# PASSAGEWAYS

# STRATEGIC PLANNING

## User's Guide

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## Introduction

The Strategic Planning Module is designed to help your business engage employees in business goals through transparency and interaction. This is accomplished by displaying the strategies, tactics and metrics on the Strategic Planning Island.   This application does work with the Passageways Dashboards module to provide dynamic visualizations of your company's success.  (For additional information on the Dashboards Module please visit https://support.passsageways.com)

## Core Strategic Planning Concepts

There are some core concepts and terms that you should be familiar with when dealing with the Strategic Planning Module. This will give you a fundamental understanding of several of the terms used in the application and how they impact the overall Strategic Planning application. The image below represents the overall strategy structure that can be set by your organization in this application. **IMPORTANT NOTE:** The terms used below are the default terms for this application. Please keep in mind that you can edit these terms to reflect the structure of the Strategic model used at your organization.
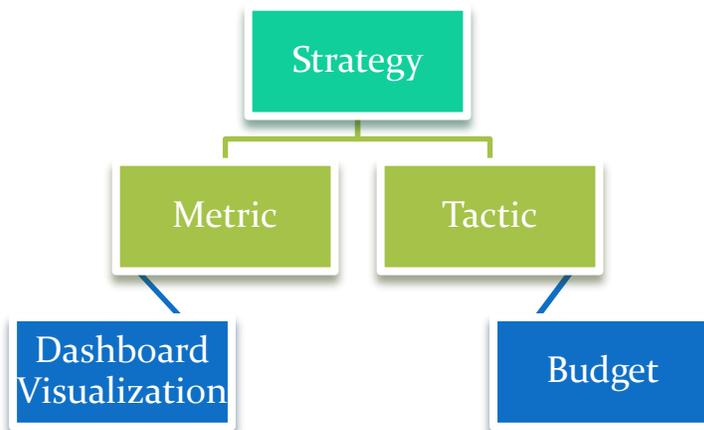


# Strategies

Strategies are the broad concepts of growth areas your company is looking to achieve.  These strategies are added to the Strategic Planning Module so that they may be communicated well and transparent to the rest of your staff through your portal.

# Metrics

A quantifiable measure that is used to track and assess the status of a specific business process.  Achieving goals is easier when you break the larger strategies down into smaller ones.  Assigning achievable metrics to each of your strategies will aid you in focusing on the important aspects that create the larger success.  Utilizing the metrics component of the Strategic Planning Application does depend on the use of the Passageways Dashboards Module, for specific instructions on creating your visualizations please reference our Dashboard Administrator's Guide.

## Tactics

Tactics can be built in the Strategic Planning Module to create manageable portions and aid in the budgeting of your organizations goals. Tactics utilize specific resources to achieve sub-goals that support your organization's strategies.

## Key People

There are two main types of permissions that you will want to be familiar with for the Strategic Planning Module; Owners and Viewers.

### Strategy Owners

Strategy Owners have the ability to add, edit, change and delete strategies for the organization.  Typically, these owners are members of your organization's executive team.

### Strategy Viewers

Viewers are the members of your organization who have been granted the ability to see a specific Strategy. These strategies will appear on the Strategic Planning Island for Viewers to see. These users can also be set to Owners of other Strategies, if necessary.

## Islands

The Strategic Planning Module has just one island that can be added to workgroup pages: the Strategic Planning Island.

### Strategic Planning Island

The Strategic Planning Island allows users to view all of the strategies, tactics and metrics they are viewers of.

## Recommended Implementation Steps

You can implement the Strategic Planning Module in several different ways and each organization has their own take on implementing a new tool. We have provided some basic steps that you can follow to help roll out this application.

# Part 1: Outlining your Strategies and Goals

The first part of implementing the Strategic Planning Module is to outline your organization's strategies and breaking them down into measurable metrics and tactics. This is a two-part process, including, in some cases, creating visualizations using the Dashboard Module.

## Step One: Determine your Strategic Naming Scheme

In the **Working with Strategic Planning Preferences** section of this guide, you'll learn how to configure the application to match the naming convention to fit the Strategic structure you use at your organization. This should be the very first step in the implementation of Strategic Planning, as it will change the terminology used throughout the application. As an example, you can change the word "Strategies" to appear as "Objectives", and "Tactics" to appear as "Campaigns". The terms used in this guide are the default terms for this application.

## Step Two: Identify your Strategy Owners

Define the list of Owners for each Strategy. Who will be able to manage the details (Metrics and Tactics) for the Strategy? These individuals are often members of your executive team.

## Step Three: Define your Strategy Viewers

Who should be able to view your Strategies? Are there certain Strategies that only certain employees should have access to? Make a list of those individuals for each Strategy.

## Step Four: Define your Metrics

Define the list of Metrics associated to each Strategy. The following are a list of questions you can use to find the best Metrics for your organization.

> ➢ Does the Metric need a dashboard associated to it?
> ➢ Does the dashboard already exist in the dashboards module?
>> o If yes, then you will be able to select that visualization when you create the Metric.
>> o If no, then you will need to create a new visualization
>>> • Decide what type of visualization item will be used.
>>> • Decide and create the Data Source that will be used for the visualization.

