

# Getting Started with StrategyBlocks

Training Guide – StrategyBlocks 4.0

# Section 1: Introduction and Key Concepts



- The Strategy Problem
- System Access
- What is a Block?
- Attributes of a Block
- Faces of a Block
- Block Structure
- Setting Up

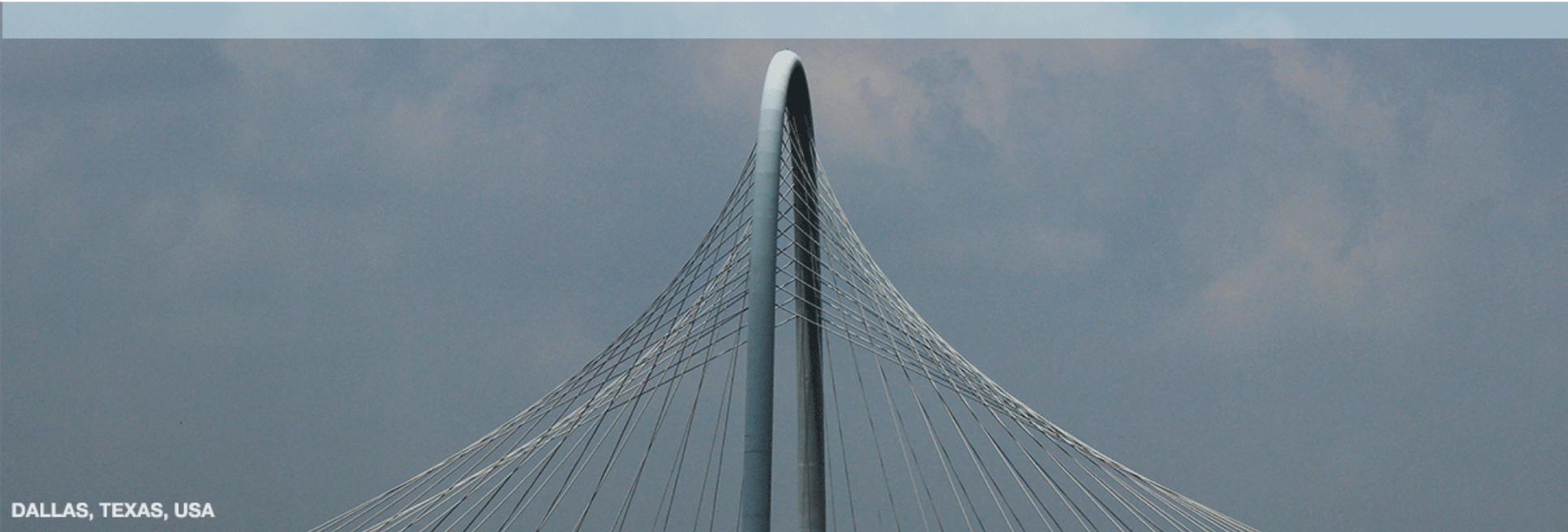
# 1.1 The Strategy Problem



It is difficult to have a clearly portrayed strategy when the strategy itself is **lengthy** and spread across a large number of areas

It is vital that everyone receives **clear direction** and understands their involvement in the strategy

StrategyBlocks allows for more extensive **stakeholder involvement** in strategy execution



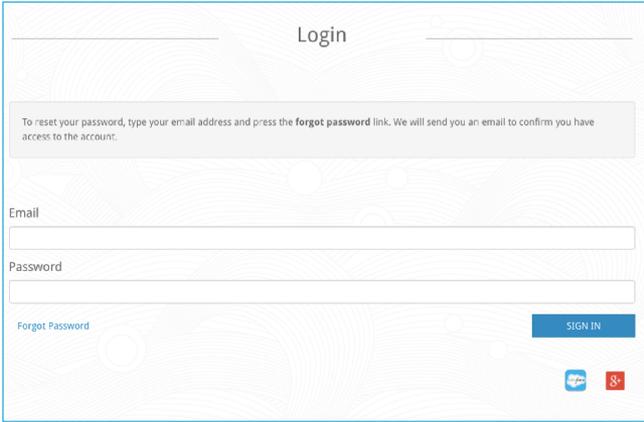
## 1.2 System Access

Access StrategyBlocks by using your:

