StrategyFrog

Improving Strategic Execution

Copyright

Version: 1.0

Summary Contents

Detailed Contents

Overview

Welcome to StrategyFrog! This is the easiest way to execute your strategies. StrategyFrog is designed to:

- Be easy to use
- Link strategy and execution
- See the big picture and details at the same time
- Increase transparency and accountability

StrategyFrog contains the following main components:

- Home
- Manage
- Organization
- Strategize
- Admin Settings
    - Organization Settings
    - Subscription

This guide is designed to help you set up and configure StrategyFrog for your organization. Please refer to the *Regular User* guide to learn more about *Home, Manage,* and *Organization.* Use the *Strategy Planner* guide to learn more about *Strategize*.

Admin Settings Overview

Admin Settings is the section in StrategyFrog to set up your organization and configure billing settings. It has two sections:
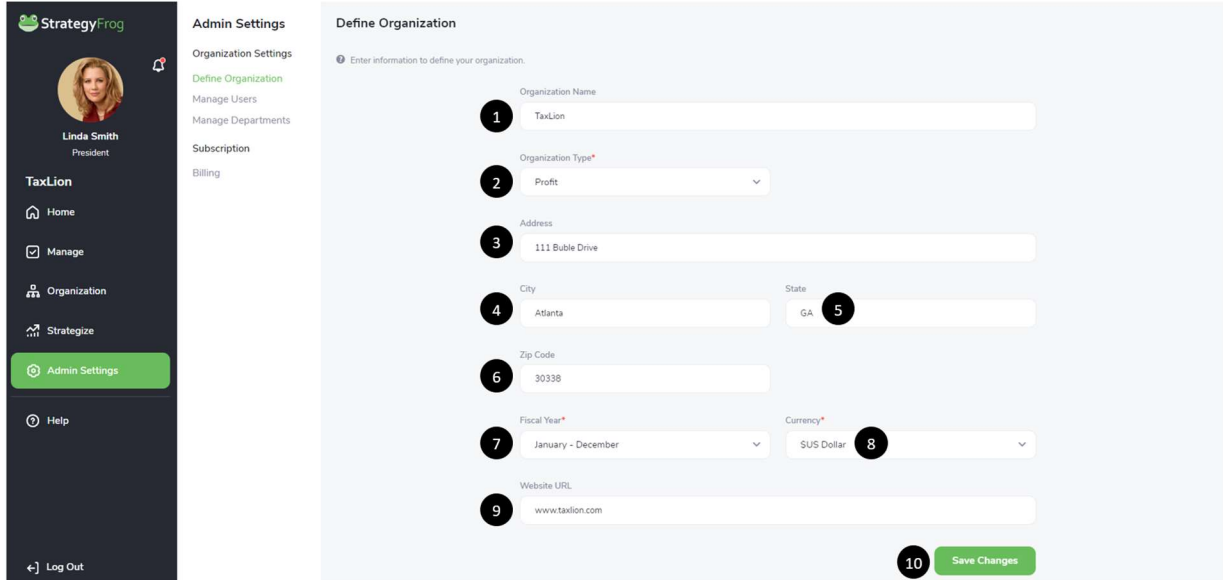
- Organization Settings
- Subscription
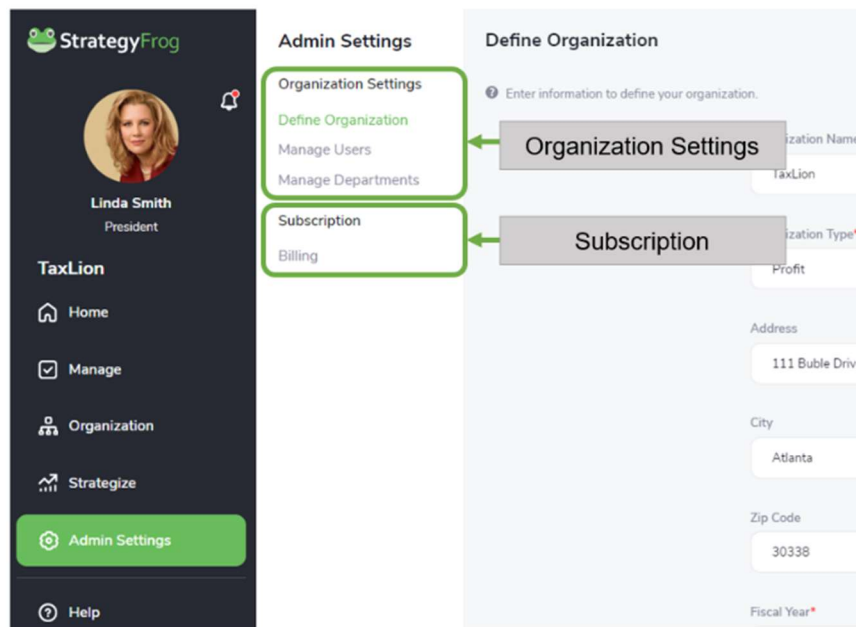
Organization Settings

After you have activated your account, you need to configure your organization in StrategyFrog. You will do the following:

- Define Organization
- Manage Users
- Manage Departments

Define Organization
Enter the following information fields for your organization.

1. **Organization Name**. This will be prefilled from your earlier activation.
2. **Organization Type**. This will be prefilled from your earlier activation.
3. **Address**. Enter your organization's main address.
4. **City**. Enter your organization's city.
5. **State**. Enter your organization's state.
6. **Zip Code**. Enter your organization's zip code.
7. **Fiscal Year**. Select the fiscal year that your organization uses, example: January – December.
8. **Currency**. Select the currency format that is appropriate for your country: US Dollar ($), European Euro (€) or Japanese Yen (¥).
9. **Website URL**. Provide the home page of your organization's website, example: www.taxlion.com.
10. Click **SAVE CHANGES** to advance to Manage Users in StrategyFrog.

