



# Improving Strategic Execution

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Establish Direction  
Plan Together

Increase Understanding  
Increase ROI

User's Guide

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## 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 modules:

- **Navigation Bar.** This area offers easy access to the different modules in StrategyFrog, and includes *User Settings* and *Notifications*.
- **Home.** This is the landing page you see when you first log into StrategyFrog to see an overview of your work.
- **Manage.** This is the area where you will create, edit, and view your work.
- **Organization.** This is the area that allows you to see a summary of your organization's strategy. It includes the followings sections: *Who We Are*, *Our Focus*, *Our Priorities*, and *Our People*.

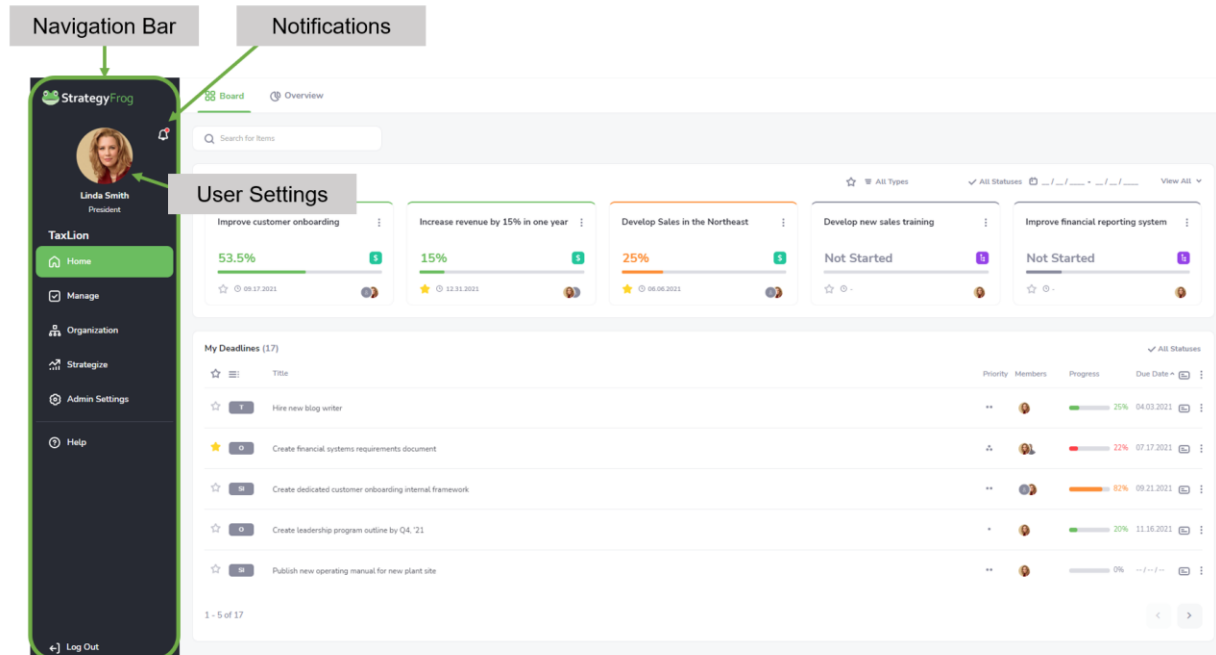
Note: If you are a Strategy Planner, you will also see *Strategize*, the module to create your organization's strategy. If you are an Admin, you will also *Strategize* and *Admin Settings*, the module to set up your organization for StrategyFrog.

This guide will help you learn how to use StrategyFrog.

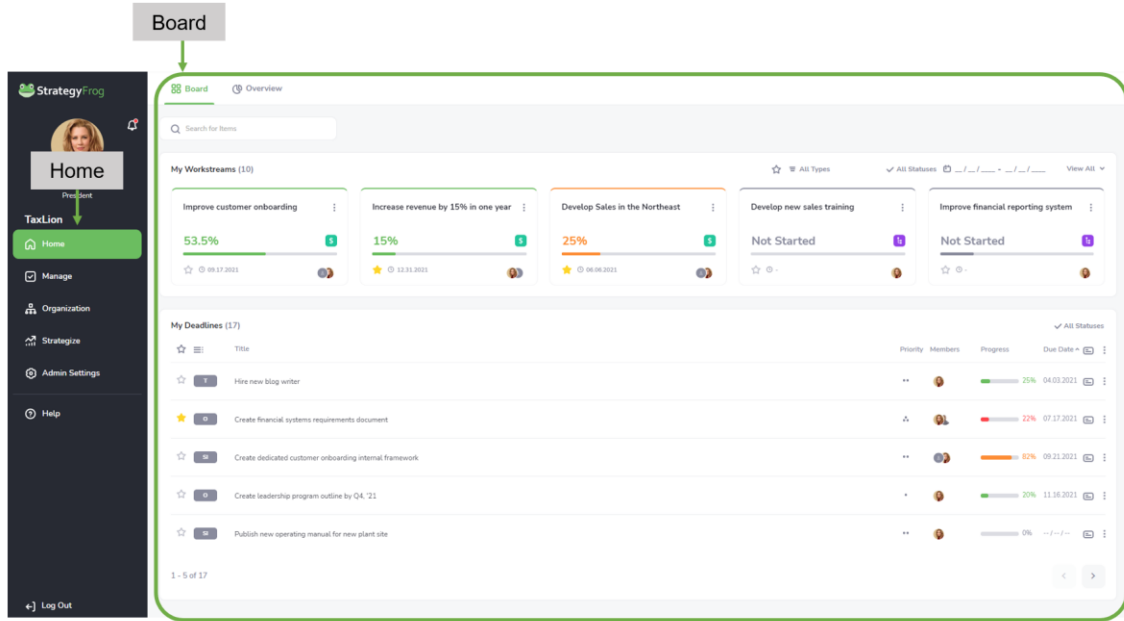
## Modules of StrategyFrog

StrategyFrog has the following modules:

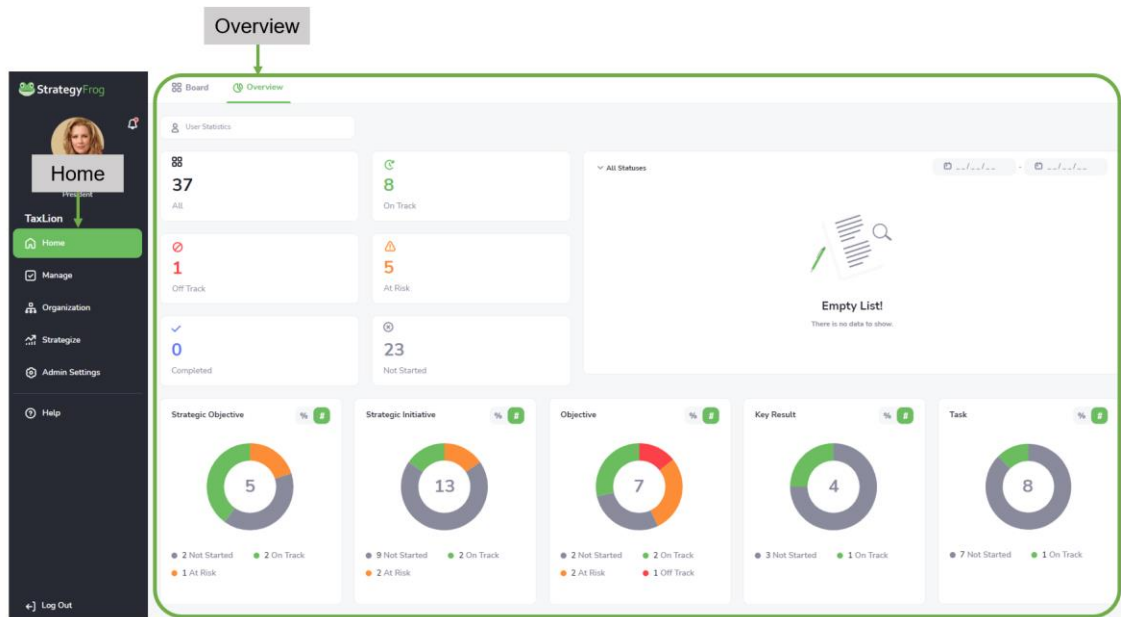
- Navigation Bar.** This area to the left of screen on a computer (and available to be accessed at the “hamburger” menu at the top right for tablets and smartphones), provides easy access to the different modules in StrategyFrog. The Navigation Bar includes *User Settings* and *Notifications*.



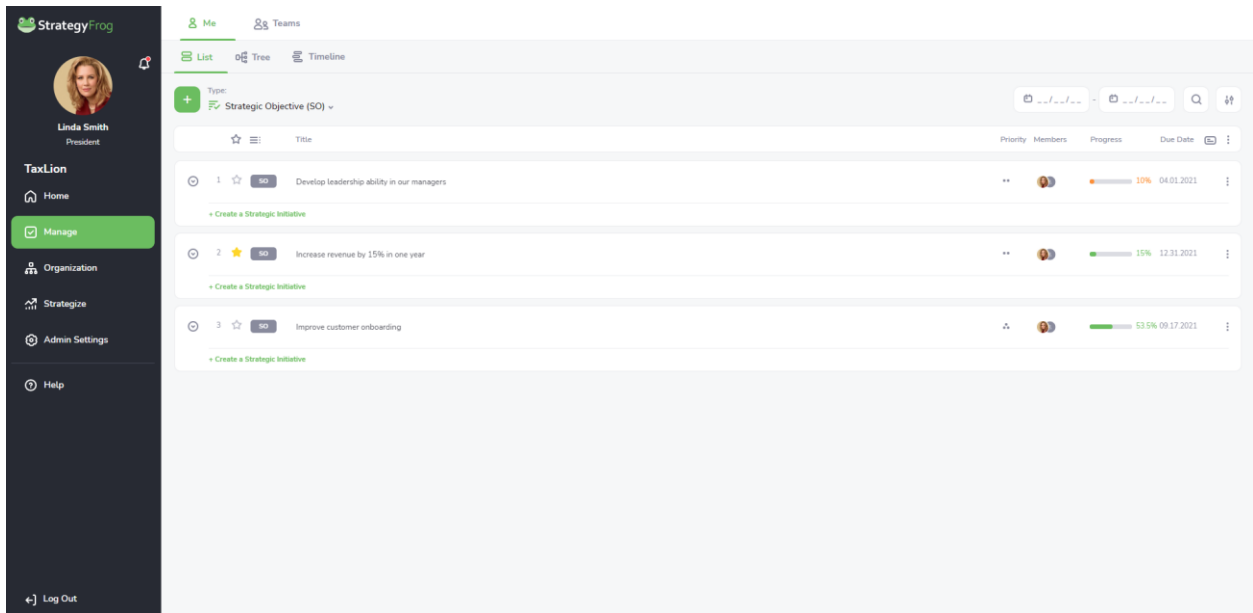
- **User Settings** – This is the area that allows you to customize your profile and establish when you want to receive notifications.
  - **View Notifications** – This is the area that highlights key notifications to alert you to upcoming work deadlines or progress updates.
- Home.** This is the landing page you see when you first log into StrategyFrog to see an overview of your work. It has two pages:



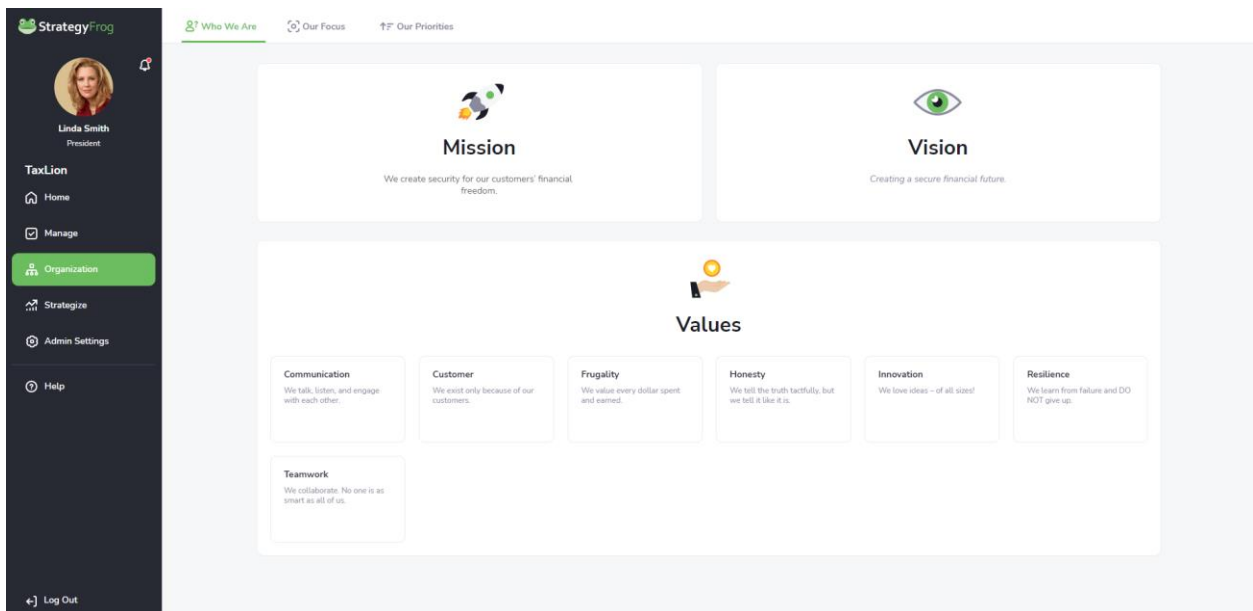
- **Board.** This screen shows you the “big picture” and the “details” of your work.



- **Overview.** This screen shows you a dashboard of your work.

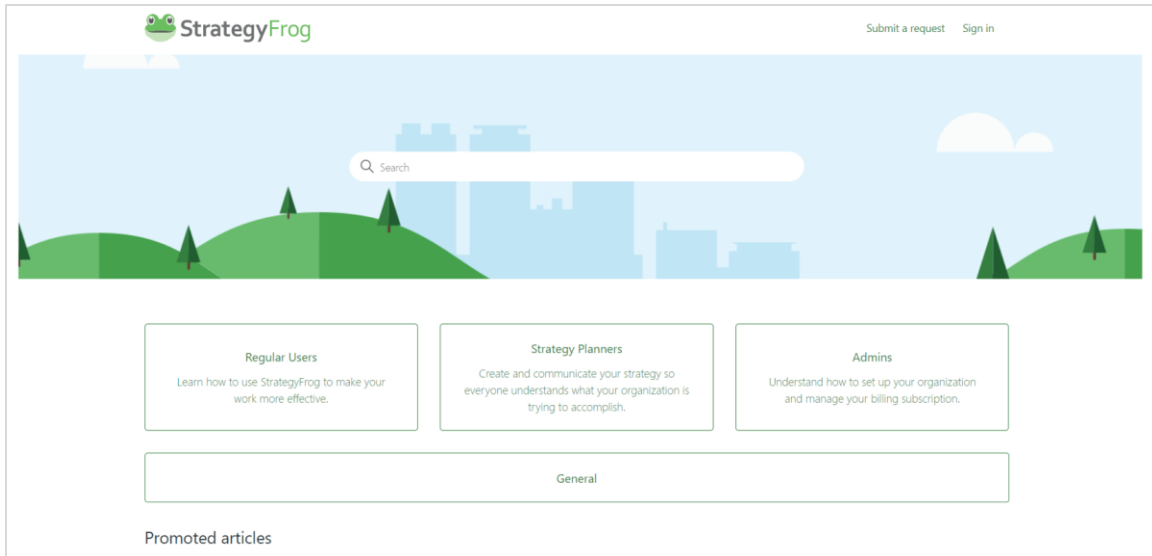


- **Manage.** This is the area where you will create, edit, and view your work.



- **Organization.** This is the area that allows you to see a summary of your organization’s strategy. It includes the followings sections: *Who We Are*, *Our Focus*, *Our Priorities*, and *Our People*.





- **Help.** This is the area where you will seek support to understand how to use StrategyFrog fully.

**Note:** StrategyFrog contains two other modules that are available only to Strategy Planners and Admins. *Strategize* is a module that Strategy Planners in your organization use to input and communicate your organization's strategy. *Admin Settings* is a module the Admins in your organization will use to configure StrategyFrog for your organization.

## Navigation Bar

### Introduction

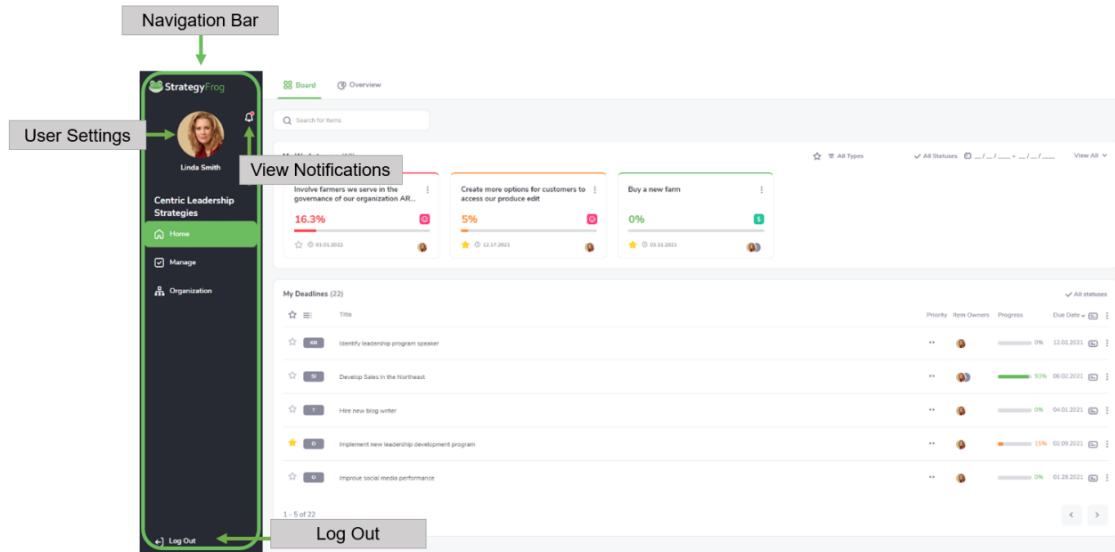
The Navigation Bar is the area to the left of screen on a computer<sup>1</sup> and provides easy access to the different modules in StrategyFrog. Use the Navigation Bar to explore other sections in StrategyFrog. It includes *Home*, *Manage*, and *Organization*.

The Navigation Bar also includes *User Settings*, *Notifications*, and *Log Out*.

- **User Settings.** This is the area that allows you to customize your profile and establish when you want to receive notifications.
- **View Notifications.** This is the area that highlights key notifications to alert you to upcoming work deadlines or progress updates.
- **Log Out.** Click this link to log out of StrategyFrog.

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<sup>1</sup> The Navigation Bar is also accessed at the “hamburger” menu at the top right for tablets and smartphones.



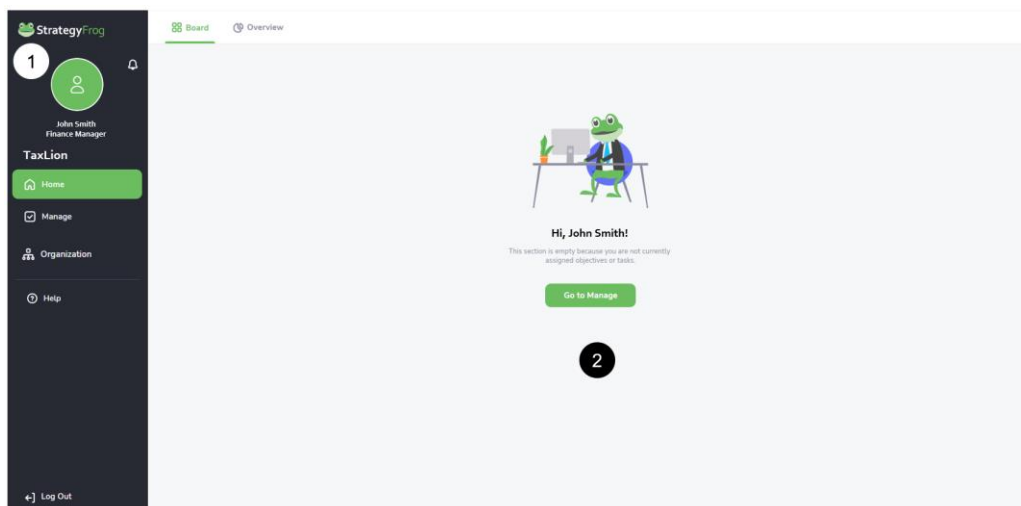
## User Settings

### Overview

This section provides guidance on how to:

- Access User Settings
- Understand User Settings
- Edit (or Update) User Information
- Change Password
- Adjust Notifications
- Archive Items

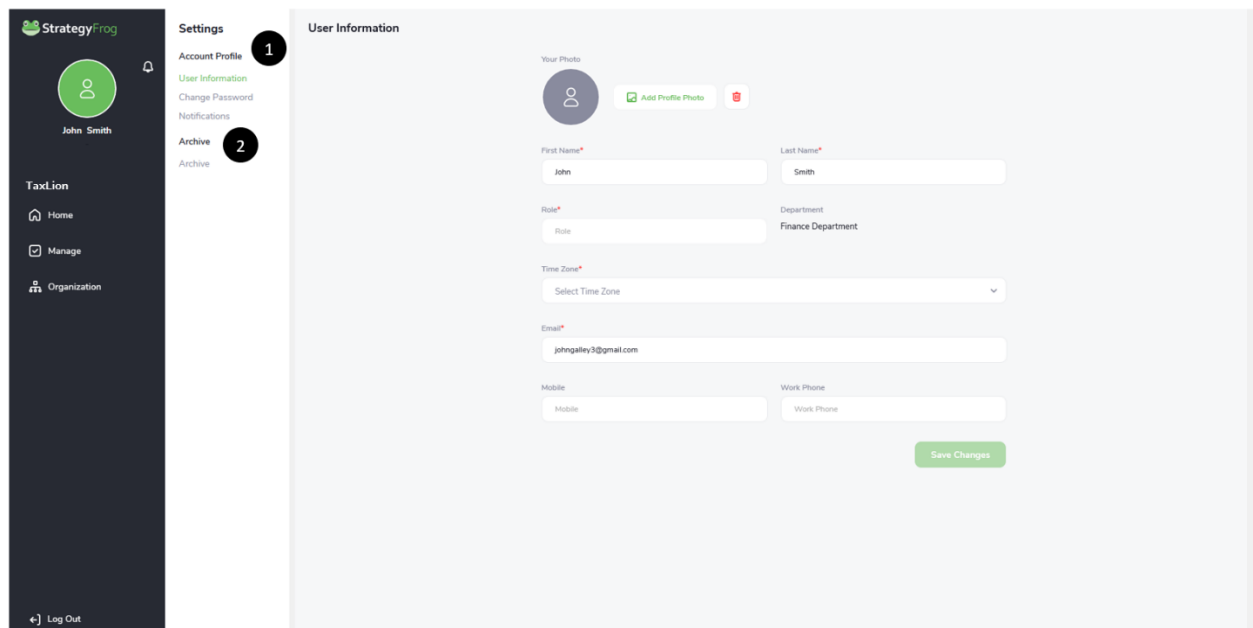
### Access User Settings



Once you are registered in StrategyFrog, you will see an initial screen that is “Empty” with no data. You can:

1. **Click** your empty *Profile Picture* to access your *User Settings*.
2. **Observe** that you likely have an “Empty List” when you log in because you have no active work items yet. (Either you have not created any work items or have not been assigned any work items.)

