

Getting Started with StrategyBlocks

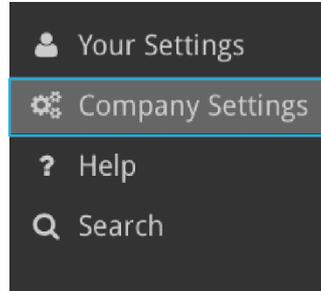
Training Guide – StrategyBlocks 4.0

Section 3: Company Settings & Custom Block Views



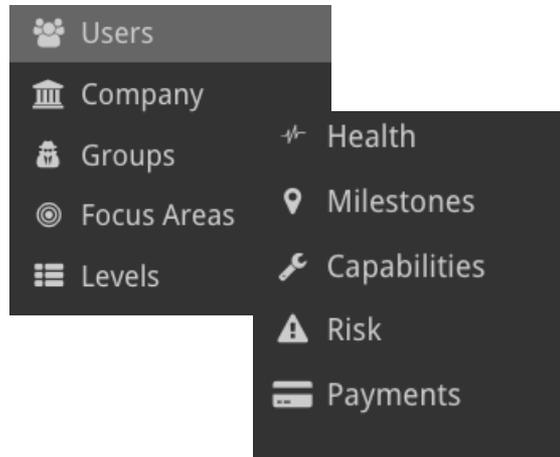
- Company Settings
- Blocks Network
- Blocks Library

3.1 Company Settings

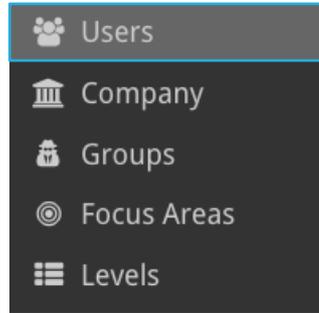


Company Settings is where changes are made regarding your company's overall strategy and decisions effecting other areas of your strategy

Company Settings are also where numerous functions must be created first in order to be further used within each individual blocks settings



3.1 Company Settings - Users



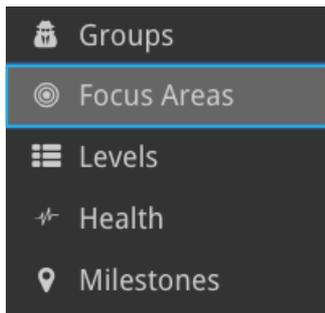
The Users tab allows people to be added into your company's strategy, allowing a user to become an owner/ manager of a block as well as allowing users to make other company decisions, accordingly

The numbers below represent how many blocks/metrics/risks that person owns

For example, Simon owns 7 blocks while managers 4 blocks. Simon also owns 4 metrics and manages 4 metrics

Active	Name	Blocks	Metrics	Risks
✓	Don Campbell	7/6	0/0	0/0
✓	Craig Catley	15/11	5/5	1/2
✓	Simon Lawrence	7/4	4/4	0/0

3.1 Company Settings – Focus Areas



Focus areas are essentially categorization of your blocks into particular areas that apply to certain areas of your strategy. These focus areas can be named to your choosing and are named to suit your company's own individual strategy

