

# Quick Reference Guide (QRG): USER SETTINGS



## Adjust your USER SETTINGS to manage your work the way you want it

The image displays two screenshots of the StrategyFrog user settings interface. The top screenshot shows the 'User Information' page, and the bottom screenshot shows the 'Change Password' page. A dark sidebar on the left contains navigation options: Home, Manage, and Organization. The 'Settings' menu is open, listing Account Profile, User Information, Change Password, Notifications, and Archive. Callout boxes provide instructions: 'Click the image to start' points to the user profile icon; 'Upload a photo so your peers can see you clearly.' points to the 'Add profile photo' button; 'Establish your time zone to set your work to the right time for you.' points to the 'Time zone' dropdown; and 'Change your password as needed.' points to the 'Change Password' option in the settings menu. The 'Change Password' page includes fields for current, new, and repeat passwords, and an 'Archive Account' button.

**Click the image to start**

**Upload a photo**  
so your peers can see you clearly.

**Establish your time zone**  
to set your work to the right time for you.

**Change your password as needed.**

# Quick Reference Guide (QRG): USER SETTINGS



## Adjust your USER SETTINGS to manage your work the way you want it

The image displays two screenshots of the StrategyFrog user settings interface. The top screenshot shows the 'Notifications' settings page, and the bottom screenshot shows the 'Archive' page. Callout boxes with green lines point to specific features in both screenshots.

**Notifications Settings:**

- Allow notifications:** A toggle switch is turned on. Callout: "Allow notifications (or not)."
- Begins at:** Time selection fields for hour (9), minute (0), and period (AM). Callout: "Set when you want notifications to arrive."
- Ends at:** Time selection fields for hour (8), minute (0), and period (PM).
- Save changes:** A green button to save the notification settings.
- Receive notifications when:** A table with columns for 'Receive notifications when', 'In email', and 'App'. Callout: "Determine what notifications you want (and how you want them delivered)."

**Archive Page:**

- Search:** A search bar at the top of the archive list.
- Table:** A table with columns for 'Title', 'Progress', and 'Archived on'. Callout: "View (or unarchive) your archived work".

Title	Progress	Archived on
SO Buy a farm	0%	03.28.2021 09:16
SO Increase leadership ability within our managers	0%	03.28.2021 09:16
SO Change this to xf	3.3%	03.28.2021 09:16
T new task 3/5 (test kr)	0%	03.21.2021 09:53
SI dsfgdsfg	0%	03.12.2021 20:20
SI fdgdfgdf	0%	03.12.2021 20:20
SO New SO 3/13/2021	25%	03.15.2021 11:10
SI asdf	0%	03.28.2021 09:09

# Quick Reference Guide (QRG): NOTIFICATIONS



## Adjust your USER SETTINGS to manage your work the way you want it

Click the Bell to view your Notifications.

Click "Archive All" to move all Notifications to the "Archived" folder.

Click "Archive" to move this item to the "Archived" folder.

Click "X" to delete the Notification.

Click "Unarchive" to restore the Notification.

# Quick Reference Guide (QRG): HOME



## A Use BOARD to see the "big picture" and all the "details" in one place

**Find what you want**  
Use Search to find your work items quickly (i.e., Strategic Objectives, Strategic

**Start with an Empty List and add work in Manage**

**Tag your Favorites**  
Click the "star" to identify an item as your "favorite."

**See your Favorites**  
Select the "star" to view your favorite items.

**Sort by Type**  
Select Strategic Objectives, Strategic Initiatives,

**Sort by Status**  
Select On track, At risk, Off track, Completed, or Not

**Sort by Due Date**

**View all**  
See all your work or a

**See Progress**  
Understand how much you have

**See Priority**  
Understand what's a High, Medium, or

**View Parent Item**  
Understand how everyone's work is

**View Options**  
See Overview, Manage View, Edit, or

**See "all the details"**

**See the "big picture"**

**Navigate to different modules**

**My Workstreams (18)**

Item	Description	Progress	Due Date
Involve farmers we serve in...	No description	29.5%	01.01.2022
Create more options for cus...	Enhance customer experience...	12%	12.17.2021
Buy a new farm	No description	0%	03.31.2021

**My Deadlines (21)**

Title	Priority	Progress	Due Date
Develop Sales in the Northeast	SI	93%	06.02.2021
Hire new blog writer	T	0%	04.01.2021
Implement new leadership development program	O	24%	01.31.2021
Improve social media performance	O	0%	01.29.2021
Get new phone equipment	T	0%	01.29.2021

# Quick Reference Guide (QRG): HOME



## B Use OVERVIEW to see data on work (yours and the organization)

**Filter by Person**  
Review your work or others to understand

**Filter by Status**  
Select On track, At risk, Off track, Completed, or Not started to see

**Filter by Dates**  
Select the date range of the work you want to

**See a count of all your work items**  
40 All

**View the "numbers" to understand the status of all your work (On Track, Off track, Completed, Not started)**  
2 Off track  
0 Completed  
18 Not started