## Step Five: Define your Tactics

Define the list of Tactics associated to each strategy. Each Tactic can help further breakdown the overall Strategy into smaller manageable portions. Tactics will also aid in keeping your overall strategy budget in line.

## Part 2: Creating and Displaying your Strategies

Now that you have organized and thought out your Strategies, Metrics, Tactics and budget, it is time to create them in the Strategic Planning Module. The following steps will outline the process.  More detailed information in creating, editing, and deleting can be found later in this guide.

### Step One: Setting Island Permissions

If you have not already done so, you will want to determine which roles should have access to the Strategic Planning Module Island. In order to set the island access, go to Module Tools > Strategic Planning > Island Access. (Roles are groups of users who have similar business functions and were created by your portal administrator for your organization's portal.  For additional information on "Roles" please see our Portal Administrator's Guide)

### Step Two: Manage Strategies

From the "Manage Level 1" node in Module Tools, create your organization's strategies, using the "New Strategy" button. Detailed instructions can be found in the **Creating Strategies** section of this guide.

### Step Three: Manage Metrics

Using the "Manage Level 1a" node in Module Tools, create your organization's metrics and associate them with the correct strategy. Keep in mind that if your Metrics will be using a Dashboard Visualization, that will also need to be created so it can be associated with this Metric. Detailed instructions can be found in the **Creating Metrics** section of this guide.

### Step Four: Manage Tactics

Next, using the "Manage Level 1b" node in Module Tools, create and associate your organization's tactics with each of the strategies created. Detailed instructions can be found in the **Creating Tactics** section of this guide.

### Step Five: Displaying your Content

The last step is displaying the content in your portal. Select the page in which you wish to display the Strategic Planning Island, and add it to that workgroup page.  Content will automatically be displayed within this island, based on the Viewer permissions that were granted during the Strategy creation. Detailed instructions can be found in the **Working with the Strategic Planning Island** section of this guide.
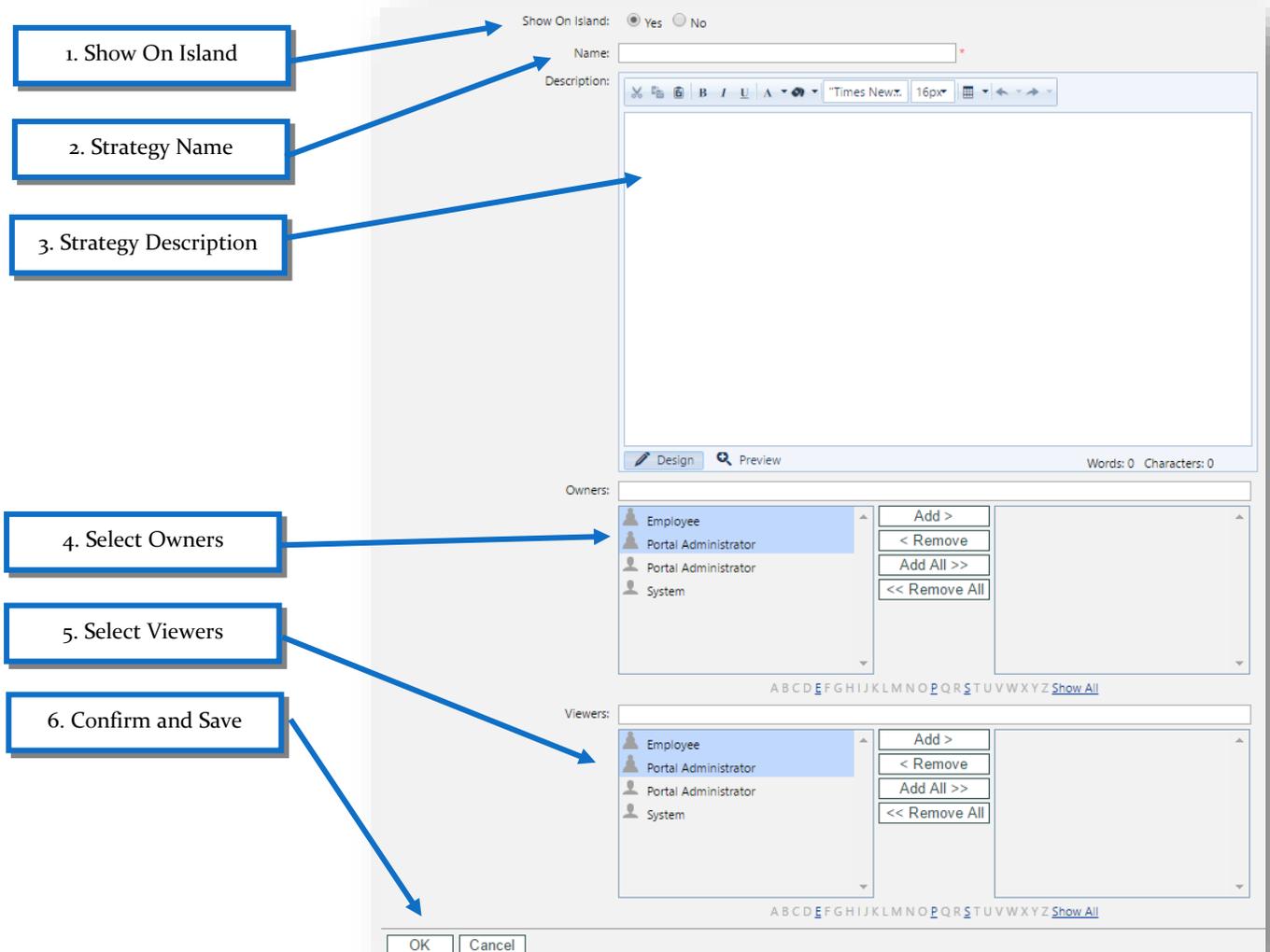
## Managing Strategies

