



Strategy Blocks

Training Guides

2.0

StrategyBlocks Author Role
Working with Blocks

2.0 | StrategyBlocks Author Role Working with Blocks

2.1
The block concept

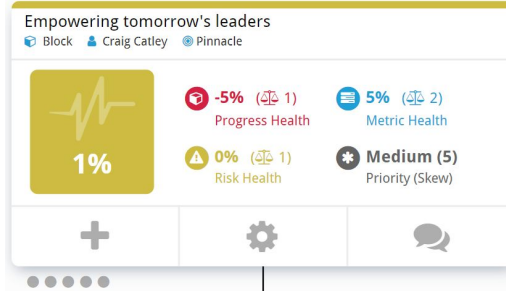
2.2
Block properties

2.3
Bulk Edit

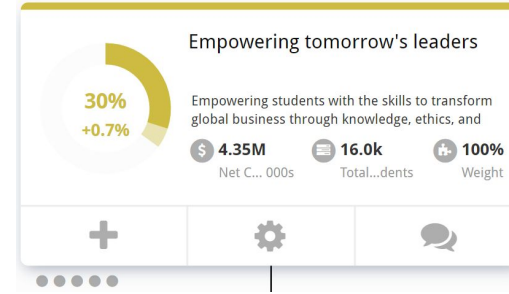
2.1

The block concept

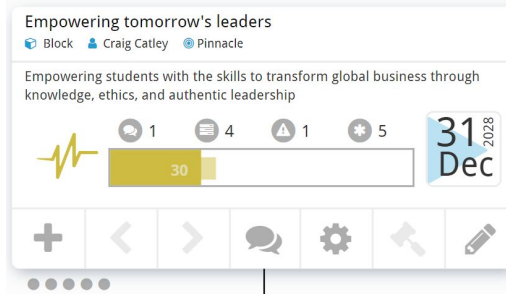
Health



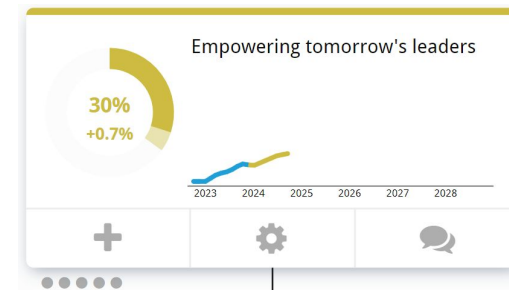
Overview



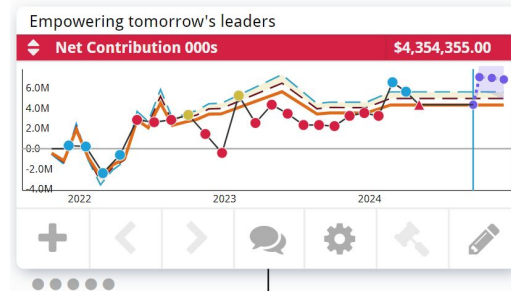
Work



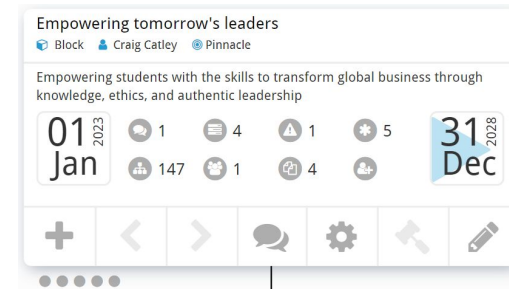
Delivery



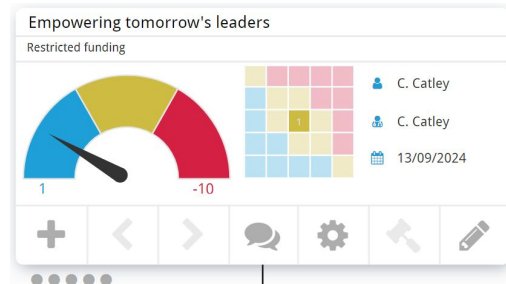
Metrics



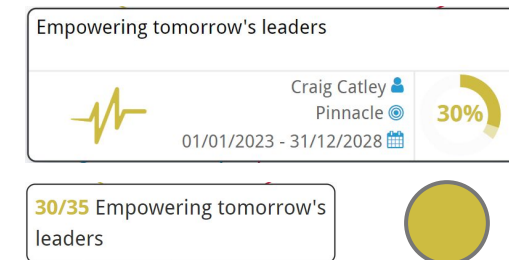
Information



Risk



Network Blocks



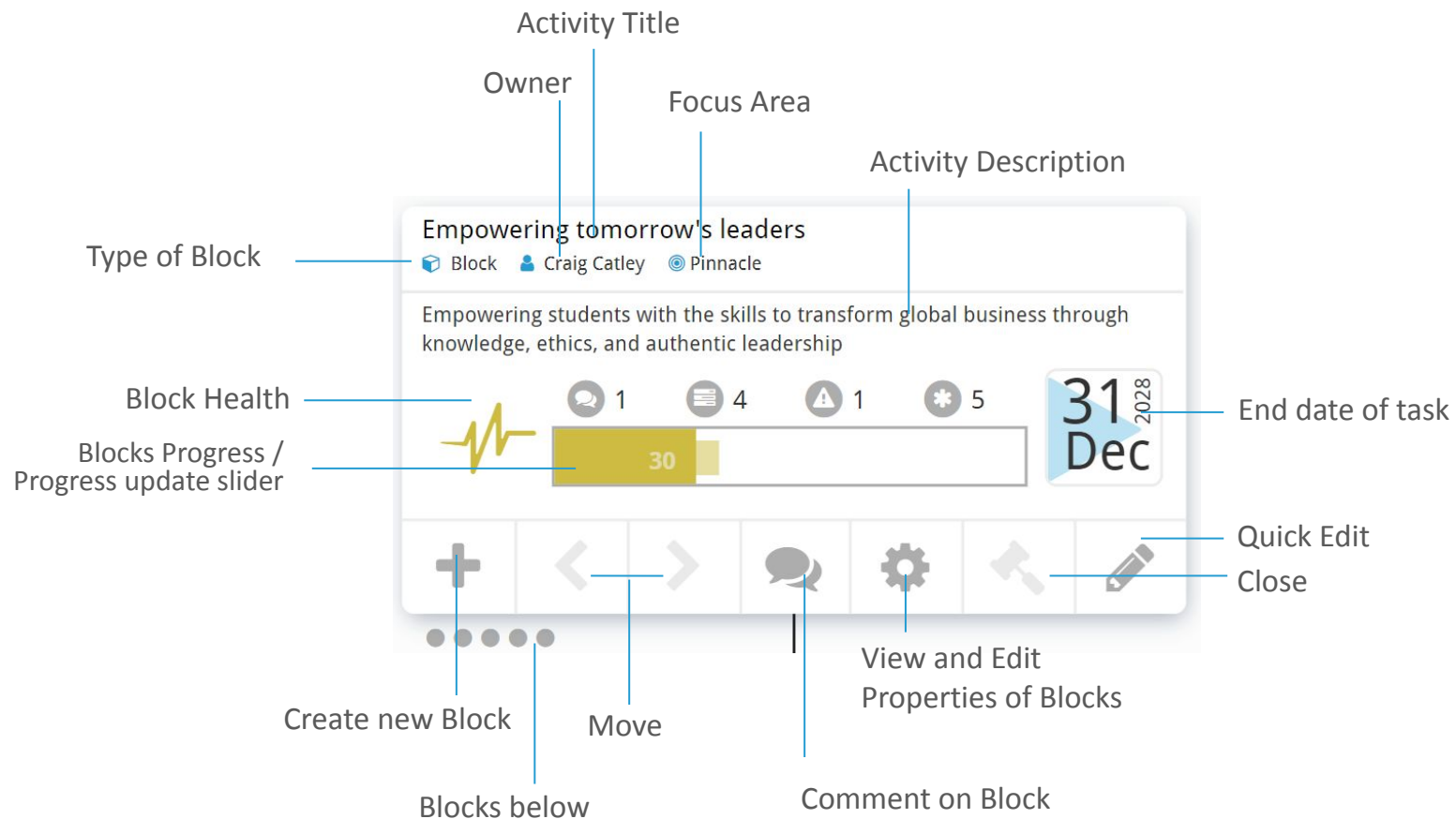
Original Block
Stand alone task.

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.