- StrategyBlocks username and password
- Google Account
- Salesforce username and password

Select  **LOG IN** via <https://app.strategyblocks.com> or <https://aus.strategyblocks.com>

Refer to your initial implementation correspondence for the correct server. If located on premise, please check with your local administrator



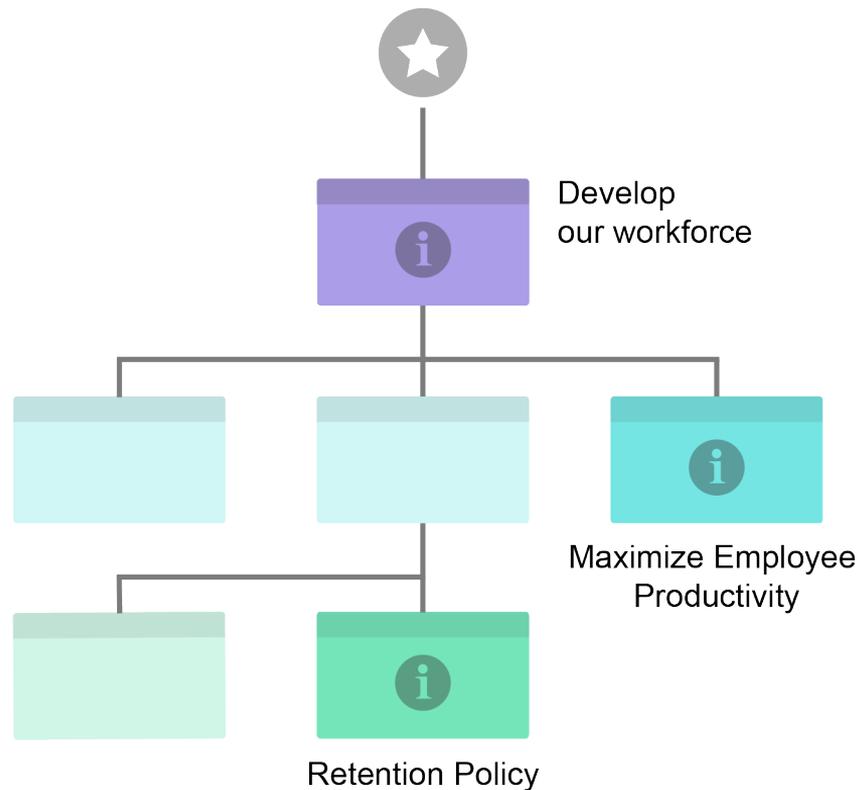
The screenshot shows a login page with the following elements:

- Title:** Login
- Forgot Password Link:** To reset your password, type your email address and press the **forgot password** link. We will send you an email to confirm you have access to the account.
- Input Fields:** Email and Password.
- Buttons:** **Forgot Password** (text link) and **SIGN IN** (blue button).
- Logos:** Apple and Google logos at the bottom right.