The first step in setting up your Strategic Planning Module is building the foundation of your organization's goals. Your Strategies. You create, edit and delete these strategies from the Manage Level 1 Module tool.



Manage Level 1
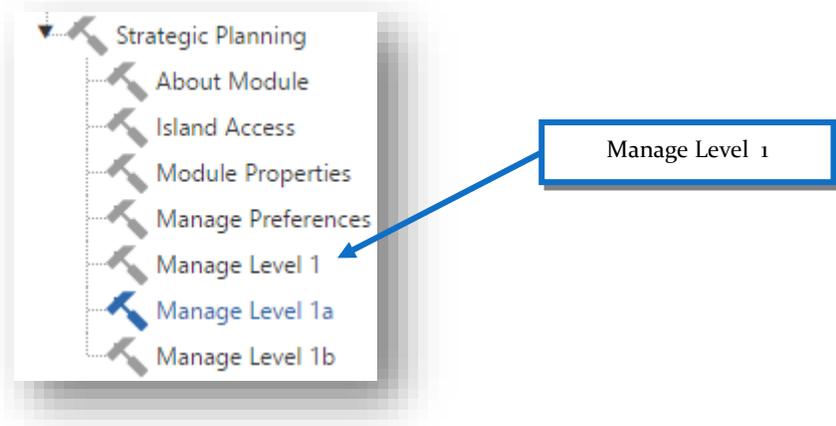
# Creating Strategies

To create a new strategy, click the "Add" button. Next, determine if this Strategy will display on the Planning Island, then give your Strategy a name. The description will show on the strategic planning island, allowing the viewers to have a better understanding of the overall strategy. In some cases, you may be creating strategy that will be needed in the future and you might not be ready to display this to you users. Finally, select your strategy owners and viewers.



1. Show On Island

2. Strategy Name

3. Strategy Description

4. Select Owners

5. Select Viewers

6. Confirm and Save

# Editing Strategies

To edit a strategy, use the Manage Level 1 node, and select Edit from the dropdown menu on the left. Here you can edit the name, description, owners and viewers.

| | Name | Description | Owners | Viewers | Show On Matrix |
|---|---|---|---|---|---|
| Edit ▼ | Grow the Core Portfolio | Includes all tactics for product growth. | User(s): Portal Administrator | Role(s): Employee | Yes |
| Edit / Delete / Edit | Accelerate Growth in Emerging Markets | Includes all tactics for expanding into new verticals. | User(s): Portal Administrator | Role(s): Employee | Yes |
| | Strengthen and Leverage Global Scale | Tactics for scaling internationally. | User(s): Portal Administrator | Role(s): Employee | Yes |
| Edit ▼ | Make Talent an Advantage | All tactics for optimizing our own employee base. | User(s): Portal Administrator | Role(s): Employee | Yes |

**Edit Strategies**
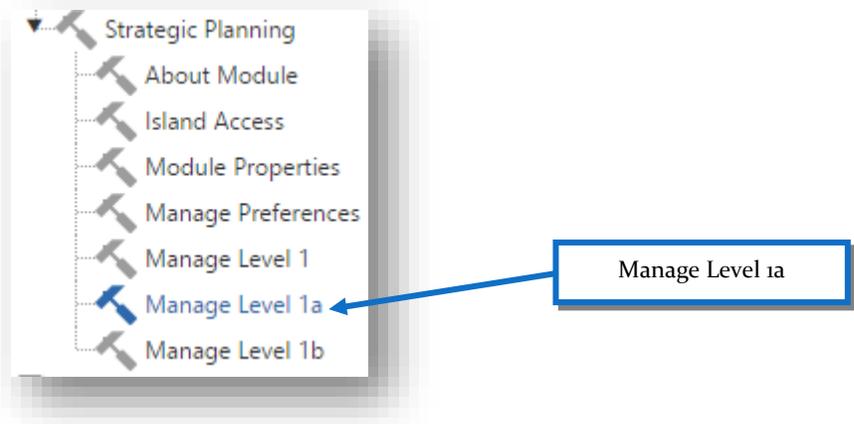
# Deleting Strategies

To delete a previously created strategy, select Delete from the dropdown menu on the left. You are asked to confirm your request and then the strategy will be deleted.

