searched for.
- Assigning certain Risks to a Block that have to be created first under Company Settings.

Overview



The overview shows the rollup of the Blocks attributes displaying:

- Current Status
- Progress History
- Health Details
- Activity

Actual: 85	Due: in 3 months (30/11/16)
Target: 100	91 days remaining. 100% expected.

85% through the task.

100% task completion expected.

Health Details

7% Total Health Variance

-12% Block Progress Variance (📊 1)

20% Total Metrics Variance (📊 2)

100% Capital Expenditure (000's)

14% Fixed Costs

-30% Market Share

-2% Net Sales (000's)

0% Total Risks Contribution (📊 1)

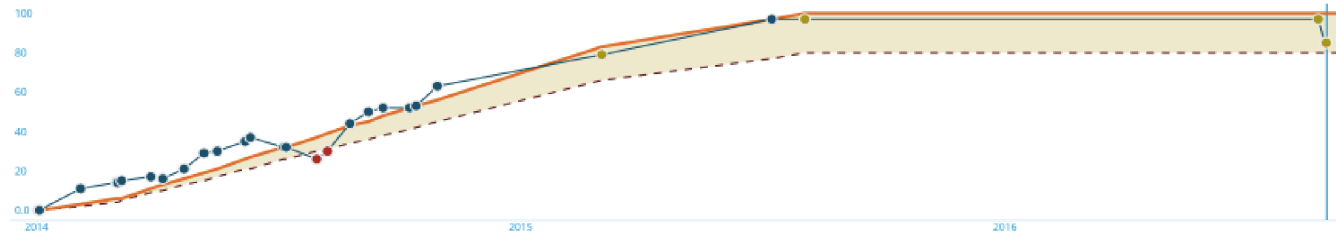
0% Retail pricing pressure

Your company may choose the factors they believe make up a healthy task execution. These factors have a combined impact on task health.

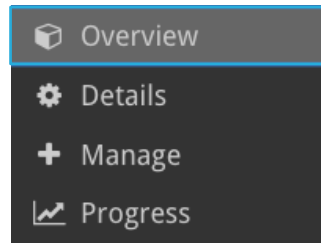
3.1

Navigation

Progress History



Overview



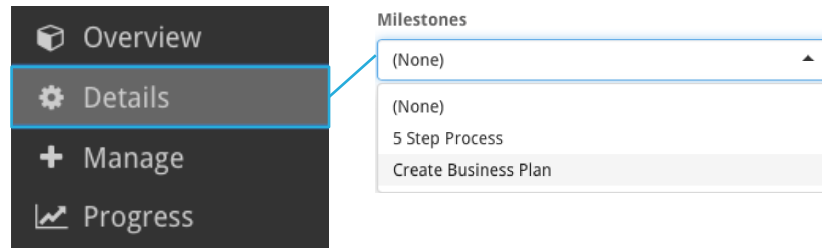
Progress History (%) shows the accumulation of each individual progress update throughout the lifespan of the task made by the Owner.

Progress updates can only be made at the bottom level of the hierarchy (leaf Blocks), therefore, the image above is either an accumulation of a single Blocks task progress or the rollup of its children tasks which helps complete that Blocks task.

3.1

Navigation

Details

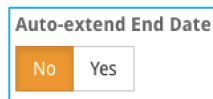


The image shows a dark navigation menu on the left with four items: 'Overview' (with a cube icon), 'Details' (with a gear icon and highlighted by a blue border), 'Manage' (with a plus icon), and 'Progress' (with a line graph icon). To the right, a 'Milestones' dropdown menu is open, showing a list of options: '(None)' (selected), '(None)', '5 Step Process', and 'Create Business Plan'.

A Milestone is a list of tasks that needs to be completed before a block can be marked as completed.

If you go to: [Company Settings > Milestones > Add Milestones](#), you can create a Milestone that fits best within your strategy and apply it to any Blocks you wish.

Basic detail editing of...



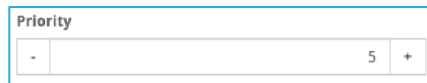
The image shows a toggle switch labeled 'Auto-extend End Date'. The switch is currently in the 'No' position, which is highlighted with an orange background. The 'Yes' position is unselected.