2.1

The block concept



of Comments



of Impacting Risks



of Attached Metrics



Level of Task Priority

2.1

The block concept

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.

Block Health



Factors that a company may choose that makes up the health of that task.

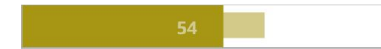
Assigned **metrics** and **risks** that roll up to create the health of task.

Start & End Date



Adjustable start and end dates.
Reflects progress bar progression.

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.

















Quick Edit

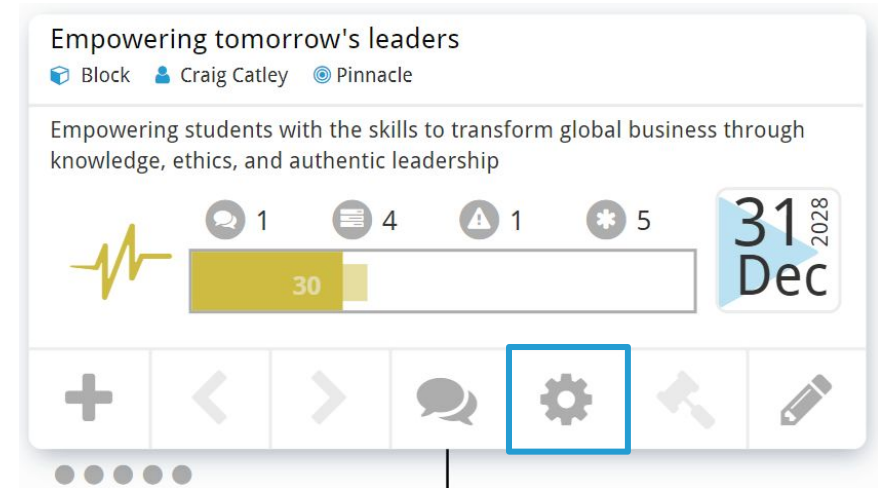


Allows for **quick editing** of basic details such as task title, description, owner, focus areas, start and end date and progress bar (if applicable).