**See the Status of your work over a period of time (e.g., On Track work from 1/01/2021 to 4/01/2021)**

**Filter by % or #**

**View all Item Types**  
See all different levels of your work, from Organizational

**Dashboard Data:**

- Strategic Objective: 6 (4 On track, 1 At risk, 1 Off track)
- Strategic Initiative: 8 (6 Not started, 2 On track)
- Objective: 14 (6 Not started, 4 On track, 3 At risk, 1 Off track)
- Key Result: 9 (4 Not started, 4 On track, 1 At risk)
- Task: 3 (2 Not started, 1 On track)

Improving Strategic Execution

# Quick Reference Guide (QRG): MANAGE



Create, communicate, or update work in MANAGE for improved performance

A

View Work (yours or any team in your organization)

B

See Different Views  
View your work in a 1 List, 2 Tree, or 3 Timeline

C

Create all your work In Manage  
Add a new Item in three different ways

D

1 Gain an OVERVIEW, CHILD VIEW, EDIT, or ARCHIVE your work items  
2 EDIT items to add more information

The screenshot shows the StrategyFrog MANAGE interface. On the left is a dark sidebar with the user's profile (Paul Miller, Manager), navigation options (Home, Manage, Organization, Help), and a Log Out button. The main area displays a list of work items under an 'Objective (O)'. Callout A points to the 'Me' and 'Teams' filters. Callout B points to the 'List', 'Tree', and 'Timeline' view options. Callout C points to the '+ Create a Key Result' button and the 'Develop new sales training program' item. Callout D points to the context menu for the 'Create financial systems requirements document' item, which includes options for Overview, Child View, Edit, and Archive.

# Quick Reference Guide (QRG): MANAGE



## A View Work (yours or any teams in your organization) for greater transparency

View Your Work

The screenshot displays the StrategyFrog interface with two views of work items. The top view, titled 'View Your Work', shows a list of work items under the 'Me' profile. The bottom view, titled 'View the Work of any Team in your organization', shows a list of work items under the 'Teams' profile. Both views include a sidebar with navigation options like 'Home', 'Manage', 'Organization', and 'Help'. Callout boxes provide instructions on how to interact with the work items, such as viewing progress, understanding due dates, and setting due dates.

See the Progress of Work

Understand important Due Dates

Select View Options to find a Department to View

Set Due Dates to move your work forward

# Quick Reference Guide (QRG): MANAGE



## B1 Use LIST view to understand your work in greater detail

**Select List View**

**Filter work by Strategic Priorities**  
Select or deselect *Financial, Customer, Processes, or Learning* (or the perspectives your organization creates) to see what's important

**Filter work by Status**  
Select or deselect *Not Started, On Track, At Risk Off Track, or Completed* to see where you are

**Filter your Work to see what you want**

**Select the Date to see the work you want**

**Filter Work By Type**  
See Strategic Objectives, Strategic Initiatives, Objectives, Key Results, Tasks (or using the terms your organization designates to each goal level)

The screenshot shows the StrategyFrog interface with a sidebar on the left containing a user profile for Paul Miller (Manager) and navigation options: Home, Manage (highlighted), Organization, and Help. The main content area is in 'List' view, showing a table of work items. The first item is 'Develop new sales training program' with a progress bar at 0% and a due date of 08.01.2021. The second item is 'Create financial systems requirements document' with a progress bar at 22% and a due date of 07.17.2021. A 'Filters' panel is open at the top, showing 'Strategic Priorities' (Financial, Customer, Processes, Learning) and 'Status' (Not Started, On Track, At Risk, Off Track, Completed). A date range filter is set from 11.02.2020 to 11.18.2021. A dropdown menu for 'Type' is open, showing options: Strategic Objective (SO), Strategic Initiative (SI), Objective (O) (selected), Key Result (KR), and Task (T).



# Quick Reference Guide (QRG): HOME



## B2 Use TREE view to gain a visual understanding of how your work is connected

Select Tree View

The screenshot shows the StrategyFrog interface in Tree View. The left sidebar includes the user profile for Paul Miller (Manager), the organization name TaxLion, and navigation options like Home, Manage, and Organization. The main content area displays a hierarchical tree of work items. At the top, there are tabs for 'Me' and 'Teams', and view options for 'List', 'Tree', and 'Timeline'. The 'Tree' view is selected. Below the tabs, there are filters for 'Type' (Objective (0)) and a date range (11.02.2020 to 11.18.2021). The tree structure shows an 'Objective (2)' containing a 'Key Result (1)' and a 'Task (0)'. The 'Key Result' is further expanded to show three items: 'Develop new sales training progr...' (15% progress, due 08/01/2021), 'Hire 4 sales trainers' (15% progress), and 'Create financial systems require...' (22% progress, due 07/11/2021). A legend at the bottom left explains the status colors: On Track (green), At Risk (orange), Off Track (red), Completed (blue), and Not Started (grey). A 'Change the view' button with a 'Reset' option is located at the bottom right.