Manage Users

Manage Users offers a variety of features to add and modify your Users in StrategyFrog. You can do the following:
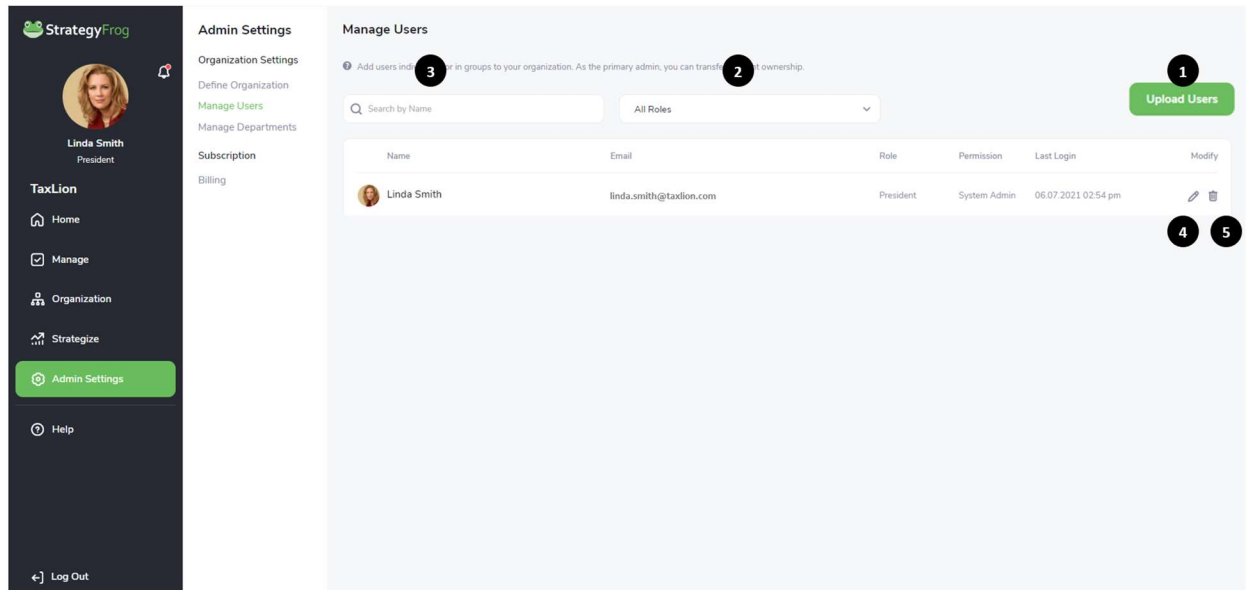
1. **Upload Users**. Send an email to a single user or multiple users (up to 50 at one time) for them to join StrategyFrog.
2. **Sort by Role**. Identify a particular role type within your organization.
3. **Search for a User**. Locate a single user by searching first name, last name, or email address.
4. **Edit a User's Role, Permissions, and Department**. Edit a User's Role, Permission Level, or Department.
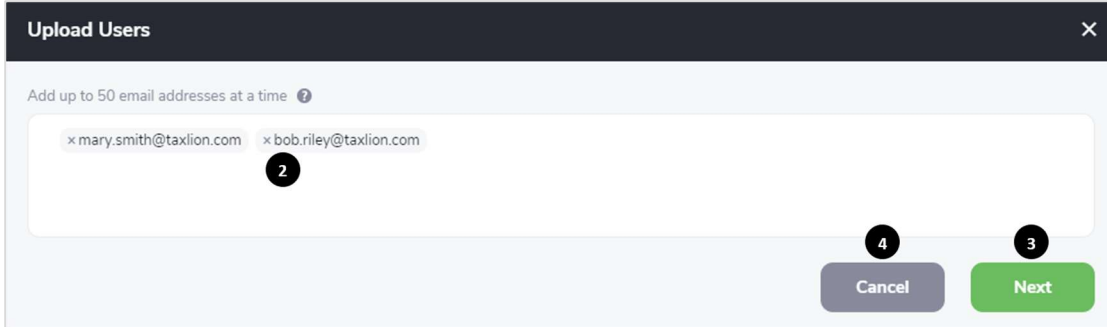5. **Delete a User**. Remove a User permanently from the system.

Upload Users

This feature allows you to add a single user or up to fifty (50) users at one time. Once you invite your users, they will be notified to activate their accounts.
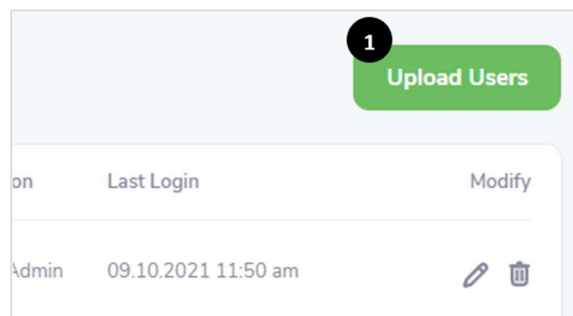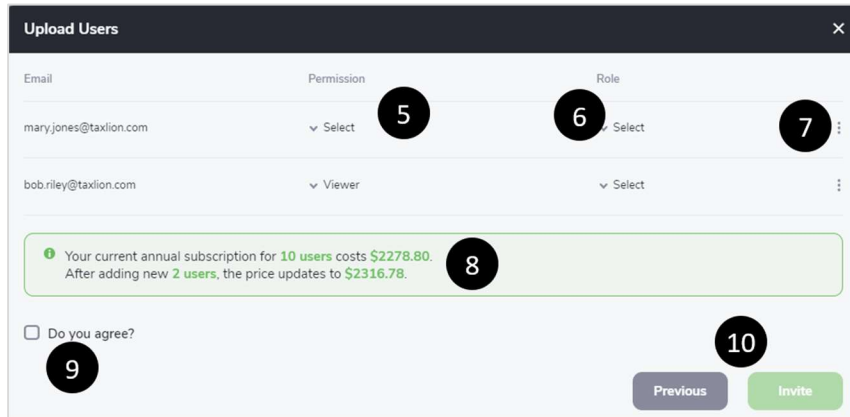

1. **Click** Upload Users.

2. **Type** the email addresses of users to upload**;** hit **Enter** after each address is entered (or **Type** a comma).
3. **Click** *Next* to identify User Permission Level and Role.
4. **Click** *Cancel* to discard this User invitation.