## 1.3 What is a Block?

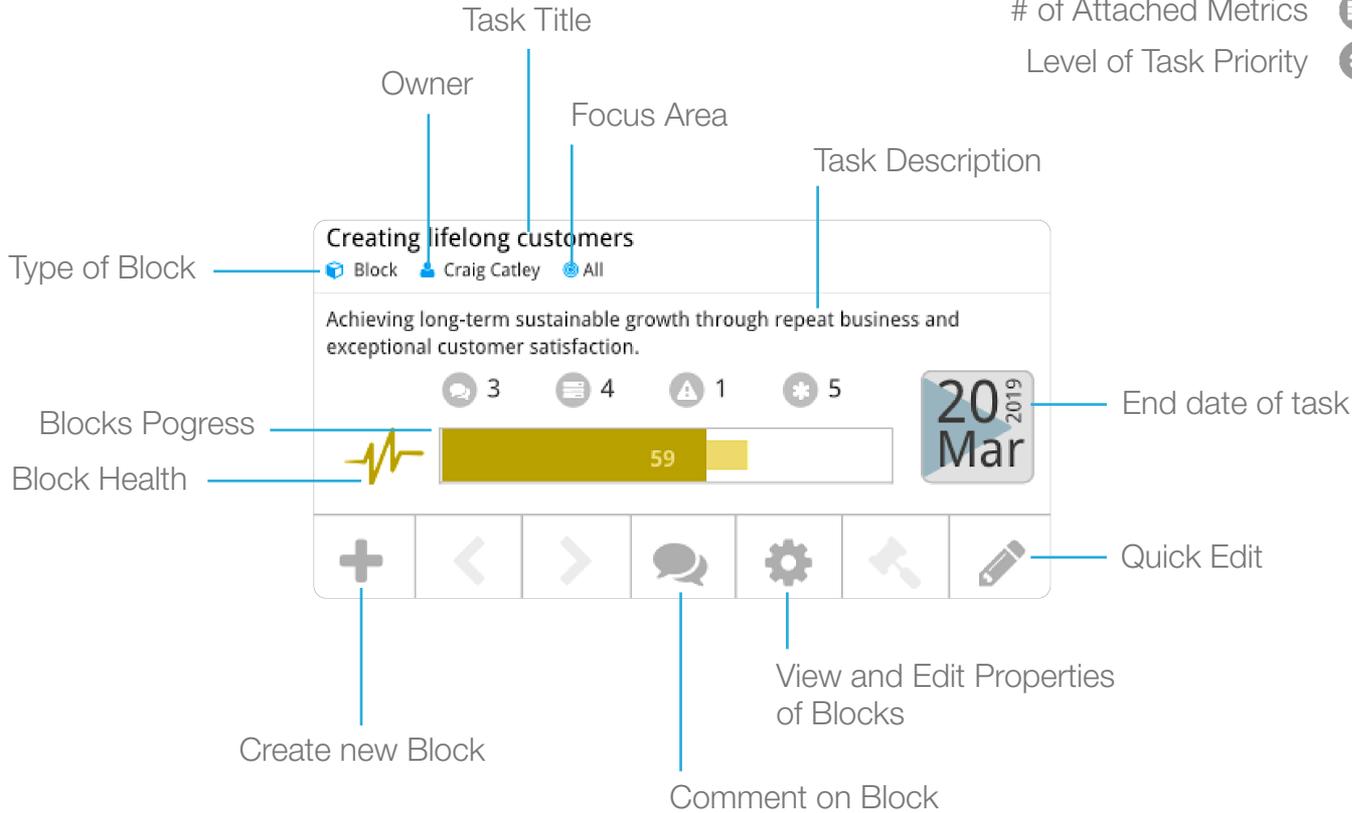
A block describes a single task attached to the overall strategy where the individual (**Owner** of block) is assigned to achieve its completion

The block may be completed once that task has been achieved or additional blocks may be assigned to that task (**Children** blocks) in order to aid in its overall completion



# 1.3 Attributes of a Block

- # of Comments  3
- # of Impacting Risks  0
- # of Attached Metrics  4
- Level of Task Priority  5



# 1.3 Attributes of a Block

## Types of Blocks

-  Original Block – Stand alone task
-  Enabling Block (Link) – [Clone](#) of your original block that can be reused within your strategy
-  B2B Block - can add a block from one of your companies to another in order to monitor its status

## Focus Areas

- Areas that your task can be categorized under e.g HR, Finance, Excellence
- Focus Areas can be renamed to [suit your company's](#) own strategy



## Start & End Date

- [Adjustable](#) start and end dates
- Reflects progress bar progression



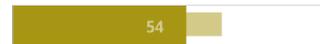
## Quick Edit

Allows for [quick editing](#) of basic details such as task title, description, owner, focus areas, start and end date and progress bar (if applicable)