## Understand User Settings



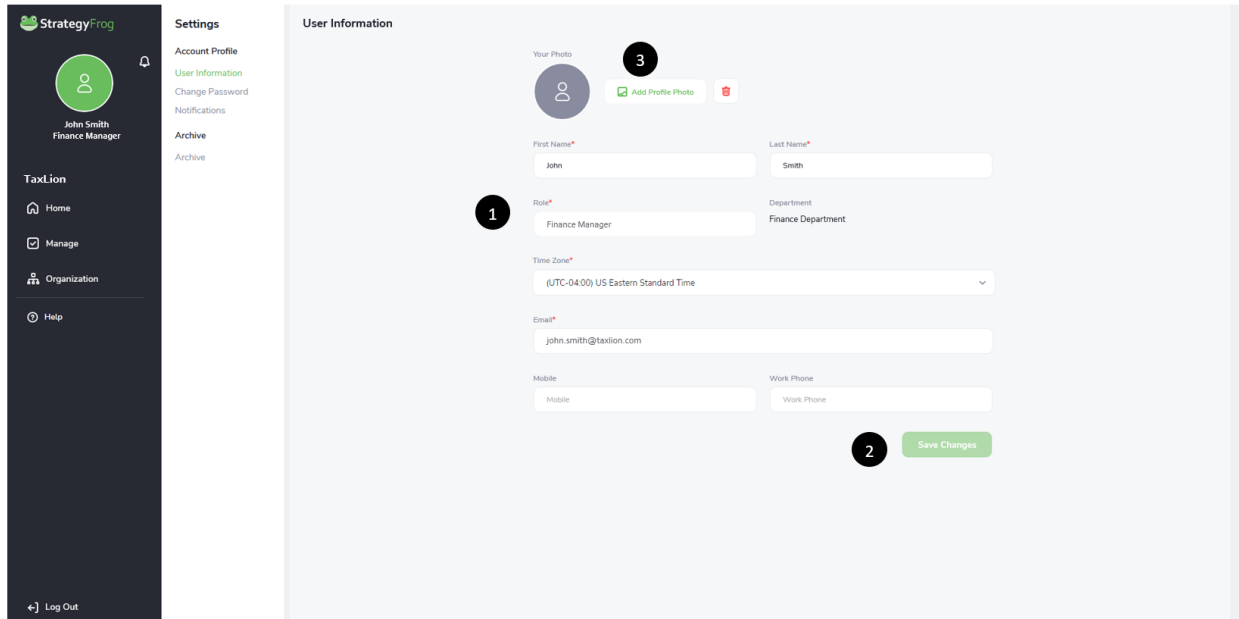
*User Settings* has two sections:

1. *Account Profile*, and
2. *Archive*.

*Account Profile* contains such features as *User Information*, *Change Password*, and *Notifications*. *Archive* stores inactive items you might want to restore or delete permanently.

### User Information

You can edit or update your *User Information* to provide profile details and add a profile picture.



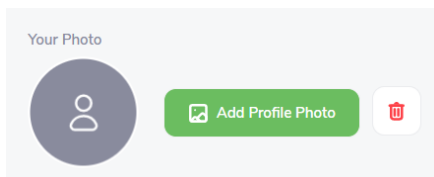
1. **Ensure** the following fields are complete:


- a. First Name\*
- b. Last Name\*
- c. Role\*
- d. Time Zone\*
- e. Email\*
- f. Work Phone
- g. Mobile Phone

(Note: These fields with an \* are required to complete for your profile.)

2. Click **Save Changes**.

3. Upload a picture to complete your Profile.

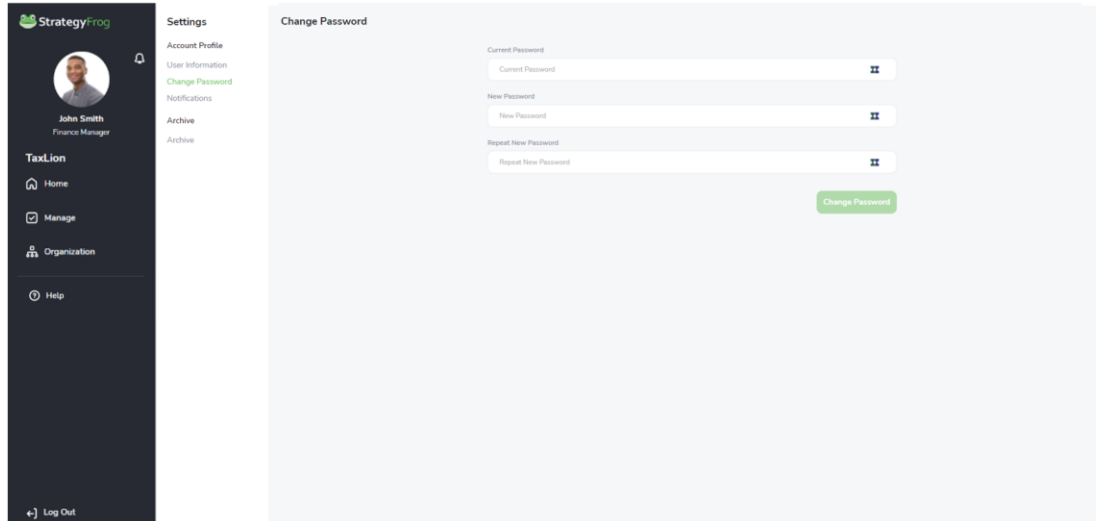


- a. **Click** “Add Profile Photo.”
- b. **Browse** to where your picture image (JPG, TIFF, BMP) is located.
- c. **Click** to select the picture.
- d. **Save** changes.
- e. **Click**  if you want to delete your picture or add another picture.

## Change Password

If you need to change your password, you can easily do so in *User Settings*. Ensure the following fields are complete:

1. **Enter** your current password.
2. **Enter** your new password.
3. **Enter** your new password again.

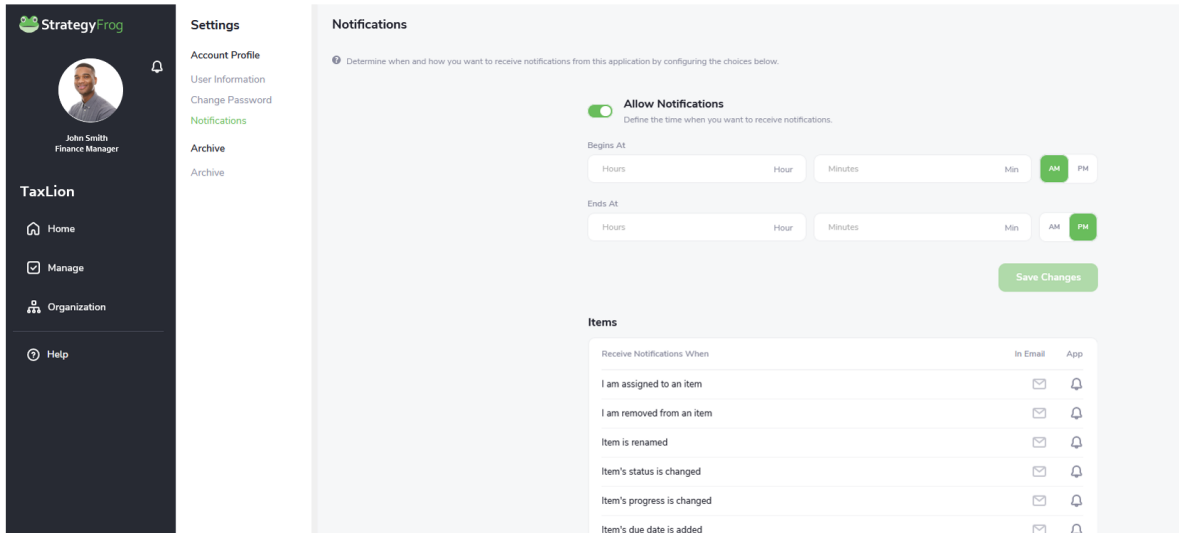


Note: Below is a list of suggestions to create a strong and unique password.

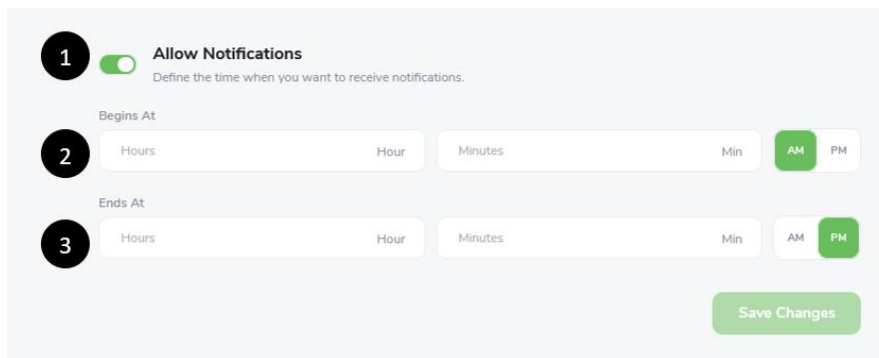
- *Keep at least an 8-character minimum length requirement.*
- *Consider a mix of upper and lower case letters, numbers, and symbols in your password (“xZ18y!hI97r” is harder to guess because it has 30,000 times as many possible combinations than an eight-character password with only lower case letters.)*
- *Do not use personal information or common words as a password.*
- *Select a random word or phrase and insert letters and **numbers** into the beginning, middle, and end to make it extra difficult to guess (such as “sPo0kyh@lI0w3En”).*
- *Do not use simple words or phrases like “password” or “letmein,” keyboard patterns such as “qwerty” or “qazwsx,” or sequential patterns such as “abcd1234” which make your password easier to guess.*

## Adjust Notifications

StrategyFrog will send automatic notifications to you either within the system or to your email address. You can define *when* you want to allow notifications to be received and *what* notifications you receive.















## Allow Notifications









1. **Determine** whether you want to allow notifications or not by choosing On or Off by selecting the toggle *Allow Notifications* feature. (Bright green indicates “On.”)
2. **Determine** the time when you want the notifications to *Begin* by entering a time to start (hour and minutes) and AM or PM (e.g., 9:00 AM).
3. **Determine** the time when you want the notifications to *End* by entering a time to start (hour and minutes) and AM or PM (e.g., 8:00 PM).

## Receive Notifications When

Determine where you want to receive notifications, in *Email*, in the *App*, or *both*. You have a variety of items to choose.

Items	In Email	App
Receive Notifications When		
I am assigned to an item	<b>1</b> 	
I am removed from an item	<b>2</b> 	
Item is renamed	<b>3</b> 	
Item's status is changed		
Item's progress is changed		
Item's due date is added		

1. Click the  to turn it green  to enable a notification in your Email.
2. Click the  to turn it green  to enable a notification in the App.
3. Enable both Email (  ) and App (  ) notifications.

## Understand Notification Types

StrategyFrog provides different type of notifications for Users. These include:

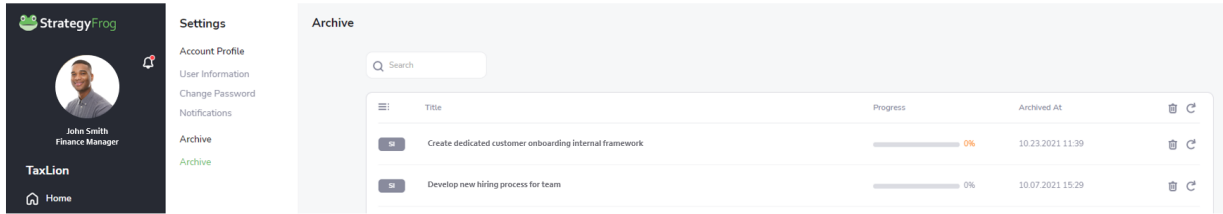
- **Items.** You might select notifications to occur when you are assigned to or removed from a work item.
- **Deadlines.** You might want to be alerted to an upcoming deadline that is occurring in a week, a day, or even after the deadline occurs.
- **Notes and Attachments.** You might want to be alerted when a note is created, or an attachment added.



Note: The following additional notifications occur for Admins.

- **Users and Members.** You might want to be alerted if there is a new member in your department.
- **Transactions.** You might want to be alerted if a transaction has succeeded or failed.


## Archive Items

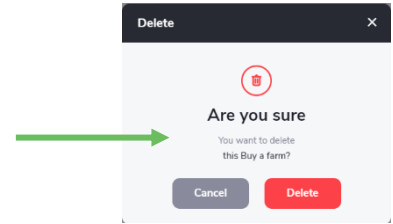
Archive allows users to *delete* an archived item or *unarchive* to restore the item in the system.




(Hover over the icon   you want to use; it will turn green signaling the icon is ready to be used.)

### Delete

1. Click the  to *delete* this item permanently.
2. Select either *Cancel* or *Delete* to remove this item permanently.



### Unarchive

1. Click the  to *unarchive* (or restore) this item to the system.



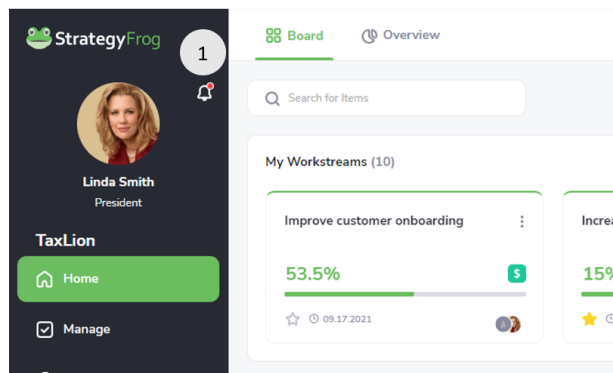
## Notifications

### Introduction

Notifications shows internal notifications generated by either the system or user actions (e.g., a user changed the status or progress of an item). You can *Read Notifications*, *Archive Notifications*, *Archive All Notifications*, *Unarchive Notifications*, or *Delete Notifications*.

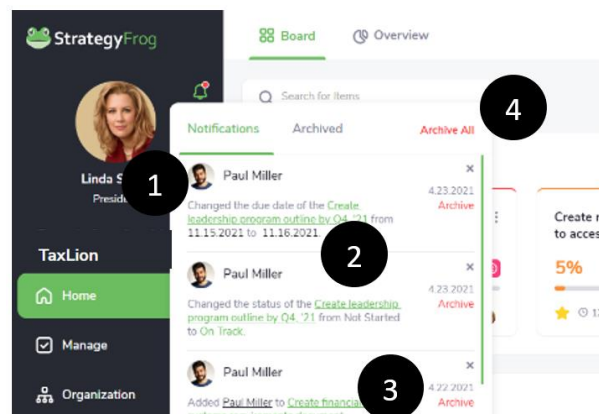
### Access View Notifications

1. Click the  at the top of the Navigation Bar to view Notifications.



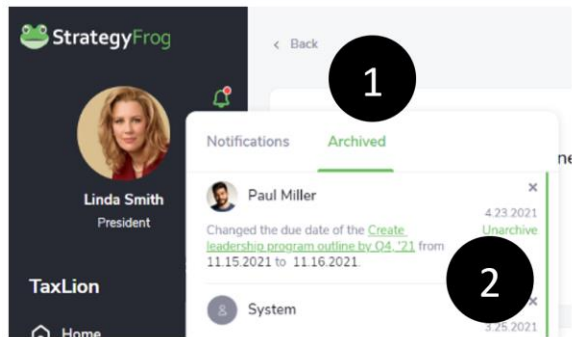
### Read, Archive, and Archive All Notifications

Once the Read Notifications window has appeared, you can Read and/or Archive the Notification.



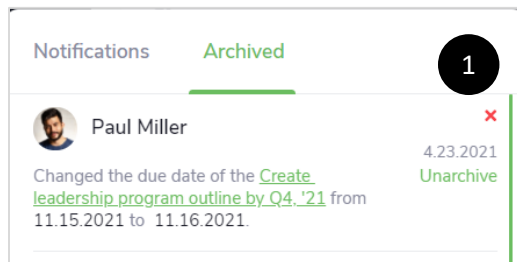
1. **Read** the Notifications.
2. **Click** the hyperlink to be taken to the item that the Notification is about.
3. **Click** *Archive* to move the notification to the *Archived* folder (for storage to potentially delete, unarchive, or restore).
4. **Click** *Archive All* to move all Notifications to the *Archived* folder.

## Unarchive Notifications

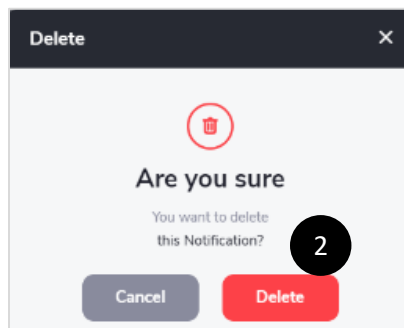


1. **Click *Archived*** within Notifications to go to this folder.
2. **Click *Unarchive*** to restore the Notification to the Notifications folder.

## Delete Notifications

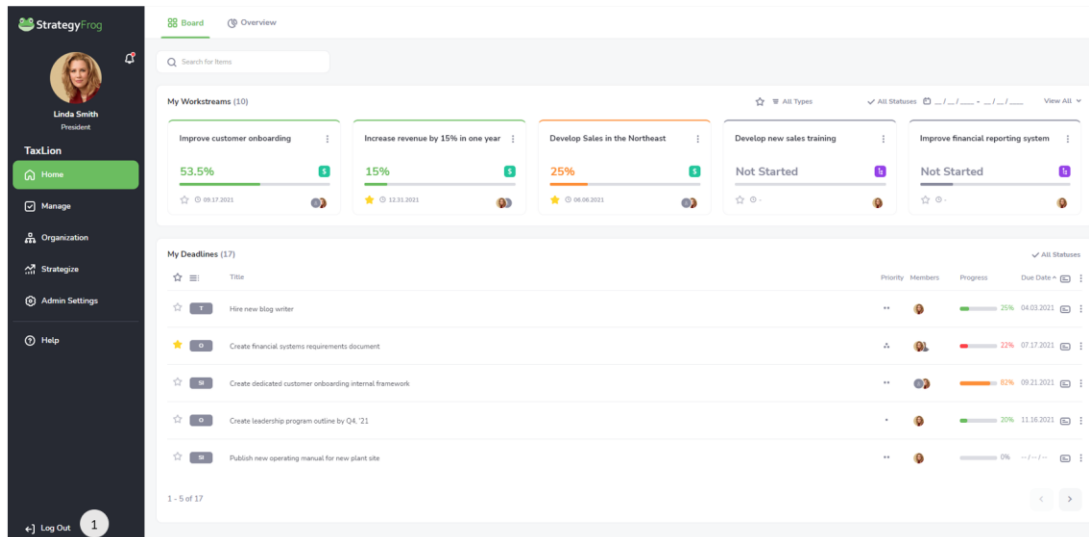


1. **Click the **x**** to delete this Notification permanently.



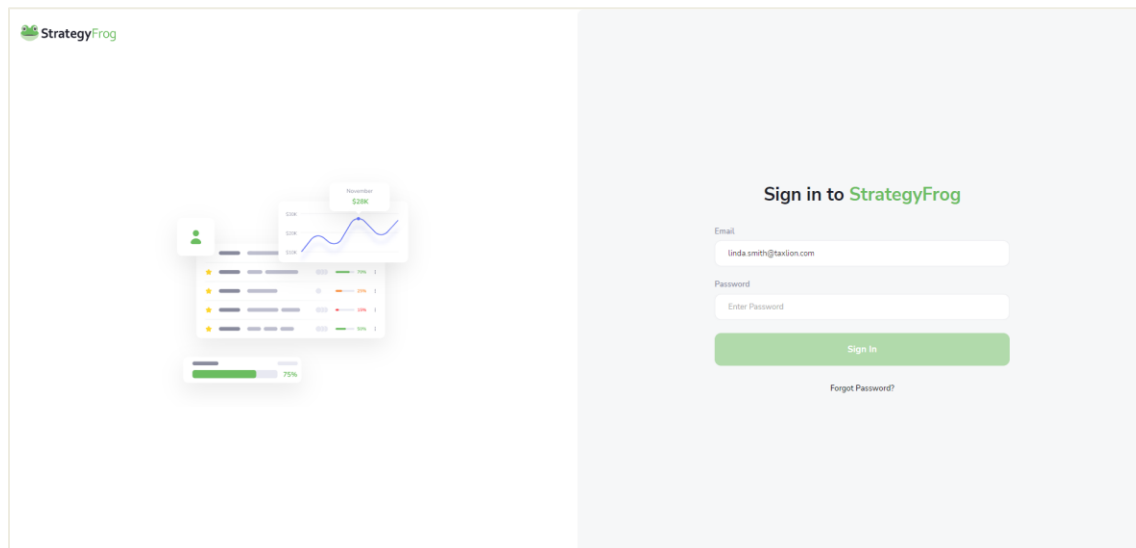
2. **Click Delete** to remove this item permanently from the system. (Or click Cancel to not Delete this item.)

## Log Out



The screenshot shows the StrategyFrog dashboard interface. On the left is a dark navigation bar with the StrategyFrog logo at the top, followed by the user's profile (Linda Smith, President). Below the profile are menu items: Home (highlighted), Manage, Organization, Strategize, Admin Settings, and Help. At the bottom of the navigation bar is a 'Log Out' link with a notification badge showing '1'. The main content area displays 'My Workstreams (10)' with five cards showing progress bars and 'My Deadlines (17)' with a table of tasks.

1. **Log Out** of StrategyFrog by clicking the Log Out link at the bottom of the Navigation Bar.



The screenshot shows the StrategyFrog login page. On the left is a preview of the dashboard with various charts and data points. On the right is the login form with the following fields and elements:

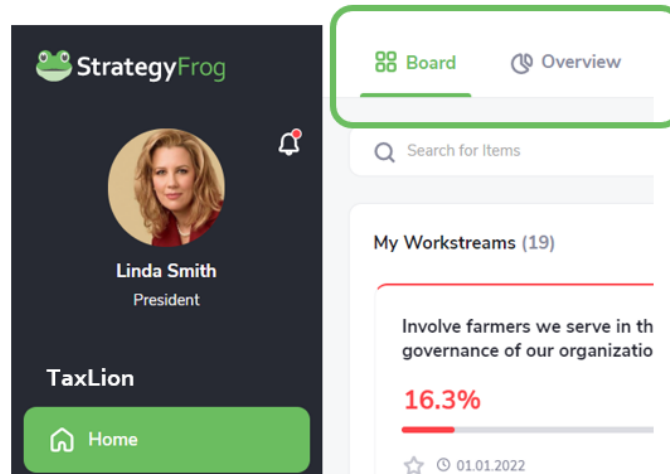
- Header: Sign in to StrategyFrog
- Email field: Contains the text 'linda.smith@taxlion.com'
- Password field: Contains the text 'Enter Password'
- Sign In button: A green button with the text 'Sign In'
- Forgot Password? link: A small link below the Sign In button.

Once you have logged out of StrategyFrog, you will be sent to the above page.

## Home

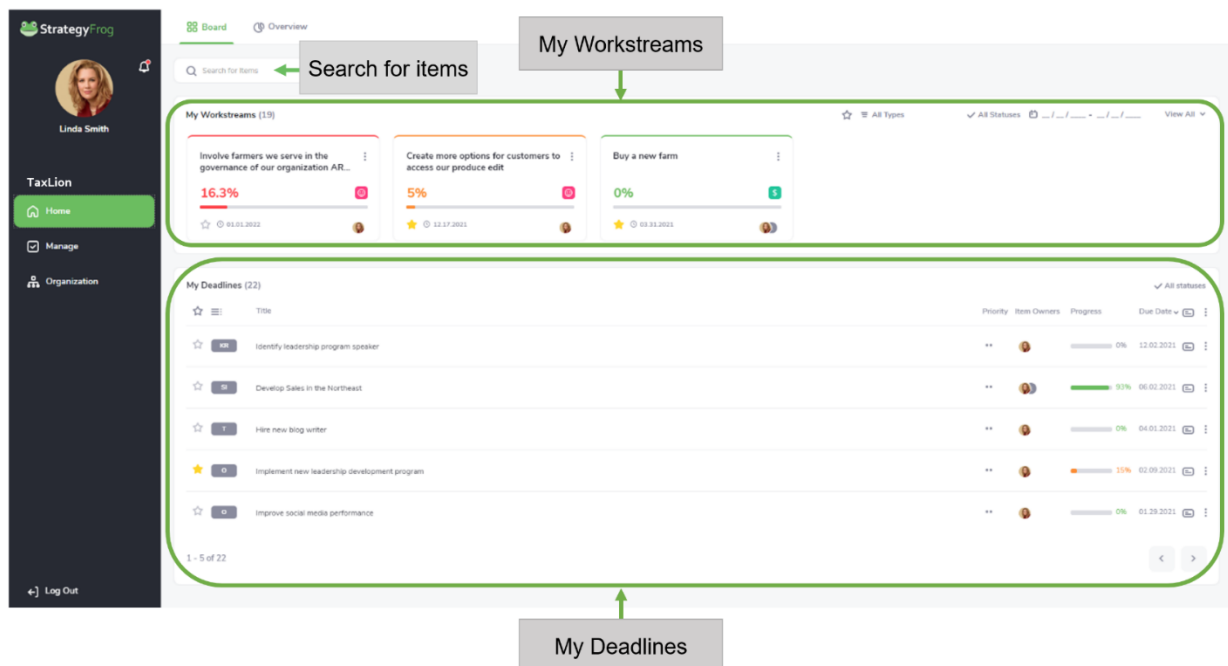
### Introduction

The Home module provides an overview of your work and is divided into two areas: *Board* and *Overview*.