   Note:
   1. Upload 50 users at a time.
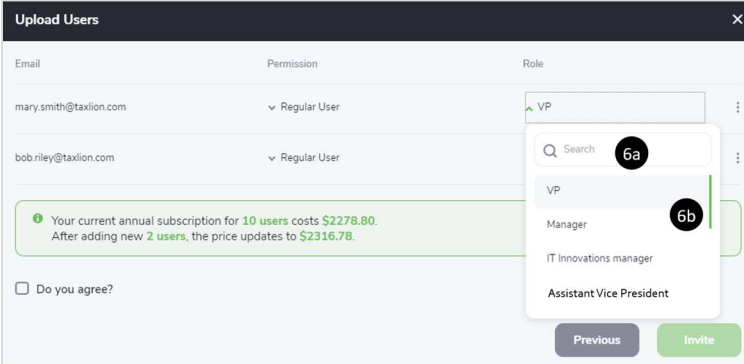   2. Delete each user that you wish to discard or click the X next to their email address.

5. **Select** the *Permission* level for Users. StrategyFrog has the following six User permission levels:
   a. **System Admins** have complete control over all features in the system. They can add new users and change existing user roles.
   b. **Tech Admins** have complete control over all features in the system, except being able to modify System Admins. They can add new users and change existing user roles.
   c. **Strategy Planners** have access to *Strategize*, and can also create Strategic Objectives and Strategic Initiatives, in addition to the permissions granted to a manager.
   d. **Managers** can see and makes changes to everything on the team, including objectives**,** key results, and tasks. The manager is responsible for helping define and achieve team outcomes.
   e. **Regular Users** can see the team's objectives, workstreams and tasks they have been given permissions to see. They can edit or remove any OKRs (Objectives, Key Results, or Tasks) they own or have delegated, but are not able to make changes to other people's workload.

f. **Viewers** can see all the various of elements of items in the system, however, they can only make changes and remove items they own or have delegated.
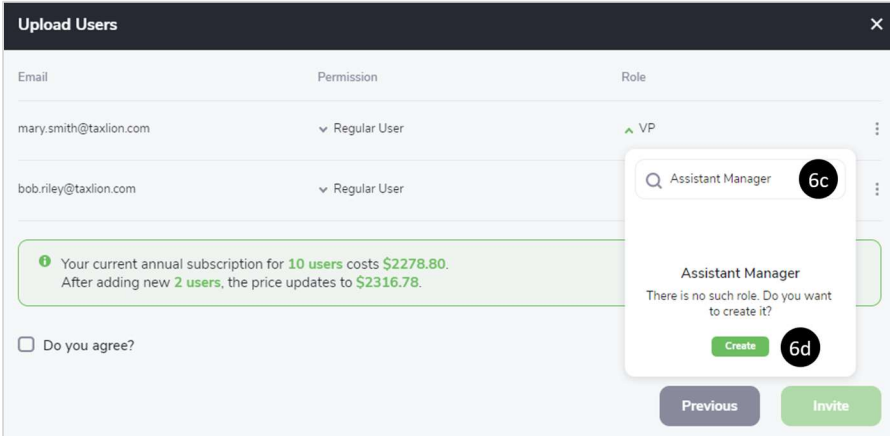
In addition, each permission level has access to different modules in StrategyFrog. All permission levels can view and access the modules of *Home*, *Manage*, and *Organization*. Strategy Planners can view, and access *Strategize*. The System Admin and Tech Admin can also view and access *Admin Settings*. See the table below for more information.

| Permission Level	Home	Manage	Organization	Strategize	Admin Settings
System Admins	✓	✓	✓	✓	✓
Tech Admins	✓	✓	✓	✓	✓
Strategy Planners	✓	✓	✓	✓	
Managers	✓	✓	✓		
Regular Users	✓	✓	✓		
Viewers	✓	✓	✓		

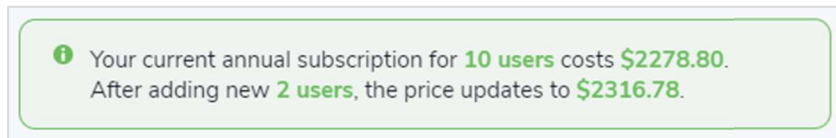6. **Select** the *Role* for the Users by either choosing a pre-existing role by *scrolling* or *searching*.

a. **Search** for the User's role, or
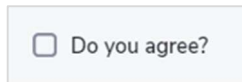b. **Scroll** *up* and *down* to find the appropriate User role.

c. **Type** the User's role if it does not exist after searching for it.
d. **Click** *Create* to enter the new role into the system.
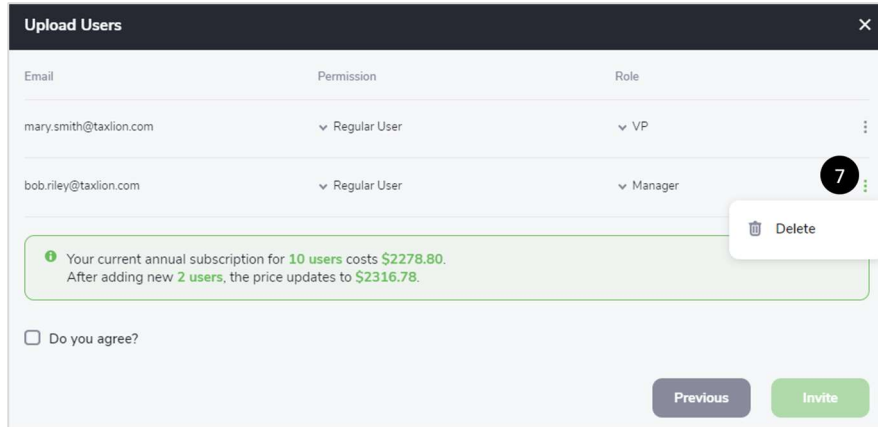
7. **Delete** a User by clicking ⋮ then **Click** Delete.

8. **Read** the subscription billing implications by adding multiple users. (Please see the *Billing* section for more information.)


9. **Click** "Do you agree?" to accept the charges for the additional Users.
10. **Click** *Previous* if you need to return to a previous screen or **Click** *Invite* to notify the Users about joining the system.

