




Quick Start — Overview (Strategy Planner)



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	Establish your Organization's Strategy	Strategy Planner(s) 	<ul style="list-style-type: none">• Go to Strategize• Complete<ul style="list-style-type: none">– Who We Are– What's Our Focus– What Are Our Priorities
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 (Strategy Planner)



1 Configure your Profile

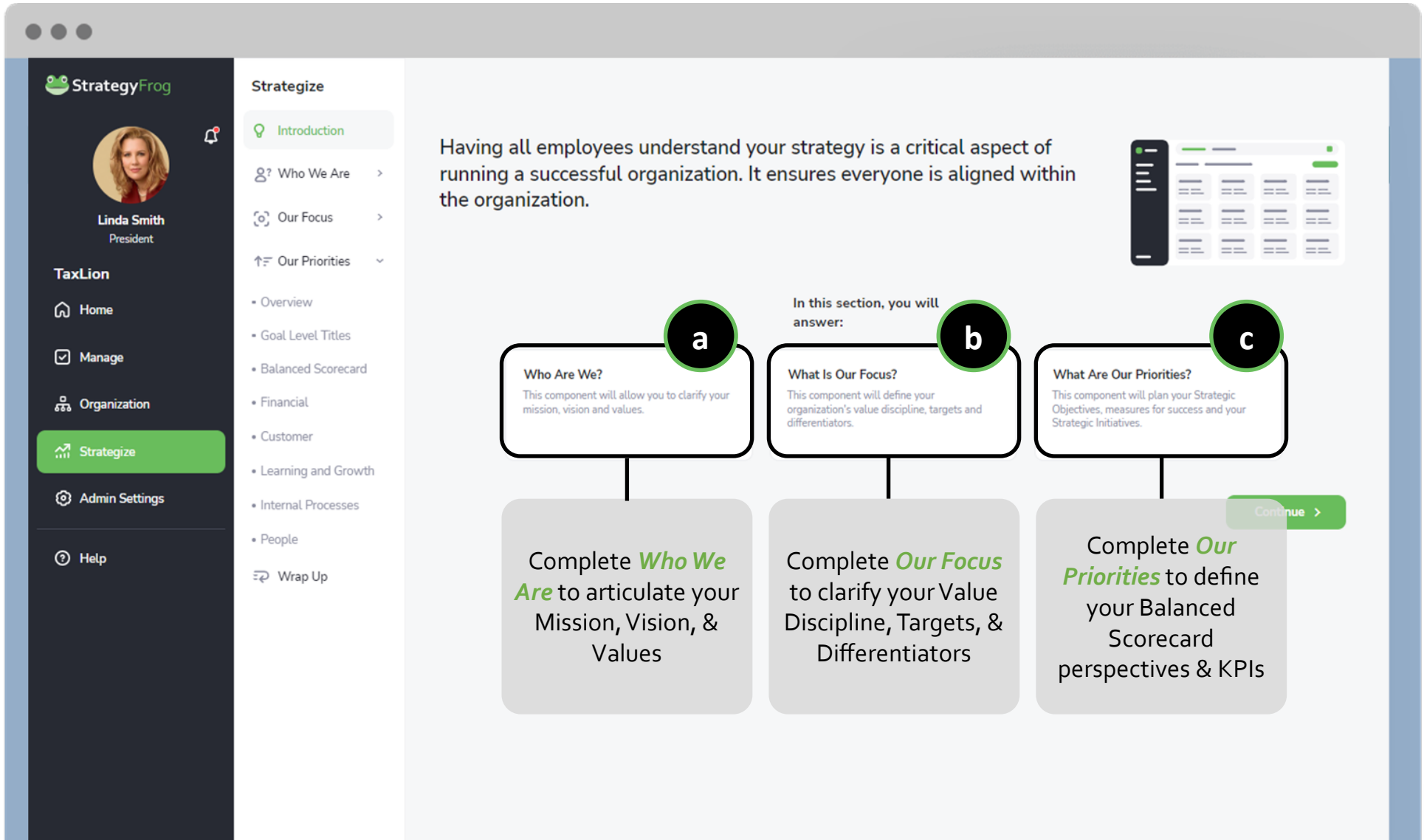
Build your Account Profile by clicking the empty profile picture.