### Board

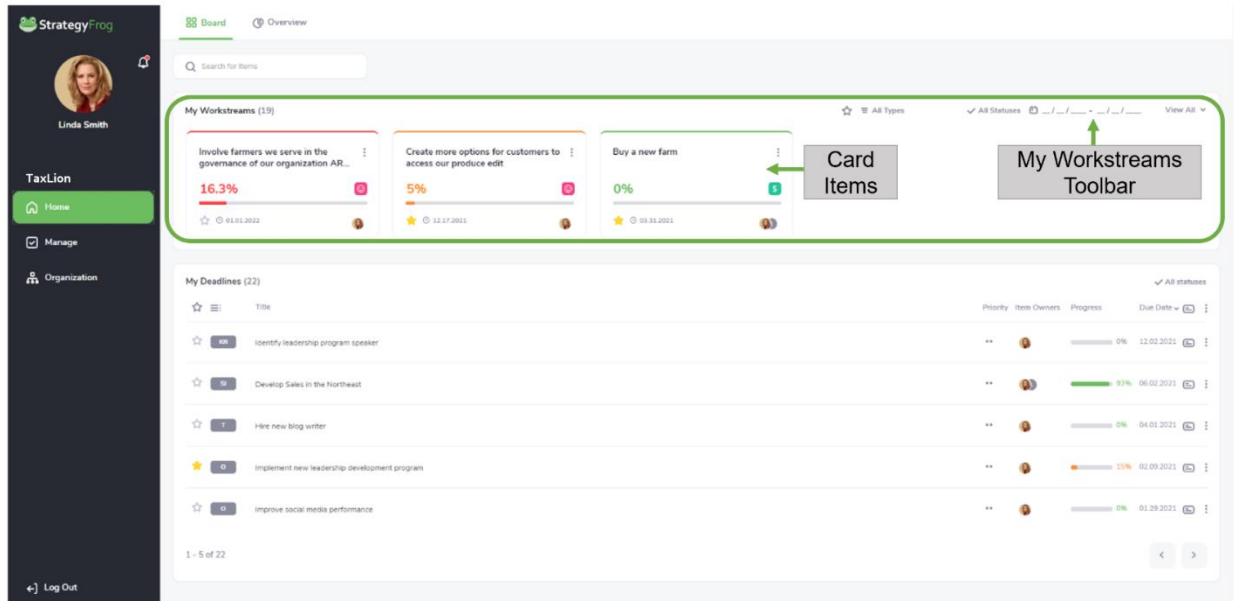
Board provides the “big picture” and all the details in one place. It has two main sections: *My Workstreams* and *My Deadlines*. It also allows you to *Search for items*.



### My Workstreams.

*My Workstreams* provides an overview of your work by sharing a summary of each significant project you lead. This section includes “Card Items” and “My Workstreams Toolbar.”

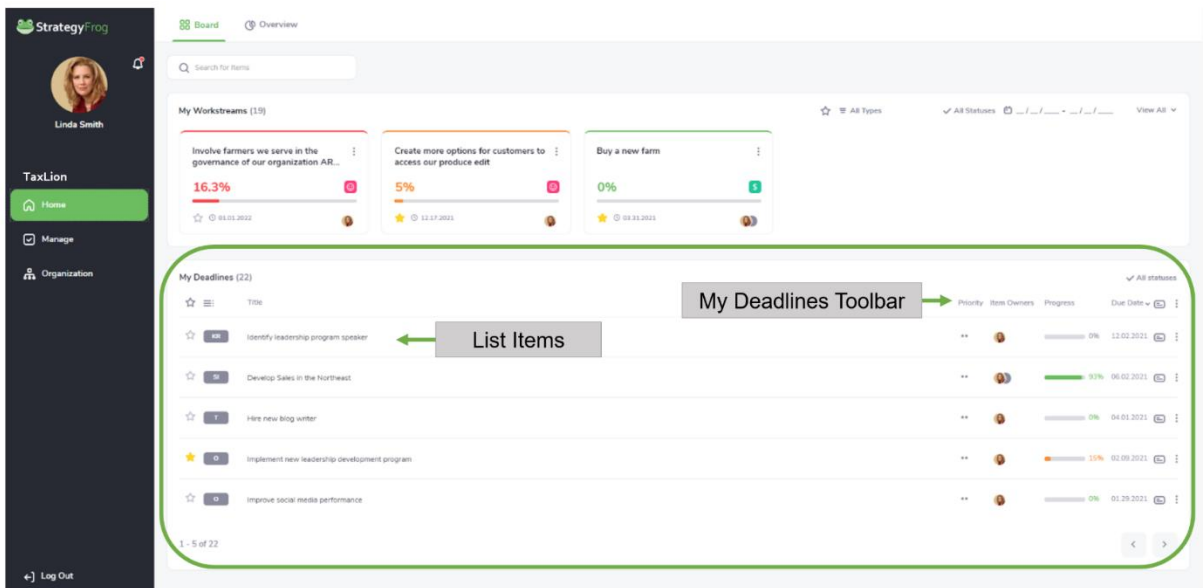
(A workstream is the progressive completion of tasks that are required to finish a project. In other words, they are the core areas of activities on a project, whether it is being conducted by an individual, a team, or a department.)



### My Deadlines

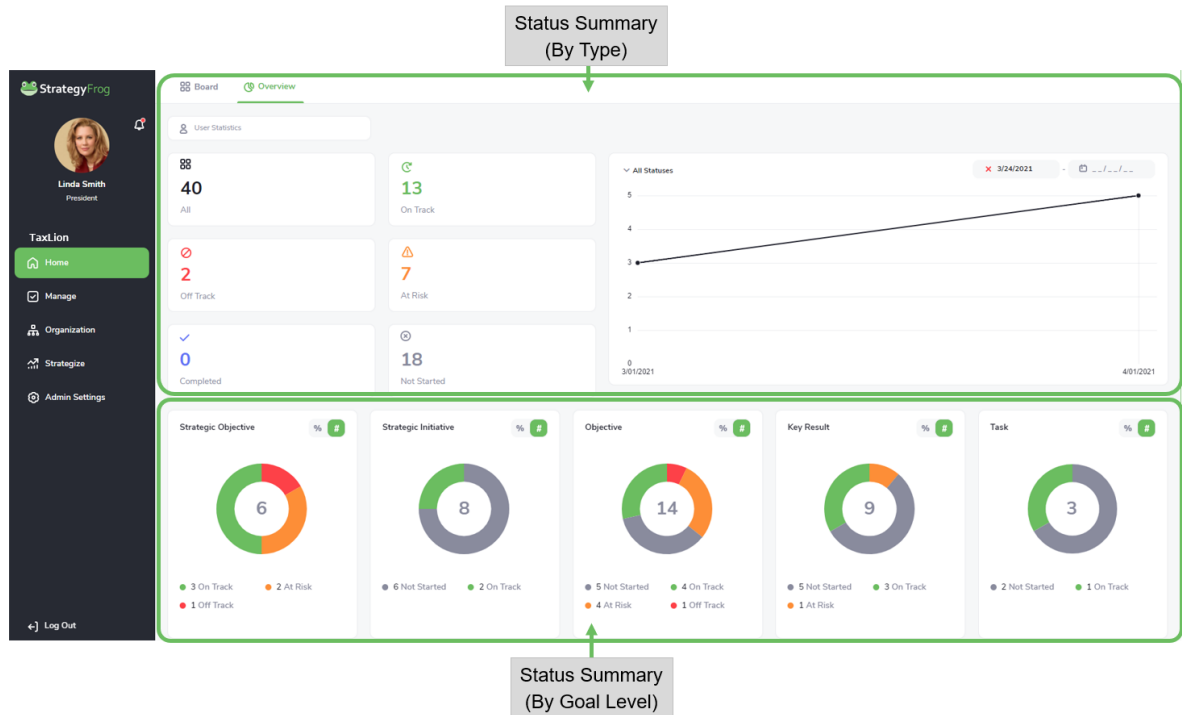
*My Deadlines* provides an overview of your work showing a list of items, sorted by due dates.

This section includes “List Items” and “My Deadlines Toolbar.”



## Overview

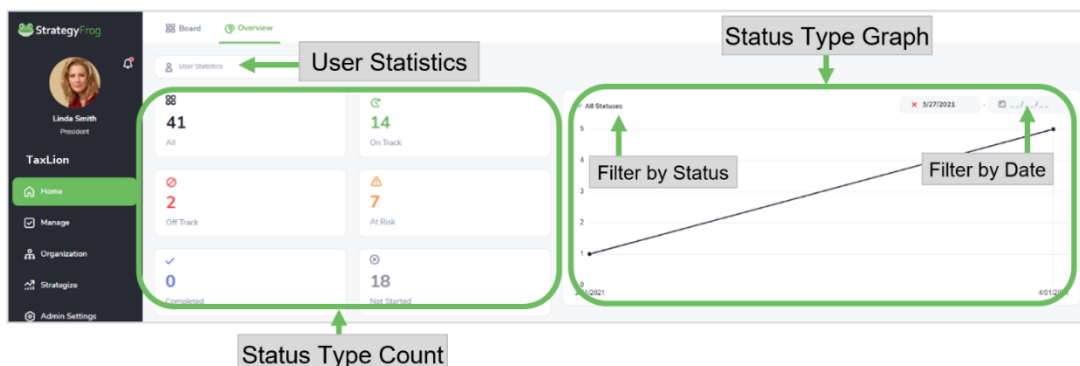
Overview is a dashboard that allows you to see data on work (yours and the organization). It has two main sections: *Status Summary (By Type)* and *Status Summary (By Goal Level)*.



### Status Summary (By Type)

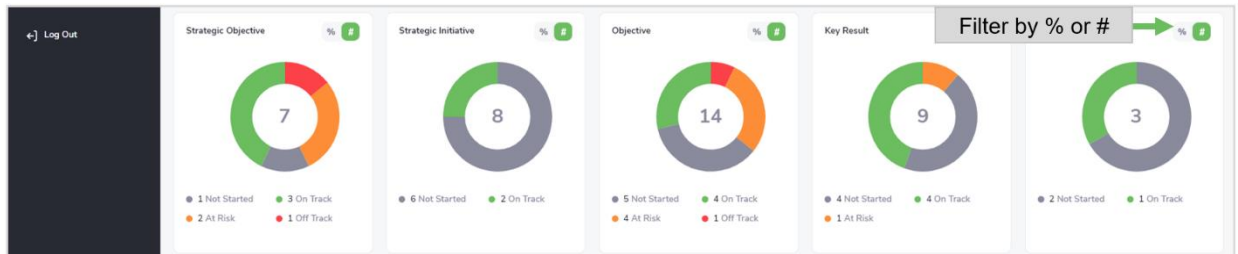
This section provides an overview of the progress of your work by status type (i.e., *Not Started*, *On Track*, *At Risk*, *Off Track*, and *Completed*). It has the following elements:

- *Status Type Count*. This displays a count of your work items by status type (i.e., *Not Started*, *On Track*, *At Risk*, *Off Track*, and *Completed*).
- *Status Type Graph*. See the flow of your work for a particular status type. (You can *Filter by Date* and *Filter by Status* type.)
- *User Statistics Filter*. Select a particular user and see the statistics for their work.



### Status Summary (By Goal Level)

This section displays a user’s progress and status by Goal Level (i.e., Strategic Initiative, Strategic Objective, Objective, Key Result, and Task). It also allows users to view the progress by percentage or number.



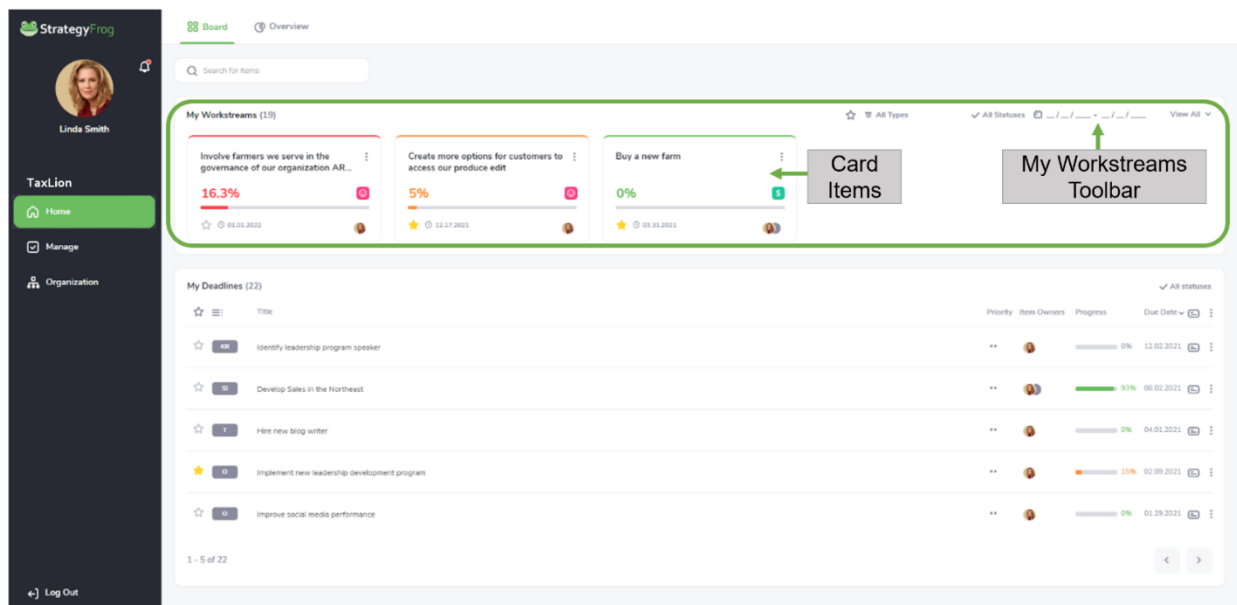
## Using Board

### Introduction

Board provides the “big picture” and all the “details” in one place. It has two main sections: *My Workstreams* and *My Deadlines*. Board also allows users to *Search for items*.

### My Workstreams

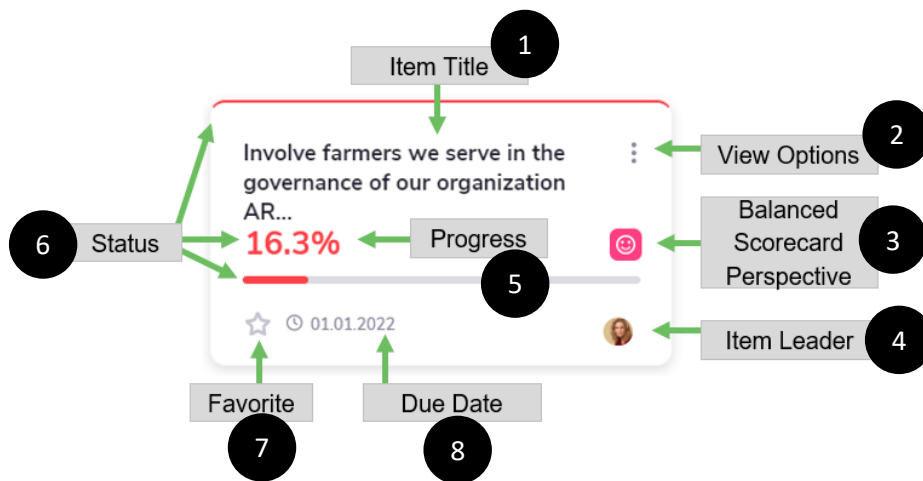
*My Workstreams* provides an overview of your work by sharing a summary of each significant project you lead. It includes *Card Items* and *My Workstreams Toolbar*.



### Card Items


#### *Introduction*

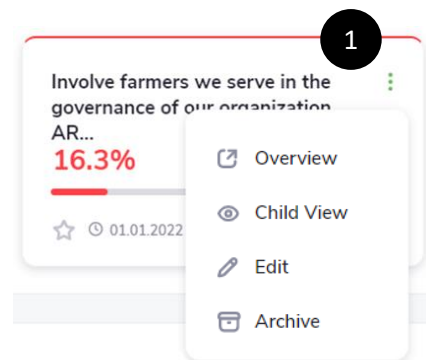
A Card Item provides a quick snapshot summary of each project you lead. It has the following features:



1. *Item Title*. This displays the title of your work item.
2. *View Options*. This allows you to transition to *Overview*, *Manage View*, *Edit*, or *Archive*. (These are different ways to view and edit your work.)
3. *Balanced Scorecard Perspective*. This icon indicates how this work item is aligned with your organization’s strategic priorities.
4. *Item Leader*. This indicates who is leading this work item. You can also identify *Supporters* to the work.
5. *Progress*. This indicates the current progress made on the work item.
6. *Status*. This indicates if your work item is *On Track*, *At Risk*, *Off Track*, *Completed*, or *Not Started*. Status for each item is presented in a unique color.
7. *Favorite*. This star represents if this item is a “favorite.” If it is yellow, then this item has been selected as a favorite and can be viewed quickly by selecting favorite in the My Workstreams tool bar.
8. *Due Date*. This displays when the work item is due.

#### Access features on a Card Item

1. **Click the ** to access *View Options* and **Select** the feature you want. You can transition to *Overview*, *Manage View*, *Edit*, or *Archive*.
  - *Overview*. This provides a summary view of your work item (i.e., Strategic Objective, Strategic Initiative, Objective, Key Result, or Task). It includes progress history and the ability to create (or add) “child” items.
  - *Child View*. This provides a view of this work item and all its children. You can edit directly on this view.





- *Edit*. This provides an editable view of this work item.
- *Archive*. This feature allows you to archive (or store) this work item.

(Please see *View Options* in MANAGE for more information about this feature.)



2. Click the title to be taken to Overview.



3. Click the star to mark this item as a *Favorite*.

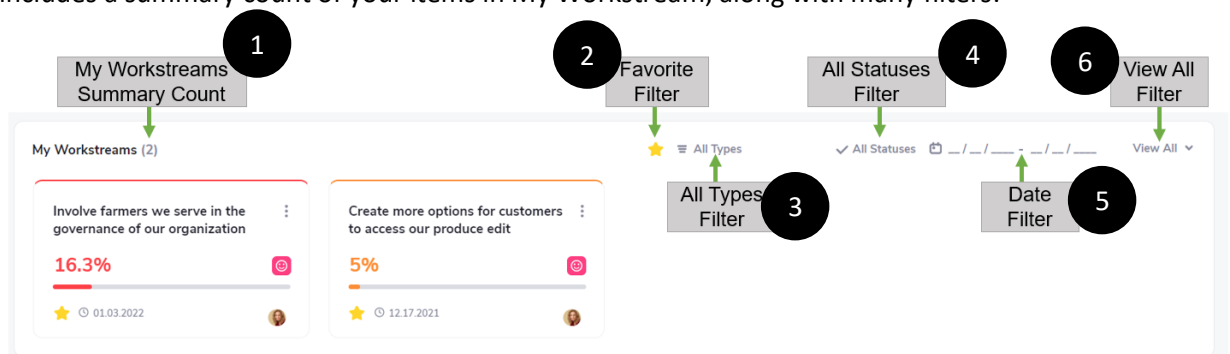
#### Learn features on a Card Item

1. **Hover** over the to learn who is the *Item Leader or Supporter*.
2. **Hover** over the to learn which Balanced Scorecard Perspective is aligned with this work item.
3. **Hover** over the 16.3% to see the Item's Progress.
4. **Hover** over the *Item Title* to see the whole title.

### My Workstreams Toolbar

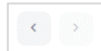
#### Introduction

The *My Workstreams Toolbar* allows you to configure your preferred view of *Card Items*. It includes a summary count of your items in My Workstream, along with many filters:



1. *My Workstreams Summary Count*. This item provides a count of all visible work items displayed in the *My Workstreams* area.
2. *Favorite Filter*. This item allows you to show your favorite items or not.
3. *All Types Filter*. This item allows you to filter and display a goal level type (i.e., Strategic Objective, Strategic Initiative, Objective, Key Result, or Task).
4. *All Statuses Filter*. This item allows you to indicate if your work item is *On Track*, *At Risk*, *Off Track*, *Completed*, or *Not Started*. The status for each item is presented in a unique color.
5. *Date Filter*. This item allows you to show your work items within a specific date range.
6. *View All Filter*. This item allows you to show All Workstream items (or not).

Note: *Scroll Backward or Forward*. This feature allows you to see all Items if *View All* is chosen.



Access features on the *My Workstreams Toolbar*

#### Favorite (★)

1. Click the ☆. The star becomes ★ and only displays work items that are favorites.

#### All Types (☰ All Types)

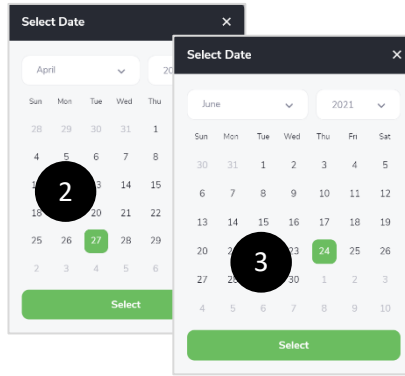
1. Click ☰ All Types. This filter turns green (☰ All Types) and displays all the goal level item types.
2. Select the type of the goal level item you want to display (i.e., Strategic Objective, Strategic Initiative, Objective, Key Result, or Task).

#### All Statuses (✓ All Statuses)

1. Click ✓ All Statuses. This filter turns green (✓ All Statuses) and displays all the status types.
2. Select the status type you want to display (i.e., *Not Started*, *On Track*, *At Risk*, *Off Track*, or *Completed*).

#### Date Filter (📅 \_\_/\_\_/\_\_ - \_\_/\_\_/\_\_ )

1. Click the Start Date (📅 \_\_/\_\_/\_\_ - \_\_/\_\_/\_\_ ).



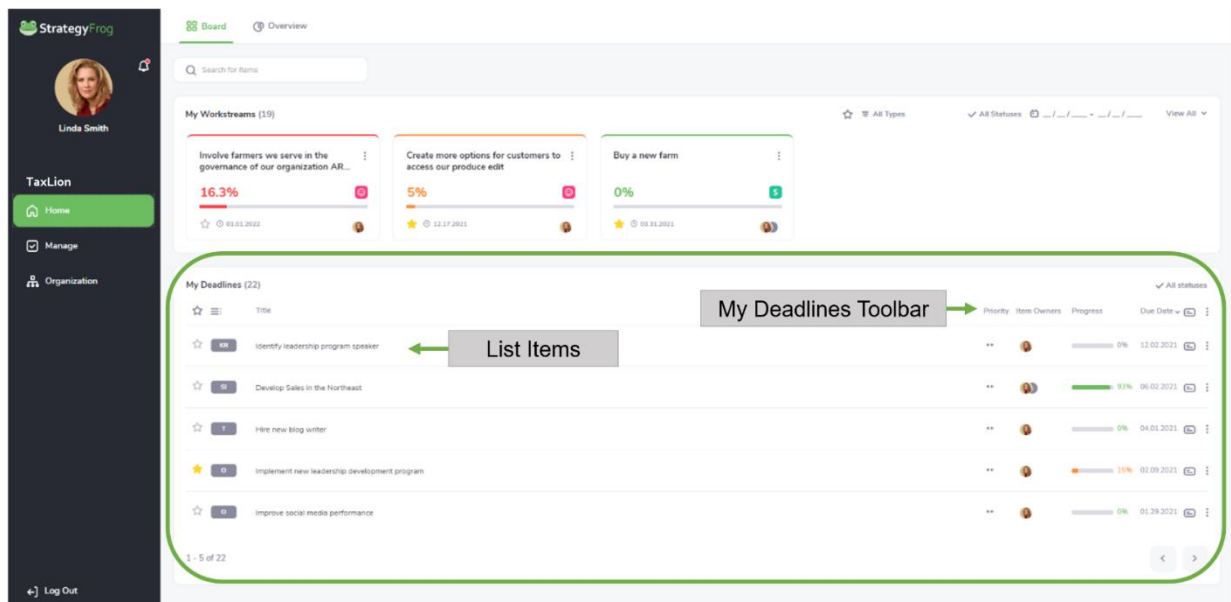
2. **Choose** a Start Date.
3. **Click** Select.
4. **Click** the End Date ( 📅 04.27.2021 - \_/\_/\_ × ).
5. **Choose** an End Date.
6. **Click** Select.
7. **Note** that the Date Filter shows a date range ( 📅 04.27.2021 - 06.24.2021 × ).
8. **Click** x to cancel the dates.