Manage Departments

Manage Departments offers a variety of features to add and modify your organization's internal departments. You can do the following:
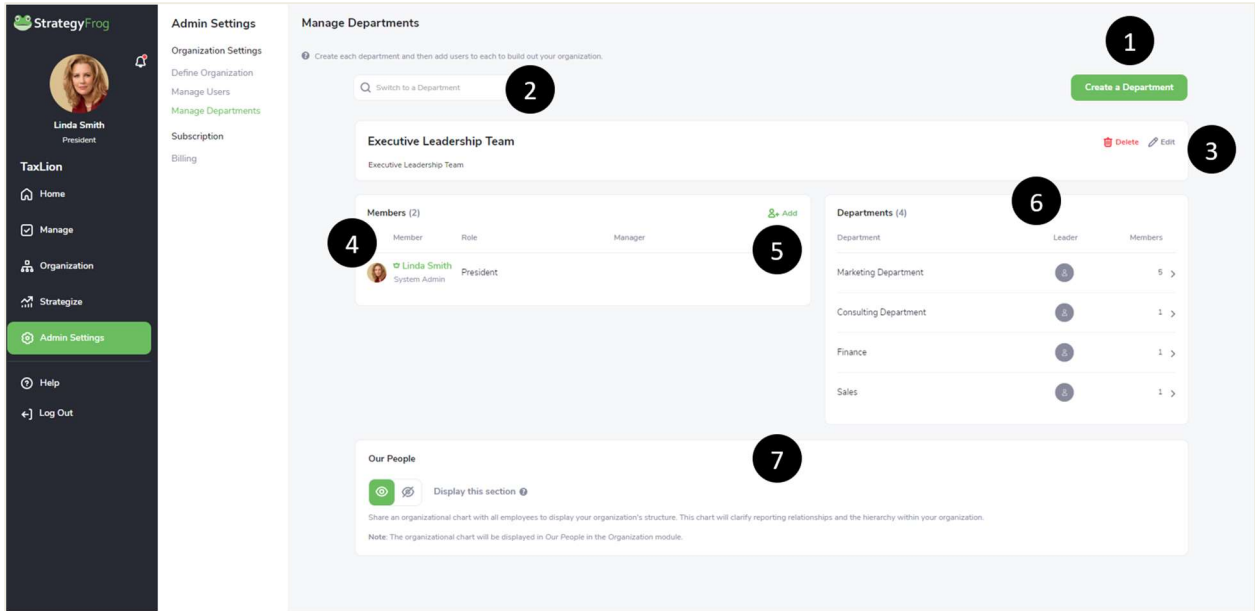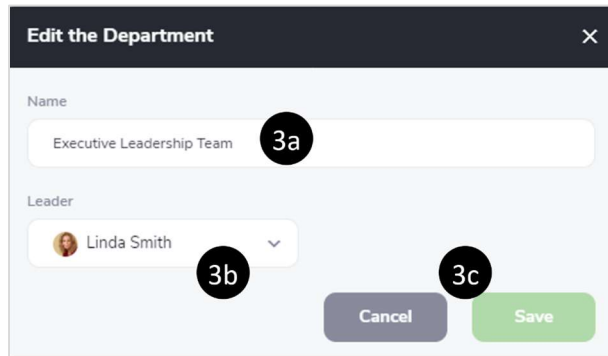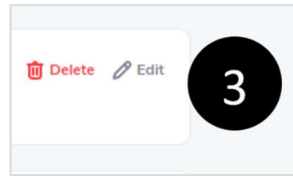
1. **Create a Department**. *Click* "Create a Department" to add your organization's departments.
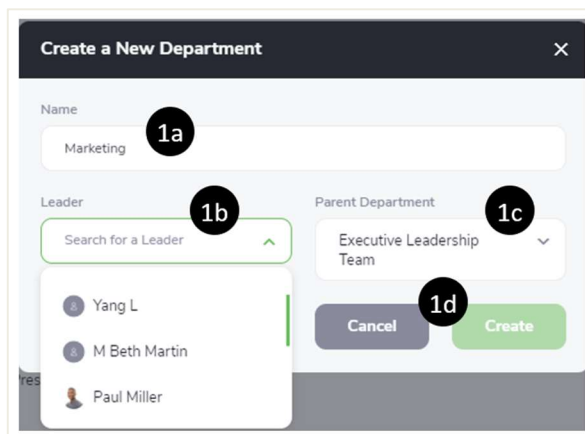

    a. **Enter** the *Name* of a Department for your Organization (i.e., Marketing, Finance, etc.).
    b. **Select** the *Leader* of the Department.
    c. **Select** the *Parent* of the Department (i.e., the department the newly created department align to).
    d. **Click** *Create* to finish adding a new department or *Cancel* to stop creating a new department.

2. **Switch to a Department**. View a different department than what is shown by Entering the other department's name.
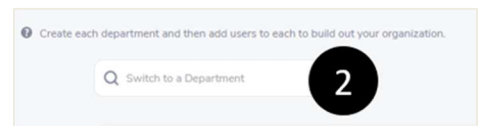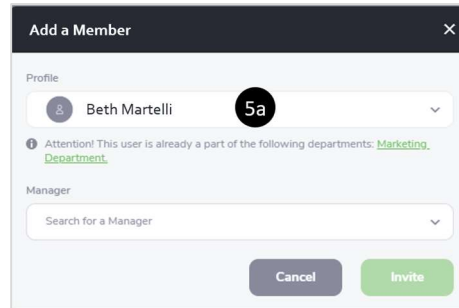

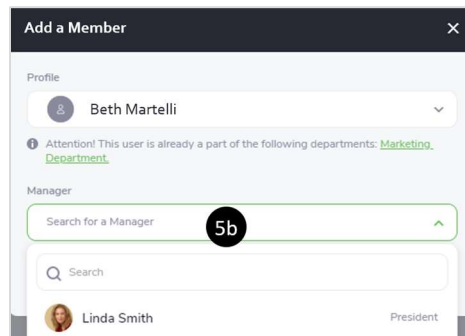3. **Delete or Edit the Department**. Modify the name of the department or its leader.

a. **Edit** the *Name* of a Department for your Organization (i.e., Marketing, Finance, etc.).
b. **Select** a different *Leader* of the Department.
c. **Click** *Save* to finish modifying the department or *Cancel* to stop modifying the department.