2.1

The block concept

- 1 |  Overview
- 2 |  Details
- 3 |  Manage
- 4 |  Progress & Milestones
- 5 |  Dependencies
- 6 |  Metrics
- 7 |  Risks
- 8 |  People
- 9 |  Comments
- 10 |  Documents
- 11 |  Groups
- 12 |  Tags
- 13 |  Export
- 14 |  Report
- 15 |  Shift
- 16 |  Delete



Navigation

Here you can manage all the different attributes surrounding/within that specific Block. The gear icon takes you to the navigation tabs of that single Block.

If you wish to have an entire overview of every Block e.g. Risk or Progress at the same time, select a [Block type](#) located at the bottom of your screen (thumb menu)

Overview (1)

The overview shows the rollup of the Blocks attributes displaying:

- Current Status
- Related Blocks
- Progress History
- Health Details
- Activity

Actual: 30

Target: 35

Due: in 4 years (31/12/2028)

1565 days remaining. **35%** expected.

Health Details

- 7%** Total Health Variance
- 12%** Block Progress Variance (📉 1)
- 20%** Total Metrics Variance (📈 2)
- 100%** Capital Expenditure (000's)
- 14%** Fixed Costs
- 30%** Market Share
- 2%** Net Sales (000's)
- 0%** Total Risks Contribution (📉 1)
- 0%** Retail pricing pressure

Your company may choose the factors they believe make up a healthy task execution. These factors have a combined impact on task health.

2.2

Block Properties

Details (2)

Details gives the **Manager** (or the Owner) the ability to edit the blocks properties, including:

- Title and Description
- Dates (auto-extend)
- Ownership
- Focus Area (and overwrite)
- Priority (1 low, 10 high)
- Days of Effort
- Custom Fields
- Health Calculation
- Milestone definition

A screenshot of a web form element labeled "Priority". It consists of a text input field with a minus sign on the left and a plus sign on the right. The number "5" is entered in the center of the field.

You can set the level of Priority that a particular task sits at in terms of your strategy.

A screenshot of a web form element labeled "Overwrite Descendant Focus Areas". It features two radio buttons: "No" (which is selected and highlighted in orange) and "Yes".

The parent Block can control whether the Focus Area is to be automatically inherited by its children.

2.2

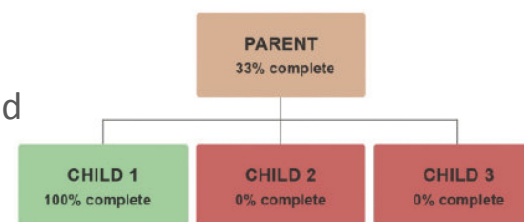
Block Properties

Manage - Creating a new Block (3)

When deciding on how you would like your task to be carried out you may ask yourself:

“Do I want to carry out the action through a single Block alone or delegate it to other people and further Blocks to make the activity more granular?”.

Delegating your activity into smaller sub tasks would allow for others within the organization to be part of the execution process. These individuals would now become owners of their assigned Blocks, taking over **responsibility for delivery** and contributing to the delivery of the parent.



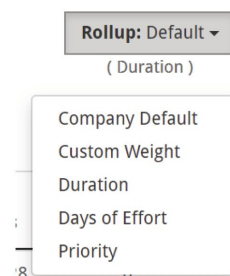
There are a number of ways to roll up progress for a family of blocks, as some blocks may require more effort or have greater strategic significance.

Path: from the drop-down select a rollup method

either: the company default

or: progress can be weighted by

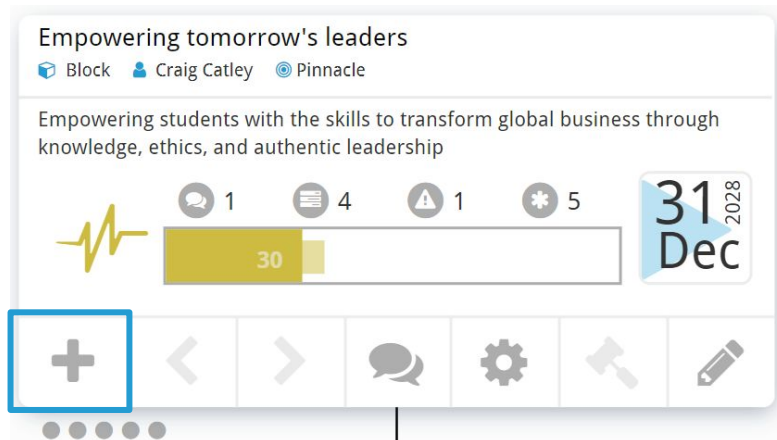
- custom value (custom weight > weight value)
- block duration (number of days from start to end date)
- days of effort (number of days from start to end date)
- priority (priority > priority value)



2.2

Block Properties

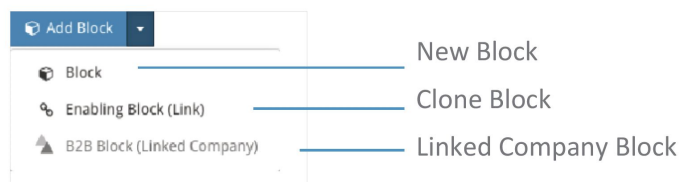
Manage - Creating a new Block (3)



Growing your organization's strategy, which will most likely encompass more strategic levels, will mean that more children Blocks need to be created. To create more children Blocks from your parent Block:

Select the + symbol > Add Block or New Idea.

