Strategy Blocks

Training Guides

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Working with Metrics

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Metrics Scorecard

The metrics scorecard is where quantitative data is loaded, entered and/or viewed, to monitor the organizations business outcomes. For example, this is where you can enter your actual financial performance, as compared to target, and then analyse the information graphically or textually.

All the Metrics (KPIs) are visible (given security access) on the metrics scorecard. The scorecard can be configured specifically to the requirements of each user (x26 columns, sort, order by and column widths).

As is the case with blocks, the Owner is responsible for updating actuals (only), and the Manager for the targets and all other properties.

Columns can be sorted based on value our text. Quick Find provides a rapid method of finding metrics.

The scorecard can be download directly to the desktop as a CSV.

	Metrics		☰ Rows (10) ▾	⊞ Columns	CSV			+ New

Type ▾	Strategic	Status	Metric Title	Owner	⊛ Focus Area	Actual	Target	Blocks
⛁	★	❌	Project expenditure	Craig Catley	Finance	$ 635,687	$ 429,490	17
⛁	★	❌	Projected resources	Craig Catley	HR	144.00 FTE's	149.00 FTE's	9
⛁	★	✅	Phases delivered	Craig Catley	Innovation	--	--	0
⛁	★	✅	project team	Craig Catley	All	--	--	0
⛁	★	✅	Earnings in (USD)	Craig Catley	Finance	$59.02	--	0
⛁	★	✅	Marketing Campaign Expenses	Craig Catley	Marketing	$ 4,990	$ 7,926	8
▦	★	❌	Orders filled (rate)	Craig Catley	All	24.33 %	27.41 %	1
▦	☆	❌	Employees per location (calc)	Craig Catley	Finance	20 staff	10 staff	0
▦	★	⊖	Sales less labour cost (calc)	Caroline Purre	Excellence	$ 84,977	$ 84,972	1
▦	☆	❌	Sale Value | Unit Sold (calc)	Craig Catley	Excellence	$ 25.02	$ 28.33	0

Quick Find:				Previous	1	2	3	4	5	...	10	Next

Metric Types

There are 3 different types of metrics available within StrategyBlocks:

1. Regular (standalone)

A regular metric is the simplest type of metric. There is no value in aggregating it, it is completely standalone. Examples include; survey results, site traffic, percentages, or counts.
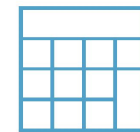
2. Cascading (self aggregating)

Each cascading metric is associated with every block. Each block can contribute its own actual and target values to the parent block. Values are, therefore, "rolled up" up the blocks tree hierarchy to a set level. Examples include: revenue, FTE's, costs, customer count.
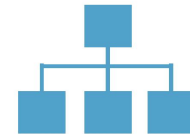
3. Calculated

A calculated metric is derived from 1 or more other metrics either Regular or Cascading and other variables. Examples include: financial ratios, operational ratios, averages.

Metric Types

Metric Type	Standard	Calculated	Cascading
Icon	👤	🧮	🗂
Features:			
Secure Access	o	o	o
Interpolated Values (best fit)	o	o	o
Cumulative Values	o	o	o
Annotations	o	o	o
Link to Plan	o	o	o
Manual Entry	o		o
Arithmetic Calculations		o	o
Spreadsheet integration	o	o	o
Automatic Upload	o	o	o
Automatic Roll-Up			o

1   ☰ Overview

2   ⚙ Details

3   # Actuals

4   📍 Targets

5   📦 Attached Blocks

6   👥 People

7   💬 Comments

8   📄 Documents

9   👜 Groups

10   🗐 Clone

11   🗑 Delete

Metric Title	Type	Strategic	Status
Training Days / Employee (AVG)	👤	☆	❌
Total Students	🔢	★	✔
Total International Students	👤	★	✔
Total Domestic Students	👤	★	➖
Total Current Assets	👤	☆	❌
Surplus after tax	👤	☆	✔
Staff Turnover	👤	☆	✔
Scholarships won	👤	★	❌
Return on Marketing Investment (ROMI)	👤	☆	✔
Return on Investment (ROI)	👤	☆	✔

Navigation

Here you can manage all the different attributes surrounding/within that specific Metric. Double clicking a metric takes you to the menu options of that metric.

Strategy Blocks

Overview (1)

The overview shows a complete history of actual versus target over the life of the metric in the form of a line chart and table.