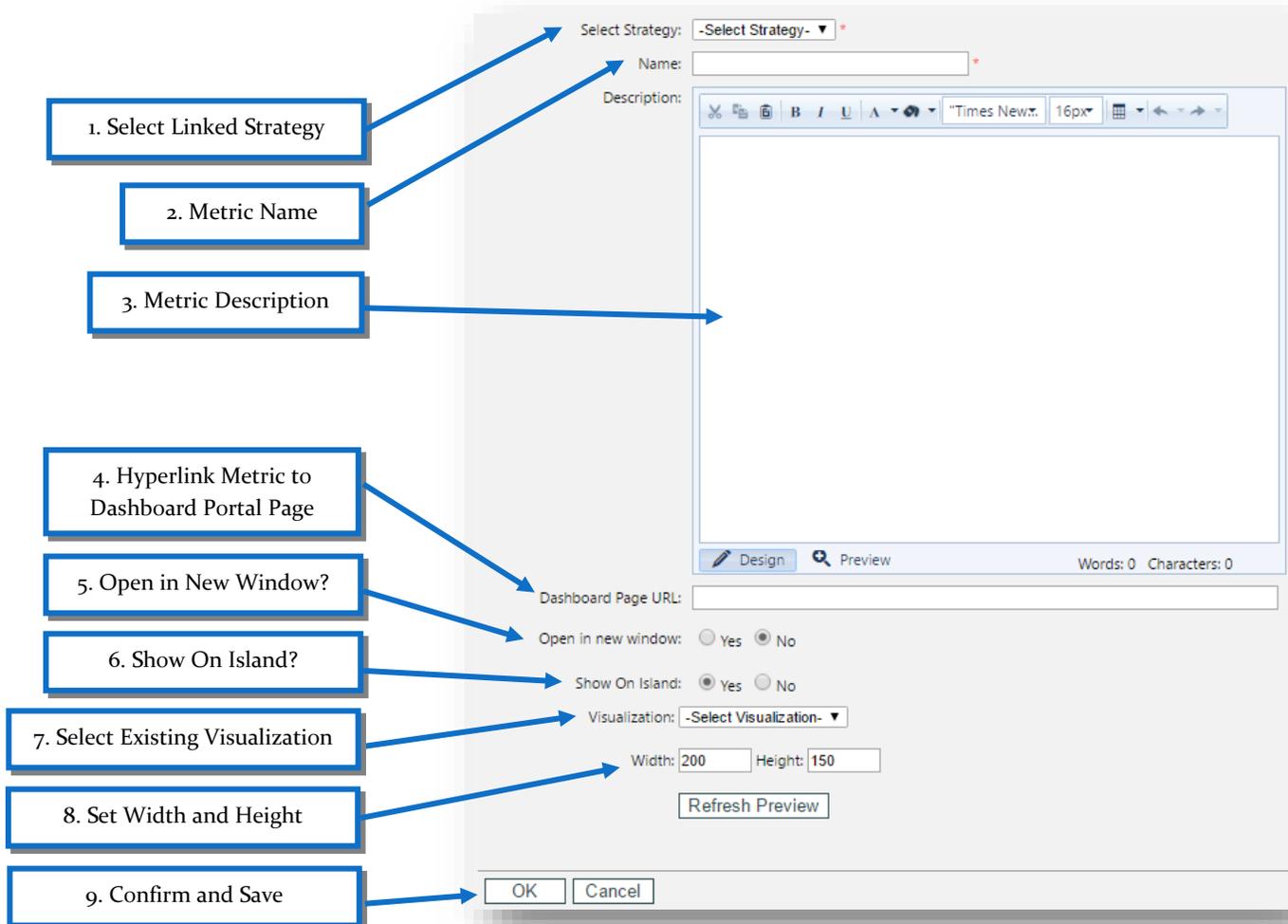| | Name | Description | Owners | Viewers | Show On Matrix |
|---|---|---|---|---|---|
| Edit ▼ | Grow the Core Portfolio | Includes all tactics for product growth. | User(s): Portal Administrator | Role(s): Employee | Yes |
| Edit / Delete / Edit | Accelerate Growth in Emerging Markets | Includes all tactics for expanding into new verticals. | User(s): Portal Administrator | Role(s): Employee | Yes |
| | Strengthen and Leverage Global Scale | Tactics for scaling internationally. | User(s): Portal Administrator | Role(s): Employee | Yes |
| Edit | Make Talent an Advantage | All tactics for optimizing our own employee base. | User(s): Portal Administrator | Role(s): Employee | Yes |

**Delete Strategies**

## Managing Metrics

Metrics are the measurable components that are a critical part of each strategy.  This section will illustrate how to create and manage the metrics for your organization. To begin, select the Manage Level 1a node from the Strategic Planning Module Tool.

Strategic Planning
About Module
Island Access
Module Properties
Manage Preferences
Manage Level 1
Manage Level 1a
Manage Level 1b

Manage Level 1a

# Creating Metrics

To create a new metric, use the "New Metric" button. Select what strategy this matrix will be associated with. Next, give your metric a name and description. Now you can enter the URL for a Dashboard portal page, if you wish to turn your metric into a hyperlink to another page with additional information. Be sure to select a Dashboard Visualization from the dropdown menu to display your metric's progress. After selecting its dimensions, be sure to click the OK button to save!