4. **View a Member's Profile Page**. *Click* a User's name to view their profile page and see more information about their work progress.
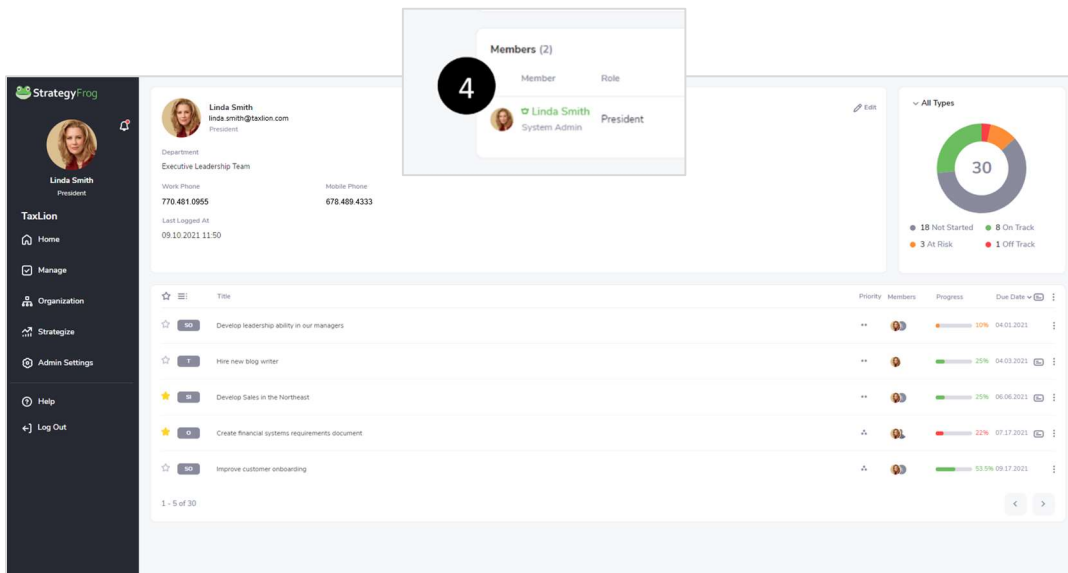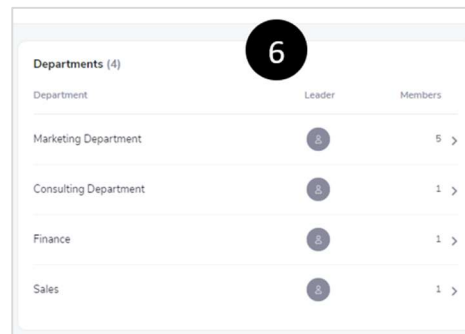
5. **Add Members to a Department**. Click 👥+ Add to add a Member to a Department.

a. **Search** for a Member to add. (Note: If the person has already been selected in another department, you will be notified.)

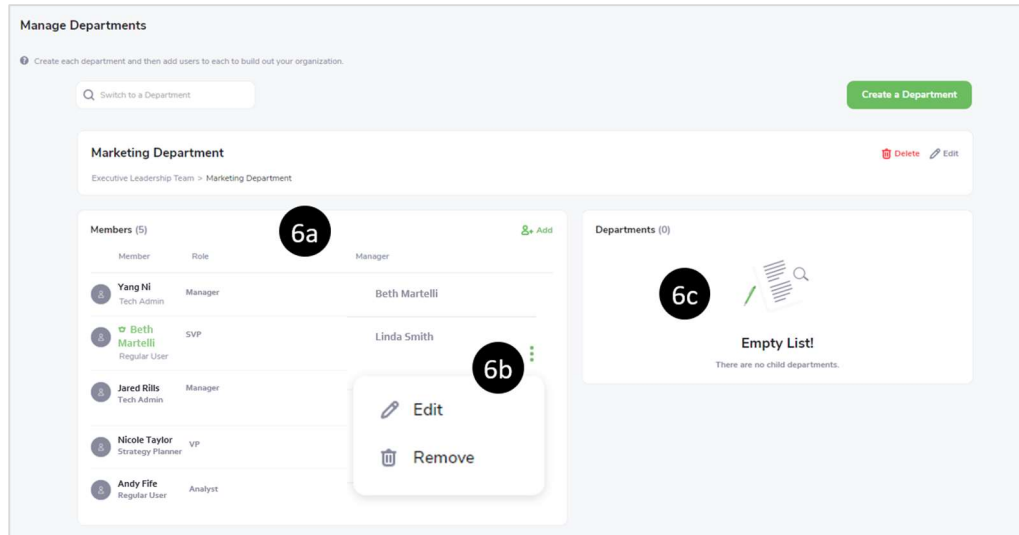b. **Search** and then select this person's Manager.

6. **View Departments.** This section allows you to review each department in more depth. *Click >* to examine a department's details, including its members and leader.

a. **Department Membership Roster.** This area contains the department's members, their role permission level, and their manager.

b. **Click** ⋮ to *Edit* or *Remove* a member from the department.