Note: before clicking on Add Block, click the **drop down arrow**. This will provide you with 3 options for Block types.



This feature allows for you to adjust the degree of weighting that you want this Block to have within your strategy.

2.2

Block Properties

Manage - Creating a new Block (3)

After selecting a new Block, you can edit the details of that Block under the manage navigation tab.

The attributes that already exists such as Dates and Focus Areas are default options, therefore, can be edited to your choosing.

The quick edit option, allows progress to be updated, and also lets you edit the information that is circled in a small dotted border (pictured below) including the Date.

Interdisciplinary structured curriculum

Block Simon Lawrence Schools & Centers of Learning

Develop an integrated curriculum that bridges business studies and the arts, fostering a holistic understanding of the complexities of the modern

0 2 0 5

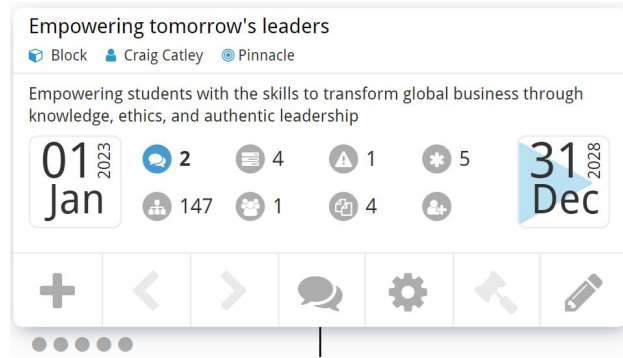
10 34

31 Dec 2027

2.2

Block Properties

Manage - Creating a new Block (3)

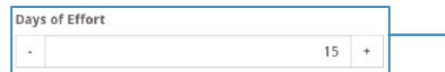


Understanding start and end dates

The start and end dates of a block must be within, or equal to, the start and end dates of that blocks Parent.



This feature allows for task end dates to be flexible. A child Block's end date cannot be extended past its parents Block end date without this feature being switched on.



The number of Days of Effort you believe the task will need to complete.

Manage - Creating a new Block (3)

Additional custom fields

Custom Fields are a facility to enable the customization of blocks, metrics and risks. They can be used to capture specific information relevant to a block.

There are several fields types available:

- Text
- Number
- Date
- Selection List

Once created, they can be added as columns to display in the table view. Numeric fields can also be used in custom dashboards to create block bubble charts.

Text fields, can be formatted and displayed in Custom Dashboards using the HTML block type.

The screenshot displays a configuration form for a block with the following sections and fields:

- Project Code:** A dropdown menu with the text "Select one".
- Initial Assumptions:** A rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, list, and text color. The text area contains the red text: "This text can be formatted for later use in Custom Dashboards!".
- Department:** A dropdown menu with the text "Customer Services".
- Cost Centre:** A dropdown menu with the text "CC2000".
- Approval Year:** A dropdown menu with the text "Pick one".
- Corporate Value:** A numeric input field with a minus sign on the left, the number "5" in the center, and a plus sign on the right.
- Strategic Assumptions:** A text input field with the placeholder text "< please enter >".
- Ability to Execute:** A numeric input field with a minus sign on the left, the number "5" in the center, and a plus sign on the right.
- Time Horizon:** A numeric input field with a minus sign on the left, the number "2" in the center, and a plus sign on the right.

Manage - Creating an Enabling Block (3)

There will be times when a block is “enabling” the execution of multiple strategies. Therefore a block may have 2 or more parents.