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

The screenshot shows the 'User Information' section of the StrategyFrog account profile. On the left, a dark sidebar contains the StrategyFrog logo, a user profile card for 'Linda, President', and navigation links for 'TaxLion', 'Home', 'Manage', 'Organization', 'Strategize', and 'Admin Settings'. The main content area is titled 'User Information' and features a 'Your photo' section with an empty profile picture icon, an 'Add profile photo' button, and a trash icon. Below this are several form fields: 'Preferred name*' (with 'Linda' and 'Richard' as examples), 'Last name*' (with 'Smith'), 'Team' (with 'Leadership Team, Business Optimization Team, Marketing Department'), 'Time zone*' (with 'America/New_York'), 'Email*' (with 'linda_smith@abc.com'), 'Work phone' (with 'Work phone'), 'Mobile' (with '(678) 488-4573'), and 'Home' (with 'Home'). A green 'Save changes' button is located at the bottom right of the form.

2 Establish your Organization's Strategy

Follow these steps to start using the **Strategize** module.



Having all employees understand your strategy is a critical aspect of running a successful organization. It ensures everyone is aligned within the organization.

a **Who Are We?**
This component will allow you to clarify your mission, vision and values.

b **What Is Our Focus?**
This component will define your organization's value discipline, targets and differentiators.

c **What Are Our Priorities?**
This component will plan your Strategic Objectives, measures for success and your Strategic Initiatives.

Complete **Who We Are** to articulate your Mission, Vision, & Values

Complete **Our Focus** to clarify your Value Discipline, Targets, & Differentiators

Complete **Our Priorities** to define your Balanced Scorecard perspectives & KPIs

[Continue >](#)

Quick Start — Home (Strategy Planner)



3 Execute and Manage your Organization's Strategy

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

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

☆	Title	Priority	Members	Progress	Due Date
☆	Hire new blog writer	**	👤	25%	04.03.2021
☆	Create financial systems requirements document	▲	👤	22%	07.17.2021
☆	Develop new sales training	**	👤	34%	12.29.2021
☆	Increase diversity in hiring	**	👤		
☆	Publish new operating manual for new plant site	**	👤		

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

Metric	Value	Legend
Strategic Objective	8	12 Not Started, 6 On Track, 4 At Risk, 1 Off Track
Strategic Initiative	16	27 Not Started, 6 On Track, 3 At Risk, 2 Off Track
Objective	9	12 Not Started, 5 On Track, 4 At Risk, 1 Off Track
Key Result	4	5 Not Started, 7 On Track, 1 At Risk
Task	7	8 Not Started, 2 On Track

Quick Start — Manage (Strategy Planner)



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 'Manage' module interface, each highlighting a different view: List, Tree, and Timeline.

- View a:** The 'List' view shows a list of strategic objectives and initiatives. A callout box with a green circle containing the letter 'a' points to the 'List' view icon in the top navigation bar. The text reads: "Click **List** to manage objectives, initiatives, results, and tasks".
- View b:** The 'Tree' view shows a hierarchical structure of work items. A callout box with a green circle containing the letter 'b' points to the 'Tree' view icon in the top navigation bar. The text reads: "Click **Tree** to see how your work is interconnected".
- View c:** The 'Timeline' view shows a Gantt chart of work items. A callout box with a green circle containing the letter 'c' points to the 'Timeline' view icon in the top navigation bar. The text reads: "Click **Timeline** to see your work in a Gantt chart".

The interface includes a dark sidebar on the left with navigation options: Home, Manage (highlighted in green), Organization, Strategize, Admin Settings, Help, and Log Out. The main content area displays various strategic objectives with progress bars and status indicators.

Quick Start — Organization (Strategy Planner)



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