Strategy Blocks

Training Guides

1.0 | Technology Introduction & StrategyBlocks Walkthrough

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What is StrategyBlocks?

A StrategyBlocks model is an online collaborative strategic business plan.

Hosted in the cloud the software platform is designed to help organizations deal with the challenges of strategic planning, portfolio and execution management. It is a highly graphical, live, strategic communication and monitoring system to help people stay aligned and involved in their company's strategy. The solution can allow stakeholders to track progress (outputs) linked to results (outcomes) and potential threats (risks) as they happen. Its aim is to turn strategic vision into operational success.

What does StrategyBlocks do?

StrategyBlocks works by linking qualitative delivery performance updates (outputs) and quantitative KPI data (outcomes), as well as, risk management to achieve enterprise-wide insight. The platform presents the company's strategic plan as an easily-digestible, visual representation of activity delivered through a series of cascading 'blocks'.
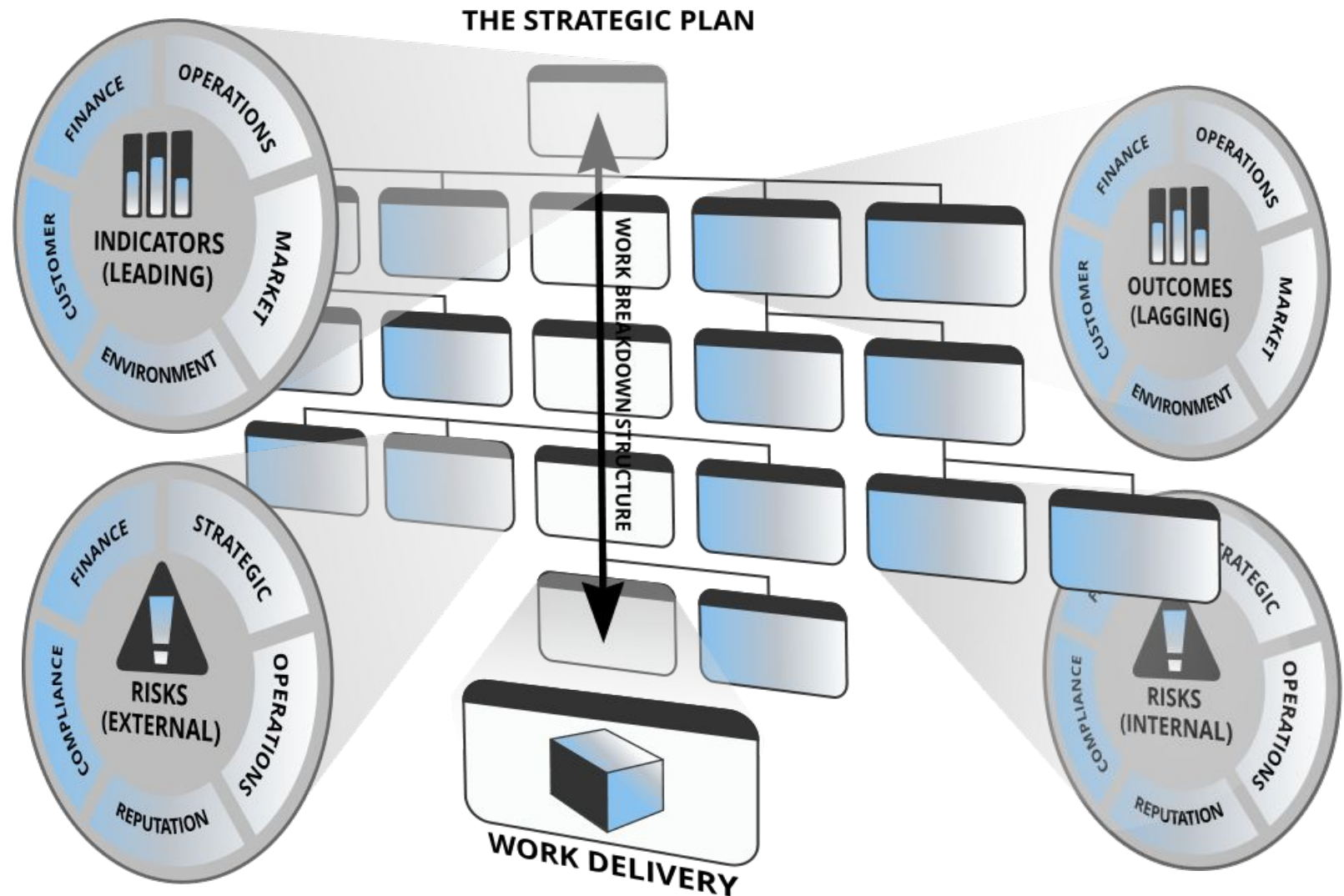
- A Block is used to describe Work Management, delivery (output) - key result areas, portfolios, projects etc., measured subjectively. It is the point where delivery, key indicators and risks meet.

