




Quick Start — Overview (All Users)



Welcome to StrategyFrog!

Getting started with StrategyFrog is as easy as **1-2-3!**

Step	What	Who	How
1	Configure your Profile	You 	<ul style="list-style-type: none">• Build your Account Profile<ul style="list-style-type: none">– Add your picture– Customize your time zone– Add your email and phone number– Set your notifications
2	Review your Work and Deadlines	You 	<ul style="list-style-type: none">• Go to Home• Review<ul style="list-style-type: none">– Board– Overview
3	Execute and Manage your Organization's Strategy	All Users 	<ul style="list-style-type: none">• Use<ul style="list-style-type: none">– Home (Board and Overview)– Manage (List, Tree, Timeline)– Organization

Quick Start — Account Profile (All Users)



1 Configure your Profile

Build your Account Profile by clicking the empty profile picture.

- Add your picture
- Customize your time zone
- Add your email
- Add your phone numbers
- Set your notifications

Quick Start — Home (All Users)



2 Review your Work and Deadlines

Use the **Home** module to review your *workstreams*, *deadlines*, and *status*.

Click **Board** to view your *Workstreams* and *Deadlines*

Click **Overview** to view your *Status* and *Progress*

Quick Start — Manage (All Users)



3 Execute and Manage your Organization's Strategy

Use the **Manage** module to create, manage, and edit your work using *List*, *Tree*, and *Timeline* views.

The image displays three overlapping screenshots of the StrategyFrog web application interface, each highlighting a different view mode for managing work. Each screenshot includes a callout box with a letter (a, b, or c) and a descriptive instruction.

- View a:** The 'List' view. A callout box with a green circle containing the letter 'a' points to the 'List' tab in the top navigation bar. The text reads: "Click *List* to manage objectives, initiatives, results, and tasks". The interface shows a list of strategic objectives with details like 'Develop leadership ability in our managers' and a progress bar.
- View b:** The 'Tree' view. A callout box with a green circle containing the letter 'b' points to the 'Tree' tab in the top navigation bar. The text reads: "Click *Tree* to see how your work is interconnected". The interface shows a hierarchical tree structure of work items, such as 'Improve customer onboarding' and 'Develop Sales in the Northeast', with associated progress percentages.
- View c:** The 'Timeline' view. A callout box with a green circle containing the letter 'c' points to the 'Timeline' tab in the top navigation bar. The text reads: "Click *Timeline* to see your work in a Gantt chart". The interface shows a Gantt chart with horizontal bars representing the duration of tasks across a timeline from January to March 2021. Tasks include 'Improve customer onboarding', 'Increase revenue by 15%', and 'Develop leadership ability'.

Quick Start — Organization (All Users)



3 Execute and Manage your Organization's Strategy

Use the **Organization** module to view your organization's *purpose, focus, and priorities*.

a Click **Who We Are** to see Mission, Vision, & Values

b Click **Our Focus** for Value Discipline, Targets, & Differentiators

c Click **Our Priorities** to view Strategic Priorities

The screenshots illustrate the following content:

- Who We Are:** Mission (We create security for our customers' financial freedom), Vision (Creating a secure financial future), and Values (Customer, Frugality, Honesty, Innovation, Resilience, Teamwork).
- Our Focus:** Value Discipline (Product Leadership), Targets (Product segments, Product and/or service categories, Geographic areas, Product and/or service categories), and Differentiators (Product differentiation, Relationship differentiation, Reputation/image differentiation, Service differentiation).
- Our Priorities:** A list of KPIs with progress indicators, including: Improve service revenue (10%), Increase revenue by 15% in one year (15%), Decrease customer onboarding time (0%), Develop leadership ability in our managers (10%), Improve training process for external vendors by... (0%), and Improve TaxLion's UI (50%).