Select Strategy: -Select Strategy- ▼
Name:
Description:

1. Select Linked Strategy

2. Metric Name

3. Metric Description

Design    Preview    Words: 0  Characters: 0

4. Hyperlink Metric to Dashboard Portal Page

Dashboard Page URL:

5. Open in New Window?

Open in new window: ○ Yes ● No

6. Show On Island?

Show On Island: ● Yes ○ No

7. Select Existing Visualization

Visualization: -Select Visualization- ▼

Width: 200    Height: 150

8. Set Width and Height

Refresh Preview

9. Confirm and Save

OK    Cancel

## Editing Metrics

From the Manage 1a node in the Module Tools, you can select Edit from the dropdown menu on the left. You are brought back to the edit screen, where you can edit the name, associated strategies and the visualization.



Edit Metric
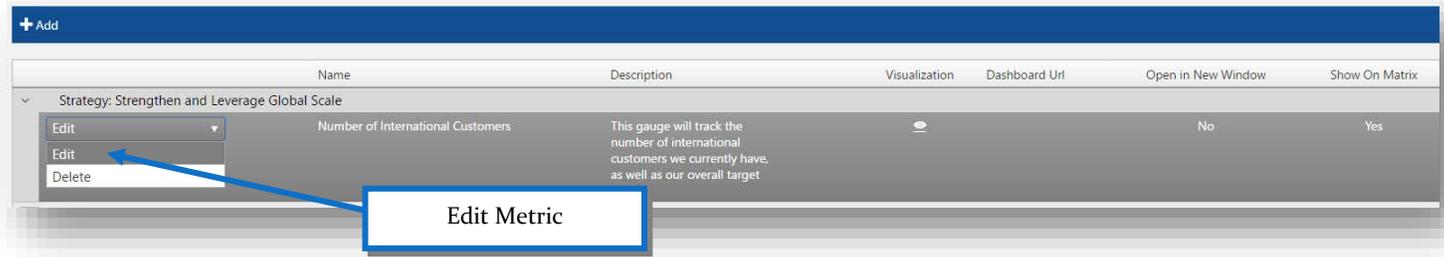
## Deleting Metrics

To delete metrics, use the Delete button from the dropdown menu on the left. You will be asked to confirm your desire to delete the metric.
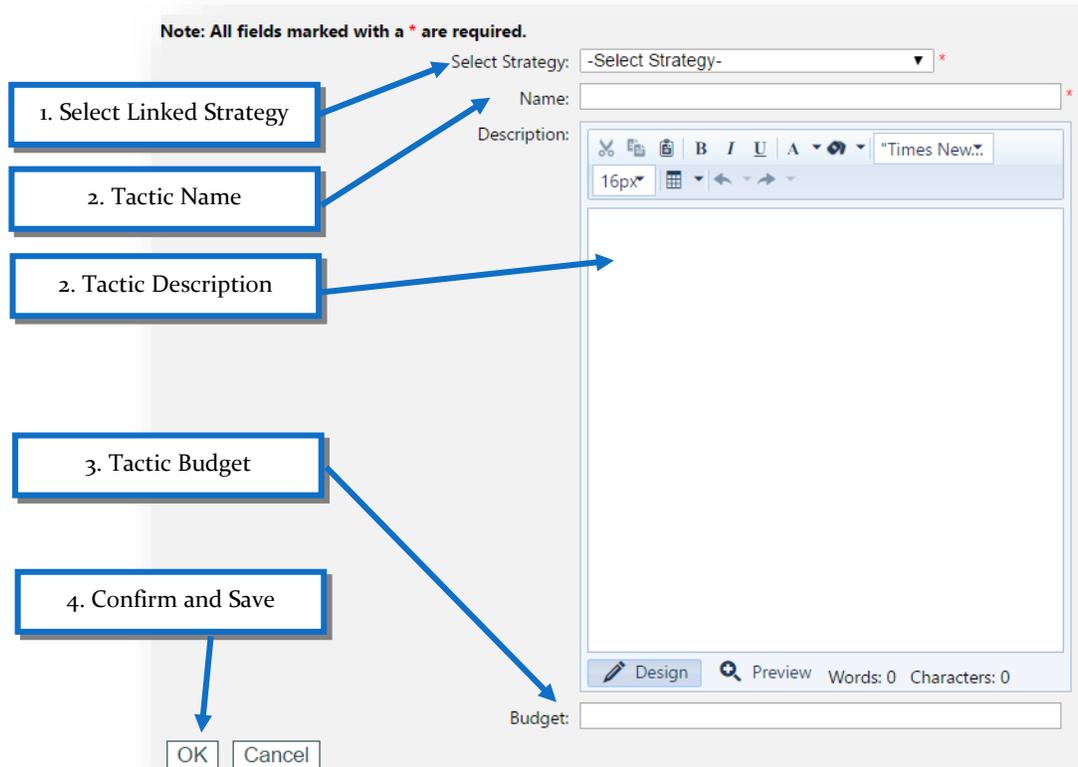