This feature allows for task end dates to be flexible. A child Blocks end date cannot be extended past its parents Block end date without this feature being switched on.



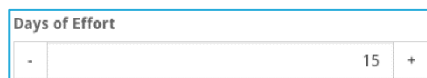
The image shows a toggle switch labeled 'Overwrite Descendant Focus Areas'. The switch is currently in the 'No' position, which is highlighted with an orange background. The 'Yes' position is unselected.

The parent Block may decide whether or not they would like its Focus Area to be automatically inherited by its children.



The image shows an input field labeled 'Priority'. The field contains the number '5'. There are minus and plus buttons on either side of the input field to adjust the value.

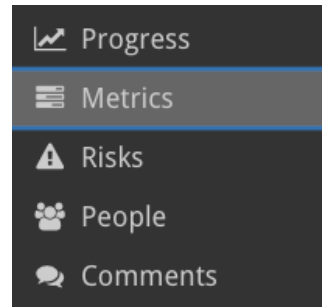
Your company can set the level of Priority that a particular task sits at in terms of your strategy.



The image shows an input field labeled 'Days of Effort'. The field contains the number '15'. There are minus and plus buttons on either side of the input field to adjust the value.

The number of Days of Effort you believe the task will need to complete.

Metrics



These are Metrics (KPI's) that are attached to this individual Block. These Metrics help contribute to the health of this Block and can be viewed separately by clicking on [Select a Metric](#). However, you must have existing Metrics in place.

- Clicking Add Metrics, only allows for pre-existing Metrics to be added to that Block.
- To add an entirely new Metric, on the Navigation screen, [Click Monitor > Metrics > + New](#).

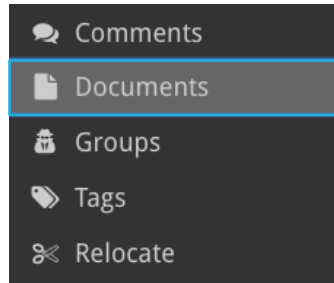
Cascading Metric

StrategyBlocks finds that organizations use a large amount of metrics to ultimately measure the same thing. A cascading metric is like a normal metric, except that each block can contribute with its own actuals and targets. These values are then rolled up through the Blocks tree to the root Block (parent Block).

When creating a new Metric, you are in charge of entering in the details of that Metric. Data such as Actual vs Target values can either be entered in manually or generated through the calculator option.



Documents



This feature allows for external documents to be uploaded, creating additional support for your company's strategy. These documents can include URL links from the internet, computer files or a Google doc.

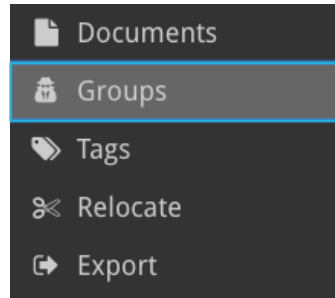
Attaching a document captures a subjective measure of work force performance.

The screenshot shows the 'Add Files' dropdown menu with three options: 'External Link (URL)', 'Upload Local File', and 'Attach a Google Document'. A blue box highlights the 'Add Files' button, and a line connects it to the dropdown. Below the menu is a table with columns: Title, Type, User, and Updated. The first row has the title 'Reading' (highlighted with a blue box), Type 'Link', User 'Maisie Palmer', and Updated '08/09/16 (3 minutes ago)'. Below the table is a light blue card for the 'Reading' document, featuring an 'Open Link' button, the text 'Updated: 08/09/16', and 'Owner: Maisie Palmer'.