- A Metric is a numeric value that needs to be monitored (an outcome), often known as a key performance indicator or measure. This is the discipline of Metrics Management.

- A Risk can be used to describe a strategic event that may affect the business, internal (failure to deliver) or external (outside of your control). Risk Management manages any form of threat to the plan.

How does it work

- Strategy Blocks are the building blocks of the strategic plan
- They are the point at which the 3 variables of strategic performance are linked
  > Work Management > Metrics Management > Risk Management

THE STRATEGIC PLAN

FINANCE · OPERATIONS · MARKET · ENVIRONMENT · CUSTOMER
INDICATORS (LEADING)

FINANCE · OPERATIONS · MARKET · ENVIRONMENT · CUSTOMER
OUTCOMES (LAGGING)

FINANCE · STRATEGIC · OPERATIONS · REPUTATION · COMPLIANCE
RISKS (EXTERNAL)

STRATEGIC · OPERATIONS · REPUTATION · COMPLIANCE
RISKS (INTERNAL)

WORK BREAKDOWN STRUCTURE

WORK DELIVERY

Definitions and terminology

DATA			METADATA	
Blocks	**Metrics**	**Risks**	**Focus Areas**	**Levels**
(subjective)	(structured)	(semi-structured)	Strategic	Work Breakdown
Things we do	Things we can measure	Things we need to consider	Grouping	Structure
Terms:	Terms:	Terms:	*Terms:*	*Terms:*
Actions	KPI's	Threats	Themes	Hierarchy
Key Result Areas	Indicators	Challenges	Perspectives	Granularity
Outputs	Lead & Lag	Exposures	Values	Framework
Work	Measures		Pillars	Cascade
Objectives	Outcomes		Categories	
Jobs to be done			Goal Areas	
Type:	Type:	Type:	*Type:*	*Type:*
Qualitative	Quantitative	Quantitative & Qualitative	Qualitative	Qualitative