Delete Metric
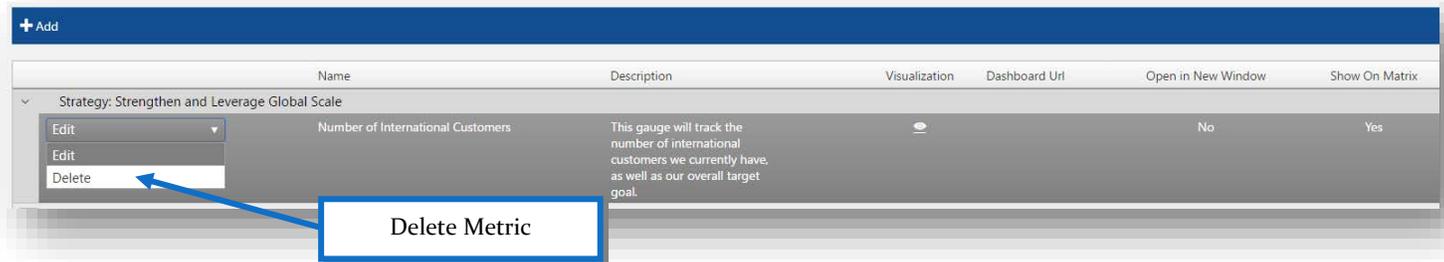
## Managing Tactics

Now you are ready to create the tactics associated with your strategies.  This section will walk you through the components of creating, editing and deleting tactics.  All of which is done from the Manage Level 1b node of the Module Tools.
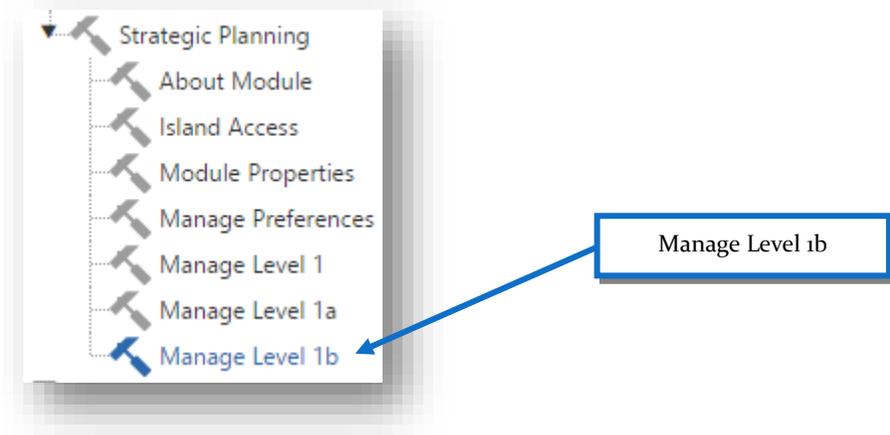


Manage Level 1b

# Creating Tactics

On the Manage Level 2 node, click the "New Tactic" button to create a new Tactic. Associate the new Tactic to an existing Strategy, and give your Tactic a name.  You can also add a description and estimated budget amount for the Tactic. Don't forget to click the OK button to save your new Tactic.



1. Select Linked Strategy

2. Tactic Name

2. Tactic Description

3. Tactic Budget

4. Confirm and Save

## Editing Tactics

To edit a Tactic you have previously created, select Edit from the dropdown menu to the left of the Tactic. This will deliver you back to the page where you can make any change you wish to the tactic.



| + Add | | | |
|---|---|---|---|
| | Name | Description | Budget |
| ˅    Strategy: Strengthen and Leverage Global Scale | | | |
| Edit                              ▼ | Leverage Infrastructure / Expand Distribution | Expand Distribution into international centers. | 12,000.00 |
| Edit | | | |
| Delete | | | Page 1 of 1, items 1 to 1 of 1. |

Edit Tactic
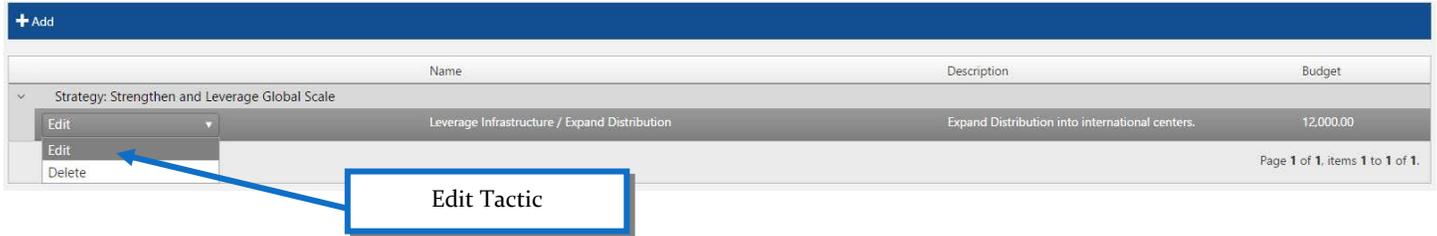
## Deleting Tactics

Deleting a tactic is also completed from the dropdown menu just to the left of the Tactic in the Manage Level 2 node of the Module Tools.



| + Add | | | |
|---|---|---|---|
| | Name | Description | Budget |
| ˅    Strategy: Strengthen and Leverage Global Scale | | | |
| Edit                              ▼ | Leverage Infrastructure / Expand Distribution | Expand Distribution into international centers. | 12,000.00 |
| Edit | | | |
| Delete | | | Page 1 of 1, items 1 to 1 of 1. |