> from the drop-down select an existing block

> choose how it will rollup

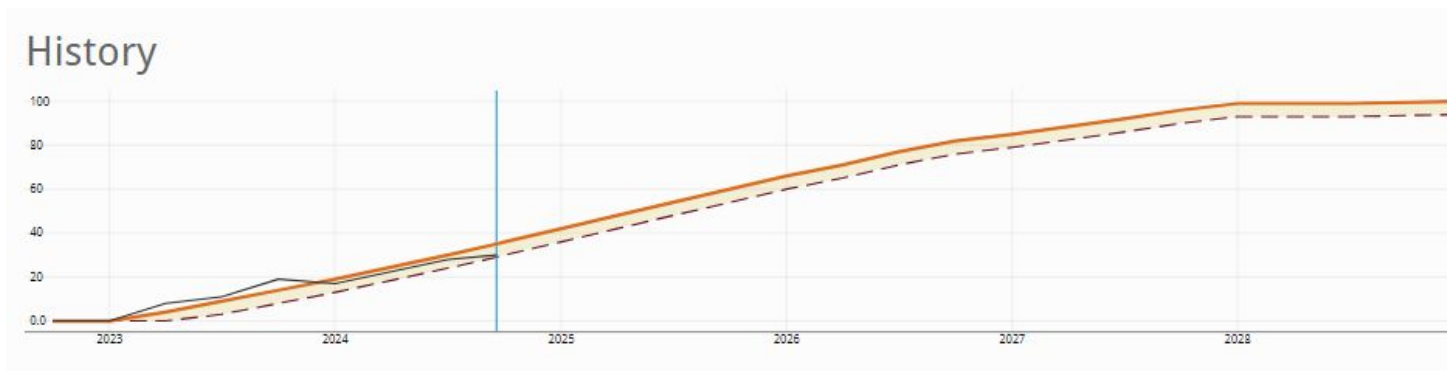
either: the company default

or:
progress will not be counted (no linked rollup)
progress will be allocated evenly (no duplicates)
progress will be double counted (normal)

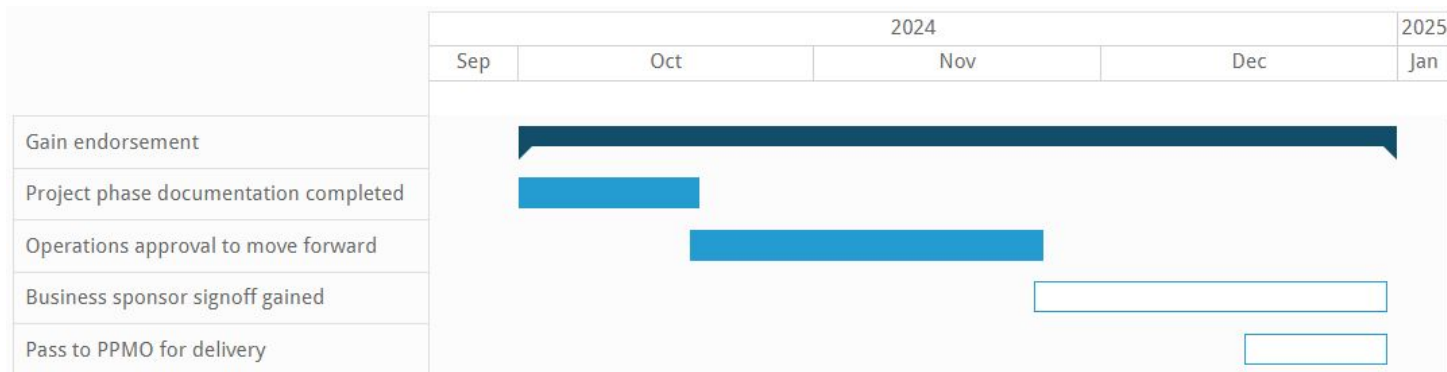
The screenshot shows a mobile-style interface for a course block. At the top, the title is "Course Optimization and Resource Mgmt System". Below the title, there are three icons: a link icon, a user icon for "Tim Everitt", and a location icon for "University Services". The main text area contains the description: "The course enrollments system will give the marketing department visibility into the enrollment interest by subject/class in real-time. This will allow them". Below the text, there is a progress bar with a yellow lightning bolt icon on the left and a blue bar showing "32". To the right of the progress bar are four circular icons with numbers: a speech bubble with "0", a list icon with "3", a warning triangle with "0", and a star with "5". Further right is a date widget showing "01 Nov 2025". At the bottom, there is a navigation bar with icons for adding (+), navigating (left and right arrows), messaging (speech bubble), settings (gear), a hammer, and editing (pencil). Below the navigation bar are five dots, with the first one filled, indicating the current slide in a sequence.

“Enabling Blocks are effectively clones of an original master block.”

Progress & Milestones (4)



Progress History (%) shows the accumulation of each individual progress update throughout the lifespan of the activity made by the Owner.



Progress delivery can either be recorded as a %, or be structured around a series of milestone steps.



Progress updates can only be made at the bottom level of the hierarchy (leaf Blocks), therefore, the image above is either an accumulation of a single Blocks task progress or the rollup of its children tasks which helps complete that Blocks task.

2.2

Block Properties

Progress & Milestones (4)

There are 2 methods of collecting delivery confidence data directly from the face of the block; the slider and milestones. The progress slider is the quickest way to capture delivery confidence (progress).

- ★ Putting the block into an editable state using the Quick Edit button, turns the progress bar into a slider. The block Owner can present the blocks current level of delivery progress.

To complete the progress report the Owner will be asked to add some commentary (this is not mandatory).

- ★ Progress automatically rolls up the block tree to reflect enterprise wide delivery.

Teaching and Learning Capability

Block Sajitha Parveen Schools & Centers of Learning

Support and further enhance key aspects of teaching and learning capabilities. thorough engagement with BEIT Team and PD activities

38 0 0 0 5 21 Aug 2026

Gain endorsement

Block Tim Everitt University Services

Agree final outcomes and sign-off with endorsement to move forward.