c. **Sub-departments within the Department.** If the department contains any sub-departments, they will be displayed here.
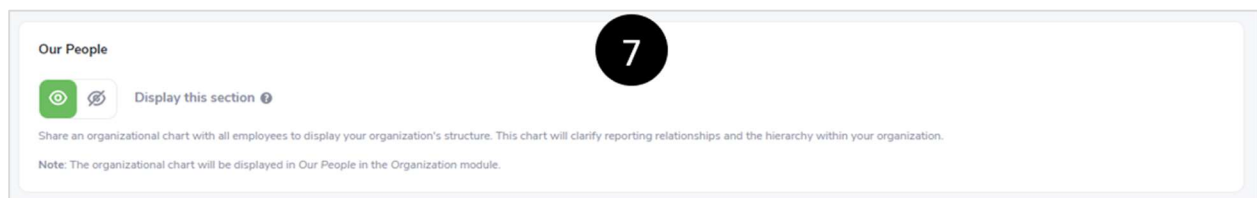
7. **Display an Organizational Chart in "Our People."** Within StrategyFrog, the module "Organization" allows users to see your organization's Vision, Mission, Values, Differentiators, Priorities, and more. Users can view an organizational chart based on how the departments are set up in the area labeled "Our People." (See below.)
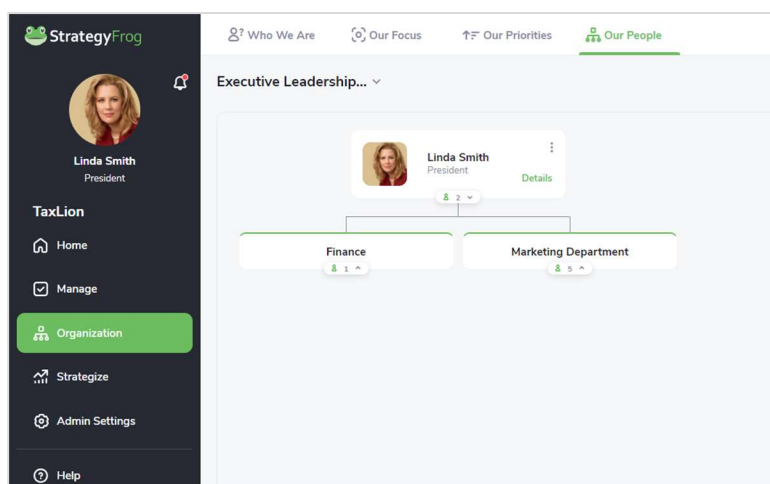
a. **Select** the toggle to *See* to *view* the organizational chart.

b. **Select** the toggle to *Not See* to *hide* the organizational chart (and "Our People" in the *Organization* module.

Subscription

Introduction

You can manage your *Billing* needs within *Subscription*.

Billing has the following sections:

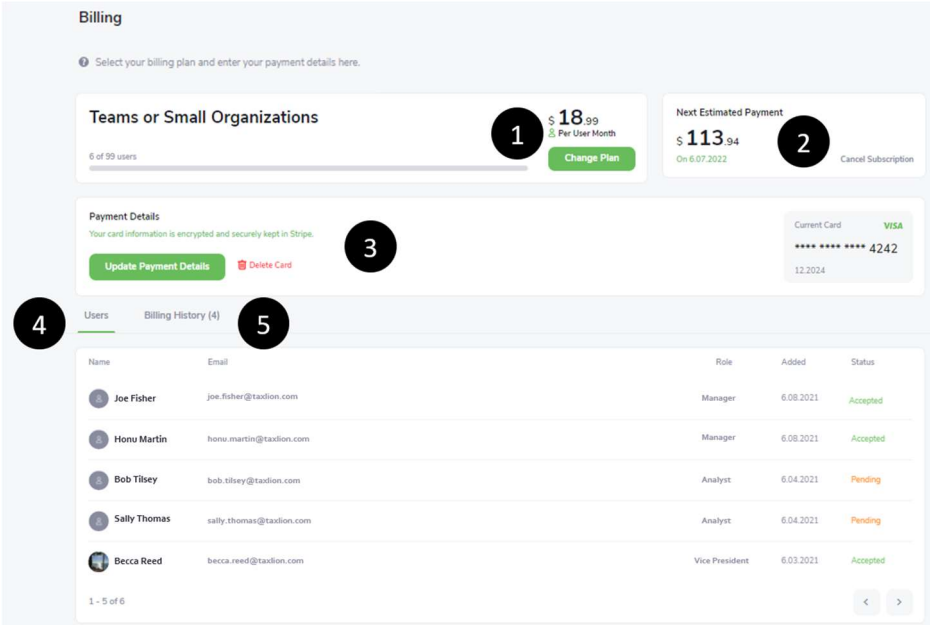1. **Billing Plan** (Teams or Small Organizations, Medium Organizations, and Enterprise Organizations). This feature indicates the Billing Plan that your organization has selected, along with other features.
2. **Next Estimated Payment Charge** (and Cancel Subscription). This feature states the next payment amount for your organization and offers the ability to cancel your subscription.
3. **Payment Details**. This feature allows you to upload and store secure and private credit card information.
4. **Users**. This feature provides the history and status of your users in the system.
5. **Billing History**. This feature provides the billing history, along with the invoice period, payment, status, and downloadable PDF.

Billing Plan

Billing Plan indicates the billing level that your organization has selected (Teams or Small Organizations, Medium Organizations, and Enterprise Organizations), along with other features.

Overview

- **Billing Plan Selected**. This indicates which of the three billing plans (i.e., Teams or Small Organizations, Medium Organizations, and Enterprise Organizations) your organization has selected.
- **Number of Users Currently Registered and Being Billed**. This indicates how many users within your organization are registered in the system and are being billed.
- **Price Per User Being Billed**. This indicates the charge for each user in your organization.
- **Monthly or Annual Billing Cycle**. This indicates if your organization is being charged on a monthly or annual billing cycle.

Change Plan

1. **Click** *Change Plan* to select another billing plan for your organization. When you select *Change Plan*, you will see the following screen:
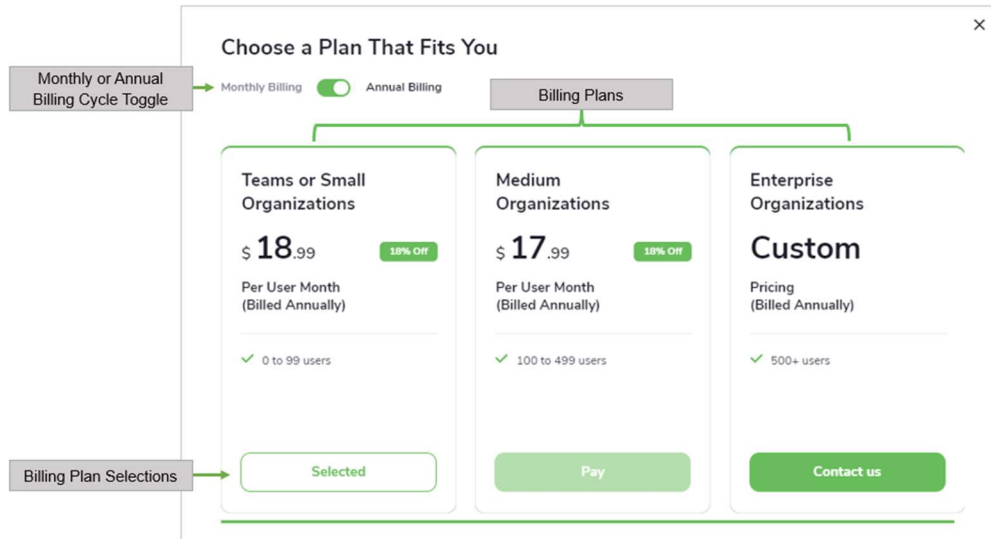
- **Monthly or Annual Billing Cycle Toggle**. StrategyFrog offers *Monthly* or *Annual* Billing Cycles. (*Annual* billing plans are 10% less expensive than *Monthly* billing plans.)
- **Billing Plans**. StrategyFrog has three billing plans for your organization:

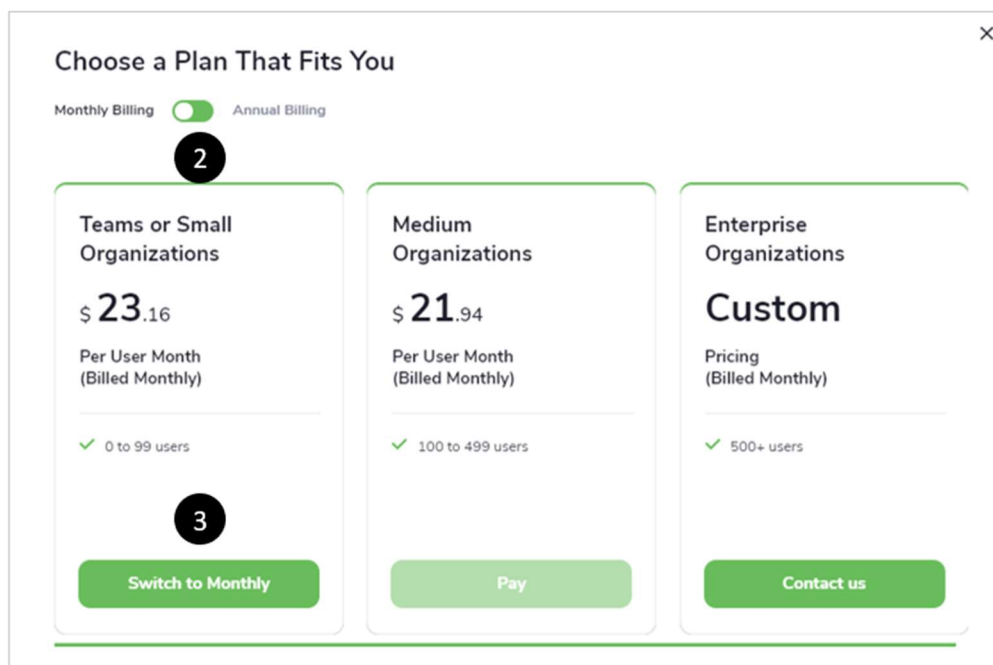| Billing Plans	Number of Users
Teams or Small Organizations	0 – 99 Users
Medium Organizations	100 – 499 Users
Enterprise Organizations	500+ Users (Contact us for your pricing.)

- **Billing Plan Selections**. There are up to four options that will display under the Billing Plans:

Billing Plan Selection	Description
Selected	This option will display on the Billing Plan you have selected.
Switch to Monthly (or Annual)	This option will display on the Billing Plan for you to select either the Monthly or Annual billing cycle.
Pay	This option will display indicating you have fewer Users than this Billing Plan requires.
Contact Us	This option will display on the Enterprise Billing Plan indicating you need to contact StrategyFrog to determine the appropriate pricing for your organization.

Choose a Plan That Fits You

Monthly Billing ⬤ Annual Billing

②

| Teams or Small Organizations	Medium Organizations	Enterprise Organizations
$ **23**.16	$ **21**.94	**Custom**
Per User Month (Billed Monthly)	Per User Month (Billed Monthly)	Pricing (Billed Monthly)
✓ 0 to 99 users	✓ 100 to 499 users	✓ 500+ users
③		
Switch to Monthly	Pay	Contact us

2. **Select** *Monthly or Annual* Billing Plan for your organization. (Annual billing plans are 10% less expensive than Monthly billing plans.)
3. **Click** *Switch to Monthly (or Annual)* to confirm the Billing Plan Type (i.e., Teams or Small Organizations, Medium Organizations, and Enterprise Organizations) for your organization.

Note: StrategyFrog only bills your organization for the number of Users registered and when they register. We do not charge for any unnecessary use.

Next Estimated Payment Charge (and Cancel Subscription)

Overview

This feature states the next estimated payment amount for your organization and offers the ability to cancel your subscription.

Next Estimated Payment

Next Payment Amount → $ **113**.94

On 6.07.2022   Cancel Subscription

Payment Due Date   Cancel Subscription
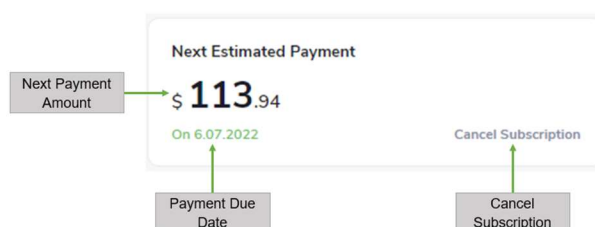
- **Next Payment Amount**. This reflects what your organization owes for the next payment amount.
- **Payment Due Date**. This is the next payment due date.
- **Cancel Subscription**. This is the option to cancel your subscription.
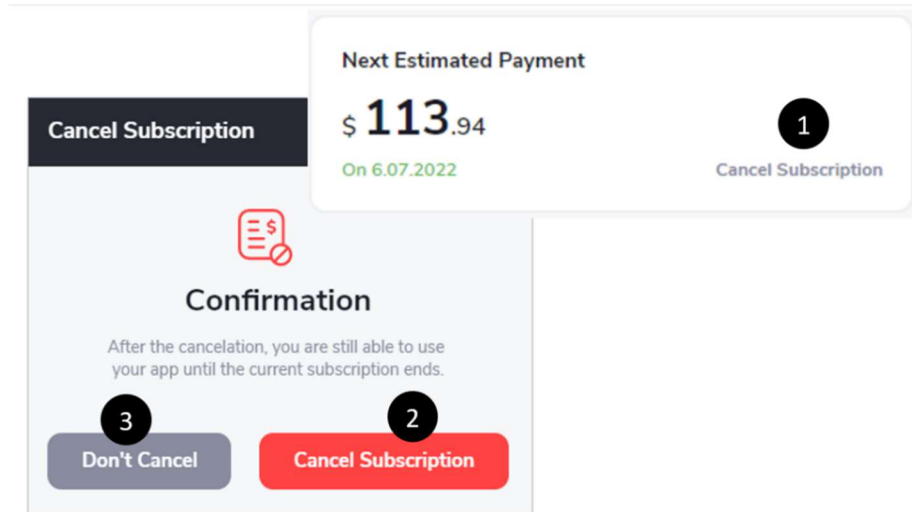
Cancel Subscription