**View All Filter ( View All ▾ )**

1. **Click** View All ( View All ▾ ). The My Workstreams work area displays all your workstream level items.
2. **Click** Close All ( Close All ▲ ) to return to the previous view.
3. **Scroll** Backward or Forward ( ◀ ▶ ) to see more Items.

## My Deadlines

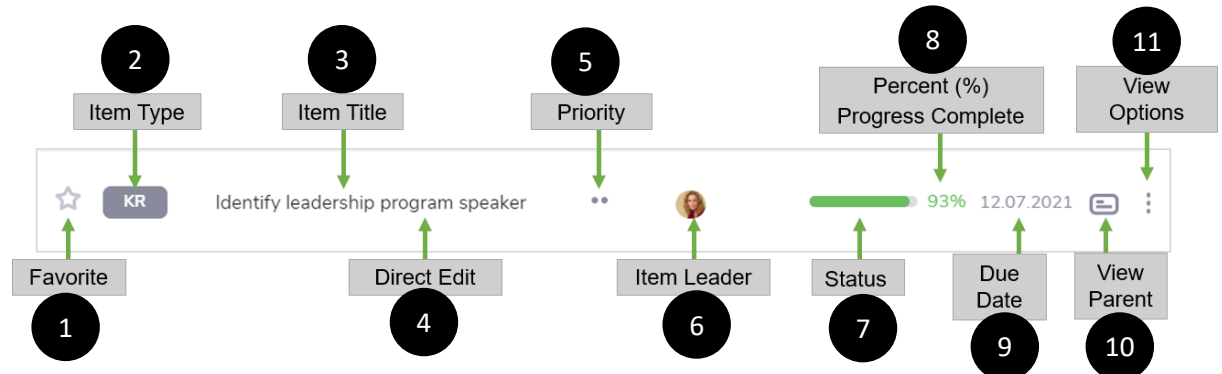
*My Deadlines* provides an overview of your work that is deadline intensive with an approaching due date. This section includes “List Items” and “My Deadlines Toolbar.”



## List Items

### Introduction

A List Item provides a quick snapshot summary of each work item that is coming due soon. It has the following features:



1. **Favorite.** This star represents if this item is a “favorite.” If it is yellow, then this item has been selected as a favorite and can be viewed quickly by selecting favorite in the My Deadlines tool bar.
2. **Item Type.** This displays the abbreviation for the item type displayed:
  - Strategic Objective (SO)
  - Strategic Initiative (SI)
  - Objective (O)
  - Key Result (KR)
  - Task (T)
3. **Item Title.** This displays the title of your work item.
4. **Direct Edit.** This feature allows you to directly edit each List Item.
5. **Priority.** This displays the priority of the work item you defined.

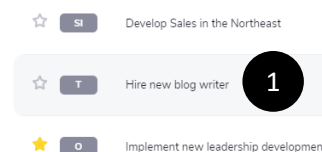
- Low
  - Medium
  - High
6. **Item Leader.** This indicates who is leading this work item.
7. **Status.** This indicates if your work item is *On Track*, *At Risk*, *Off Track*, *Completed*, or *Not Started*. The status for each item is presented in a unique color.
8. **Progress.** This indicates the current progress made on the work item.
9. **Due Date.** This displays when the work item is due.
10. **View Parent.** This allows you to see the parent of this child item.
11. **View Options.** This allows you to transition to *Overview*, *Manage View*, *Edit*, or *Archive*. (These are different ways to view and edit your work.)

### Access features on a List Item

#### Favorite (★)

1. **Click the ☆.** The star becomes ★ and only displays work items that are favorites.

#### Direct Edit



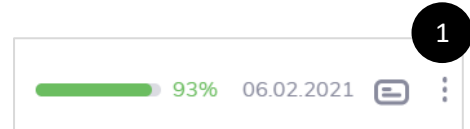
1. **Click** the *List Item* you want to directly edit.
2. **Type** your revisions.

Note: You can easily access other features in direct edit by doing the following:

1. **Hit** tab to advance to other features (i.e., Priority, Item Owners, Progress, Due Date, View Parent, and View Options) in this List Item.
2. **Click** the feature to edit it.

### View Options (⋮)

1. **Click** the ⋮ (three dots) to access *View Options*.
2. **Select** the feature you want. You can transition to *Overview*, *Manage View*, *Edit*, or *Archive*.

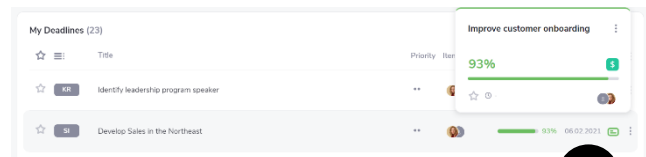


- *Overview*. This provides a summary view of your work item (i.e., Strategic Objective, Strategic Initiative, Objective, Key Result, or Task). It includes progress history and the ability to create (or add) “child” items.
- *Child View*. This provides a view of this work item and all its children. You can edit directly on this view.
- *Edit*. This provides an editable view of this work item.
- *Archive*. This feature allows you to archive (or store) this work item.

(Please see *View Options* in MANAGE for more information about this feature.)

### View Parent (☰)

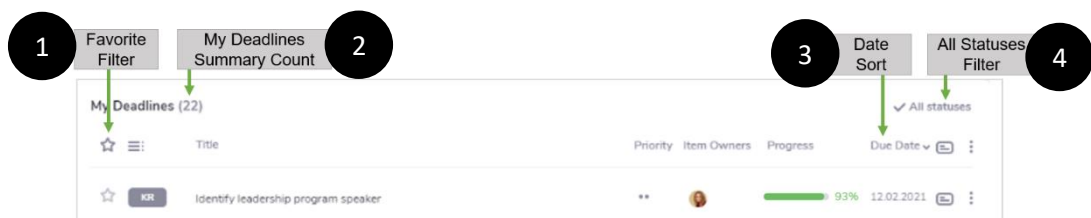
1. **Click** ☰ to access *View Parent*.
2. **Click** the Parent item to learn more.



## My Deadlines Toolbar

### Introduction

The *My Deadline Toolbar* allows you to configure your preferred view of *List Items*. It includes a summary count of your items in *My Deadlines*, along with filter and sort features.

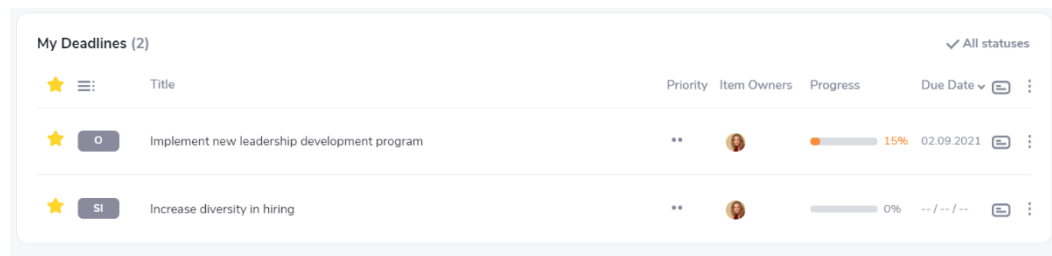


1. *Favorite Filter*. This item allows you to show your favorite items or not.
2. *My Deadlines Summary Count*. This item provides a count of all visible work items displayed in the *My Workstreams* area.
3. *Date Sort*. This item allows you to sort your List Items *Oldest to Newest* or *Newest to Oldest*.
4. *All Statuses Filter*. This item allows you to indicate if your work item is *On Track*, *At Risk*, *Off Track*, *Completed*, or *Not Started*. The status for each item is presented in a unique color.

Access features on the *My Deadlines* Toolbar

### Favorite (★)

1. **Click** the ☆. The star becomes ★ and only displays work items that are favorites.



### All Statuses (✓ All Statuses)

1. **Click** ✓ *All Statuses*. This filter turns green (✓ *All Statuses*) and displays all the status types.
2. **Select** the status type you want to display (i.e., *Not Started*, *On Track*, *At Risk*, *Off Track*, or *Completed*).

### Date Sort ( Due Date ▼ )

By default, StrategyFrog arranges the *Due Date* of items in *My Deadlines* showing the most current date to the date farthest in the future (Ascending order). You can also choose to show the date farthest in the future to the most current date. (Descending order).

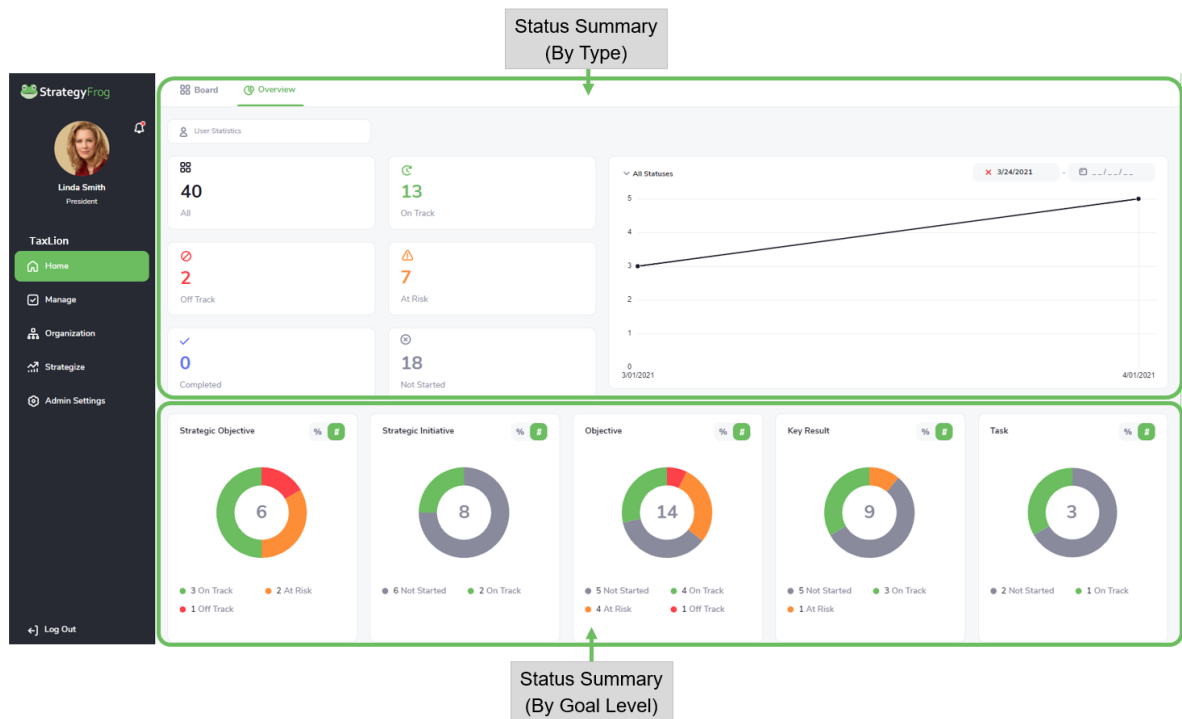
1. **View** Due Date ▼ to see the Items with the most current due dates (Ascending order).
 

Due Date ▲	Due Date ▼
02.11.2021	11.16.2021
04.03.2021	09.21.2021
07.17.2021	07.17.2021
2. **View** Due Date ▲ to see the Items with the due dates farthest in time (Descending order).

## Using Overview

### Introduction

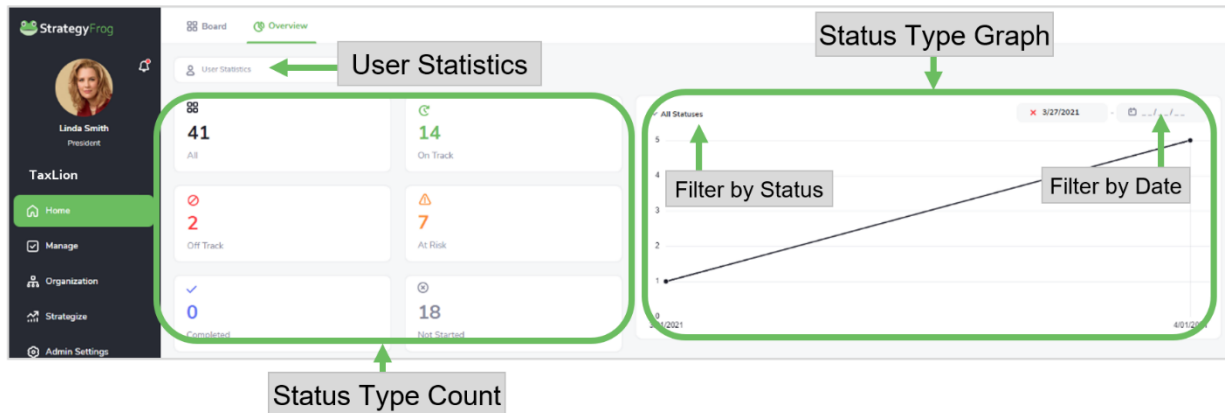
Overview is a dashboard that allows you to see data on work (yours and the organization). It has two main sections: *Status Summary (By Type)* and *Status Summary (By Goal Level)*.



### Status Summary (By Type)

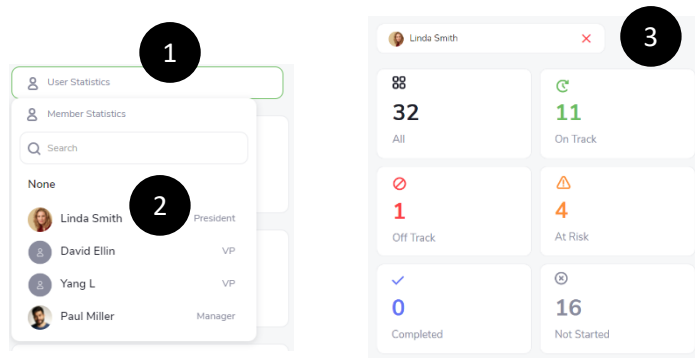
This section provides an overview of the progress of your work by status type (i.e., *Not Started*, *On Track*, *At Risk*, *Off Track*, and *Completed*). It has the following elements:

- *User Statistics Filter*. Select a particular user and see the statistics for their work.
- *Status Type Count*. This displays a count of your work items by status type (i.e., *Not Started*, *On Track*, *At Risk*, *Off Track*, and *Completed*).
- *Status Type Graph*. See the flow of your work for a particular status type. (You can *Filter by Date* and *Filter by Status type*.)



### User Statistics

User Statistics



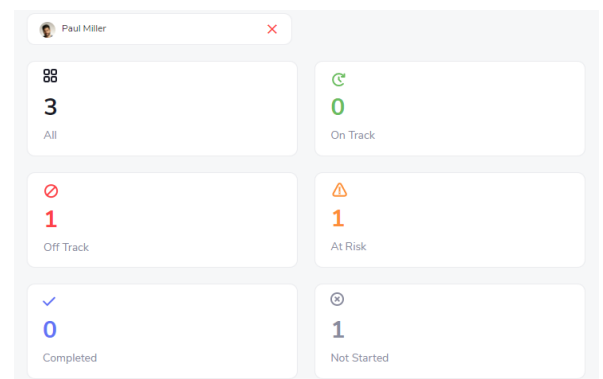
1. **Click**  to *select* or *search* for a user to review their work progress.
2. **Select** a person by clicking on their name.
3. **Review** this person's progress in the *Status Type Count* or *Status Type Graph* area.

### Status Type Count

**Review** a person's progress in the *Status Type Count* work area, after selecting a user in *User Statistics*.

#### Note:

1. By default, StrategyFrog presents the Status Type for the entire organization, unless a user has been selected.
2. This section displays the counted work items by *Status*. For example, Paul Miller has a total of 3 items (All). He has one (1) item that is Off Track, one (1) item that is At Risk, and one (1) item that has Not Started yet.





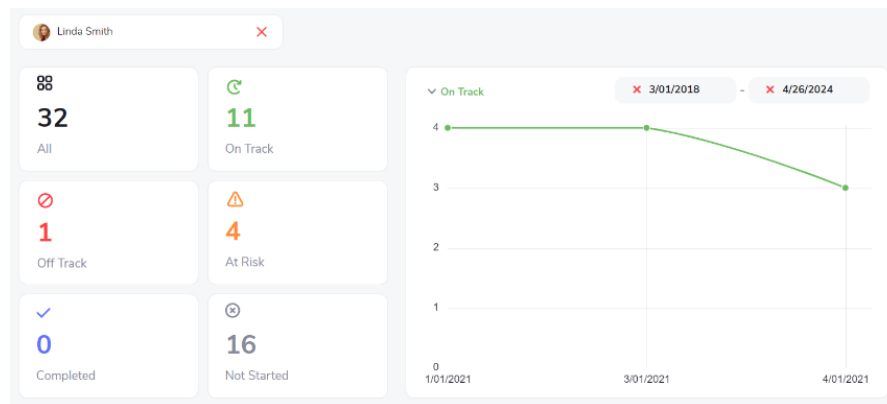
## Status Type Graph

Review a person's progress in the *Status Type Count* work area, after selecting a user in *User Statistics*.

### 1. Filter by Status

- Click** ▼ All Statuses to select the status type you want to display (i.e., *Not Started*, *On Track*, *At Risk*, *Off Track*, or *Completed*).
- View** the graph showing the progress of a status type over time.

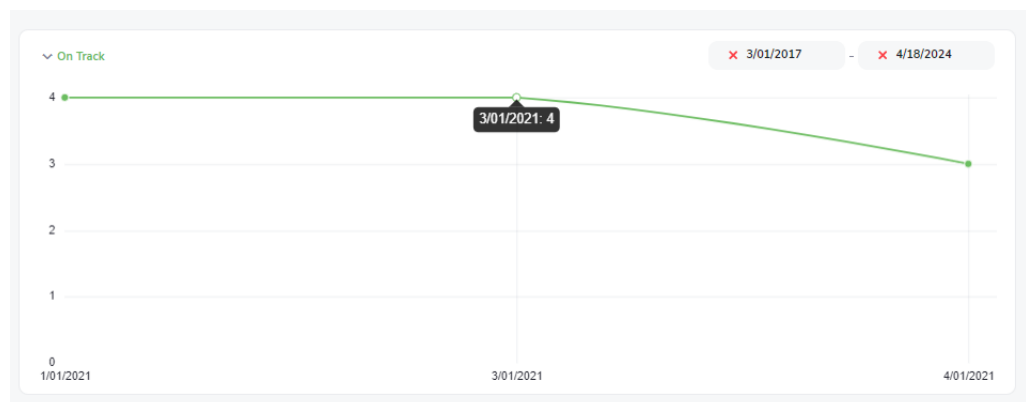
### Example:



Linda Smith has a total of 32 work items, with 11 of these items being *On Track*. The Status Type Graph shows that Linda did the following:

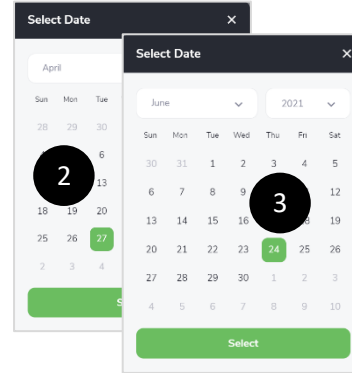
- 1/01/2021 - Created 4 tasks that currently have *On Track* status
- 3/01/2021 - Created 4 tasks that currently have *On Track* status
- 4/01/2021 - Created 4 tasks that currently have *On Track* status

Note: Hover over the graph to identify specific item counts. See the example below.



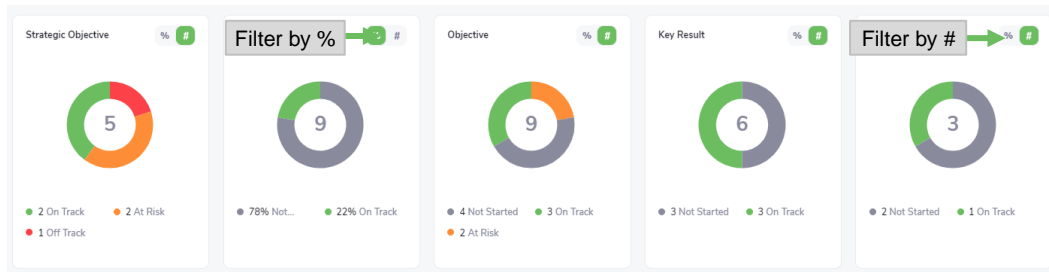
**Date Filter** (  -  )

1. **Click** the Start Date (  -  ).
2. **Choose** a Start Date.
3. **Click** Select.
4. **Click** the End Date (  -  ).
5. **Choose** an End Date.
6. **Click** Select.
7. **Note** that the Date Filter shows a date range (  -  ).
8. **Click** x to cancel the dates.

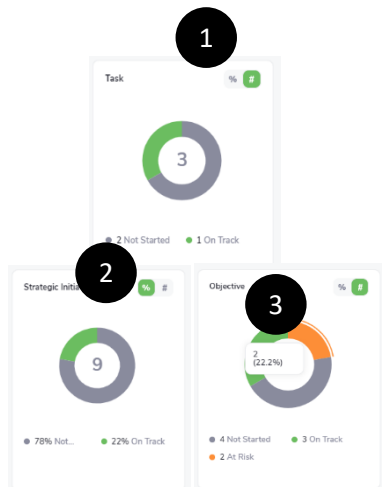


### Status Summary (By Goal Level)


This section displays a user's progress and status by Goal Level (i.e., Strategic Initiative, Strategic Objective, Objective, Key Result, and Task). It also allows users to view the progress by percentage or number.



Note: In this example, the person above has a total of 32 work items (or 5+9+9+6+3).



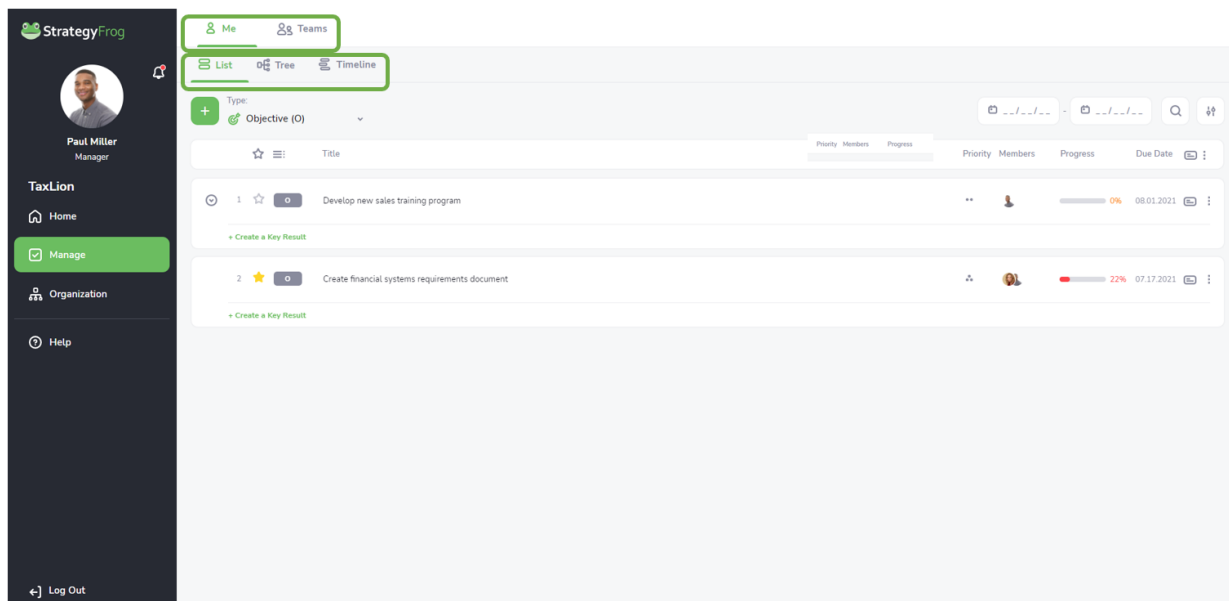
Filter by % or # % #

1. Click % # to show # in your Status Summary by Goal Level.
2. Click % # to show % in your Status Summary by Goal Level.
3. Click a Status section  of the Doughnut Chart to see # and %.