01 Oct 2024 6 0 30%: Business sponsor signoff gained 31 Dec 2024

60

Progress & Milestones (4)

The owner of the block can choose whether they want progress to be displayed using a normal progress bar or a milestone progress bar.

When to use milestones.....

- When the same person is doing all the sub-tasks
- When the same tasks are repeated often and never change (a standard process)
- When the tasks cannot be decomposed further
- When progress is either completed or not completed, there is no 50% through

If you go to: [Company Settings > Milestones > Add Milestones](#), you can create a Milestone that fits best within your strategy and apply it to any Blocks you wish.

Authors have the ability to customise and localise Milestone Definition



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's progress.



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

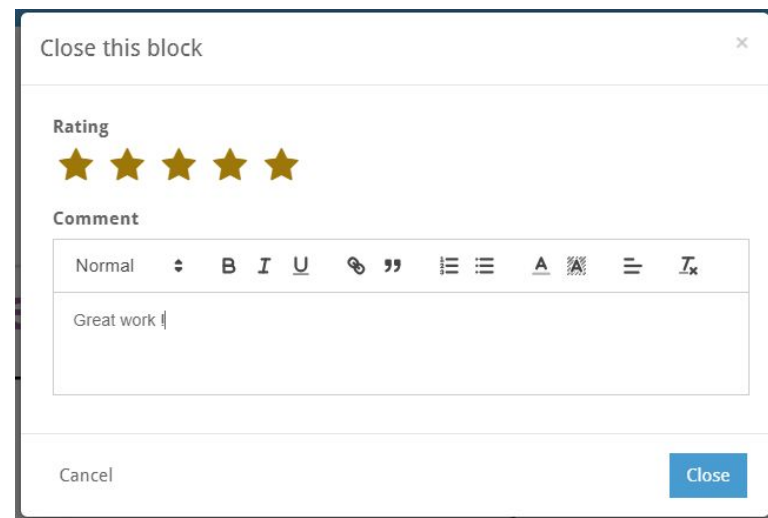
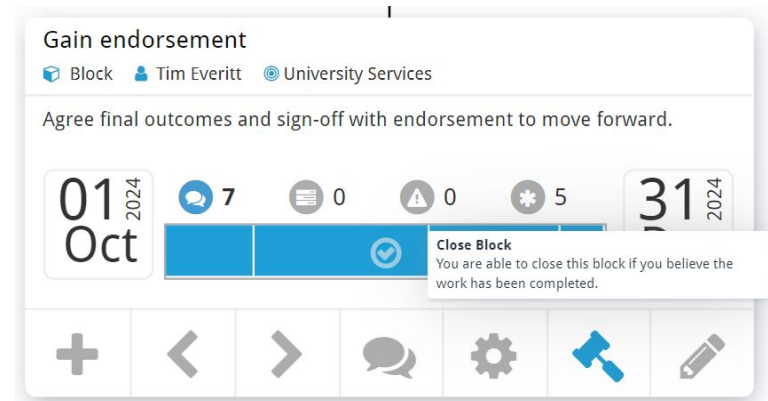
Progress & Milestones (4)

Once a block has reached 100% completion or by completing all the milestones, the block will change to display a close button. Responsibility for closing the block is now passed to the block Manager.

The star rating is used by the Manager to rate the success by which the block was completed.

- > click the gavel button to close the block
- > select the number of stars
- > enter a final progress report (optional)

- ★ Once a block is closed it can be reopened from the [block details](#) > [progress screen](#) (the gear icon on the block).



2.2

Block Properties

Dependencies (5)

The start date of one block can be linked to the completion date of another block (or blocks). So a sequential series of project activities can be dependent on each other.

Dependent blocks affected by delivery slippage will not be compressed, so the parents of dependent blocks are required to be set with an auto-extend end date, this will ensure block duration is preserved.

PROPERTIES > DEPENDENCIES

The screenshot displays the 'Phases' section of the Strategy Blocks software. Two blocks are visible: 'Abstraction' and 'Formulation'. The 'Abstraction' block is scheduled to end on 31 Dec 2024. The 'Formulation' block is scheduled to start on 01 Jan 2025 and end on 29 Jan 2025. A tooltip for the 'Formulation' block shows its dependencies, listing 'Abstraction' as a dependency with a completion date of 31/12/2024. The tooltip also indicates that the floating end date (auto-extend) is disabled.

Phases

Abstraction
Block Allen Keyte University Services
Description of the concept/idea, explaining the potential benefits and outcomes.
0 0 0 5 31 Dec 2024

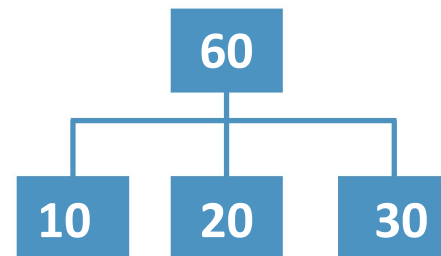
Formulation
Block Abi Davidson Unk
Create the conceptual design and
01 Jan 2025 29 Jan 2025
30 Jan 2025

Start: 01/01/2025 (in 3 months)
End: 29/01/2025 (in 4 months)
Floating end date (auto-extend) is: disabled.
Dependencies: This block's dates depend on the following blocks being closed on schedule:
• (31/12/2024) Abstraction

Metrics (6)

These are Metrics (KPI's) that are attached to an individual Block. These Metrics help contribute to the health of this Block and can be viewed separately by clicking on [Select a Metric](#). However, you must have existing Metrics in place.