- Trend Forecast
- Chart History
- Progress History
- Actual and Target updates
- Activity
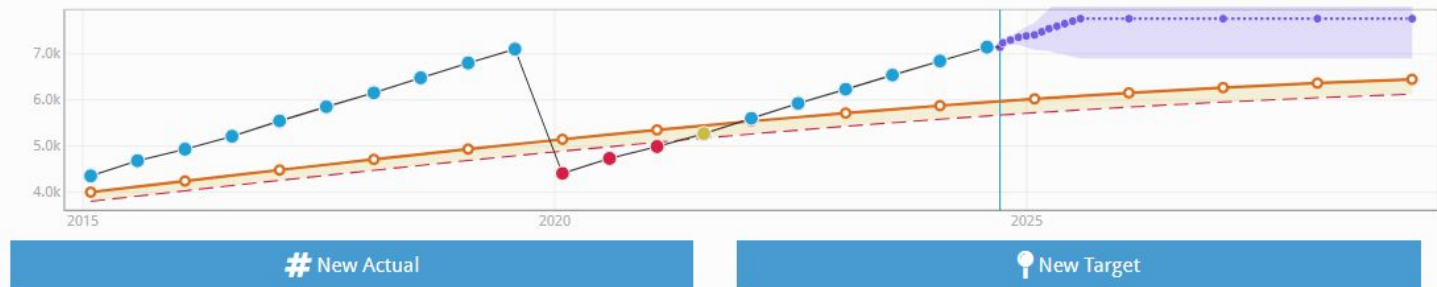
From the Overview metric owners can post a new actual, and managers may post a new or revised target.

Details (2)

Details gives the Manager (or the Owner with rights) the ability to edit the metrics properties, including:

- Title and Description
- Dates (auto-extend)
- Ownership
- Focus Area (and overwrite)
- Strategic flag
- Auto forecasting
- Interpolation (estimating values, smoothing)
- Cumulative (addition of past values)
- Precision (decimal points)
- Units (unit of measure) and Prefix
- Tolerance Start and End (describes when the metric is in a warning state) and % or integer
- Invert tolerance

Add Actuals and Targets (3,4)

There are a number of ways to add values:

1. From the Overview screen (individual values)

2. Manual Actuals and Targets table (multiple values)

3. Edit as CSV (bulk upload)

4. Automated through Metrics Zone daily upload

Attached Blocks (5)

Shows all the blocks this metric is attached to.

Path: METRICS > ATTACHED BLOCKS > ADD BLOCKS

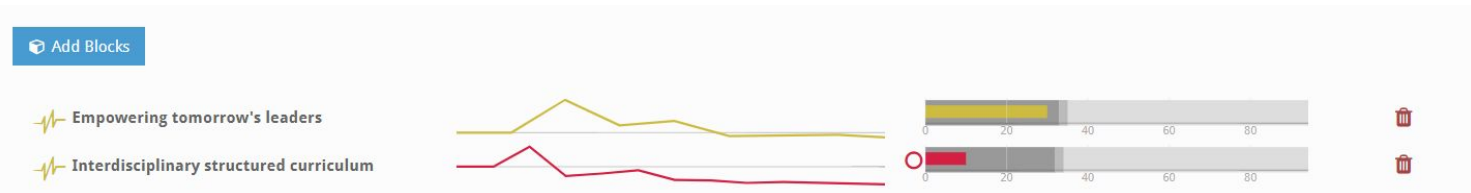★ Consider what is the outcome of the attached blocks

Attached Blocks (5)

Attaching a metric to a block affects the block's health and allows you see the metric in the context of your strategy. It is the process that links the output of the organization described in the context of a block, with the outcome described in the metric.

Option 1 - from the metric

Path: METRICS > select metric > ATTACH BLOCKS > ADD BLOCKS

Option 2 - from the block

Path: BLOCKS TREE > select metric > select block properties > METRICS

The Block Metrics table allows the user to order the metrics for viewing from the block. The metrics in position 1 and 2 are used as the primary metrics to be displayed on the Overview block face.

1	☑	**Capital Expenditure (000's)**: Total expendature (CAPEX)
2	☑	**Net Contribution	Net Sales**
3	☑	**Net Contribution**: Net contribution (Finance)
4	☑	**Project expenditure**: This metric will roll up the investment made in each strategic initiative.
5	☑	**% of Budget Cuts Achieved**: Percentage of budget cuts achieved (measured in money) versus budget cuts planned (measured in money).
	☐	**Earnings in (USD)**
	☐	**Marketing Campaign Expenses**: An aggregation of all expenses relating to all marketing campaigns
	☐	**Phases delivered**: Total aggregated count of all sprints delivered over all EPICs.

People (6)

Select other users to watch the selected metric. It will be added to their watchlist, and they will receive an email notification. When you are a watcher, you will get status updates.

Drag users from left to right to add.

NB: Administrators can see into all Metrics

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

Comments (7)

View / delete / add comments on the metric.