## Block Health

- [Factors](#) that a company may choose that makes up the health of that task
- Assigned [metrics](#) and [risks](#) that roll up to create the health of task



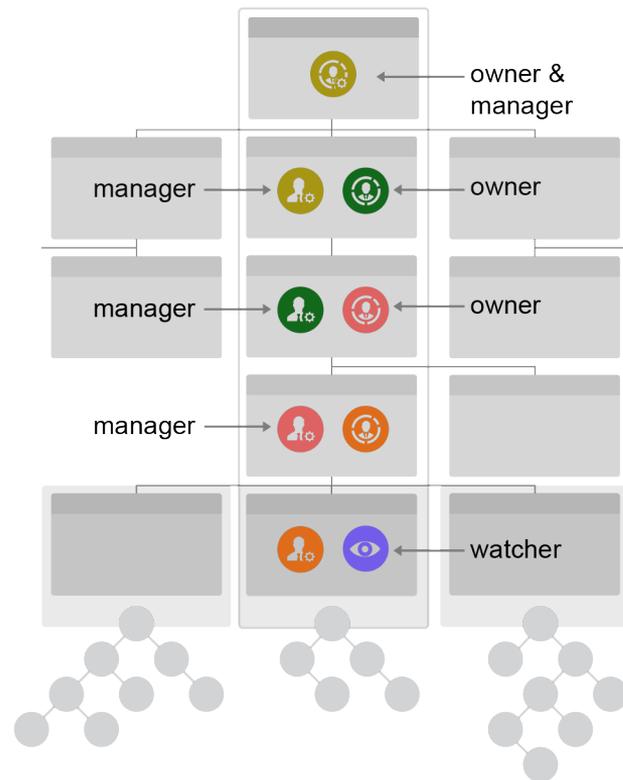
## Blocks Progress

- Measures % of [task completion](#) to date
- Measures % of [where](#) completion should be to date
- % [expected](#) to be completed
- Measures [days](#) remaining and expected days to complete

## 1.3 Attributes of a Block

### Block Ownership:

-  **Owner** - Has responsibility of the block and the completion of its task. The owner can also create child blocks
-  **Manager** - Is the owner of the parent block. Its role is to make sure that the task (block) is making good progress. The manager can change the blocks details including the title, description, owner, focus areas, dates etc.
-  **Watchers** - will receive email reports regarding the block's status whilst can see newsfeed items about its activity (comments, progress update etc.)



# 1.3 "Faces" of a Block

## Block Type:

## Status

Create an innovative shopping experience  
Block Allen Keyte Excellence

Utilize our Innovation to build better relationships with Key Customers.

1 1 1 9

02 Jun 2018

64

Information

Metrics



Connecting people products and experiences  
Block Craig Catley All

To be the world's best online shopping destination, leading the way in retail.

01 Jun 2013

3 4 1 5

90 4 11

04 Jul 2019

Health

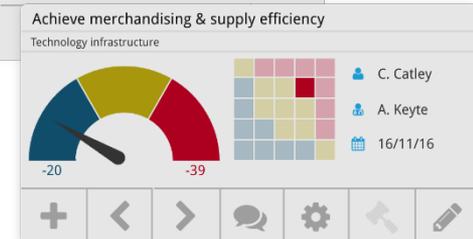
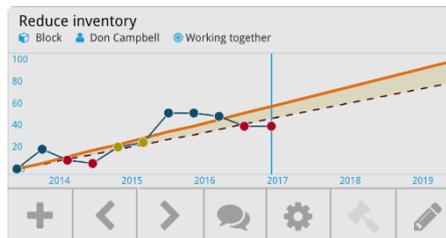
### Introduce new services to achieve growth

Block Maureen Placente Innovation

Reduce the impact of economic changes by improving our product differentiation to appeal to a wider group of prospective buyers.