1. **Click** *Cancel Subscription.*
2. **Click** *Cancel Subscription.*
3. **Click** *Don't Cancel* if you want to retain your Subscription.

Note: At StrategyFrog, we are relentless about delivering a world-class product to delight our customers. Please share your feedback with us about how we can improve our product or services to meet your needs. Contact us at hello@strategyfrog.com or call us at 888.570.FROG (3764). Thank you very much.

Payment Details

StrategyFrog accepts credit cards to process your payments. This section allows you to *Update Payment Details* or *Delete a Card*.
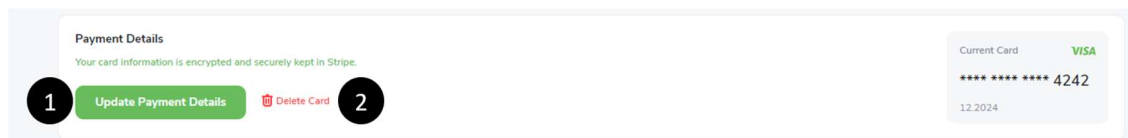
1. **Click** *Update Payment Details* to provide your Credit Card details. You will be sent to a site to input your credit card information:
   a. Email address
   b. Card information, number, month, year, CVC number.
   c. Name on the card
   d. Country
   e. Zip code
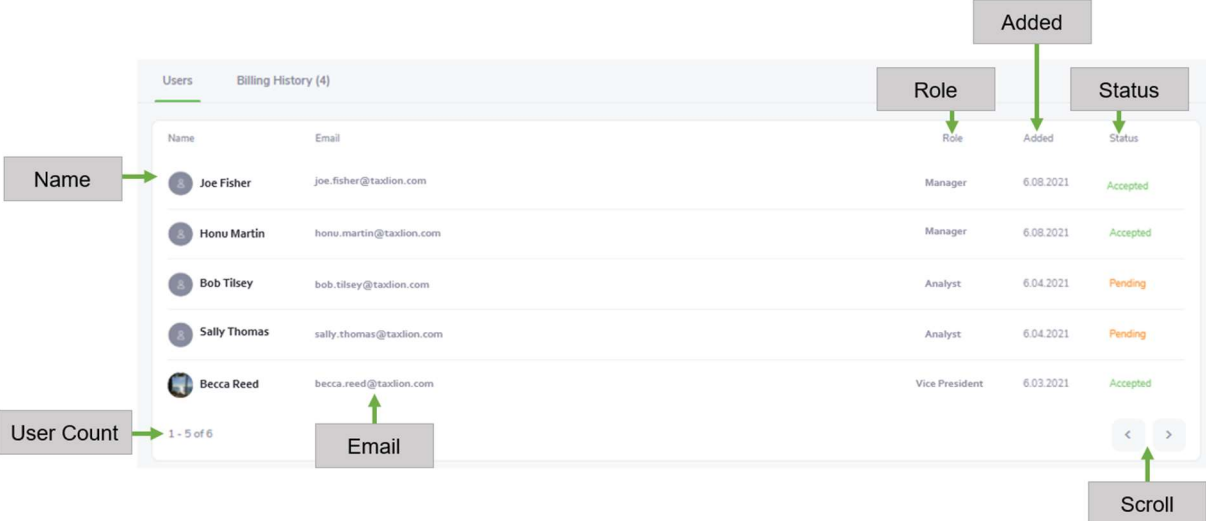
   (Click *Save card* to confirm the use of this credit card for billing.)

16
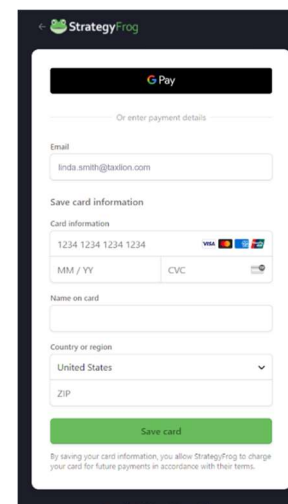
2. **Click** *Delete Card* to remove the current credit card saved in StrategyFrog.

Users

This section within Billing provides a summary of all current users in your system.

- **Name**. This column lists all users in the system by name. Admins can *click* on a user's name to see their Profile Page.
- **User Count**. This displays the number of users per page, and the total number of users currently in the system.
- **Email**. This column displays the users' email address in the system.
- **Role**. This column displays a user's role in the system.
- **Added**. This column displays when users are added to the system, with the most recently added user at the top.
- **Status**. This column displays a user's status in the system. An *Accepted* status indicates that the user has fully logged into the system. *Pending* status indicates a user has not fully logged into the system.
- **Scroll**. This allows an Admin to scroll backwards or forwards to see all users in the system.

Billing History

This section within Billing provides a history of all billing transactions, along with the ability to download invoices for your internal use.

- **Transaction Count**. This field displays the number of transactions that have occurred for your account.
- **Billing Transaction**. This column displays each transaction that has occurred in your account (e.g., adding a user, deleting a user, initiating your subscription, etc.).
- **Billing Period**. This column displays when a transaction occurred or the billing period for your subscription.
- **Payment Amount**. This column displays the payment amount that was charged to your account attached to the billing transaction.
- **Payment Status**. This column displays the status of your transaction (i.e., Paid, pending, etc.).
- **Download**. This column displays the download icon. If the icon is clicked, you can download a receipt for your internal records. See the example below.