



# Strategy Blocks

Training Guides

## 5.0

Cascading Metrics  
and B2B Blocks

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# 5.1

## Cascading Metrics



What is a Cascading Metric?\_\_\_\_\_

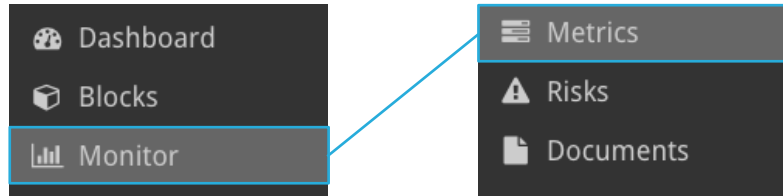
A **Cascading Metric** is like a normal metric, except that each Block can contribute its own actual and target values to the root Block. Each Blocks values are, therefore, “rolled up” to the root Block.

# 5.1


## Cascading Metrics

### How to create a Cascading Metric

Select + New > Select Yes for Cascading Metric > Enter Details > Save



Type	Strategic	Status	Title	Owner	Focus Area	Actual	Target	Blocks
	★	⬆	CASCADING METRIC	Glenn Murphy	All	22,322.00 \$	50.00 \$	0
	★	⬇	FFS	Glenn Murphy	All	0.00 \$	0.00 \$	0
	★	⬆	Customer Satisfaction Rating: Average	Chiwai Chan	Results	80.67 %	80.00 %	0

The title of a Cascading Metric does not have to be called Cascading Metric, you may choose whatever title suits that Metric. The symbol  next to your Metric means that that Metric is cascading.

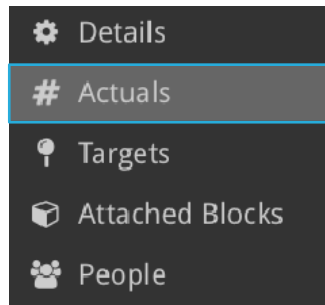
# 5.1

## Cascading Metrics

### Actuals

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When you select the [Actuals tab](#) for a particular Cascading Metric, you can manually add values to Blocks that you believe make up that Metric. Once a certain Block has had values assigned to it, that Block will appear under the attached Blocks tab.



After or before adding your actuals, you may also add in your target values under the [Targets tab](#). These values will also consecutively roll up to the root Block.

[Attached Blocks tab](#) shows the Blocks that have that Cascading Metric assigned to it. This means that that Blocks data, along with other attached Blocks, will be consecutively rolled up to each Block within your company's hierarchy of Blocks.

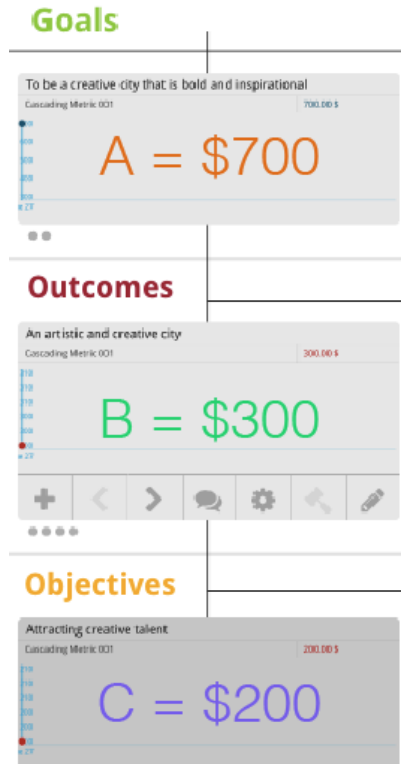
#### Note

This menu containing all these Tags are exactly the same for when a normal Metric is created, therefore, this example will help in creating a normal Metric, accordingly.

# 5.1

## Cascading Metrics

### Example (simple)



Lets say you have three Blocks A , B, C and a Cascading Metric called M.

Everyone is entering end-of-month values, B enters \$100 for M's actuals and C enters \$200. If you were to view these Blocks on the Blocks Tree, the Metrics would show Block C to remain at \$200 while Block B would grow (i.e. Block C's data will roll up) to \$300 and is the root Block for the below data (\$200 of Block C plus \$100 of Block B).

If we further add this Metric to Block A (i.e. add in an actual value for Block A) and add in a value of \$400, that Block which is now the root Block, will now have a roll up sum of \$700 (\$300 sum from the below children Blocks plus the \$400 value entered in relation to Block A's data).