Comments can be added to the metric and/or specific data points which the metric own
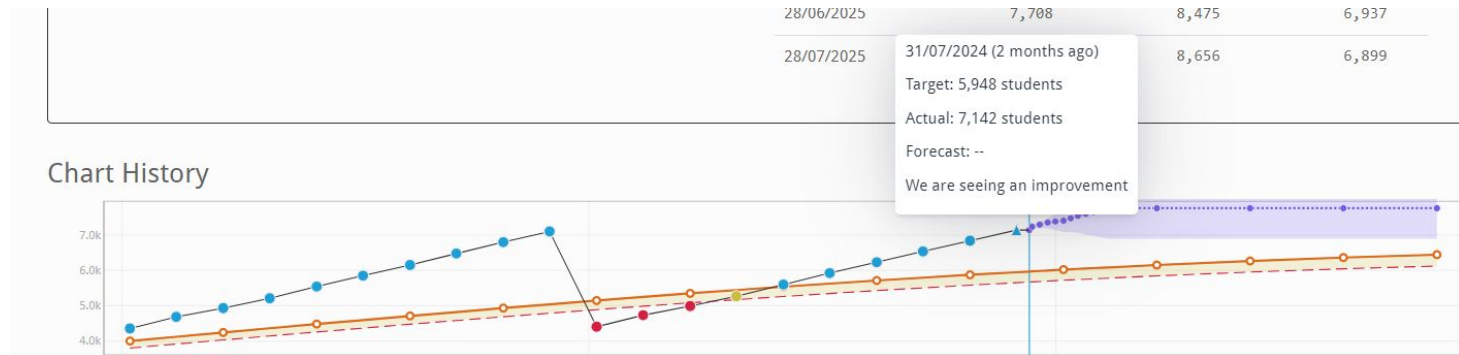
Documents (8)

This feature allows for external documents and links to be uploaded, creating additional support for your company's strategy.

Upload a File

Title

Give this file a title...

Description

| Normal ⬍ | B | I | U | 🔗 | " | ☰ | ☰ | A | A̲ | ☰ | T_x |

Description...

Upload a document.   Browse ...

Groups (9)

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

Steering Committe	No	Yes

Group may also include other Groups.

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

Clone (10)

Often metrics can be very similar, with the same period, same unit of measure etc

Path: METRIC > CLONE

Attributes can include:

- Title and Description
- Owner and Manager
- Focus Area
- Strategic flag
- Keep current Actuals and/or Targets

Delete (11)

Delete a metric from the Scorecard.

Create a Metric

This allows the configuration of all aspects of the metric:

Path: MONITOR > METRICS > + NEW

|	
Title	- text
Description	- text
Manager	- user responsible for Targets
Owner	- user responsible for Actuals
Focus Area	- category
Strategic	- yes/no switch (lead v lag)
Interpolate	- line of best fit between data points
Cumulative	- values are summed until the end of the fiscal period
Precision	- number of decimal points
Units	- text
Strategic	- yes/no (unit before or after)
Custom Fields	- text, date or drop-down selection list
Tolerance Start	- set the warning region
Tolerance End	- set the warning region
% Tolerance Range	- yes/no (real or a percentage)
Invert Tolerance	- yes/no (bad is bad above)

Cascading Metrics

Path: + NEW > Select YES for CASCADING METRIC

Adding Actuals and Targets can be done from the metric by selecting the contributing block or from the block itself.

A cascading metric roll-up can be 'interrupted' as the values rollup. Therefore additional values can be added as the metric aggregates up the hierarchy.
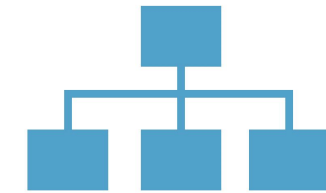
Cascading Metric (Block Rollup)

No | Yes

Displaying Cascading Metrics

The left thumb menu allows you to select which metric you would like displayed on the blocks tree. All of the blocks that have had cascading metrics data added will appear on tree, showing on the 'face' of the metrics block.

Calculated Metrics

Path: METRICS > Select metric > ACTUALS or TARGETS > CALCULATION

The calculation control offers the facility to create new metrics based on other metrics currently available in the scorecard, it allows the user to build a calculation expression in function-first order.

When building your calculations, the Function (or operator) is added first, and its parameters are nested below.

There is a wide range of functions available:

- arithmetic
- prior period actuals & targets
- minimum and maximum ranges
- variance
- scores
- sums and averages

Sharing a Calculation

When the calculation is shared (using the Shared Toggle), both Actuals and Targets will use the same calculation to generate their values. As it may be that the calculation only applies to a single range of data.

Strategy Blocks

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