Ribbon Menu

Navigation Menu

Options Menu

Thumb Menus
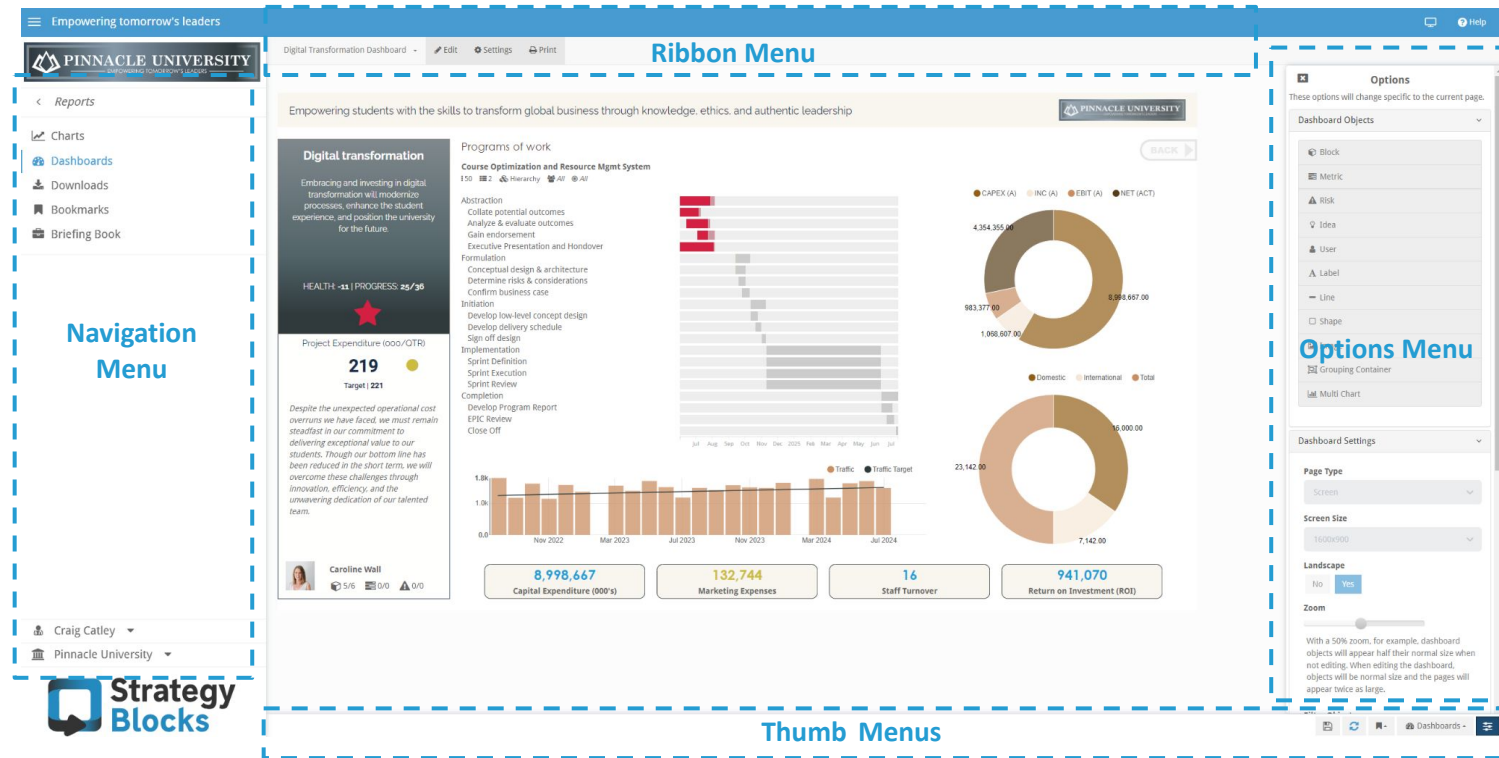
How does StrategyBlocks work?

StrategyBlocks' user interface has a straightforward simple layout. All user functionality is contained in only 6 menus on the left-hand navigation menu;

- **Home** - displaying a summary of assets relating to the system user

- **Strategy** - access to the 4 different strategy maps, and block utilities.

- **Reports** - access to dashboards and data downloads

- **Metrics** - a scorecard view off metrics (KPI's)

- **Risks** -a register of potential threats

- **Ideas** - an ideation sandpit for strategic planning

Additional detail can be reached through the top and bottom Ribbon and Thumb Menus, and the left-hand Options Menu which offers a range of filtering tools.