View more options to review and edit the item in more detail

Expand the Tree view to see more connected work items

Create a specific item type

See the connection to understand your organization's priorities

See Due Date to understand when your work is due

Make it a Favorite to see your work more frequently

Understand the status and progress of all your work by color:

- On Track
- At Risk
- Off Track
- Completed
- Not Started

Change the view

# Quick Reference Guide (QRG): MANAGE



## B3 Use Timeline View to understand your work's timeframe

**Select Timeline View to get a big picture of your work (and see how work is connected)**

**Filter by Strategic Priorities**  
See your organization's priorities (*Financial, Customer, Process, Learning, or areas your organization chose*)

**Filter by Status**  
See your work by what's *Not Started, On Track, At Risk, Off Track, or Completed*

**Filter by Dates**  
Select the date range of the work you want to review.

**Display left menu bar to see the item's details**

**Add an Item**  
Review your work or others to understand progress.

**Jump to the Item's Start Date**  
See the work from its beginning

**View Options**  
View, Edit, or Archive the item

**Scroll to see more**  
See all the work

**See your work in a timeline to understand the flow of your work**

Name	Starts at	%	Progress
Involvement of farmers we serve in the governance of our organization ARCHIVE TEST	2021-01-...	16%	[Red bar]
Create more options for customers to access our produce edit	2021-01-...	5%	[Orange bar]
Implement new leadership development program	[Starts in February 2021]	[Progress]	[Orange bar]
Improve social media performance	[Starts in February 2021]	[Progress]	[Green bar]
Buy a new farm	2020-06-...	0%	[Green bar]
Increase revenue by 10%	2021-02-...	20%	[Green bar]
Hire new blog writer	[Starts in February 2021]	[Progress]	[Green bar]
Develop Sales in the North...	[Starts in February 2021]	[Progress]	[Green bar]

# Quick Reference Guide (QRG): MANAGE



## C Create all your work in MANAGE

**Start with an Empty List and add work from there**

**Create all your work In Manage**  
Add a new Item in three different ways

**Filter your work to see what you want**

**See your Favorites**  
Select the "star" to view your favorite items.

**Set Priority**  
Establish *High, Medium, or Low* Priority.

**See Leaders & Members**  
Understand who is leading and supporting the work

**View Progress**  
Understand how much has been accomplished

The screenshot shows the StrategyFrog MANAGE interface. On the left is a dark sidebar with the user's profile (Paul Miller, Manager), navigation options (Home, Manage, Organization, Help), and a Log Out button. The main area displays a list of work items under the 'Objective (O)' type. Each item includes a title, a priority indicator (e.g., 'SO'), a progress bar, and a date. Callouts with green lines point to specific UI elements: a green box at the top right points to the empty list area; a green box in the middle points to the '+ Create a Strategic Initiative' button and the 'SO' priority indicator; a grey box on the right points to the filter buttons; a grey box at the bottom left points to the star icon; a grey box at the bottom middle points to the priority dropdown; a grey box at the bottom right points to the user icons; and a grey box at the bottom right points to the progress bar.

# Quick Reference Guide (QRG): MANAGE



## D1 Gain an OVERVIEW, EDIT, or ARCHIVE your work items

View Options to manage your work in different ways

The screenshot displays the StrategyFrog interface with a sidebar on the left containing navigation options: Home, Manage (highlighted), Organization, and Help. The main content area shows a list of work items under the 'Timeline' view. A callout box labeled '1' points to a work item titled 'Develop new sales training program' with a '0%' progress indicator. A second callout box labeled '2' points to a dropdown menu for this item, which includes options for 'Overview', 'Child View', 'Edit', and 'Archive'. A third callout box labeled '3' points to a confirmation dialog box that asks 'Are you sure' about archiving the work item. Other callouts include 'Get an Overview of an Item to learn about its', 'Edit an Item to make changes to its progress and details', 'Archive your work for future reference', 'See your supporting work items', 'Create more supporting work items', and 'Search your work'.

# Quick Reference Guide (QRG): MANAGE



## D2 EDIT items to add more information

**Set your Status** (Not Started, On Track, At Risk, Off Track, Completed)

**Set a priority for your work** (Low, Medium, or High)

**Let your work be visible to others** (you, your team, or everyone)

**Set Progress** and add a note so everyone knows what's going on

**Add attachments** to keep documents connected to your work

**Establish who supports the work**

**Add KPIs** to measure success

**Add a Note** for others to see

The screenshot shows the 'Edit the Objective' modal with the following details:

- Title: Get new list of sales prospects
- Status: On Track
- Start Date: 11.16.2021
- Due Date: 11.26.2021
- Strategic Alignment: Develop Sales in the Northeast
- Leader: Paul Miller
- Supporters: Yang Wilson, Beth Myers, Jared Russell
- Priority: Medium
- Visible To: Everyone
- Progress: 22%
- Attachments: 0
- Notes: 0