# 5.1

## Cascading Metrics

### Example (comprehensive)

#### CASCADING METRIC

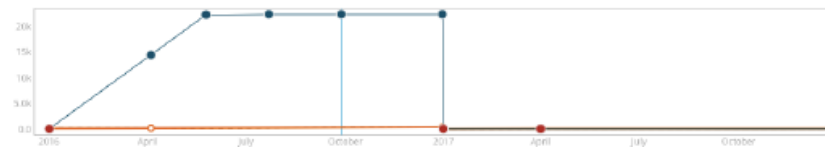
Actual: 22,322.00 \$

Last Updated: 14 hours ago

Target: 279.89 \$

Type: Cascading

#### Chart History



#### Table History

Date	Actuals			Targets			Variance(%)
	Local	Rollup	Total	Local	Rollup	Total	
31/12/17	0.00	0.00	0.00	50.00	0.00	50.00	-100.0%
01/04/17	0.00	0.00	0.00	50.00	0.00	50.00	-100.0%
01/01/17	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
31/12/16	100.00	22,222.00	22,322.00	50.00	300.00	350.00	100.0%
27/09/16	100.00	22,222.00	22,322.00	50.00	247.95	279.88	100.0%
22/07/16	100.00	22,222.00	22,322.00	50.00	211.26	230.46	100.0%
25/05/16	71.43	22,222.00	22,222.00	50.00	179.47	187.64	100.0%
04/04/16	46.32	14,408.23	14,408.23	50.00	151.53	150.00	100.0%
01/01/16	0.00	0.00	0.00	0.00	100.00	100.00	-100.0%

The table above compiles all of your Actuals and Targets into a single list and is displayed on the chart history graph. Local values come from the values assigned to the root Block while Rollup values are compiled from the children Blocks (i.e. Blocks below root Block).

# 5.1

## Cascading Metrics

### Example (comprehensive)

Actuals				
Date	Local	Rollup	Total	
31/12/17	0.00	0.00	0.00	
01/04/17	0.00	0.00	0.00	
01/01/17	0.00	0.00	0.00	
31/12/16	100.00	22,222.00	22,322.00	
27/09/16	100.00	22,222.00	22,322.00	
22/07/16	100.00	22,222.00	22,322.00	
25/05/16	71.43	22,222.00	22,222.00	
04/04/16	46.32	14,408.23	14,408.23	
01/01/16	0.00	0.00	0.00	

Actuals				
Date	Local	Rollup	Total	
31/12/17	0.00	0.00	0.00	
01/04/17	0.00	0.00	0.00	
01/01/17	0.00	0.00	0.00	
31/12/16	100.00	26,522.00	26,622.00	
01/10/16	100.00	26,522.00	26,622.00	
22/07/16	100.00	24,155.96	22,322.00	
25/05/16	71.43	22,222.00	22,222.00	
04/04/16	46.32	14,408.23	14,408.23	
01/01/16	0.00	0.00	0.00	

The **roll up** total of 22,222.00 on the left was the result of one child Blocks' rolled up values, however, when another Block and its Actual value of 4,300 is attached to that Metric, the roll up now becomes 26,522 ( $22,222 + 4,300 = 26,522$ ).

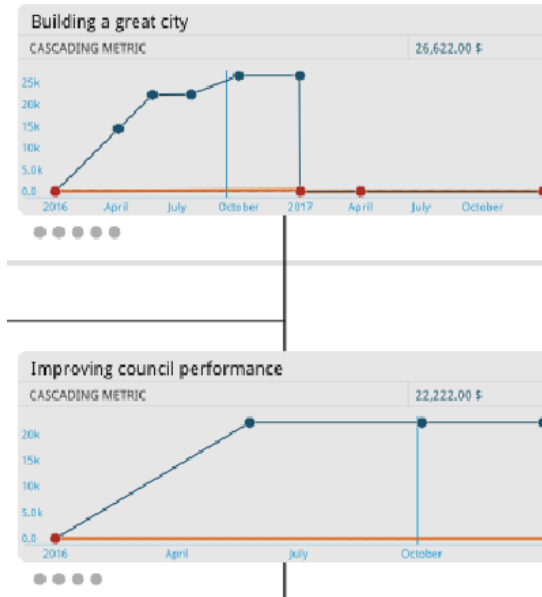
The total next to the roll up value is the combination of the roll up values of the children in addition to the local parents Actual value.



# 5.1

## Cascading Metrics

### Example (simple)



The Block Tree shows the charts for each Block which has contributed Actuals and/or Targets to the Metric. This Block Tree shows that the Block [Improving council performance](#), is a the roll up of that child's Block values while the parent Block [Building a great city](#), is an accumulation of all its children Blocks.