Strategy Blocks

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Homepage

Path: HOME

Upon logging in, users will land on the Homepage, the initial screen of the system. They can navigate through different objects in the system via the top ribbon, filtered to show only relevant items. Users can easily access their reports and favorite bookmarks, and perform various updates directly from the Homepage, including delivery completion progress, metrics review, and risk management. The right-hand pane features a prioritized list of action items and a news feed.
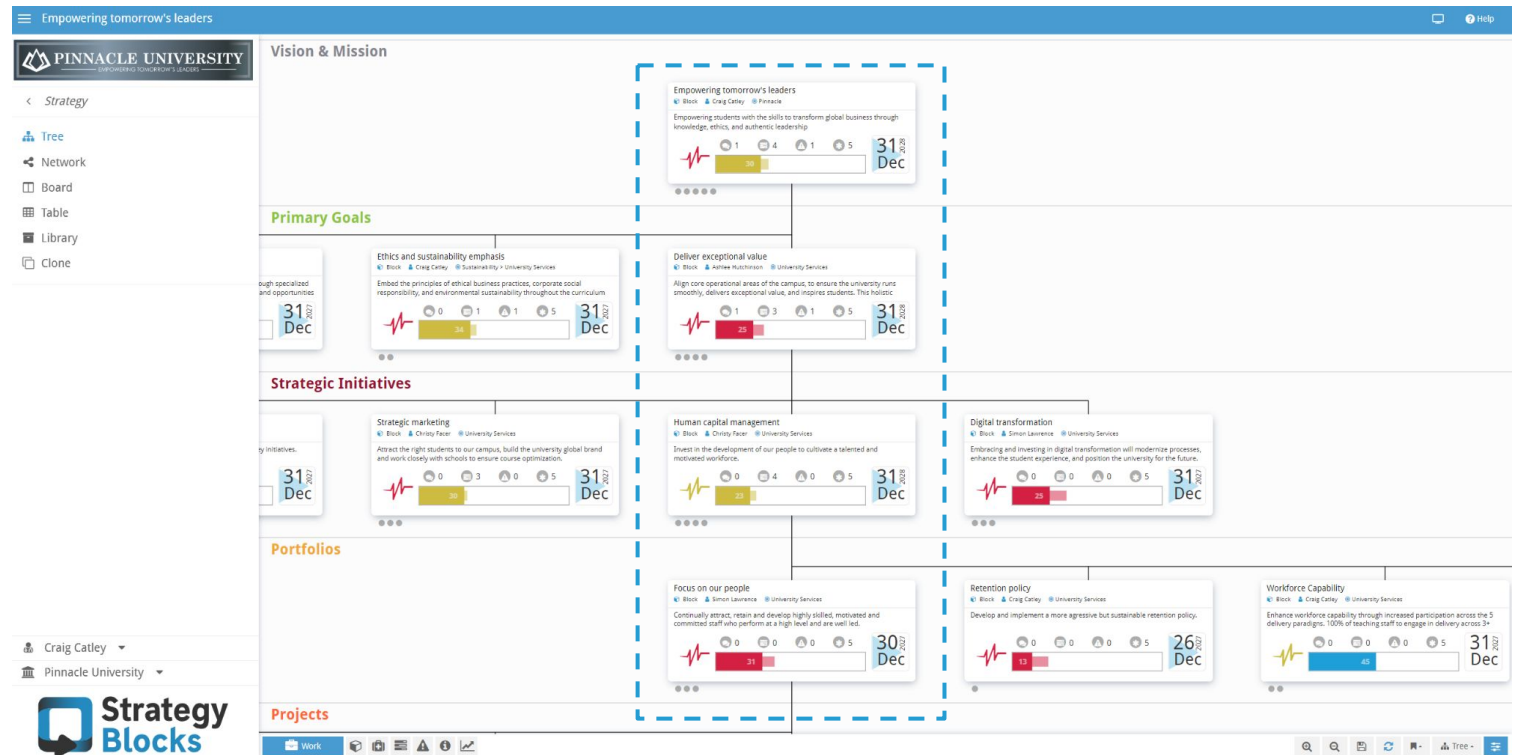
Blocks Tree

Path: STRATEGY > TREE

The strategic plan needs to be organized in a clear and logical way. All organizations consistently describe their strategic plan as a hierarchy. The Tree aligns the organization around vision top to bottom (macro) and bottom to top (micro). Every piece of strategic activity (work management output) must align with vision and is described in the context of a Block. It is also the primary operational interface for the management of the model.

Blocks Network

Path: STRATEGY > NETWORK

The Network (spray) diagram showcases all plan elements on a single page, with color coding indicating delivery status. Via the thumb menu options, users can adjust the layout (radial, horizontal, or vertical) and modify the nodes (circles, titles, blocks, or metrics). Upon selecting Metric, users can view the primary metric associated with that block or opt for a rollup of any cascading metrics being utilized. It is important to note that Cascading Metrics possess the distinctive feature of rolling up from the bottom to the top of the blocks hierarchy.

1.3

Strategy views

Blocks Board

Path: STRATEGY > BOARD

The Blocks Board (Kanban) offers a practical view of current work status and progress tracking of delivery. Blocks are categorized into columns (Not Started, Behind Target, In Range, Ahead of Target, Complete) based on their completion status and due dates. In addition to customizing the block face, users can utilize the Board Type option to switch between User and Block(s) views. The Leaf Blocks / All Blocks toggle enables users to switch between viewing all blocks and focusing solely on leaf blocks (which are blocks where progress can be updated).