Delete Tactic
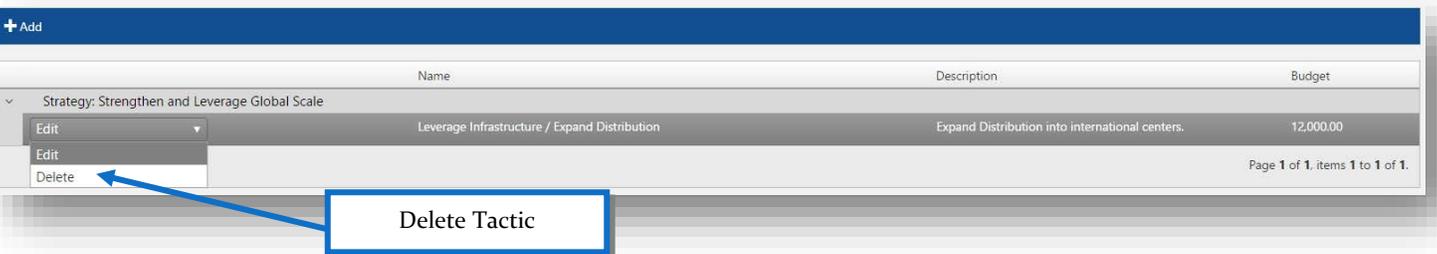
## Working with Strategic Planning Preferences

Managing the Preferences for Strategic Planning allows you to create a custom look for the island, as well as some custom labels for each of the main categories. For example, if your organization doesn't use the word "Tactic" or "Strategy", feel free to change it using the settings found below!
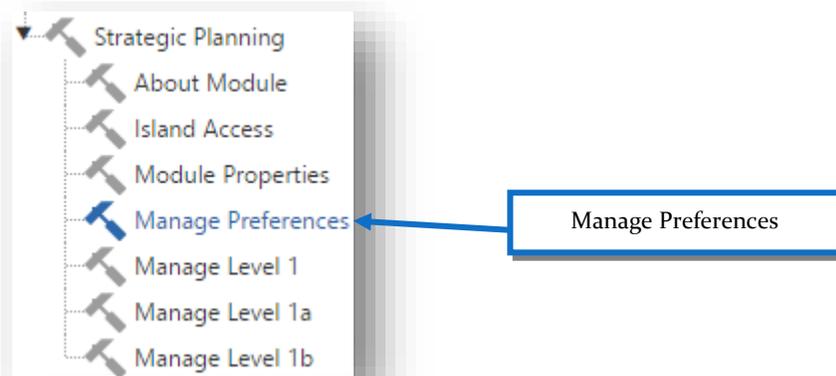


# Editing Strategic Module Labels

The first tab of the Manage Preferences tool allows you to change the displayed text on the Strategic Planning Island. Just type in the name of the new value into the text boxes shown below, and the island will reflect the changes. Just keep in mind that these settings are global, meaning that they'll affect all Strategic Planning Islands, and their categories.
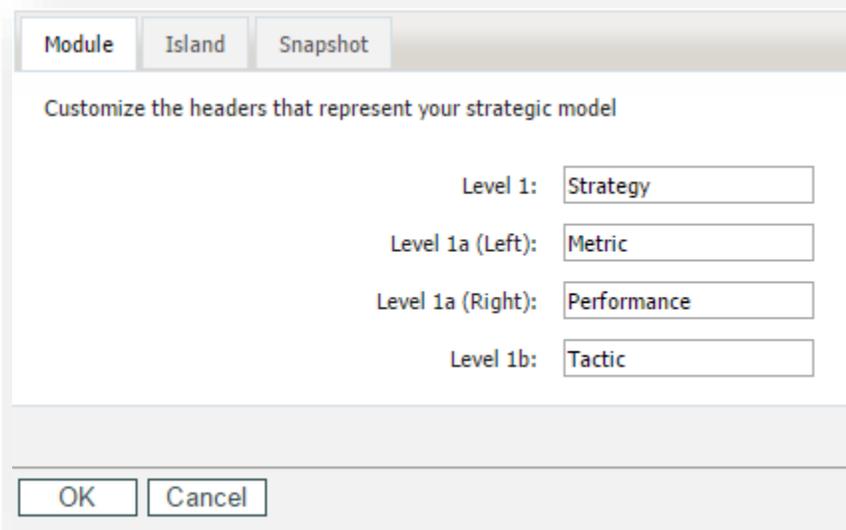
## Editing Island Preferences

The second tab in the Manage Preferences tool is where you will be able to change how parts of the Strategic Planning Island will display by default. Both the Strategies and Metrics can be expanded or collapsed by default, based on the settings chosen from this screen.
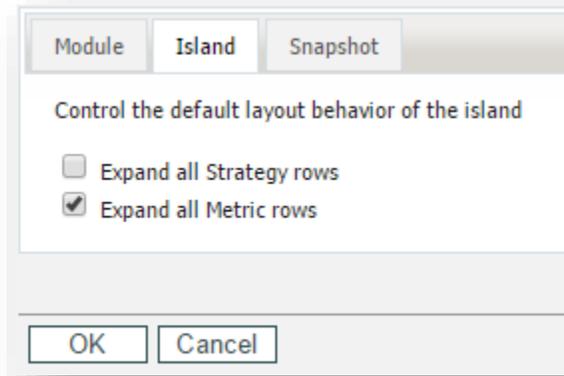