- Clicking Add Metrics, only allows for pre-existing Metrics to be added to that Block.
- To add an entirely new Metric, on the Navigation screen, [Metrics > + New](#).



Cascading Metric

StrategyBlocks finds that organizations use a large amount of metrics to ultimately measure the same thing. A cascading metric is like a normal metric, except that each block can contribute with its own actuals and targets. These values are then rolled up through the Blocks tree to the root Block (parent Block).

When creating a new Metric, you are in charge of entering in the details of that Metric. Data such as Actual vs Target values can either be entered in manually or generated through the calculator option.

Risks (7)

These are Risks that are attached to an individual Block. These risks help contribute to the health of this Block.

- Clicking Attach Risks, only allows for pre-existing Risks to be added to that Block
- To add an entirely new Risks, on the Navigation screen, [Risks > + New](#)
- Risks impacting a block affect the blocks overall health
- Risks driven by a block are affected by the blocks health



Risks Impacting this Block

Risks that are impacting blocks can affect the block's health when that risk is triggered. If you are the manager of this block, you can add risks as impacts.

	Risk	Status	Health	Potential Health	
	Restricted funding	Inactive	1	-10	

Attach Risks

Risks Driven by this Block

When a risk is driven by a block, the block's health can cause the risk to enter a warning or triggered state. You can make the current block a driver for any risk you manage.

Risk	Driver Effect	Warning Health	Trigger Health	
Undergraduate admission	Inactive	- -10 +	- -20 +	

Attach Risks

People (8)

There may be others in the organization that will, or that you will want to keep informed about a block; its progress and updates. Those colleagues will become block watchers.

- > from the block, click the properties
- > select people
- > select the users you wish to add (or remove)
- > invite
- > or watch the block yourself

★ Updates regarding watched blocks will be emailed and appear in that users news feed, through their home page and the block details screen.

Users

Select users from the left to invite them to watch this. It will be added to their watchlist, and they will receive an email notification. When you are a watcher, you will get status updates.

Filter		Filter
Lawrence, Simon	»	Catley, Craig
Keyte, Allen	>	Everitt, Tim
Hutchinson, Ashlee	<	
Wall, Caroline	«	
Parveen, Sajitha		
Facer, Christy		

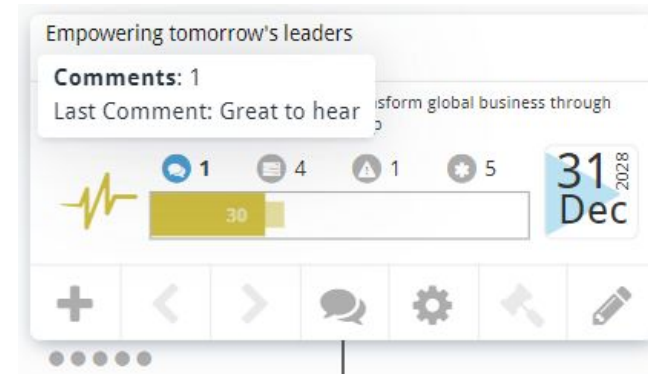
Cancel **Invite**

Comments (9)

Adding commentary to a block, metric or risk is a convenient feature when sharing thoughts, updates and ideas with others.

With the addition of user mentions (starting with @) users 'mentioned' are alerted by email. The email notification has a link to the conversation and the object being discussed.

New comments are shown using the blue chat icon on the status block.



Comments

Hey @Simon-Lawrence#145 and @g lets discuss this block when you time

Craig-Catley#5
Glenn-Murphy#315
Paul-Gillespie#321
Daniel-Leong#840
Adele-Heritage#845

Cancel Send

Documents (10)

This feature allows for external documents to be uploaded, creating additional support for your company's strategy. These documents can include URL links or uploaded files.

Supporting Documents and Links

Upload documents or create external links to supporting information.





- **Documents**

Anyone who can see this page can download the attached documents. Files up to 10MB are supported.

- **Links**

Any link that your internet browser can open will work here, including private intranet links. Links do not contribute to AI Generations.

+ Add Files ▾

Title	Type	User	Updated	
Pinnacle Campus Image	File (PNG image, 1.21 MB)	Craig Catley	3 months ago	
Pinnacle Campus Dash Back	File (PNG image, 1000 KB)	Craig Catley	3 months ago	
Back Button	File (SVG, 1.96 KB)	Craig Catley	3 months ago	
Pinnacle Logo Ani	File (GIF image, 367 KB)	Craig Catley	2 months ago	

2.2

Block Properties

Groups (11)

This feature gives your company the option of making a specific Blocks (metrics or risks) visible to only a certain Group or can be made public to all those involved within the strategy.

Steering Committe	<input checked="" type="radio"/> No	<input type="radio"/> Yes
-------------------	-------------------------------------	---------------------------

Group may also include other Groups.