Risk

## Progress

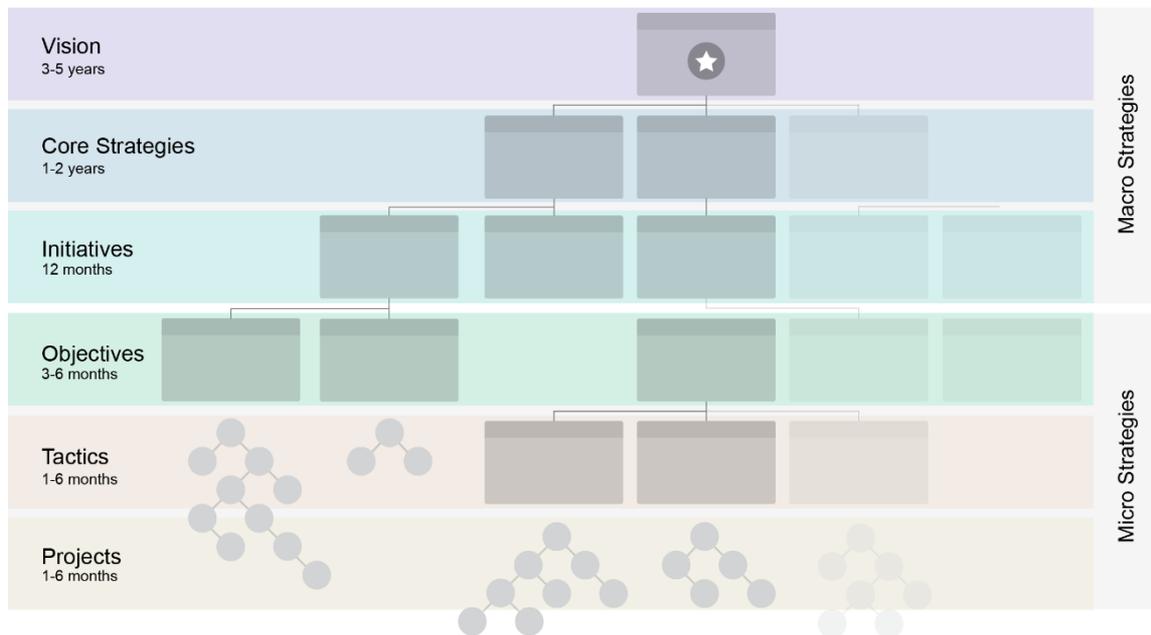


# 1.4 Block Structure

## Levels

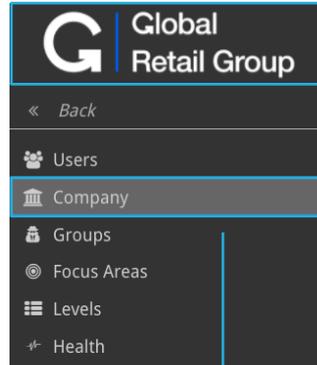
Blocks are arranged in **levels**, each level describes another layer of granularity. These levels move from macro strategic (at the top) to micro operational detail (at the bottom)

Each layer usually represents a shorter time period required to deliver each task described by a block. These labels can be customized to the terminology used by your organization

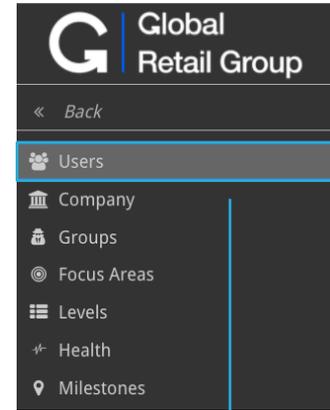


# 1.5 Setting up Basics

## Uploading company logo



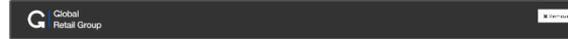
## Adding users that are in charge of assigned blocks



### Upload your Company Logo

You can upload a company logo by clicking the **Browse** button, or by dragging a picture from your filesystem if that's supported.