## Manage

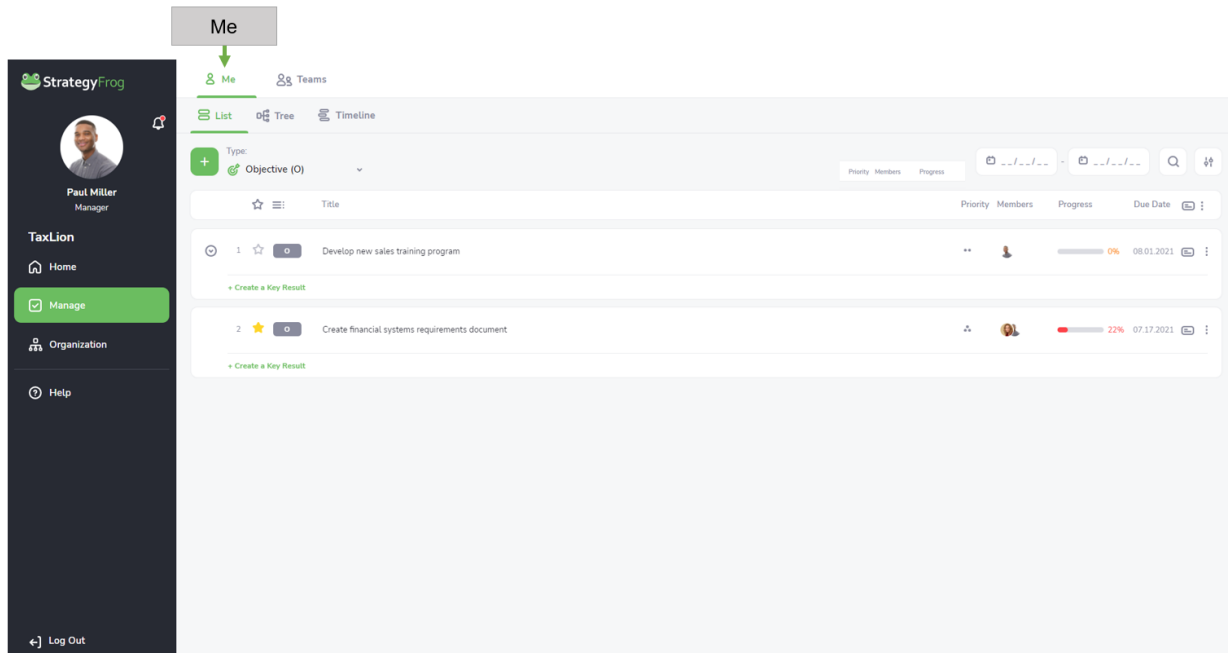
### Introduction

The Manage module is the place where you will create, communicate, and update your work for improved alignment, transparency, and performance for your organization. It has two main sections: *Me* and *Teams*. Each section has three different views of your work: *List*, *Tree*, and *Timeline*.



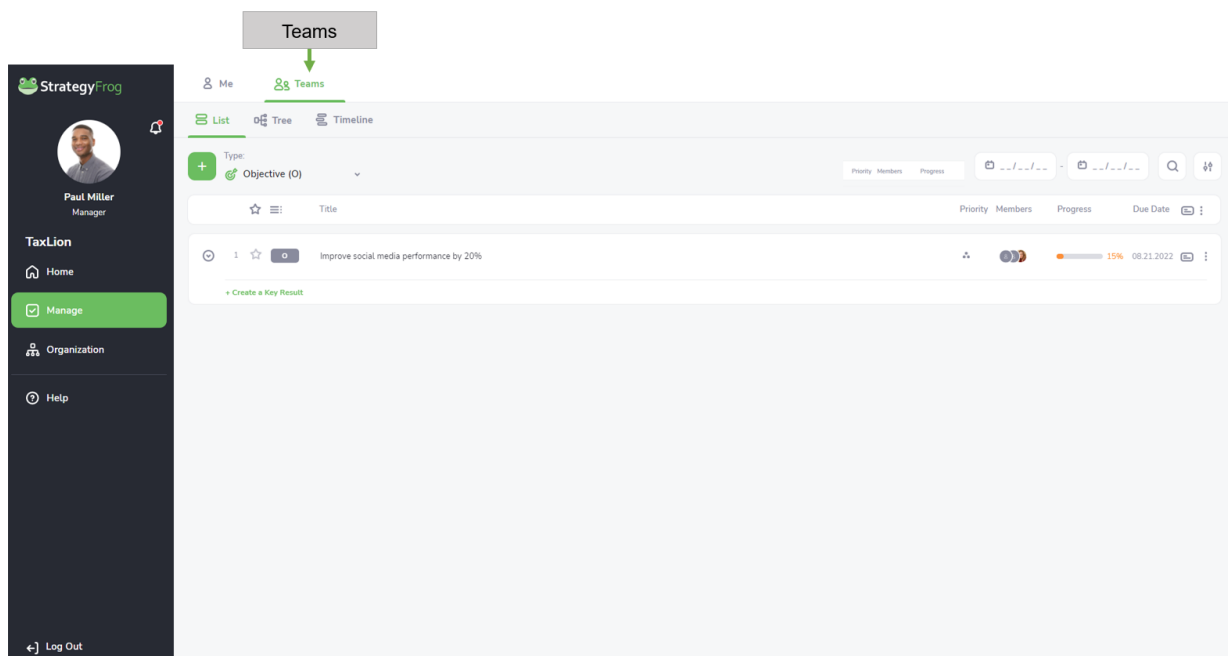
### Me

This section of Manage allows you to focus on your work.



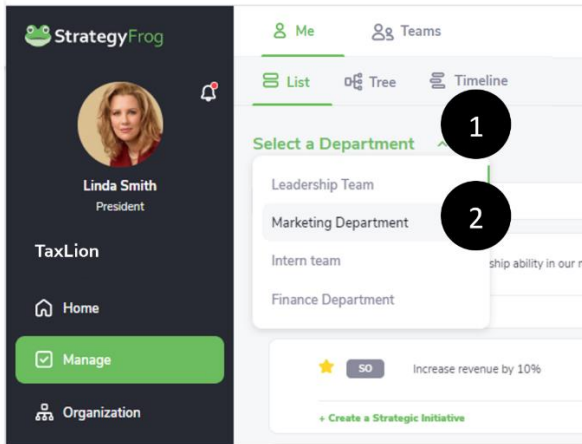
## Teams

This section of Manage allows you to see the progress of work being conducted by departments in your organization.



Note: In the Teams section, you can view the work of any department in your organization

Select a Department (  )



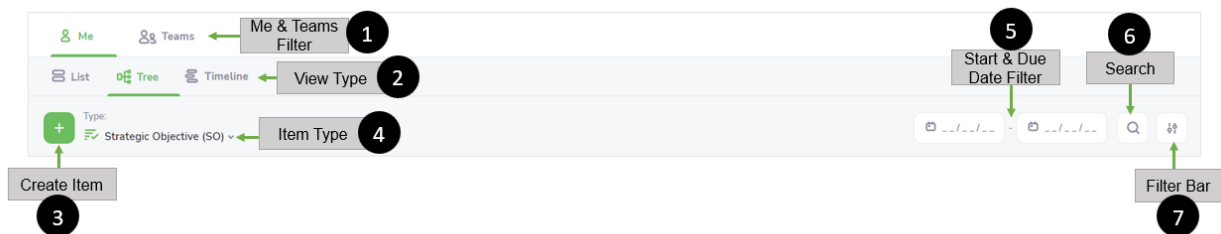
1. Click **Select a Department** . (Note: This command turns green **Select a Department** .)
2. Click a department to select what you want to view. **3**
3. Click the "X" to deselect this department.

## Manage Menu Bar

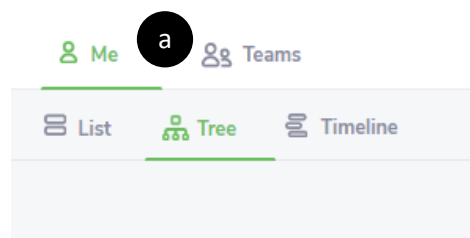
### Introduction

The *Manage Menu Bar* allows you to manage your work by selecting different filter and sort features. This menu bar is the same in *List View*, *Tree View*, and *Timeline View*.

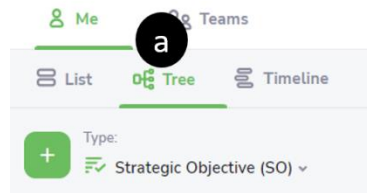
### Using the Manage Menu Bar



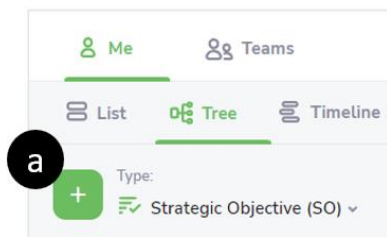
1. Me & Teams Filter. This filter allows you to see your work (Me) or other departments (Teams) in your organization to increase transparency.




- a. **Click *Me* or *Teams*** to see your work or the work of other departments.
2. **View Type Filter**. This filter allows you to select one of three different views of your work: *List*, *Tree*, and *Timeline*.



- a. **Click *List*, *Tree*, or *Timeline*** to view your work the way you want. (See the *List View*, *Tree View*, and *Timeline View* sections to learn more.)
3. **Create Item**. This feature allows you to create a new Work Item in *Manage*. Entering a new *Objective*, *Key Result*, or *Task* into StrategyFrog is easy (and aligns your work with others).

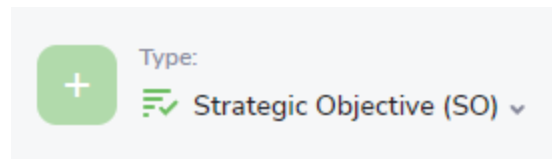


- a. **Click ** and enter *Critical Details* including *Title*, *Status*, *Alignment*, *Start and Due Dates*, and if this item is a *Favorite*. You can add other important information including:
  - i. *More Options*. Add other details like Leaders and Supporters (i.e., who will work on this item), Departments, Description, Priority and Visibility.
  - ii. *Progress and Updates*. Add percentage complete and updates about the progress.
  - iii. *Notes and Comments*. Add general comments among team members about the work.
  - iv. *Attachments*. Include relevant attachments that are relevant to your work.

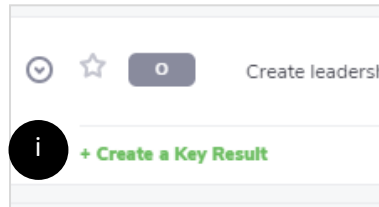
(Please See *Edit an Item* for more information.)

Note:

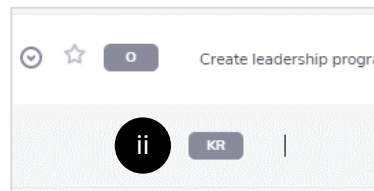
1. If you do not have the ability to create Strategic Objectives or Strategic Initiatives by your organization, you will see a light green create button. See below.



2. You can also enter an Item by doing the following:

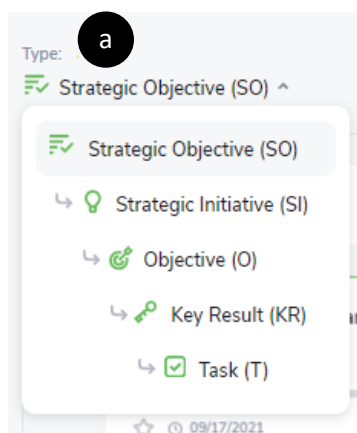


i. Click “+ Create a . . . .” and type your work item.



ii. **Identify the Parent item** you want to add a supporting work item, click **Enter**, and **type** your work item.

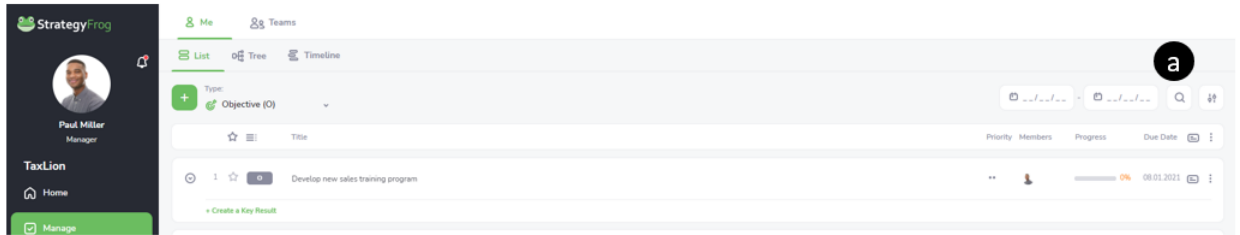
4. Item Type Filter. This filter lets you display a view showing a particular item type (Strategic Objective (SO), Strategic Initiative (SI), Objective (O), Key Result (KR), and Task (T)).




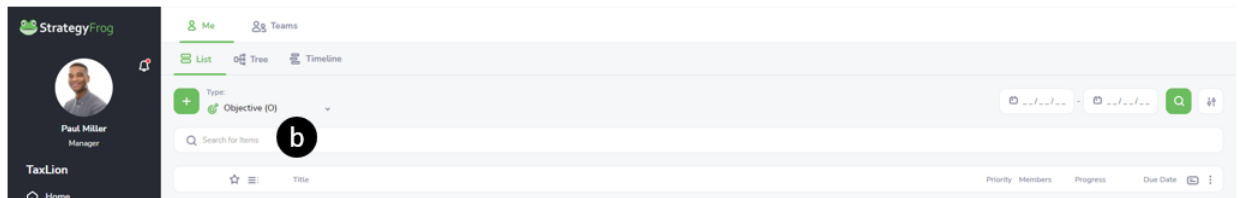
a. **Click Type Filter** to see a view of your work starting at different item types.

5. Start & Due Date Filter. This feature allows you to select a date range to view only certain work items.

6. Search. Find a Goal Level Type item at your convenience.

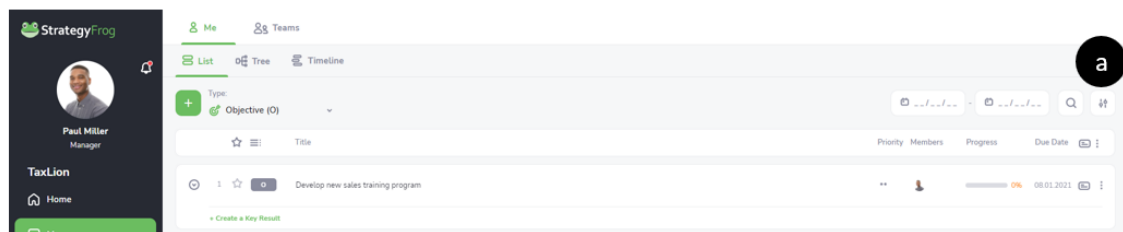


a. Click  (magnifying glass) to reveal the search bar.

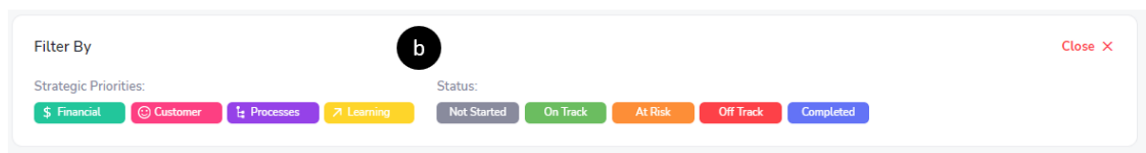


b. Type your search item and hit **Enter**.

7. Filter Bar. This feature opens a new window and allows you to filter on *Strategic Priorities*, *Status*, and *Date Range*.



a. Click Filter .



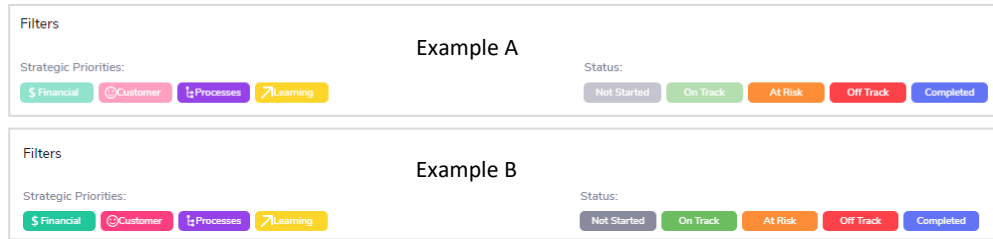
b. **Select** the type of filter you want to apply: *Strategic Priorities* and *Status*. If you are in Teams, then you can select the *Department* filter too.


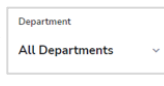
Note:

- By default, all *Strategic Priorities* and *Statuses* show here, without any date restrictions. If you want to deselect a *Strategic Priority* or a *Status*, **click** the item color and you will notice that the color is slightly muted. This indicates the item is deselected and will not show any List Items in your view.



- In Example A, the Strategic Priorities *Financial* and *Customer*, and Status *Not Started* and *On Track* have been deselected and they are muted. These items will not be displayed. By contrast, Example B shows all choices selected. As a result, all Strategic Priorities and Statuses will be displayed.



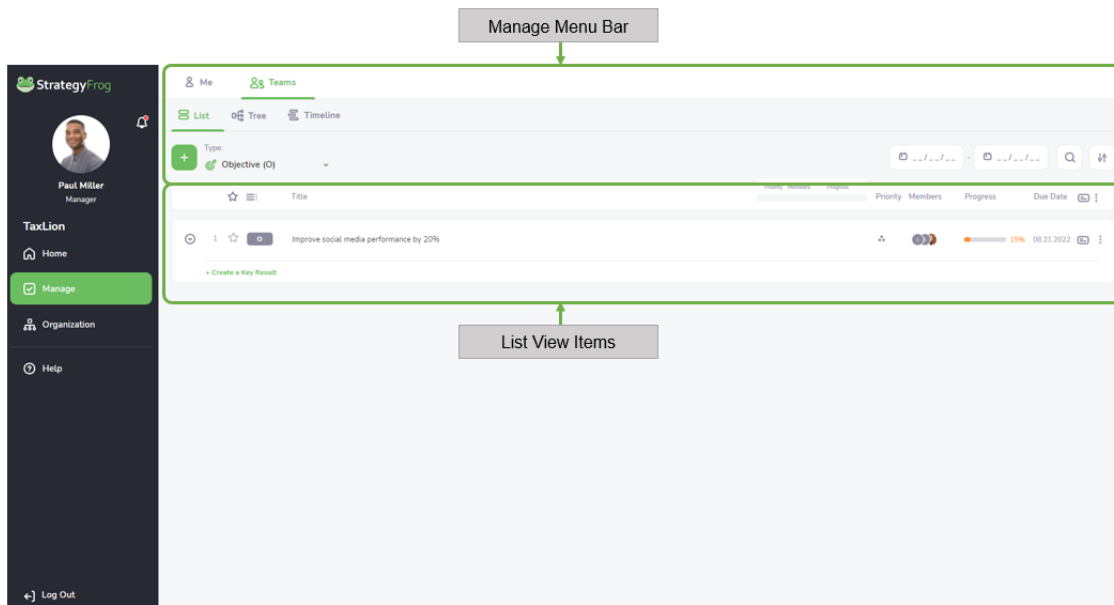
- In Teams, the Filter  provides an additional option to select a particular department in your organization. **Click**  to select which department's work you want to see.



## List View

### Introduction

List View allows you to view all your work items displayed in a “list.” This view has two main components: *Manage Menu Bar* and *List View Items*.

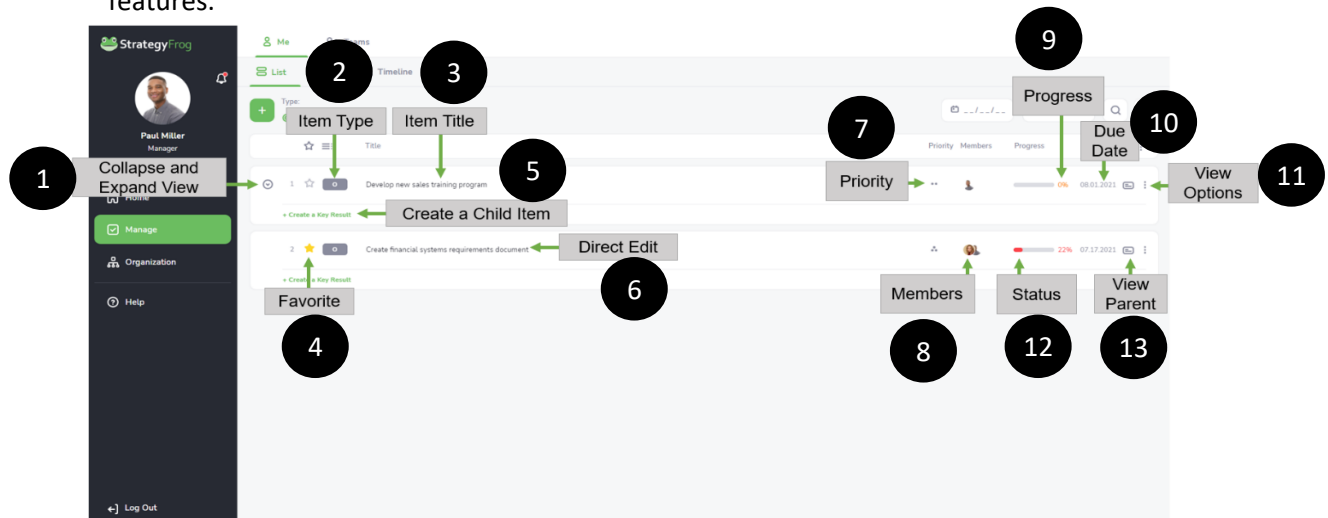


## Manage Menu Bar

Please see the *Manage Menu Bar* section for more information about selecting filter and sort options to manage your work.

## List View Items

The List View Items displays Goal Level Type items in a series of rows. It has the following features:

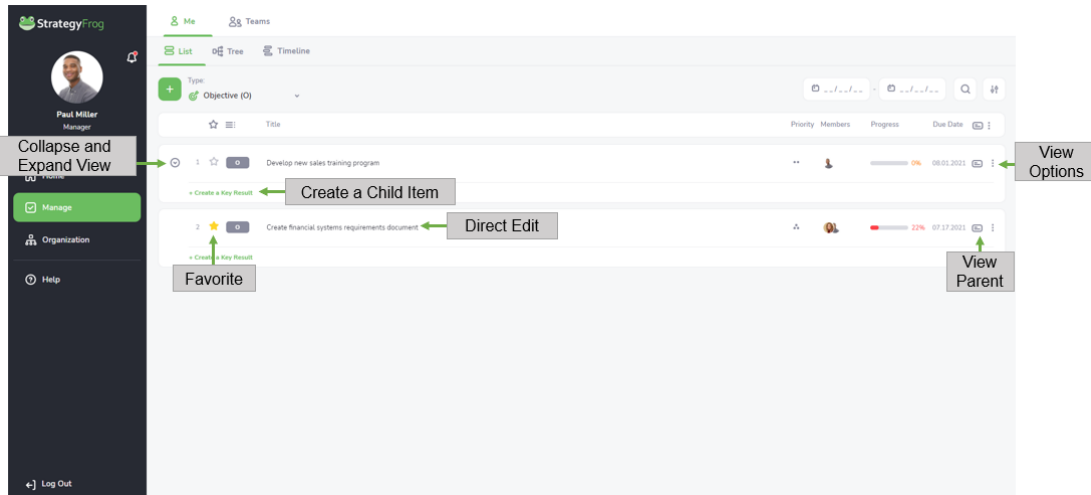


1. *Collapse and Expand View*. This feature allows you to collapse or expand the view of items underneath the item displayed.
2. *Item Type*. This symbol identifies the abbreviation of the Goal Level Type Item (i.e., *Strategic Objective (SO)*, *Strategic Initiative (SI)*, *Objective (O)*, *Key Result (KR)*, and *Task (T)*).
3. *Item Title*. This describes the title of your Goal Level Type Items.
4. *Favorite*. This allows you to select and mark a favorite item or not.
5. *Create a Child Item*. This feature allows you to create a Goal Level Type item that is aligned with a Parent item.
6. *Direct Edit*. This feature allows you to directly edit the item in List View.
7. *Priority*. This is the display of the priority level of the Goal Level Type item (i.e., High, Medium, or Low).
8. *Members*. This is the person leading the Goal Level Type item, or *Leader*. Note: It will also show you the people who support this work, or the *Supporters*.
9. *Progress*. This is the display showing the progress of your Goal Level Type items.
10. *Due Date*. This is a feature that allows you to sort when an item is due.
11. *View Options*. This feature allows you to select a different view (Overview, Child View, Edit, or Archive).
12. *Status*. This indicates the status of your Goal Level Type item (i.e., *Not Started*, *On Track*, *At Risk*, *Off Track*, or *Completed*).