- ★ This option will be available once an Administrator has created the Group under the Company Settings.

Tags (12)

Tags

Tags are an unstructured way to label blocks for categorization and filtering. The **Tag Cloud** below shows all the tags being used in your company, with the largest tags being used most frequently. Select the tag to toggle in on / off for this block.



Tags

Reset

Save

Tags are user created keywords that help filter objects for the purposes of adhoc reporting. They are extremely flexible and can be searched and filtered using the following views:

Blocks views - blocks can be filtered to show only those with the requested tag.

Tags

Blocks Below: No Yes

Using “Blocks Below” will include all children of the selected block.

Blocks Table - in addition all tags can be displayed in the blocks table.

Export (13)

A family of blocks that could be reused in the future, can be exported to the Library. The blocks will retain the title, description and their duration. All other details will be removed.

- > select export
 - > enter a title and description (for the group of blocks)
 - > choose the type “library archive”
 - > select the number of levels of blocks
 - > export
-

Once exported a family of blocks can be reused repeatedly through the [Library](#). The blocks will be created underneath the current block and spread proportionally based on their duration and the parents duration.

- > from the main navigation select Block Library
- > select import
- > find the item from the list
- > alter the date range (if required) and Focus Area
- > import



Deleted blocks are automatically added to the Library

Report (14)

Provides a facility to download as CSV or HTML a report for the selected block and the chosen number of levels below. Columns include:

- Status & Health
- Level & Focus Area
- Ownership
- Due Date
- Progress performance

Block Report

Download or Email a CSV or HTML report for this block and its descendants.

- This block has 147 descendant blocks, some of which might not be visible to you.
- The descendant blocks are spread over 6 levels.

Levels

 - +

How many levels below the current block do you want to report on. If you want to export just this block and its children, this value would be 1

CSV

 No Yes

Comma Separated Value report

HTML

 No Yes

Printable Web Report (HTML)

Shift (15)

There are 2 scenarios where a block manager may want to manipulate a large number of blocks in a single pass rather than editing the properties of each individually. They may need to:

1. Shift a family of blocks to a new physical location in the tree
2. Shift a family of blocks in time, forwards or backwards

1. Physical shift

As the strategic plan evolves, sections of the plan may be need to shifted from one branch to another. Select a new target parent block for the currently selected

2. Time shift

There will be occasions when activities are reprioritized with the delivery dates amended accordingly. There are two options for changing dates:

Overwrite Dates: All the descendant blocks (including the currently selected block) will have their dates overwritten to the start and end dates set in the START DATE and END DATE fields.

Proportional Dates: All the descendant blocks will have their dates moved and adjusted proportionally to fit within the start and end dates set in the START DATE and END DATE fields.



The start and end date of highest block in the family to be relocated, must be within the start and end dates of the new target parent.

Delete (16)

There are several safeguards when deleting blocks.

1). Deleted blocks are automatically added to the Library - with current progress delivery and ownership details removed

2). Warnings will be provided articulating the consequences of the deletion

3). The system will detect an accidental or malicious deletion event, and will automatically trigger a complete Model backup sequence.

★ The Only Delete Children toggle, will Retain the selected block.

This block has 4 descendant blocks which will be deleted (some might not be visible to you).

Warning: Reported progress will be lost on 5 blocks.

Warning: 4 other users are involved with these blocks.

Blocks to be deleted

Level	Block	Owner	P/T	Metrics	Risks	Files
1.1.2.2	Student Satisfaction	Sophia Brook	39/45	0	0	0
1.1.2.2.1	Understanding Learner needs	You	50/45	0	0	0
1.1.2.2.2	Appropriate Teaching and Learning Strategies	You	28/45	0	0	0
1.1.2.2.2.1	Industry links	Caroline Wall	19/45	0	0	0
1.1.2.2.2.2	Student enrollments	You	37/45	0	0	0

Only Delete Children

No Yes

Keep the current block but delete all the children.

Clone

Often families of blocks can be very similar. An annual departmental plan for example, may be very similar to the plan from last year. It may act as a useful starting point for the coming planning period.

Path: main navigation > BLOCKS CLONE

- > Navigating through the hierarchy select a block(s) which you want to clone
- > Select CLONE
- > Complete a SEARCH & REPLACE to change in bulk i.e. 2019 for 2020
- > CLONE

The cloned blocks will appear under the currently selected block.

The screenshot shows a web interface titled "Blocks Clone". On the left is a vertical navigation menu with icons for home, search, and various block types. The main content area is titled "Select Blocks" and contains the following text: "Select the blocks you want to clone. You can filter this list using the Blocks Filters from the options menu (⚙️) on the right. Selected blocks will be cloned as sibling blocks under the same parent." Below this text are four buttons: "Clear Selection", "Select All", "Expand All", and "Collapse All". A "Clone" button is located at the top right of the list. The list itself is a tree structure:

- Growth through innovation and customer engagement
 - 1.2: Long-term growth and efficiency
 - 1.2.1: Utilize our expertise and innovation as a marketing tool
 - 1.2.1.3: Operational marketing plan

A "Clone" button is located at the bottom right of the selected block.



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