Blocks Table

Path: STRATEGY > TABLE

The Blocks Table showcases all blocks in rows within an adaptable table format. The top ribbon menu includes a drop-down option to choose the number of rows displayed per page. By clicking on the Columns button, users can access a new page to personalize the columns visible in the table. The CSV button permits users to download the table as a CSV file. Utilizing Order By enables sorting the table by a non-visible column (ascending or descending). The thumb menu offers a zoom control for wider tables with numerous columns exceeding the screen width.

Blocks Library

Path: STRATEGY > LIBRARY

The Blocks Library serves as a repository for blocks and families of blocks that can be utilized as templates. These library items preserve their text content (titles, descriptions, etc.), milestone definitions, and the relative duration of each individual block. This feature enables the quick import and reuse of blocks. Block families can be exported to the library from block details (gear icon on the face of the block), and block structures can be imported from the Library into the block hierarchy.

Blocks Clone

Path: STRATEGY > CLONE

The Clone feature is beneficial for users who want to duplicate an existing block or block family. This can serve as a helpful starting point instead of creating a new block family from scratch. The Clone feature enables users to make search-and-replace bulk changes, expediting the block creation process.
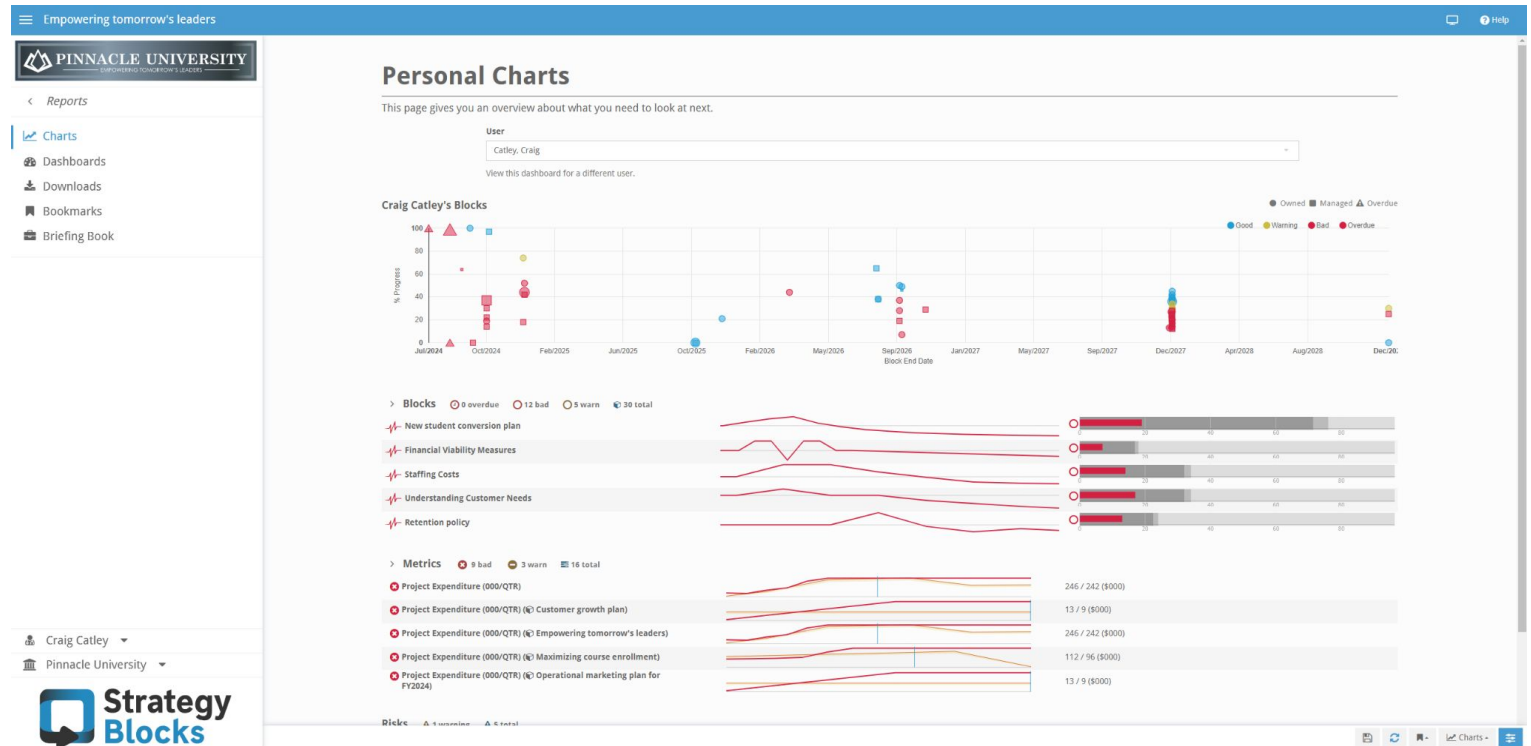
Personal Charts