13. *View Parent*. This is a feature allowing you to see the Parent item of an item if it is the child.

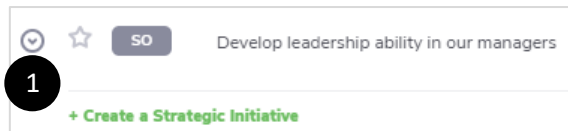
### Using List View Items


The List View Items displays Goal Level Type items in a series of rows. The following are actionable features.

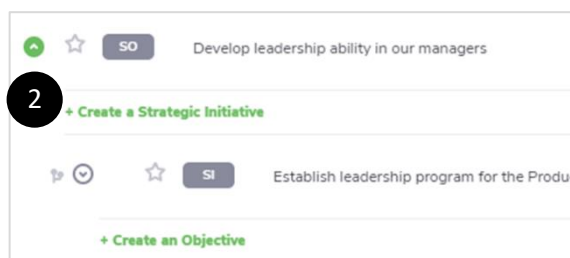


#### Collapse and Expand View


This feature allows you to collapse or expand the view of items underneath the item displayed.



1. Click  to *expand* the Parent item to see child items.

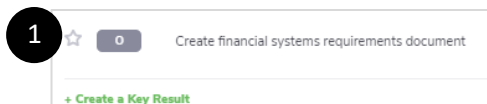


2. Click  to *collapse* the view and only see the Parent item.

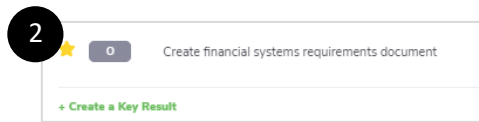
Note: The child items have the  symbol adjacent to the expand and collapse symbol.

#### Favorite (★)

This allows you to select and mark a favorite item or not.



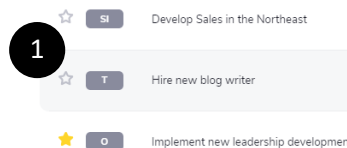
1. Click ☆ to mark an item as a “favorite.”



2. Notice the ☆ is now ★ indicating it is a “favorite.”

### Direct Edit

This feature allows you to directly edit the item in List View.



1. Click the *List Item* you want to directly edit.
2. Type your revisions.

Note: You can easily access other features in direct edit by doing the following:

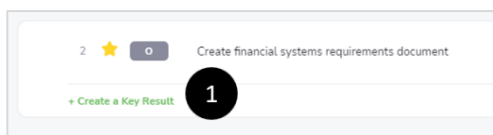
1. Hit tab to advance to other features (i.e., Priority, Item Owners, Progress, Due Date, View Parent, and View Options) in this List Item.
2. Click the feature to edit it.

### View Options ( ⋮ )

This feature allows you to select a different view (Overview, Child View, Edit, or Archive).

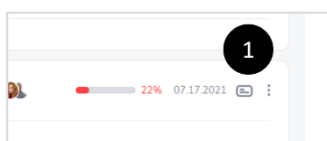
Please see *View Options* later to learn more.

### Create a Child Item



1. Click “+ Create . . .” to create a Child Item of the Parent Item.

### View Parent

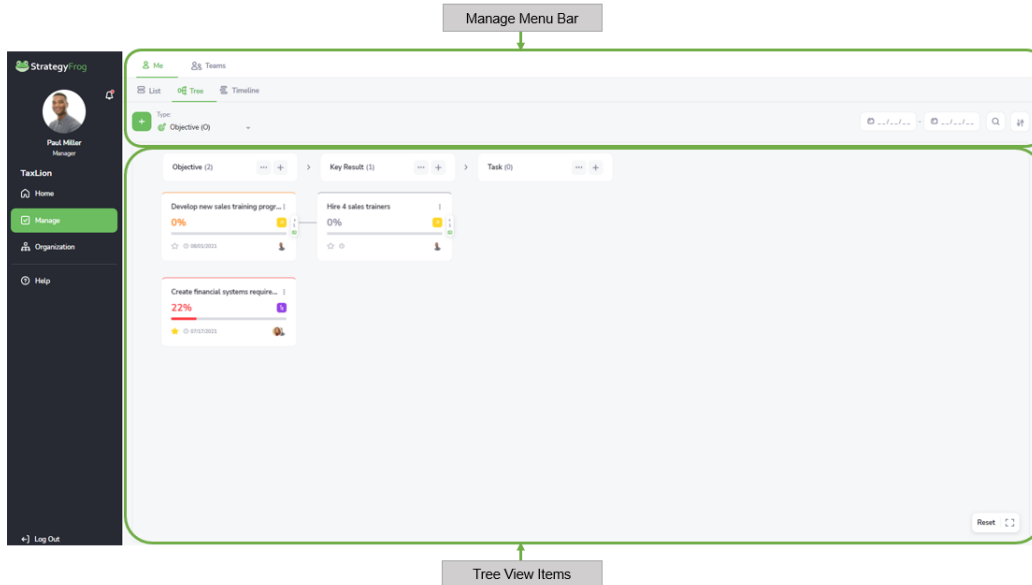


1. Click to access *View Parent*. Click the Parent item to learn more.

## Tree View

### Introduction

Tree View allows you to view all your work items displayed in a process or flow chart, like branches on a “tree.” This view has two main components: *Manage Menu Bar* and *Tree View Items*.

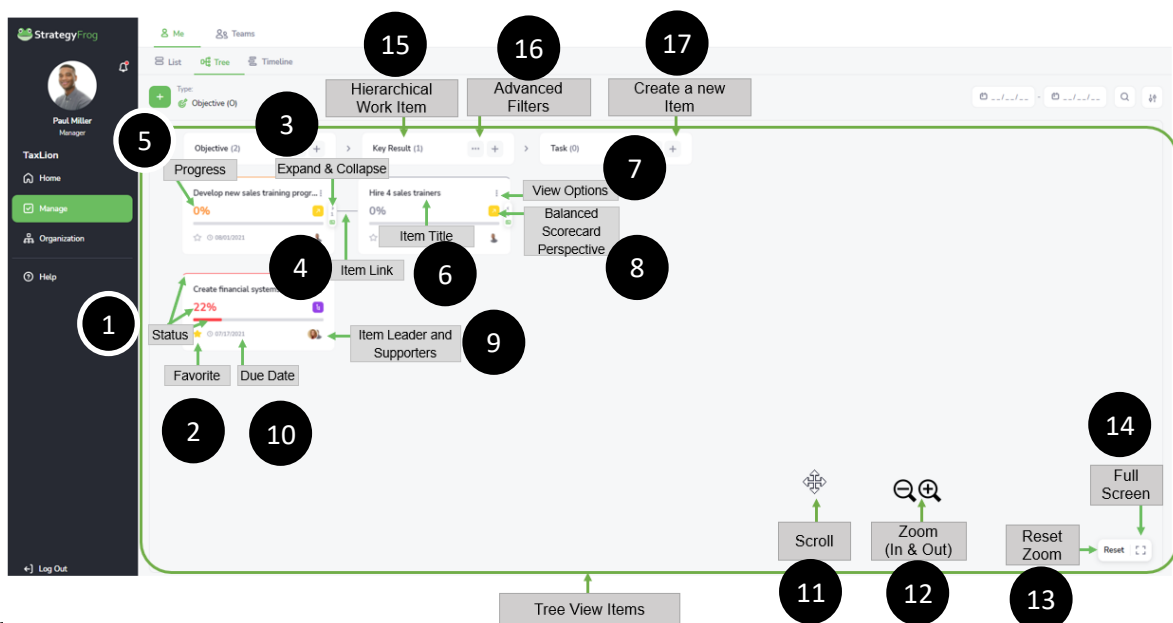


### Manage Menu Bar

Please see the *Manage Menu Bar* section for more information about selecting filter and sort options to manage your work.

### Tree View Items (“Cards”)

The *Tree View Items* are “Cards” that allow you to visualize the connections and flow of your work. You can create new “Cards” or edit existing ones.

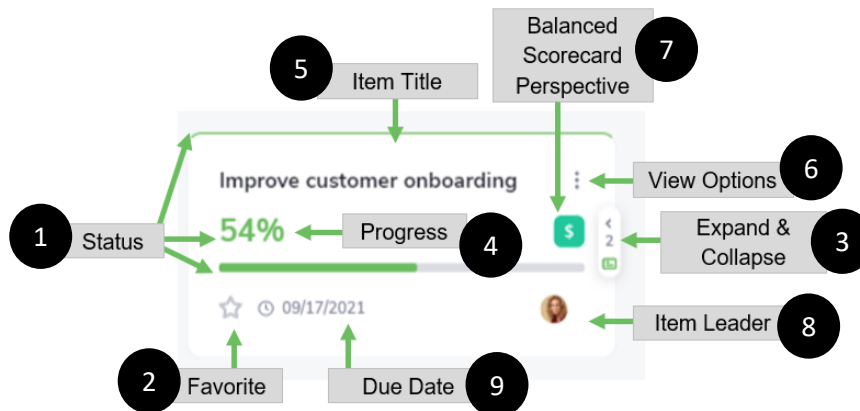


1. *Status*. This feature displays the current Status of Goal Level Type items (i.e., *Not Started*, *On Track*, *At Risk*, *Off Track*, or *Completed*). The color of the Status is shown in the progress bar, the % completed, and the arc at the top of the Tree card.
2. *Favorite*. This feature allows you to select and mark a favorite item or not.
3. *Expand & Collapse*. This feature allows you to *Expand* or *Collapse* the process flow of work in a hierarchical group of Goal Work Items (i.e., Strategic Objective, Strategic Initiative, etc.). It shows how work is all connected.
4. *Item Link*. This line shows individual Goal Work Items are connected.
5. *Progress*. This feature displays the progress of your Goal Level Type items in a percentage. For example, 53% would indicate that the item is 53% complete.
6. *Item Title*. This describes the title of your Goal Level Type Item.
7. *View Options*. This feature allows you to select a different view (Overview, Child View, Edit, or Archive).
8. *Balanced Scorecard Perspective*. This icon indicates how this work item is aligned with your organization's strategic priorities.
9. *Item Leaders and Supporters*. This displays who is the *Leader* of the Goal Level Type item and who are the *Supporters*, or people helping to achieve the work item.
10. *Due Date*. This displays when the Goal Level Type item is due.
11. *Scroll*. This feature allows you to move the screen around to gain different views of your work.
12. *Zoom (In & Out)*. This feature allows you to Zoom In and Out to see your work in close up or far away.
13. *Reset Zoom*. This feature returns your screen to the original view dimensions.
14. *Full Screen*. This feature expands your screen by hiding the *Tree View Menu Bar* and the *Navigation Bar* to see more of your work.
15. *Hierarchical Work Item*. This item identifies the level of the Goal Level Type item (i.e., Objective, Key Result, Task)
16. *Advanced Filters*. This feature allows you to access additional filters by Status and Type.
17. *Create a New Item*. This feature allows you to create a new item by Goal Type.

## Using Tree View Items


### Editing Tree View Items ("Cards")

A Card Item provides a quick snapshot of each item of Goal Level Type Item in your work. It has the following features:

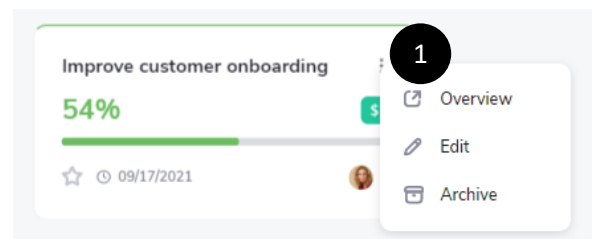





1. **Status.** This indicates if your work item is *On Track*, *At Risk*, *Off Track*, *Completed*, or *Not Started*. Status for each item is presented in a unique color.
2. **Favorite.** This star represents if this item is a “favorite.” If it is yellow, then this item has been selected as a favorite and can be viewed quickly by selecting favorite in the My Workstreams tool bar in the *Home* module.
3. **Expand & Collapse.** This allows you to see items in your work hierarchy. (Note: The number in this feature indicates the number of items in the next level of the hierarchy.)
4. **Progress.** This indicates the current progress made on the work item.
5. **Item Title.** This displays the title of your work item.
6. **View Options.** This allows you to transition to *Overview*, *Edit*, or *Archive*. (These are different ways to view and edit your work.)
7. **Balanced Scorecard Perspective.** This icon indicates how this work item is aligned with your organization’s strategic priorities.
8. **Item Leader.** This indicates who is leading this work item (or it could also display the *Supporters* in your work).
9. **Due Date.** This displays when the work item is due.

### Using Tree View Items Features

1. **Click the  to access *View Options* and **Select** the feature you want. You can transition to *Overview*, *Edit*, or *Archive*.**

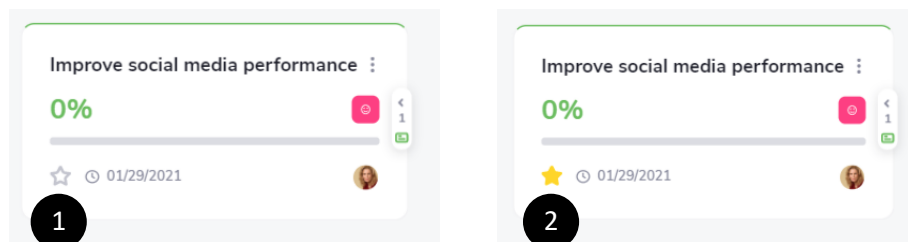
- **Overview.** This provides a summary view of your work item (i.e., Strategic Objective, Strategic Initiative, Objective, Key Result, or Task). It includes progress history and the ability to create (or add) “child” items.



- *Edit*. This provides an editable view of this work item.
  - *Archive*. This feature allows you to archive (or store) this work item.
2. **Hover** over the  to learn who is the *Item Leader or Supporter(s)*.
  3. **Hover** over the  to learn which *Balanced Scorecard Perspective* is aligned with this work item.
  4. **Hover** over the  to see the *Item's Progress*.
  5. **Hover** over the *Item Title* to see the whole title.

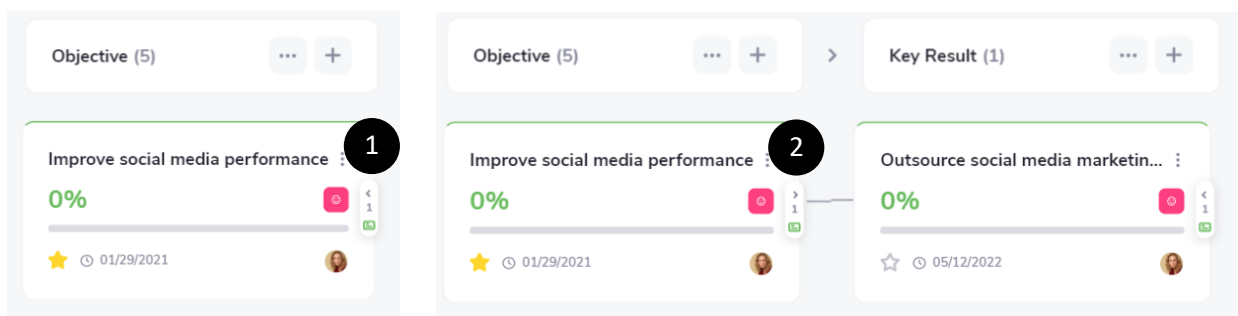
**Status.** This feature displays the current Status of Goal Level Type items (i.e., *Not Started*, *On Track*, *At Risk*, *Off Track*, or *Completed*). The color of the Status is shown in the progress bar, the % completed, and the arc at the top of the Tree card.


**Favorite.** This feature allows you to select and mark a favorite item or not.



1. **Click** ☆ to mark an item as a “favorite.”
2. **Notice** the ☆ is now ★ indicating it is a “favorite.”

**Expand & Collapse.** This feature allows you to *Expand* or *Collapse* the process flow of work in a hierarchical group of Goal Work Items (i.e., Strategic Objective, Strategic Initiative, etc.). It shows how work is all connected.




1. **Click**  to Expand the Tree View hierarchy.

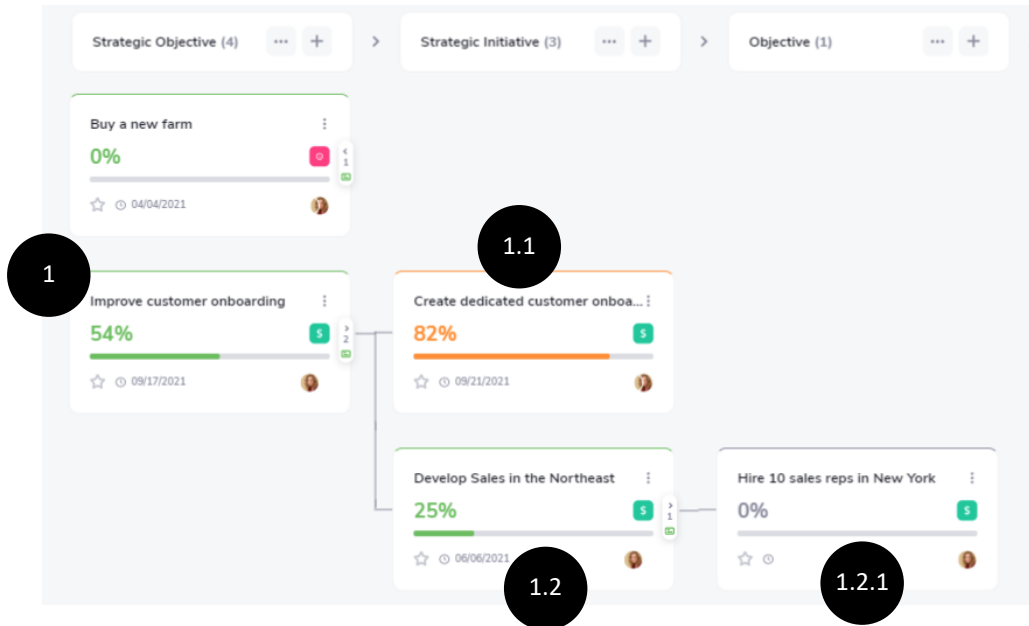




2. **Click** to Collapse the Tree View hierarchy.

Note: The number in  refers to how many items are in the next level hierarchy. In the example above, “*Improve social media performance,*” an Objective, has one Key Result, “*Outsource social media marketing.*”



Item Link. This line shows individual Goal Work Items are connected.



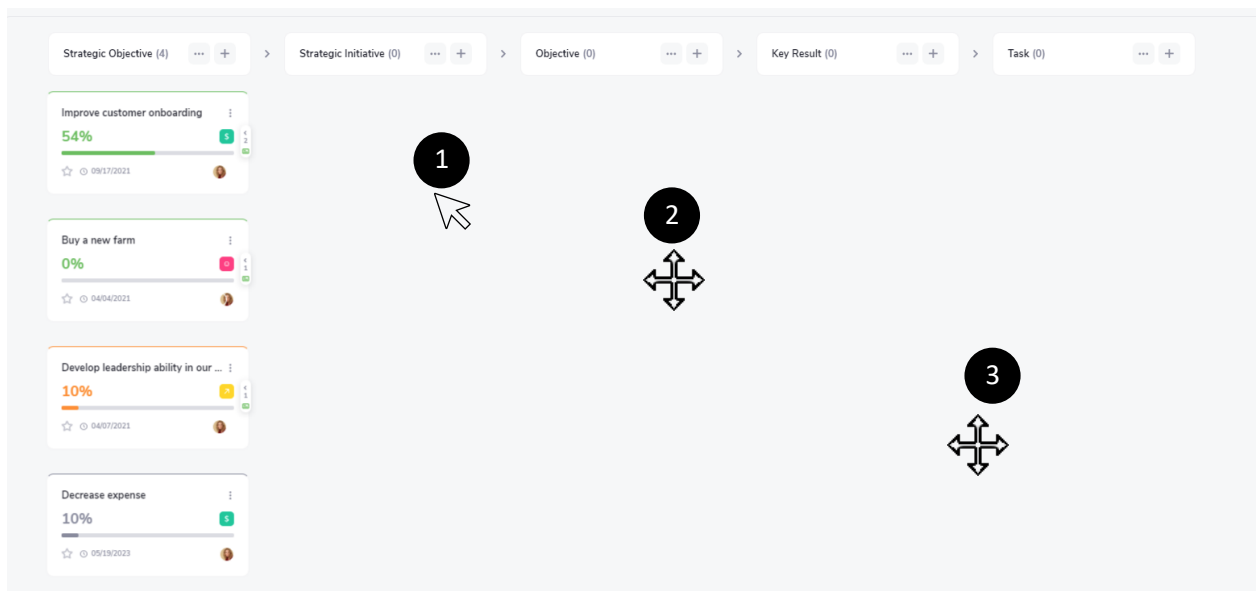
Note: In the example above, **(1)** *Improve customer onboarding*, a Strategic Objective, has two Strategic Initiatives, **(1.1)** *Created dedicated customer onboarding* and **(1.2)** *Develop Sales in the Northeast*. These two items are “Children” of the “Parent.” *Develop Sales in the Northeast* has a Child Item, **(1.2.1)** *Hire 10 sales reps in New York*, an Objective. Each of these items are all linked together.

Note: The following functionality is based on PCs and may not be similar on MACs.

Scroll. This feature allows you to move the screen around to gain different views of your work.


1. **Place** your cursor  in the gray Tree View area.
2. **Click** and **hold** the cursor in the gray Tree View area. (Your cursor now looks like .)
3. **Move** the cursor left, right, up, or down to move the area to your preferred position.

Zoom (In & Out). This feature allows you to *Zoom In* and *Zoom Out* to see your work in close up or far away.




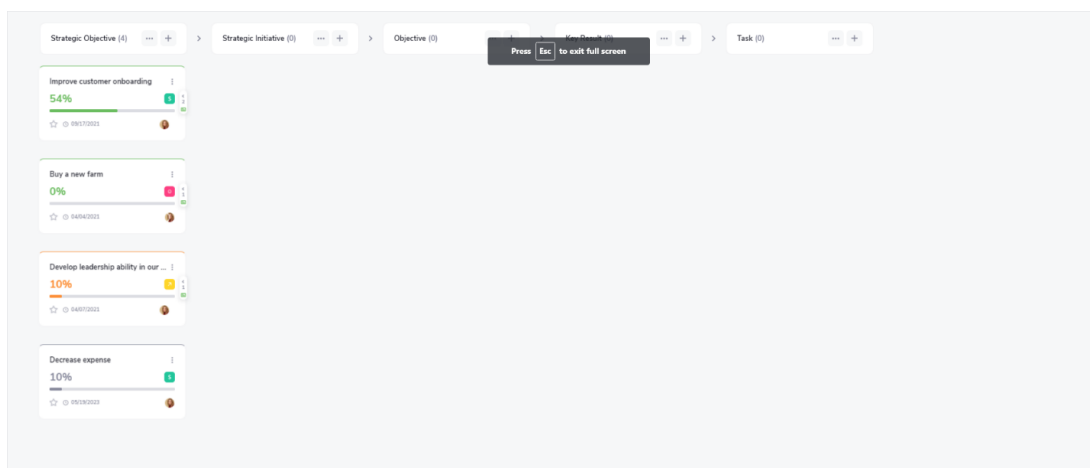
1. **Rotate** your mouse wheel *forward* to Zoom In (i.e., make objects appear larger).
2. **Rotate** your mouse wheel *backward* to Zoom Out (i.e., make objects appear smaller).