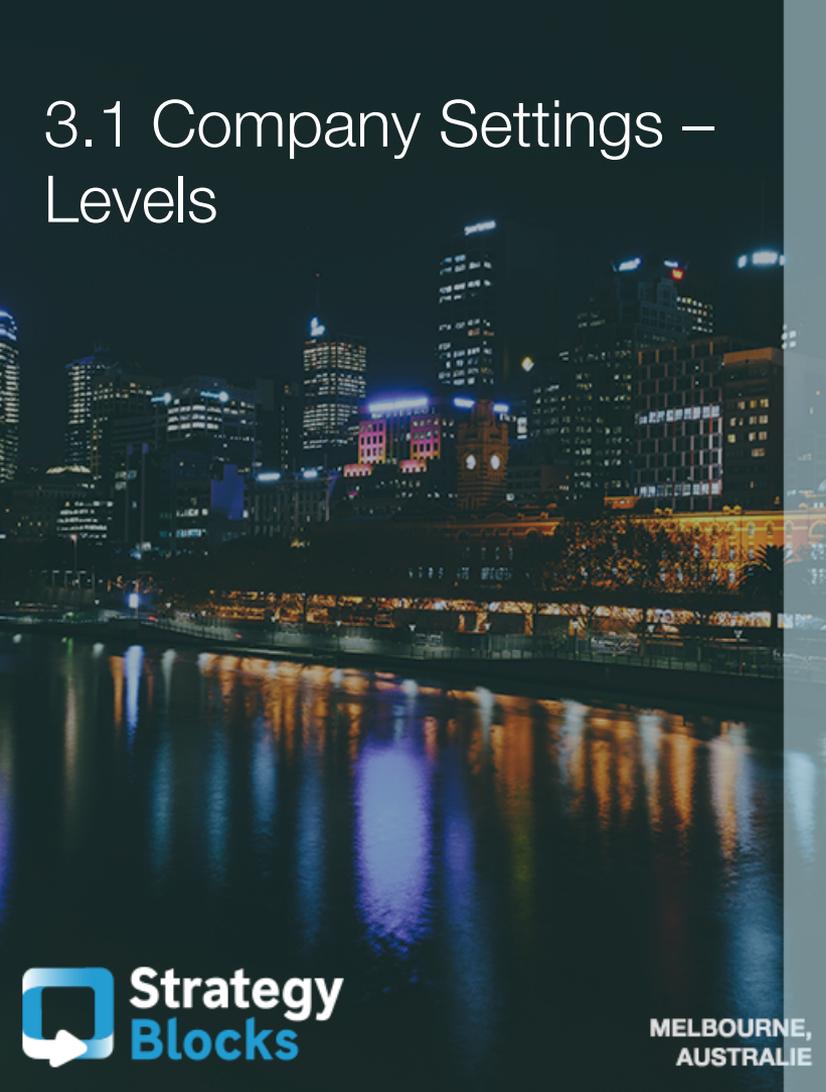
Focus areas can be created in regards to a main focus area (parent) whilst sub focus areas (children) can be created underneath. This type of categorization helps users to allocate and to understand the relationship of these areas within the strategy. Sub focus areas are optional

Parent Focus Areas

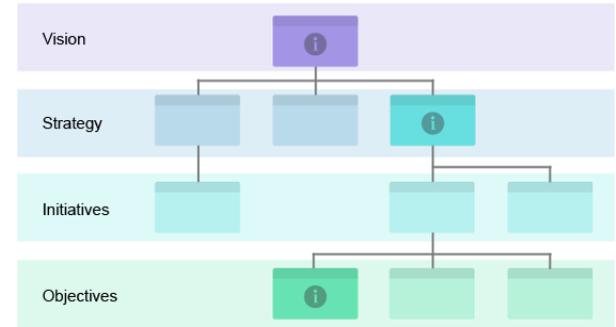
Child Focus Areas

	▼ All	All
	Finance	
	▼ Innovation	Market leading thinking
	Store	Store and channels
	Sustainability	Our global responsibility
	Marketing	Marketing and customer management

3.1 Company Settings – Levels



- Focus Areas
- Levels**
- Health
- Milestones
- Capabilities



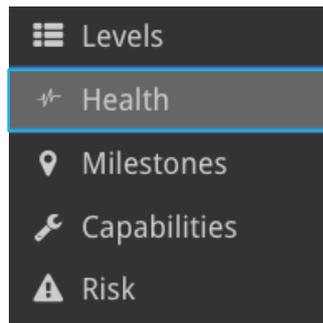
Blocks are arranged into levels with each level being a successive breakdown of your strategy

The title of each level can be changed at any time to suit your own company as well as the color of that title name

Labels

Position	Title	Color
1	Vision & Mission	Light Green
2	Goals	Purple
3	Objectives	Dark Blue
4	Initiatives	Blue
5	Projects	Yellow
6	Sub Projects	Orange
7	Actions	Light Blue