Path: REPORTS > CHARTS

The Charts view offers a comprehensive summary of each system user's strategic activities related to their owned and managed assets, such as Blocks, Metrics, and Risks. Using a range of charts, it effectively presents and emphasizes the optimal utilization of an individual's efforts.

Reports

Path: REPORTS > DOWNLOADS

The Reports page allows for easy access to a range of reports and data sets that can be downloaded or emailed. These reports can be utilized in external reporting tools. Some reports are tailored to objects under your ownership or management, while others, like SQLite reports, are subject to access controls. The database download feature includes the complete model in SQL format. Metrics download offers a filterable KPI dataset. The User Actions Report enables the downloading of all actions performed by selected users, with optional filters for specific requirements.

Bookmarks

Path: REPORTS > BOOKMARKS

The Bookmarks section serves as a central hub for all your saved views. This feature enables StrategyBlocks users to quickly access their favorite views, automatically applying any previously applied filters. By selecting the edit option, users can share bookmarks with other users or groups, as well as clone bookmarks and assign ownership to another SB user.

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Briefing Book

Path: REPORTS > BRIEFING BOOK

The Briefing Book is a facility where you can gather a range of screens from throughout StrategyBlocks, and collate them into a series of static images. Use the magnifying glass button to review each view. You can also discard unwanted views using the trash can button.

Metrics

Path: MONITOR > METRICS

The Metrics scorecard feature enables effective monitoring and management of key financial and operational indicators (KPI's). It displays the performance of all indicators, with the option to expand each for a detailed chart showcasing historical data, future forecast and the ability to manually enter actuals if needed. Users can annotate data points to provide additional context on trends. The three metric types available include regular (standalone), calculated (derived from other metrics), and cascading (self-aggregating from bottom to top using the blocks hierarchy).

Risk

Path: MONITOR > RISKS

The Risk (or issues) register displays a list of potential threats to the plan. Each risk can be expanded to investigate mitigation steps and risk status. StrategyBlocks links Risks to the Health of activities. As the Health of a Block falls, two trigger gates can be setup to drive resolution. The first trigger automatically distributes pre-event mitigation steps to the risk owner and the second sends post-event response steps.

1.7

Ideas views

Ideas

Path: Ideas

StrategyBlocks Ideas is an intuitive, user-friendly strategic planning and ideation tool within StrategyBlocks that empowers all users to share, evaluate and actualize their ideas into the overall strategy. Whether it's a new project proposal, a departmental business plan, or a staff suggestion, Ideas facilitates the seamless integration from idea into strategy. The thumb menu offers 4 alternate views: Yours - ideas which you have created, Everyone's - ideas which have been set to public, Approvals - Ideas of which you are the approver, and Compare - which allows you to consider different Ideas prior to approval.

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Ideas views

Ideas

Path: Ideas > [selecting an Idea provides a range of choices on the Navigation Menu]

Overview - provides a high level summary of the Idea (and add comments). Details - edit the basic details of Ideas which you own. Outline - presents a list of the tasks that make up the idea. You can also import Block structures from the Block Library to use as the outline for your Idea. Sandbox - a visual space to mind-map the tasks that make up the idea. Timeline - facilitates task scheduling and accountability. Contention - shows the availability of resources proposed for each task.. Approvals - track the status of an approvals. Metrics, Risks, Documents - attach any supporting information. Delete - delete the Idea.

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