3.1

Navigation

Groups

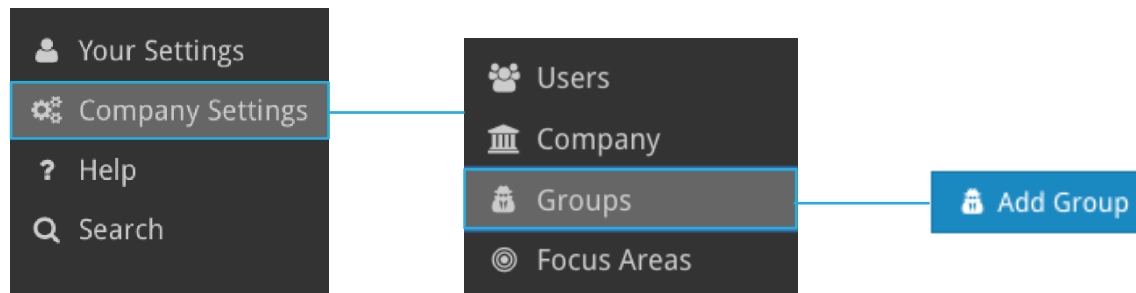


This feature gives your company the option of making a specific Block visible to only a certain Group or can be made public to all those involved within the strategy.



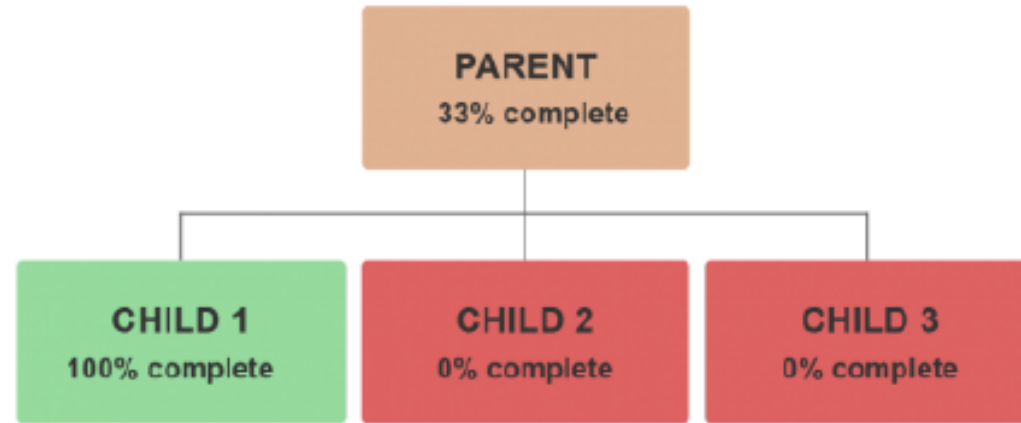
This option will be available under all of the Blocks individual Group areas once you have created the Group under the Company Settings.

To create a Group:



3.2

Creating a new Block



Creating a new Block

When deciding on how you would like your task to be carried out you may ask yourself:

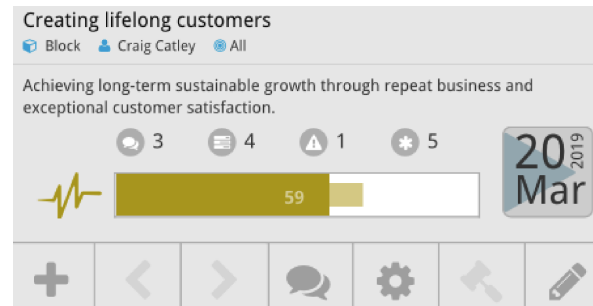
“Do I want carry out the task/idea through a [single Block alone](#) or [delegate it](#) onto other Blocks to make the task more manageable?”.

Delegating your task into smaller sub tasks would allow for others within the organization to be apart of the execution. These individuals would now become owners of their assigned Block, signing over a [% of responsibility](#) in helping to execute the main (parent) task.

3.2

Creating a new Block

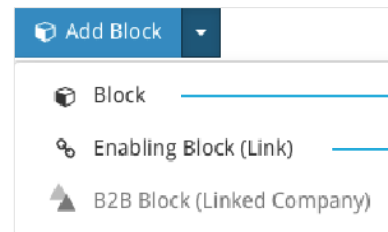
Growing your strategy



Growing your organization's strategy, which will most likely encompass more strategic levels, will mean that more children Blocks need to be created. To create more children Blocks from your parent Block:

Select the + symbol > Add Block.