3.1 Company Settings - Health



Each individual block within your strategy is made up of factors that contribute to its health. These factors include progress (updated within the progress bar), metrics and risks

This health tab allows you to create your own health calculations allowing you to choose the type of weighting that you believe that each factor should have on your blocks

You have the option of using the default set of health calculations or creating more sets of health calculations. Each set can be applied to different blocks

Example

Progress Variance Weight

Metrics Variance Weight

Risk Variance Weight

The block “create an innovative shopping experience” may have risks as the larger weighting factor in regards to the makeup of that single blocks health compared with another block that may have a different set of health calculations which may have metrics as the biggest weighting

3.1 Company Settings - Health

Default	Title	Description				Last Update
	Default	No description	1	1	1	07/02/14 (3 years ago)
	Customer Health	This health definition is specifically used for activities relating to our customers.	0	1	0	19/09/16 (2 days ago)
✓	Default	No description	1	2	1	12/07/16 (2 months ago)

Beside are 3 sets of health calculations that can be allocated to blocks of the owners choosing

Priority Skew

No
 Yes

The higher the priority of a block, the quicker it turns the blocks health to a good/bad state while the lower the priority the longer it takes for the block to go good/bad

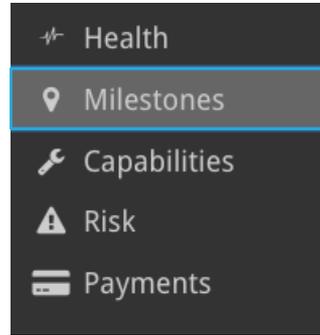
Positive Tolerance %

Negative Tolerance %

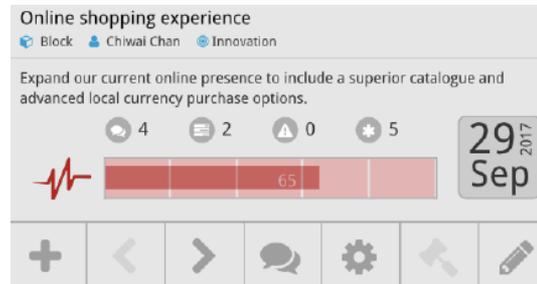


The number of days of effort you believe the task will need to complete

3.1 Company Settings – Milestones



Milestones are shown on a blocks progress bar as lists of tasks that need to be completed before a block can be marked as complete



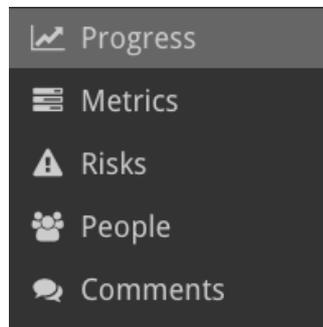
For example, each compartmentalized section of the progress bar represents the contribution amount that is input whilst creating that milestone. The example above shows each section to have a contribution amount of 20 per each of the 5 steps created. That contribution amount represents how much weighting you want that individual task to show to make up the overall progress completion

3.1 Company Settings - Milestones

The owner of the block can choose whether they want progress to be displayed using a normal progress bar or a milestone progress bar. If a milestone progress bar is selected, the user cannot change the progress of the bar manually under quick edit and can only do it under the blocks progress tab