## Editing Snapshot Preferences

The final tab of the Module Preferences will assist with the layout of the Strategy Snapshots. On the Strategic Planning island, each Strategy can be delved into to display more details about that Strategy. The settings in the screenshot below assist in customizing that display.
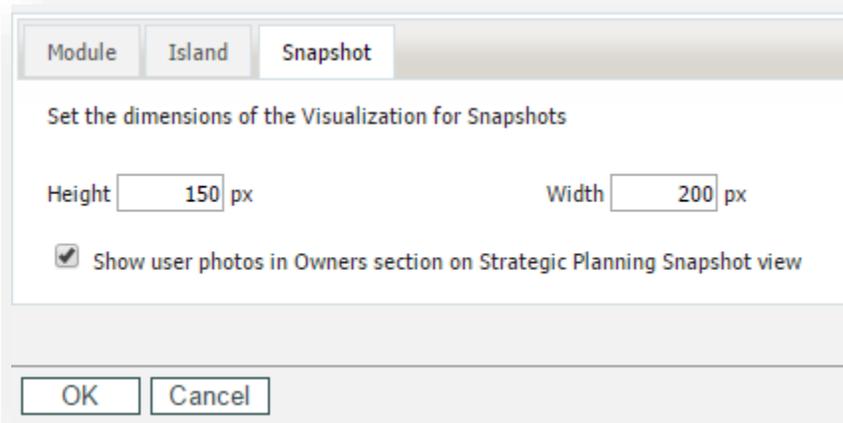
**Working with the Strategic Planning Island**

The Strategic Planning Island provides users with an easy way to view the organization's strategic goals and subsequent tactics and metrics. This island keeps the overall company goals transparent, so anyone who has access to view the Strategy can see its progress!



## Expanding and Collapsing All

Users can easily change their view of the island by selecting one of two available view options: Expand All, or Collapse All.



## Expand/Collapse Individual Objects

Users can easily expand individual Strategies and metrics by clicking on the expand and collapse arrows for each item.
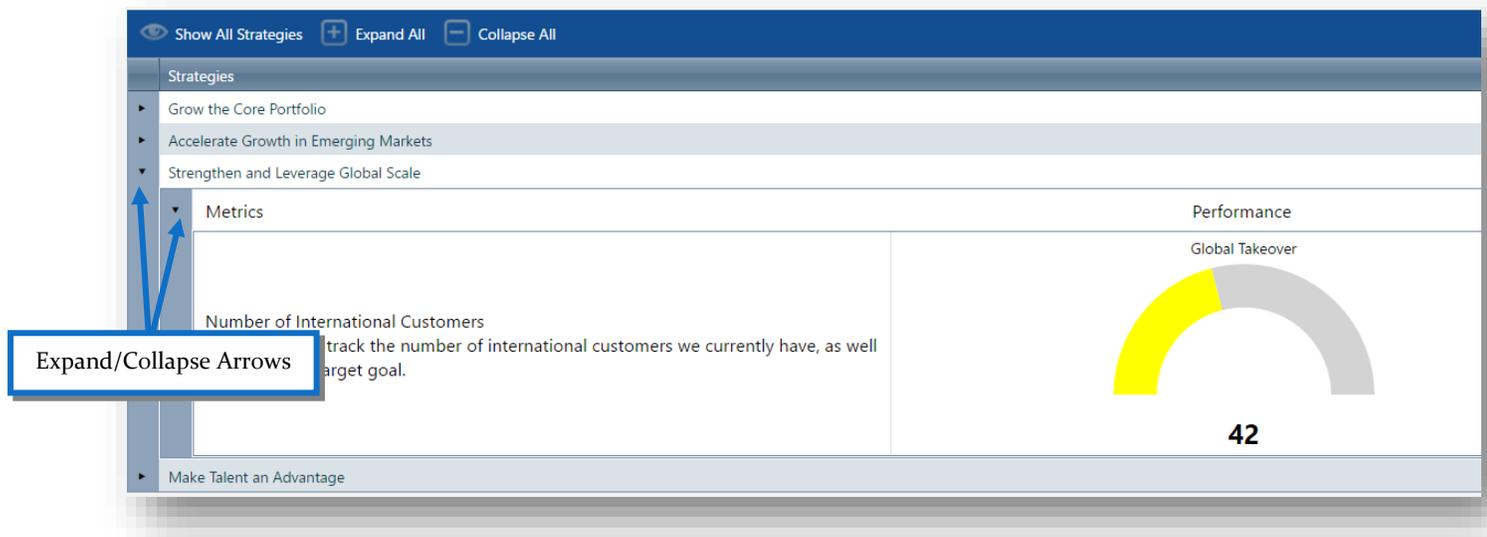
## Viewing a Strategy's Details

By clicking on the name of a strategy in the Strategic Planning island you can open that strategy's details.  This will show you the strategy's description, metrics, tactics, and owners.



See Strategy's Details

Strategy Details Page

**Take Note!**

Last Updated May 30, 2017