Reset Zoom. This feature returns your screen to the original view dimensions.

1. **Click**  to return your screen to the original view dimensions.

Full Screen. This feature expands your screen by hiding the *Tree View Menu Bar* and the *Navigation Bar* to see more of your work.

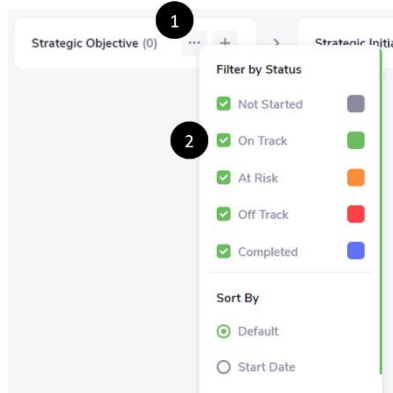
1. **Click**  to expand your screen.




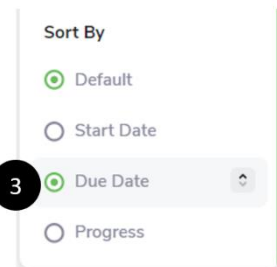
Note: **Click** ESC or  to exit the full screen view.



## Using Other Tree View Item Features

1. Advanced Filters. Access a Filter and Sort Feature for each Goal Level Type Item. You can filter by Status (i.e., *Not Started*, *On Track*, *At Risk*, *Off Track*, *Completed*) or Sort by *Default*, *Start Date*, *Due Date*, and *Progress*.



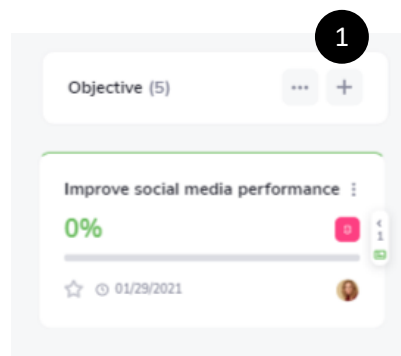
1. **Click**  to open Advanced Filters.
2. **Select** the Status you want to show as a Filter. (By default, all are showing.)



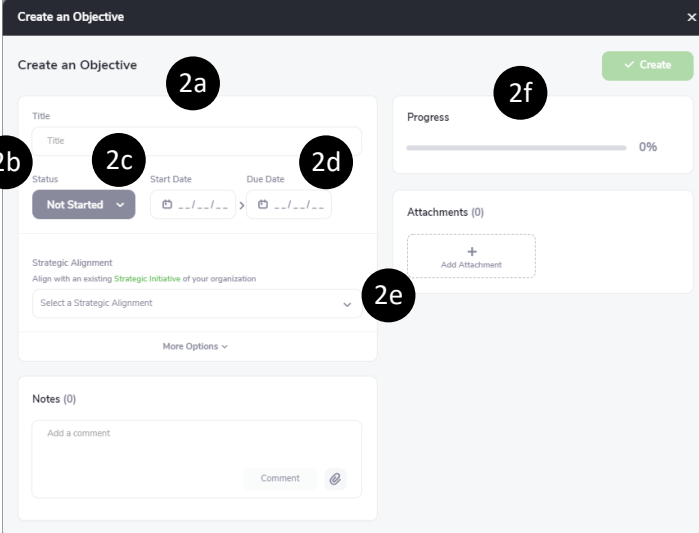
3. **Click**  to Sort By *Start Date*, *Due Date*, or *Progress*. You can also select *Ascending* or *Descending Order* (  ).

Note: The first Work Item selected allows users to Filter by Status (i.e., *Not Started*, *On Track*, *At Risk*, *Off Track*, and *Completed*) and Sort (i.e., by *Start Date*, *Due Date*, and *Progress*). All other Work Items can only Filter By Status.

2. Create a new Item. Create a new Goal Level Type Item by individual hierarchy.



1. Click **+** (+) to add a new Goal Level Type item.

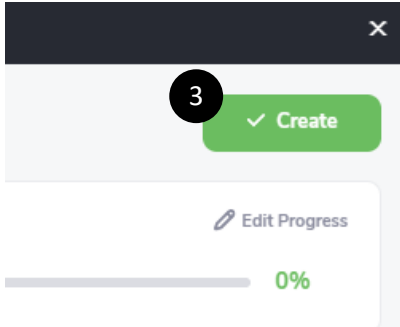


The screenshot shows a 'Create an Objective' modal window. It contains several input fields and sections:
 

- 2a**: The main title input field.
- 2b**: The status dropdown menu, currently set to 'Not Started'.
- 2c**: The start date input field.
- 2d**: The due date input field.
- 2e**: The 'Strategic Alignment' dropdown menu.
- 2f**: The progress bar, currently at 0%.

 Other visible elements include an 'Add Attachment' button, a 'Notes' section with a 'Comment' button, and a green 'Create' button in the top right corner.

2. **Enter** the item's *Title (2a)*, *Status (2b)*, *Start Date (2c)*, *Due Date (2d)*, *Strategic Alignment (2e)*, and any *Progress (2f)*. (Note: You must determine the *Strategic Alignment* for this item to be created.)



This is a close-up of the bottom right portion of the form. It shows a green button with a checkmark and the text 'Create'. A callout '3' points to this button. Below the button is an 'Edit Progress' link and a progress bar showing 0%.

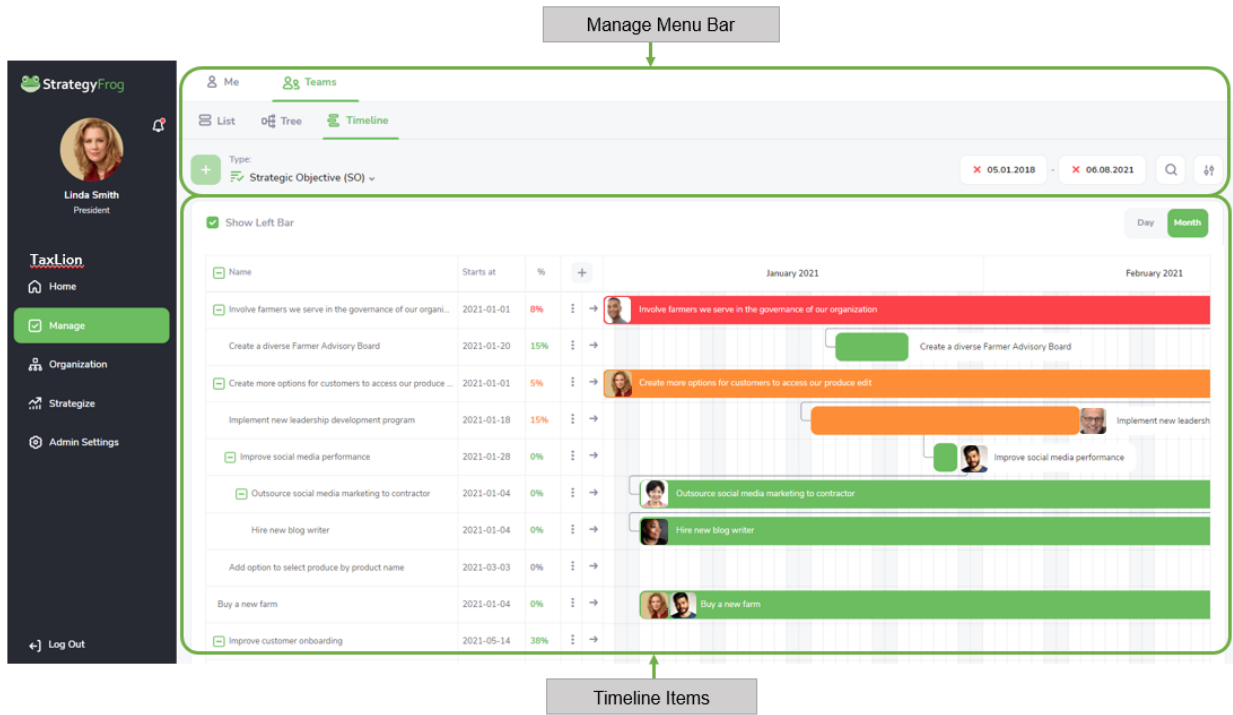
3. Click *Create* to save this item.

## Timeline View

### Introduction

The Timeline View provides an ability to see your work in a “Gantt chart.” This is a type of bar chart that illustrates a project schedule. Gantt charts also show the dependency relationships between activities and the current schedule status.

Timeline includes the *Manage Menu Bar* and the *Timeline Items*.

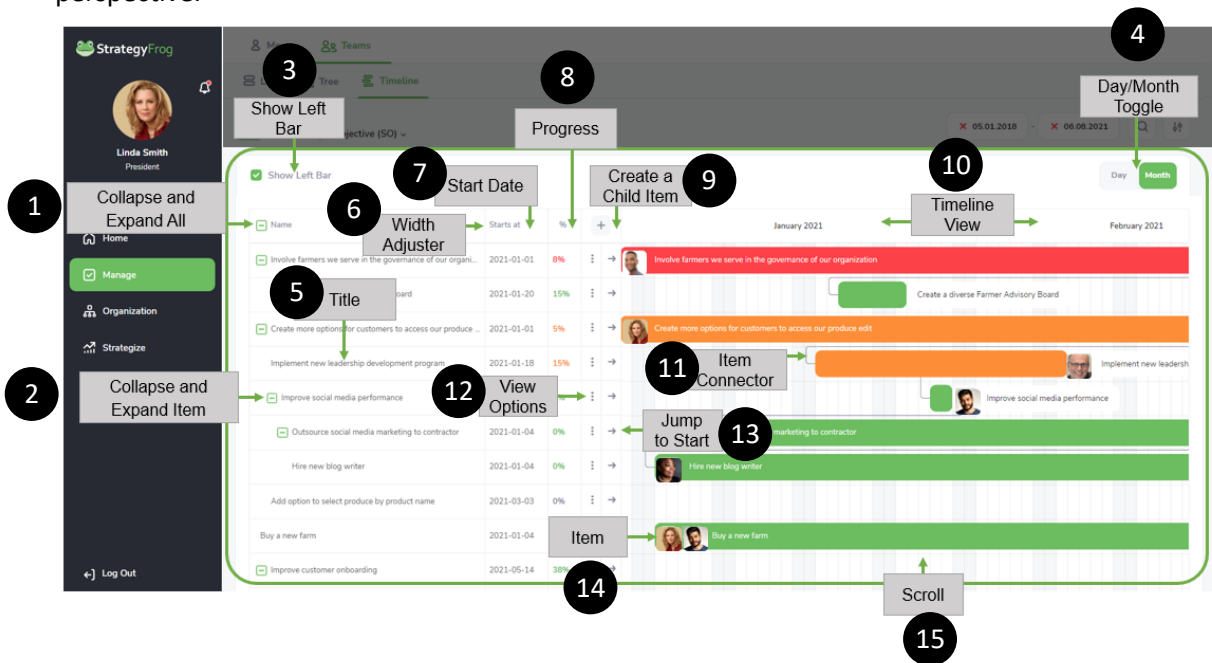


### Manage Menu Bar

Please see the *Manage Menu Bar* section for more information about selecting filter and sort options to manage your work.

### Timeline Items

The *Timeline Items* section allows you to analyze your work in greater detail from a timing perspective.



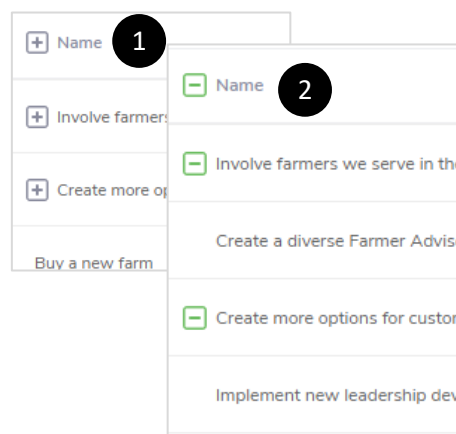
1. *Collapse and Expand All*. This allows you to collapse or expand all connected items listed in the Timeline View.
2. *Collapse and Expand Item*. This allows you to collapse or expand each set of connected items listed in the Timeline View.
3. *Show Left Bar*. This allows you to see more details about your work items.
4. *Day/Month Toggle*. This allows you toggle between seeing your work laid out in time, either by the Day or the Month.
5. *Title*. This displays the title of your work item.
6. *Width Adjuster*. This allows you to adjust the width of the columns, either narrower or wider.
7. *Start Date*. This displays your Start Date of your work items.
8. *Progress*. This displays the percentage (%) progress of your work items.
9. *Create a Child Item*. This item allows you to create a Child Item of work, that will be aligned to a Parent Item already created in the system.
10. *Timeline View*. This displays your work items, either by day or month.
11. *Item Connector*. This shows how your work items are connected.
12. *View Options*. This allows you to access more features for your work item. You can *View*, *Edit*, or *Archive* it.
13. *Jump to Start*. This allows you to be sent directly to when the work item begins in the Timeline View.
14. *Item*. This displays work items and shows who is leading it.
15. *Scroll*. This allows you to move forward or backward in time to see your work in the Timeline View.



## Using Timeline Items

The *Timeline Items* section allows you to analyze your work in greater detail from a timing perspective.

### Collapse and Expand All

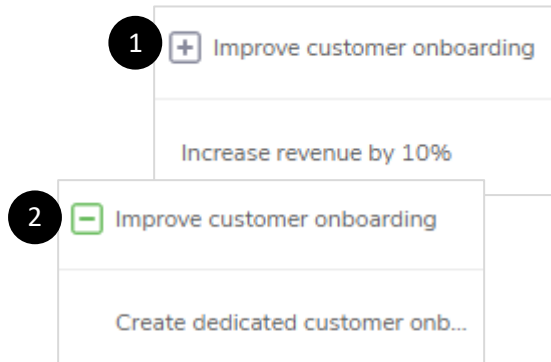
This allows you to collapse or expand all connected items listed in the Timeline View.





1. **Click**  **Name** to expand all connected items listed in the Timeline View.
2. **Click**  **Name** to collapse all connected items listed in the Timeline View.

### Collapse and Expand Item

This allows you to collapse or expand each set of connected items listed in the Timeline View.



1. **Click**  to *expand* a set of connected items listed in the Timeline View.
2. **Click**  to *collapse* a set of connected items listed in the Timeline View.

### Show Left Bar

This item allows you to see more details about your work items.



1. **Click**  **Show Left Bar** to display the menu bar providing more details about your work items.
2. **Click**  **Show Left Bar** to hide the menu bar.

### Day/Month Toggle

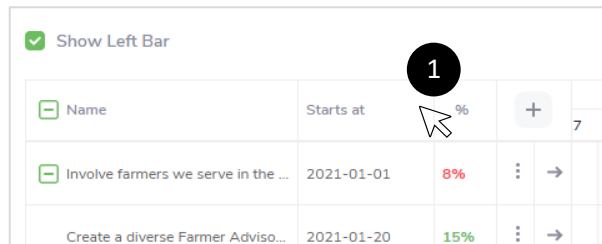
This item allows you to toggle between seeing your work laid out in time, either by the Day or the Month.



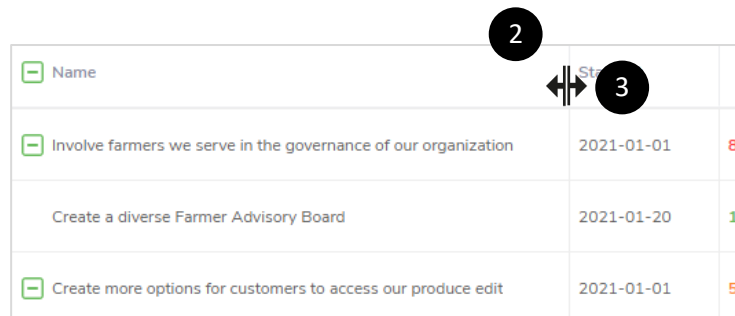
1. Click Day or Month.

### Width Adjuster

This allows you to adjust the width of the columns, either narrower or wider.



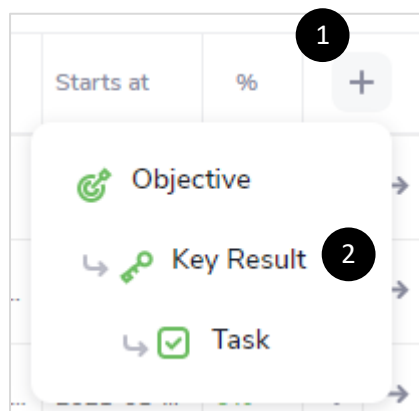
1. Move your cursor in between the lines separating the titles at the top of column.




2. Note how your cursor has converted to the *Width Adjuster* icon (⇄).
3. Click your mouse and move the *Width Adjuster* icon (⇄) left or right to make the column narrower or wider.
4. Unclick your mouse when you are satisfied with the width of the column.

### Create a Child Item

This item allows you to create a Child Item of work, that will be aligned to a Parent Item already created in the system.





1. Click  .
2. **Select** the Child Item you want to create that will be aligned to a Parent Item already created in the system.

### View Options

This allows you to access more features for your work item. You can *View*, *Edit*, or *Archive* it. Please see *View Options* for more information.

### Jump to Start

This allows you to be sent directly to when the work item begins in the Timeline View.

1. **Go** to the Work Item you want to view from its start date. (See the example below for Improve customer onboarding. It starts on 2021-05-14 but the calendar is just focused on April 13, 2021.)

Name	Starts at	%		April 2021			
			+	Tu 13	We 14	Th 15	Fr 16
Buy a new farm	2021-01-04	0%	⋮ →				
Improve customer onboarding	2021-05-14	38%	⋮ →		<b>2</b>		
Create dedicated customer onboarding internal framework	2021-05-14	50%	⋮ →				

2. Click  .

Name	Starts at	%		May 2021			
			+	Fr 14	Sa 15	Su 16	Mo 17
Buy a new farm	2021-01-04	0%	⋮ →				
Improve customer onboarding	2021-05-14	38%	⋮ →		<b>3</b>		
Create dedicated customer onboarding internal framework	2021-05-14	50%	⋮ →				
Increase revenue by 10%	2021-02-01	20%	⋮ →				
Create a diverse Farmer Advisory Board	2021-01-20	15%	⋮ →				

3. **See** the Work Item from its start date.

### Scroll

This allows you to move forward or backward in time to see your work in the Timeline View.

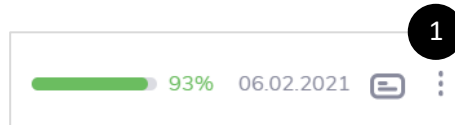
Name	Starts at	%		Mo 19	Tu 20	We 21	Th 22	Fr 23	Sa 24	Su 25	Mo 26	Tu 27	We 28	Th 29	Fr 30	Sa 1	Su 2	Mo 3
Buy a new farm	2021-01-04	0%	⋮ →															
Improve customer onboarding	2021-05-14	38%	⋮ →															
Create dedicated customer onboarding internal framework	2021-05-14	50%	⋮ →															
Increase revenue by 10%	2021-02-01	20%	⋮ →															
Create a diverse Farmer Advisory Board	2021-01-20	15%	⋮ →															
Implement new leadership development program	2021-01-18	15%	⋮ →															
Improve social media performance	2021-01-28	0%	⋮ →															
Outsource social media marketing to contractor	2021-01-04	0%	⋮ →															
Hire new blog writer	2021-01-04	0%	⋮ →															
Add option to select produce by product name	2021-03-03	0%	⋮ →															


1. **Move** your cursor to the calendar section of the Timeline.
2. **Click** and **hold** your mouse; **move** the cursor left or right to move the calendar backward or forward.

## View Options

This feature allows you to select a different view of your work, i.e., *Overview*, *Child View*, *Edit*, or *Archive*.

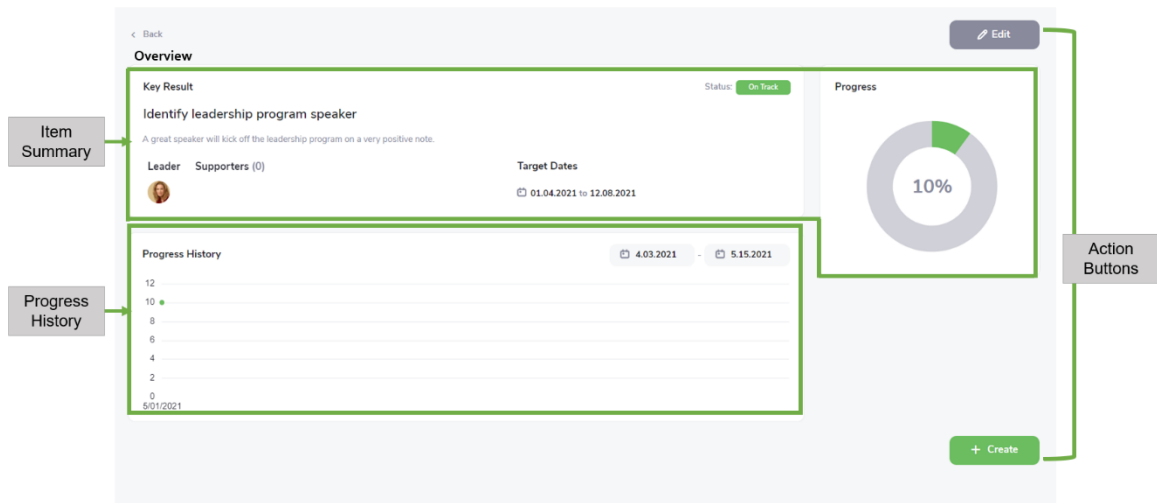
### Introduction



1. **Click** the  to access *View Options*.
2. **Select** the feature you want. You can transition to *Overview*, *Child View*, *Edit*, or *Archive*.

### Overview

This provides a summary view of your work item (i.e., Strategic Objective, Strategic Initiative, Objective, Key Result, or Task). It includes *Item Summary*, *Progress History*, and *Action Buttons* (to Edit this item or Create a “child” item).




**Item Summary**

**Key Result** Status: On Track

**Identify leadership program speaker**

A great speaker will kick off the leadership program on a very positive note.

Leader  Supporters (0)

Target Dates 01.04.2021 to 12.08.2021

**Progress**

10%

**Progress History** 4.03.2021 - 5.15.2021

12

10

8

6

4

2

0

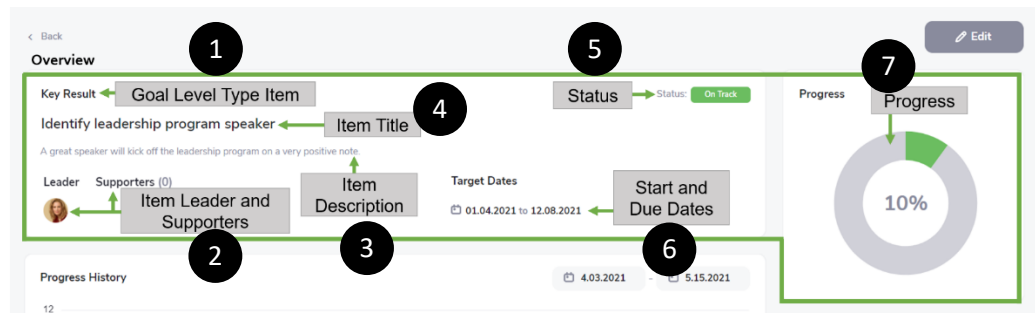
5/01/2021

**Action Buttons**

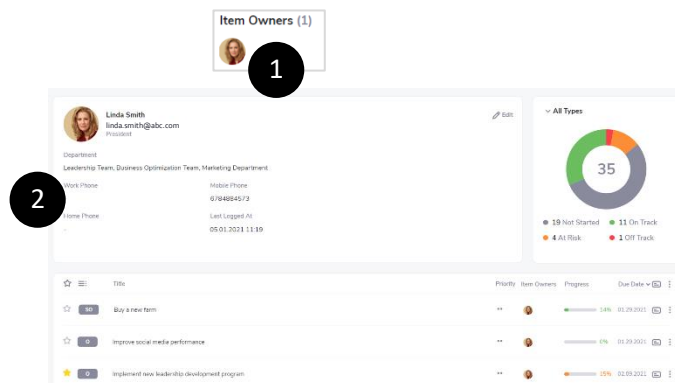
Edit

+ Create

## Item Summary

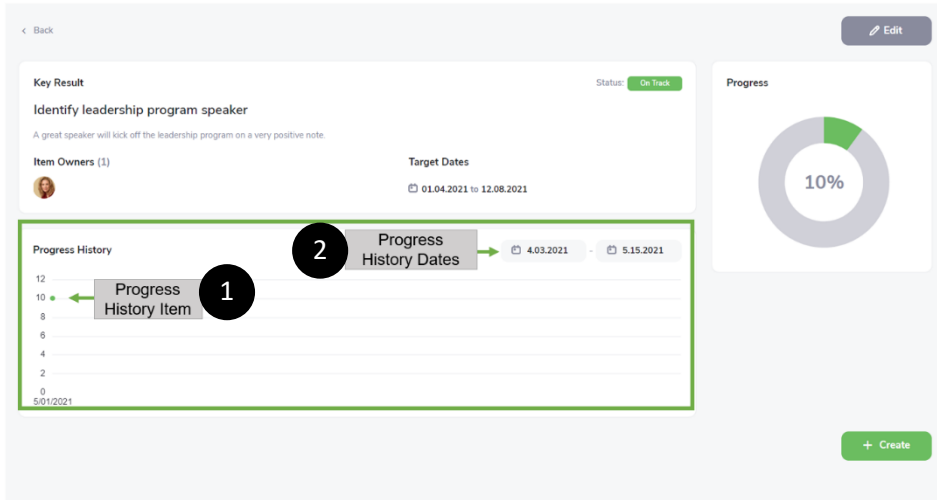


1. **Goal Level Type Item.** This identifies the Goal Level Type Item you are viewing (i.e., Strategic Objective (SO), Strategic Initiative (SI), Objective (O), Key Result (KR), and Task (T)).
2. **Item Leader and Supporters.** This is an actionable feature to learn more about the person who leads this work.