Note: before clicking on Add Block, click the [drop down arrow](#). This will provide you with 3 options for Block types



New Block

Clone Block

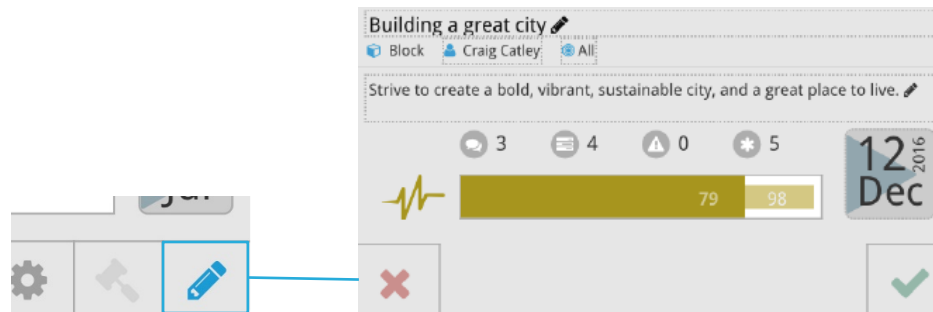
Linked Company Block

3.2

Creating a new Block

After selecting a new Block, you can edit the details of that Block under the manage navigation tab.

The attributes that already exists such as Dates and Focus Areas are default options, therefore, can be edited to your choosing.



The quick edit option is also available that lets you edit the information that is circled in a small dotted boarder (pictured above) including the Date.

3.2

Creating a new Block

Definitions

Private Block

No	Yes
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Making a **block** private or not private allows for the Owner to work on their task whilst not being visible to others within the company. A private Block restricts changes in Progress or to attach Metrics or Risks.

Auto-extend End Date

No	Yes
----	-----

Auto-extend

12 Dec 2016	12 Dec 2016
-------------	-------------

When the blue arrow within the left date box is present, this means that the Blocks end date is flexible whilst no blue arrow means the end date is fixed.

Custom Progress Weight

-	0	+
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This feature allows for you to adjust the desirability of weighting that you want this Block to have within your strategy. For example, the staff development Block will take twice the effort then of the talent management Block even though they will be delivered at the same time.

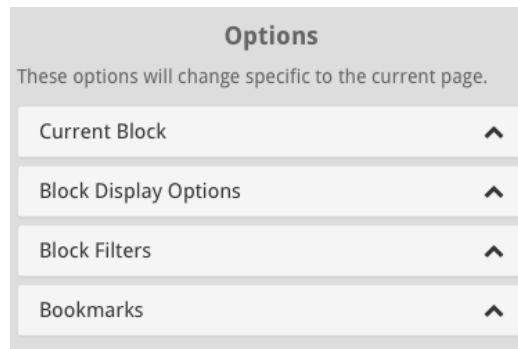
3.3

Additional navigations

Additional Navigations

These options situated on the bottom right hand side of the screen under the blue tab, gives the individual the ability to have a quick overview of different Blocks and sections of the strategy through a short hand navigation method.

Note: Options vary depending on the section of the strategy you are viewing:



Current Block allows you to click on any Block and have it displayed off the side of your screen. This stand alone live image of your Block will be useful when creating your custom chart (discussed later).

Block Display Options gives the user the ability to click on an individual Block within the Block tree, allowing selection of the Block type that they want to view e.g. Health, Risks, Metric.



Bookmarks allows the user to 'screenshot' a certain section within the strategy that they may wish to revisit. Bookmarking a certain page allows the user quick access to that section no matter where they are located within StrategyBlocks.



To bookmark select this icon click on it and name the section e.g. Company risks. You can visit this part of the strategy anytime by clicking here* and selecting bookmarks.

3.3

Additional navigations

Blocks tree navigation options

Options	
These options will change specific to the current page.	
Current Block	^
Block Display Options	^
Block Filters	^
Bookmarks	^

Search

Yours

Status

Owners

Tags

The filter option allows for a more narrowed and specific search of particular Blocks that you wish to find. This option reduces time spent methodically searching for a particular Block.

You may be presented with pre existing options such as the type of Focus Area you wish to isolate in order to condense your search.

Areas that have not yet been created by your company e.g. [Tags](#) will be greyed out making the user unable to search for a specific Block using that search area.

You may enable this feature and allow a search of a certain Block using certain words once a particular Block has Tags saved under its Tags Tab e.g. Innovation.



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