Milestones

- (None)
- 5 Step Process
- Create Business Plan
- Example

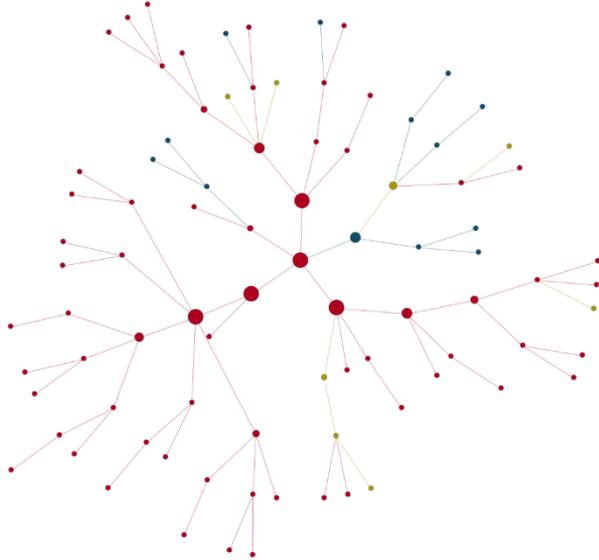


Milestones can only be assigned to leaf blocks (i.e. the last blocks that have no children underneath it). This is because progress is not subject to manual updating of the progress bar but is instead the amalgamation of all of that block's children progress

To assign a milestone to a block [select the blocks gear tab](#)  [Details > Milestones](#). The milestones must first be created under company settings in order to be selected



3.2 Blocks Network



The blocks network is another vantage point when viewing your company's strategy. This network creates a more holistic view of your strategy enabled through interaction within the blocks network page

These tabs located under the blocks network tab allows you to view your strategy from a variety of structured view points

Layout: Radial ▾		Node: Circles ▾	
Radial		Circles	
Horizontal		Title	
Vertical		Small Block	
Layout: Radial ▾		Node: Circles ▾	Node: Circles ▾

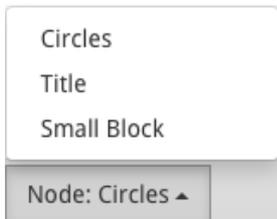
Tip

To zoom in or out to view your network up close or from a distance, use your scroller on your mouse or laptop pad



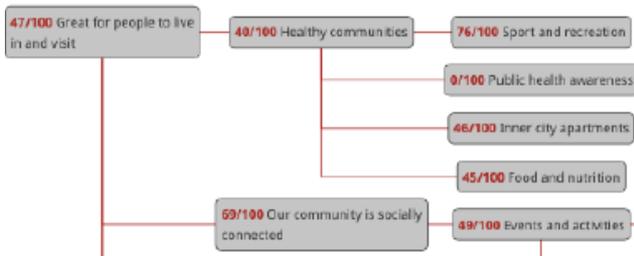
3.2 Blocks Network

Nodes



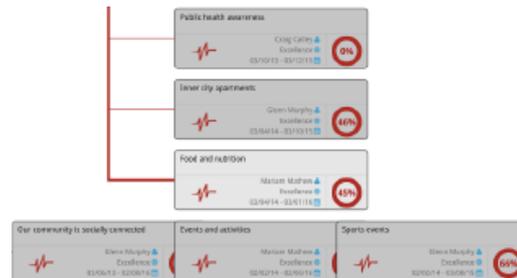
Allows you to view your strategy (i.e. blocks) from three possible viewpoints. Selecting **Title** or **Small Block**, changes the circles (default view) into altered versions of your original blocks

Nodes: Title



This option allows you to view only your blocks task title and the progress towards your blocks completion, i.e. $49/100 = 49\%$ of the blocks task achieved out of 100%

Nodes: Small Block



This option provides a more detailed view of your blocks, showing details such as the blocks health % (when hovered over) as well the owners, focus areas and the start and end dates of those tasks