The Navigation Bar below is located on the bottom of the Block Tree screen which allows you to select which Metric you would like displayed on the Block Tree. All those Blocks that have been assigned that Metric, i.e. Cascading Metric 001, will appear on tree to show that 'face' of the Block.

*Block Default*

CASCADING METRIC

Cascading Metric 001

FFS

Block Type: Metrics ▲

Metric: CASCADING METRIC ▲

## Company Blocks

Creating lifelong customers

Global Retail Group

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- Users
- Company
- Groups
- Focus Areas
- Levels
- Health
- Milestones
- Capabilities
- Risk
- Payments

Maureen Placente

Global Retail Group

StrategyBlocks

Capabilities and Server Settings

### Edit Capabilities

This page allows you to toggle the availability of certain features in StrategyBlocks, depending on your needs.

Block Chat Inherited	No	Yes	Allow Block Chats to be inherited by its children
Block Chat Delete	No	Yes	Allow Block Chats to be deleted
Progress Comment Required	No	Yes	A comment is required on a block progress update
Security Group Progress Rollup	No	Yes	Progress values will be rolled up to the parent block based on the blocks visible to a user
Metric Chat Delete	No	Yes	Allow Metric Chats to be deleted
Interpolated metrics	No	Yes	New metrics are Interpolated
Cumulative metrics	No	Yes	New metrics are Cumulative
Risk Chat Delete	No	Yes	Allow Risk Chats to be deleted
Company Blocks	No	Yes	Enable Company Blocks Feature
Google Drive	No	Yes	Enable Google Drive Access Feature

Reset

Save

Capabilities -

Add Block

- Block
- Enabling Block (Link)
- B2B Block (Linked Company)

Enabling this feature will enable the use of the B2B Block (Linked Company) tab.

Within StrategyBlocks, you have the ability to belong to multiple companies. A B2B Block is a Block that can be added from one of your companies to another in order to monitor its status. To enable/disable this feature select yes or no under the capability **Company Blocks**.

# 5.2

## B2B Blocks

### Blocks Network

Add Block

Block

Enabling Block (Link)

B2B Block (Linked Company)

This link is located under any Blocks' Manage tab which will take you to the screen below. This will allow the linked company's vision Block from i.e. A Child Company, to be attached to your current company i.e. City Co.

B2B Blocks are an effective way for users within a parent company, for example, to see the status of their sub-company without having to switch back and fourth between each one.

### Company Link Block

Choose an available company that you want to link to. This will allow the progress from the linked-company's vision block to roll up into the current company.

Company

A Child Company

Title

Title of your strategy

Custom Progress Weight

-

0

+

This value only applies when the block's rollup method is "Custom".

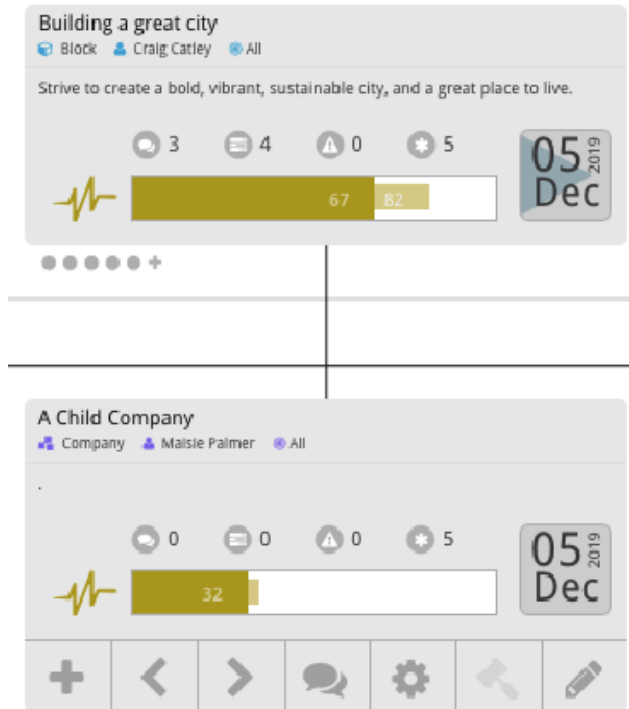
Delete

Cancel Done

# 5.2

## B2B Blocks

### Blocks Network



These Blocks show a simplified version showing a child B2B Block having been attached to its parent company in order for that parent company to monitor the that company's status.

B2B Blocks have limited editing, cannot have children added to it and currently does not import any of the metrics/risks from the sub-company which might be attached.

B2B Blocks are considered to act as a shallow copy of the sub-company's vision Block and automatically updates its progress %.



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with us



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