Current logo:



Drag here

Upload your image:



Change the background color to better suit your company logo.

### Users

Show the list of users in your company. When a user is active, they are able to log into StrategyBlocks. The blocks / metrics / risks column shows how many of each object the user is responsible for (Owner / Manager).

If you have run out of seats you, can still add users, but they will not be active.

Active	Name	Blocks	Metrics	Risks
✓	Shresh Laxmanna	0/14	0/0	0/0
✗	Prithi Mar	0/0	0/0	0/0
✓	Kaareen Florence	1/2	0/0	0/0
✓	Jonathan Moudis	0/0	0/0	0/0
✓	Silves Murphy	0/1	1/1	0/0
✓	Gen L Lempicki	1/05	0/1	0/0
✓	Craig Kelley	3/039	25/24	5/1
✓	Clayton Chan	0/2	2/1	0/4
✓	Clayton Chan	0/0	16/06	0/0
✓	Caroline Rame	1/2	0/0	0/0

Quick Filter:

Previous 2 Next



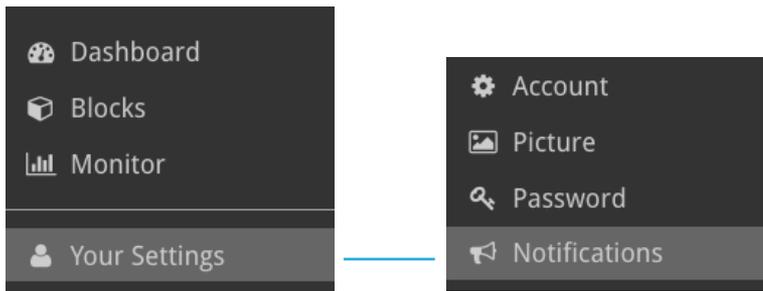
# 1.5 Setting up Basics

## Email Notification

You will be alerted to take action on your blocks by email or from the dashboard pages. This will notify you when certain blocks are:

- Overdue
- Falling Behind
- Warning State

## Setting up Notifications



### Notification Settings

These settings determine how often you receive emails from StrategyBlocks.

Status Report Frequency (days)

Send event notifications (chat, assigned block, etc...)

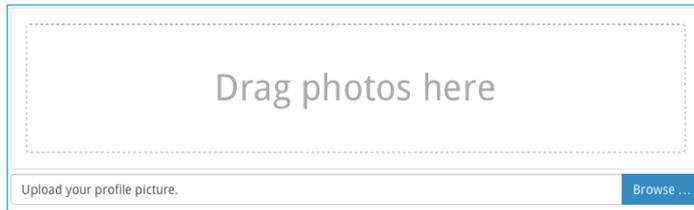
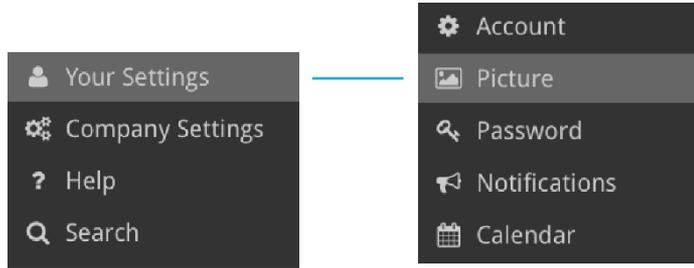
 

Save

# 1.5 Setting up Basics

## Uploading Profile Picture

Once you select [Picture](#), you are presented with two options of how you want to create a profile picture. You may either drag photos from your desktop/upload them manually or can click on the Gravatar link and make an account



OR



Your Gravatar profile image.

You can change your image by creating a gravatar account and assigning an image to your email address.



[youtube.com/user/strategyblocks](https://youtube.com/user/strategyblocks)



[linkedin.com/company/strategyblocks-ltd](https://linkedin.com/company/strategyblocks-ltd)



[www.strategyblocks.com](http://www.strategyblocks.com)

## Contact



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