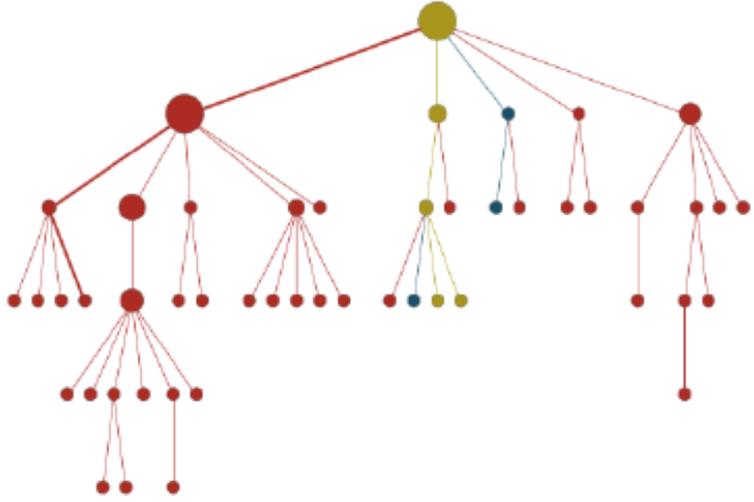
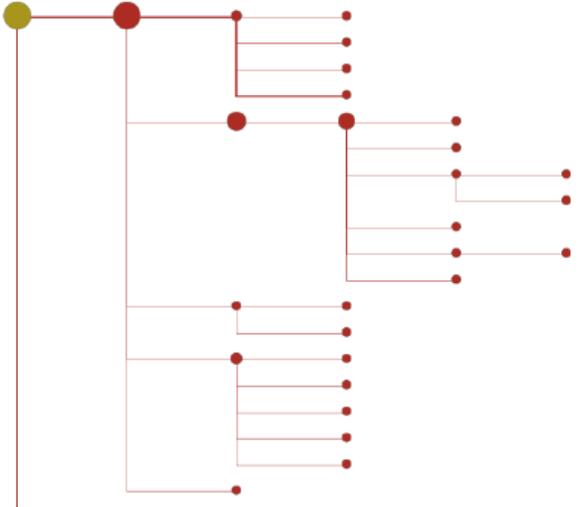
3.2 Blocks Network

Nodes

Allows you to choose the layout to which you would like to view your nodes. Below are two of the different types of layouts you can choose from. Instead of circles, the title or small block nodes can be applied, alternatively

Radial
Horizontal
Vertical

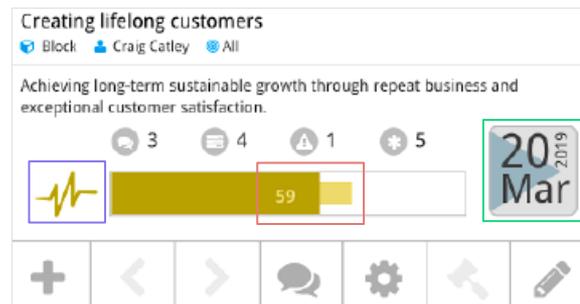
Layout: Radial ▾ Node: Circles ▾



3.2 Blocks Table

The blocks table is a more structured way to view your blocks. Clicking on any block, allows you to access all of that blocks editing options

The status reflects the progress of your block (shown in the progress bar on a block within the block tree)



P%/T% means progress vs target, i.e. if have achieved 42 but my target is 65

Status	Health	Title	Owner	Level	P%/T%	End
✓		Creating lifelong customers	Craig Catley	Initiatives	100/90	12/12/16 (in 3 months)
✓		Reduce inventory	Don Campbell	Initiatives	100/100	29/12/16 (in 3 months)
✗		Item level merchandise tracking	Don Campbell	Projects	100/100	24/04/16 (5 months ago)
✗		Product availability	Glenn Murphy	Projects	96/100	30/07/16 (2 months ago)
		Streamlining logistics	Simon Lawrence	Objectives	93/94	29/12/16 (in 3 months)

3.2 Blocks Library

The blocks library are all the blocks that have had their structure exported for later use. Some of the blocks seen in the library may not yet be attached under the blocks tree as they have not been properly imported into your strategy. You can import these blocks into your own strategy by selecting a block and clicking import.

★	Public	Title	User	Focus	Duration			
--	✓	1 Business Plan Development	Craig Catley		25/08/16	3 years	4	2
--	✓	360 degree view	Craig Catley		25/08/16	4 years	8	3
--	✓	Operations Management	Craig Catley		25/08/16	2 years	20	4
--	✓	Employee Objective	Craig Catley		25/08/16	2 years	9	3

➔ Import



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