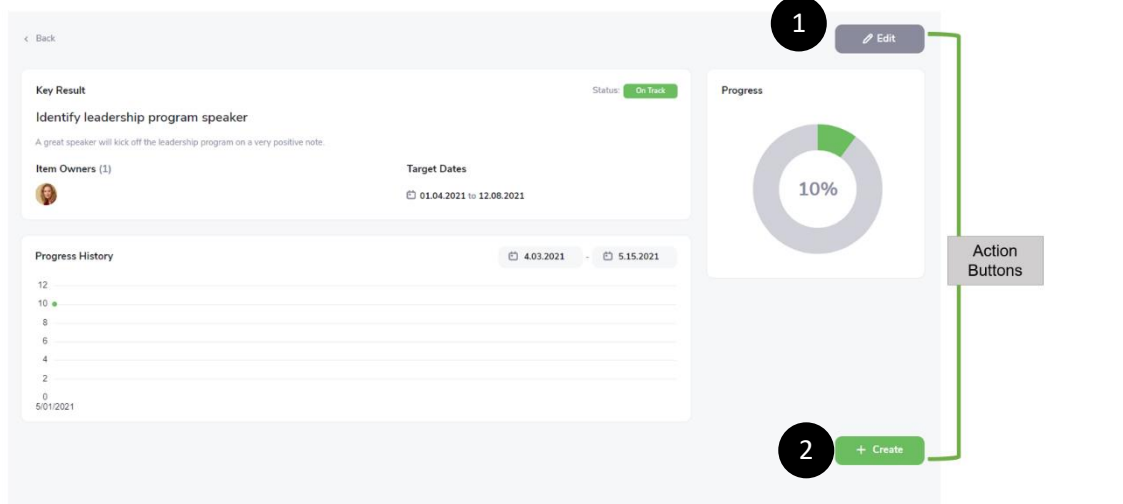
1. **Click** the person's profile picture.
2. **View** the person's Public Profile for more information.
3. **Item Description.** This is a short description you can provide to describe your item in more detail.
4. **Item Title.** This describes the title of your Goal Level Type Item.
5. **Status.** This indicates the status of your Goal Level Type item (i.e., **Not Started**, **On Track**, **At Risk**, **Off Track**, or **Completed**).
6. **Start and Due Dates (Target Dates).** This shows your *Start Date* and *Due Date* for your work item.
7. **Progress.** This is the display showing the progress of your Goal Level Type item.

## Progress History




1. **Progress History Item.** This shows the history of when an item was updated, and what was the update. (**Hover** over the ● to see more information.)
2. **Progress History Dates.** This is an actionable feature that allows you to adjust the dates of the progress history you are viewing.

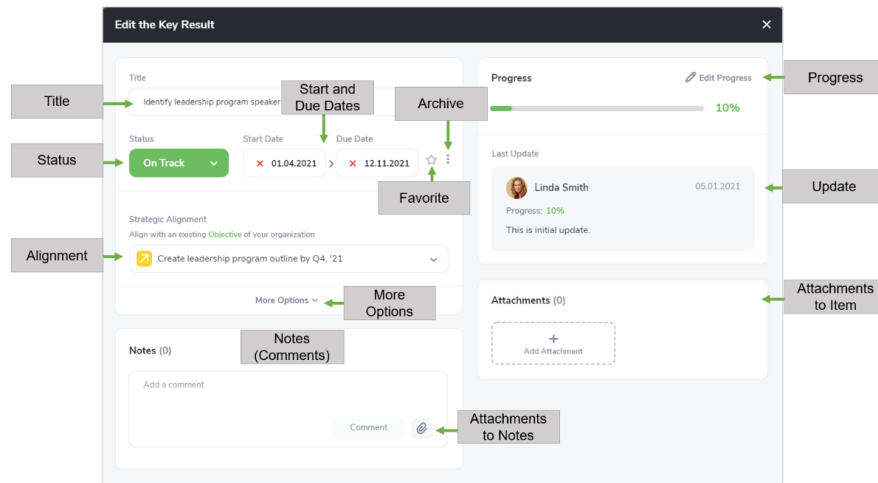
### Action Buttons



1. **Edit.** This is an actionable feature that takes you to the Edit Window. The Edit Window allows you to make a variety of edits to your item.

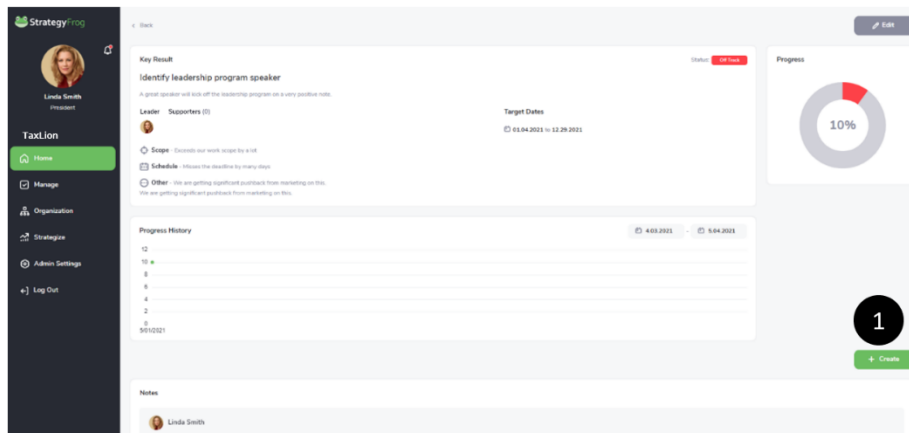
1. **Click**  to access the Edit Window to make changes to the current options.

2. Notice the features below to *Edit an Item*.

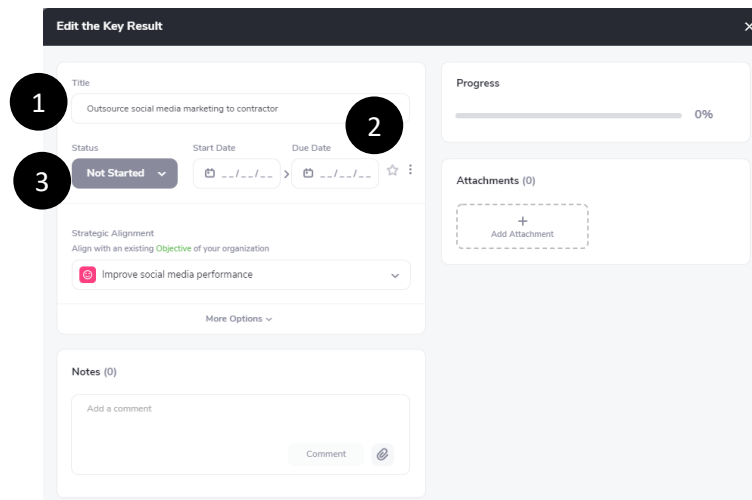


(See *Edit an Item* for more information.)

2. Create. This *Action Button* allows you to create a Goal Level Type item that is aligned with a Parent item.



1. Click **+ Create** to create a Child Item, connected to this Parent item to align your work.

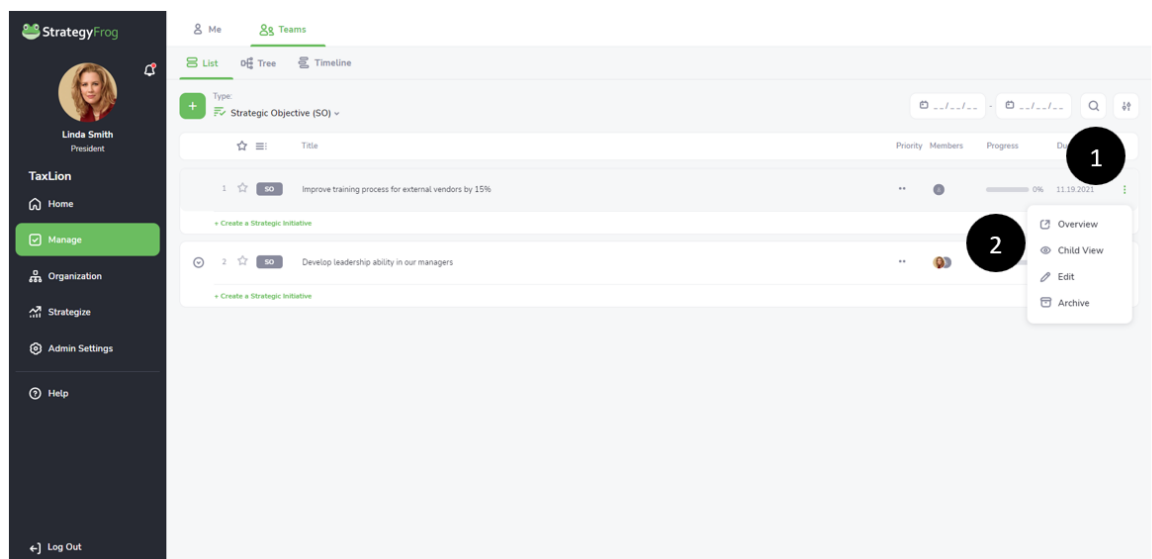



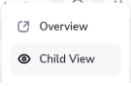
2. **Provide** basic information (1 Title, 2 Start and Due Date, and 3 Status) to activate this Child Item and include it in your work.
3. **Enter** additional details as needed.

## Child View

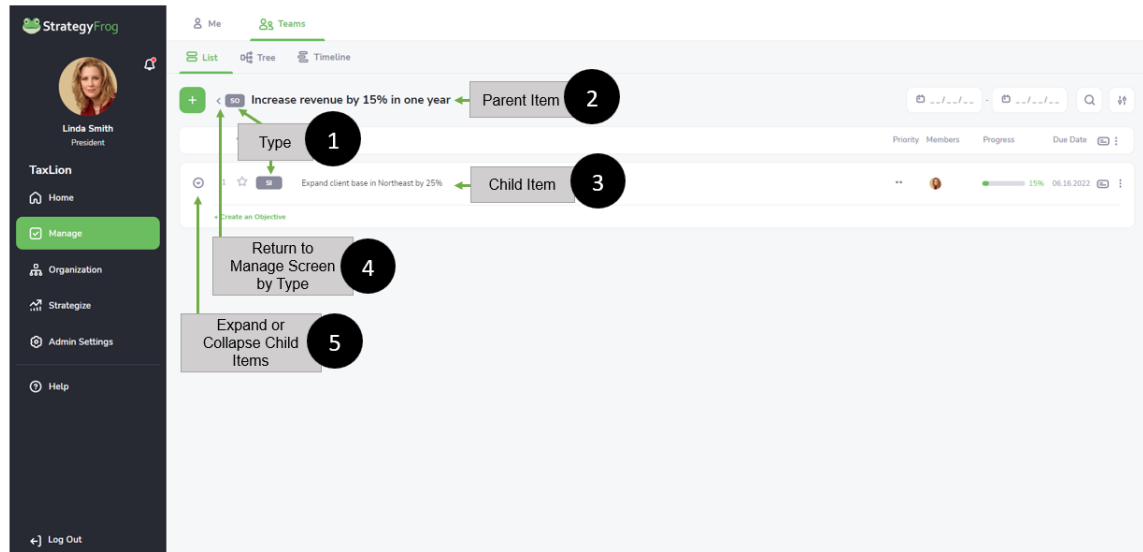
This provides a summary view of your work item (i.e., Strategic Objective, Strategic Initiative, Objective, Key Result, or Task). It includes all *Child Items* related to the *Parent* Item in a view like *List View*.

### Access Child View



1. **Click**  to see the View Options window.
2. **Click**  to see a list of related Child Items to the Parent Item you have selected. (Note: If there are no Child Items, then *Child View* will not be present.)

## Understand Child View



1. **Type.** The symbol **SO** adjacent to the item indicates the type of work item. By default, StrategyFrog offers customers the following level types:

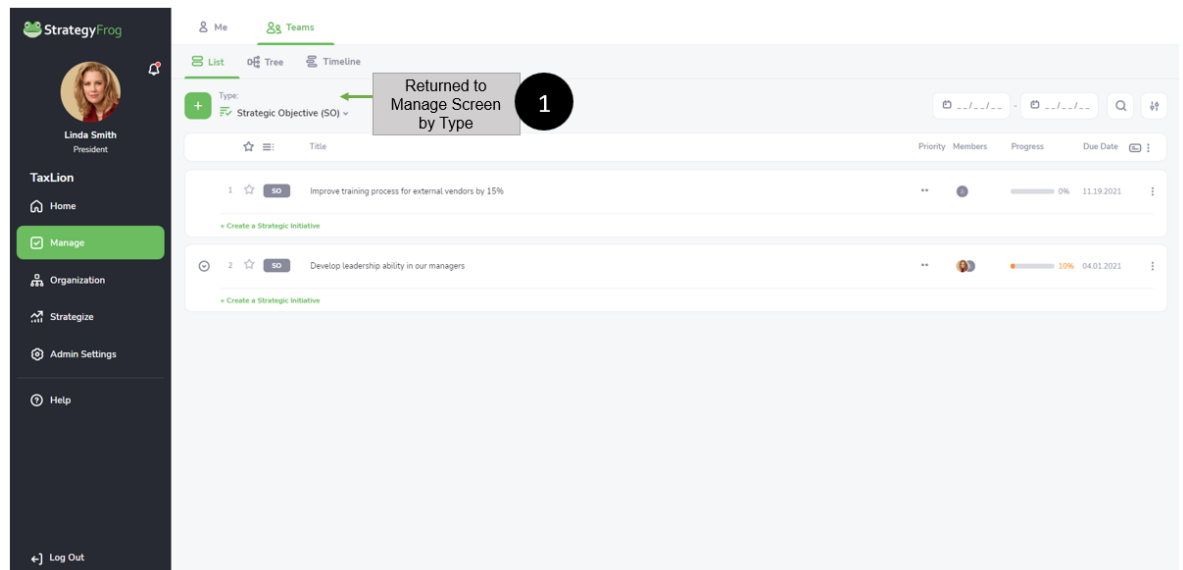
- Strategic Objective (SO)
- Strategic Initiative (SI)
- Objective (O)
- Key Result (KR)
- Task (T)

*Strategic Objective* is a significant Organizational Objective impacting the entire organization. *Strategic Initiative* indicates how the *Strategic Objective* will be accomplished. An *Objective* is an Individual Objective supporting the *Strategic Initiative*. A *Key Result* is a measurable outcome required to achieve the *Objective*. A *Task* is a minor action that supports accomplishing the *Key Result*.

2. **Parent Item.** All work is aligned in StrategyFrog. A Parent Item usually contains Child Items. For example, you might have an Objective of Increase Social Media Presence. A Key Result supporting this Objective might be Hire Social Media bloggers by March 1st.
3. **Child Item.** All work is aligned in StrategyFrog. A Child Item is a sub-item supporting the Parent Item. See above.
4. **Return to Manage Screen by Type.** Click this button to return to the *Manage* screen to see all work organized by *Type*.
5. **Expand or Collapse Child Items.** Click this button to *see* or *hide* all Child Items.

## Return to Manage Screen by Type

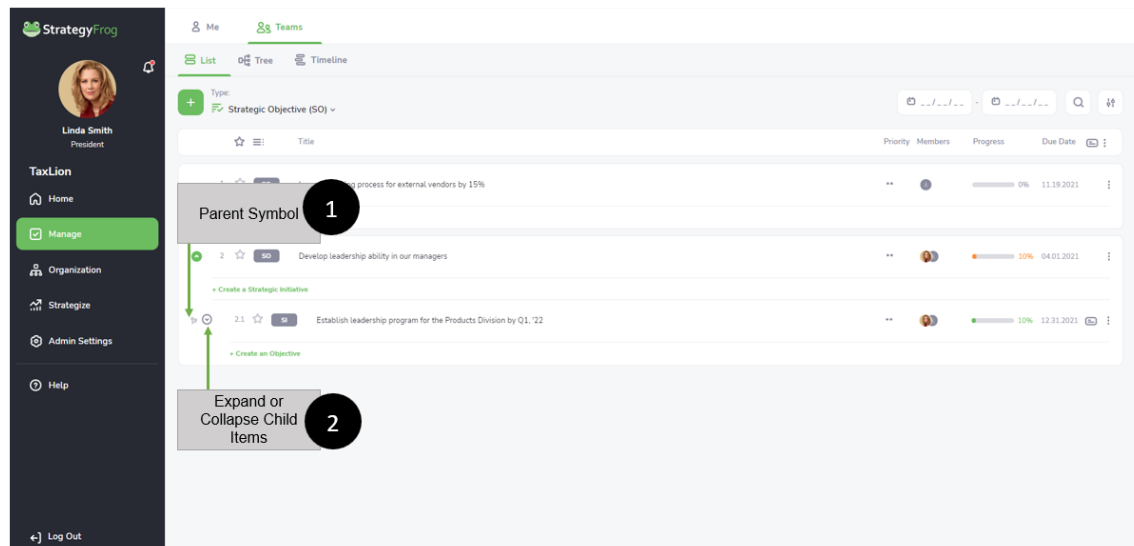
After you click on *Return to Manage Screen by Type* you will see the following screen:



1. **Returned to Manage Screen by Type.** This indicates you have returned to the Manage Screen, with your data organized by Type, i.e., Strategic Objectives, Strategic Initiatives, etc.

## View More Child Items

After you click on *Expand Child Items* you will see the following screen:



1. **Parent Symbol.** This indicates this item is the *Child item* of the above *Parent Item*.
2. **Expand or Collapse Child Items.** Click this button to *see* or *hide* more Child Items.



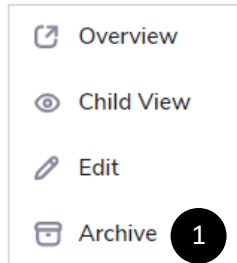
## Edit

This is an actionable feature that takes you to the Edit Window. The Edit Window allows you to make a variety of edits to your item. Click in the text box or select an option to make changes.

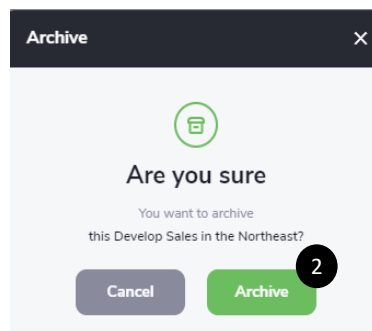
Please see *Edit an Item* for more Information.

## Archive

This feature allows you to archive (or store) this work item for later use.



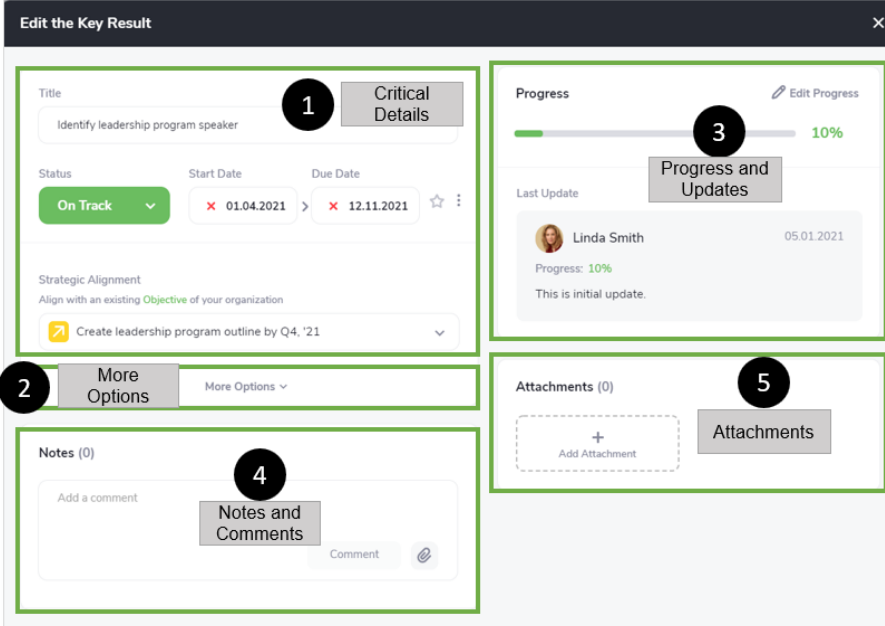
1. Click  and Select  Archive



2. Click *Archive* to store this item.

## Edit an Item

This is an actionable feature that takes you to the Edit Window. The Edit Window allows you to make a variety of edits to your item.



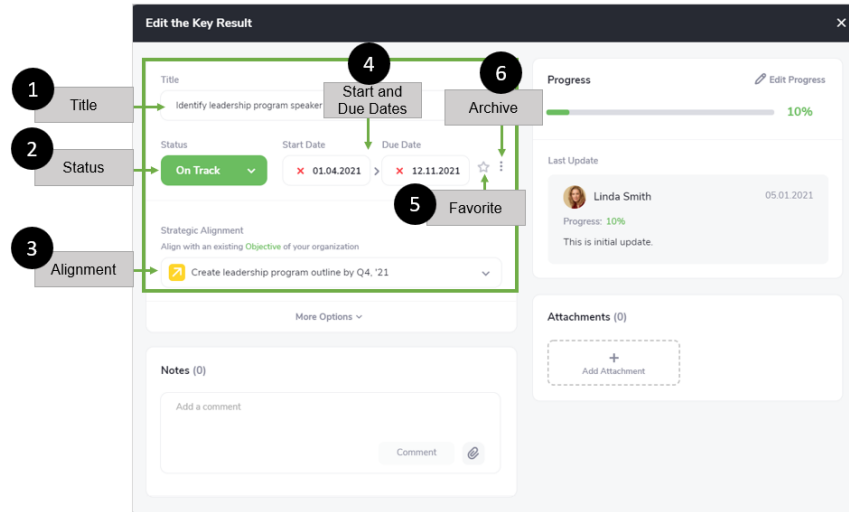
The screenshot shows the 'Edit the Key Result' interface with five numbered callouts:

- 1 Critical Details:** Title (Identify leadership program speaker), Status (On Track), Start Date (01.04.2021), Due Date (12.11.2021), and Strategic Alignment (Create leadership program outline by Q4, '21).
- 2 More Options:** A button labeled 'More Options' with a dropdown arrow.
- 3 Progress and Updates:** A progress bar at 10% and a 'Last Update' section by Linda Smith on 05.01.2021.
- 4 Notes and Comments:** A text area for 'Add a comment' and a 'Comment' button.
- 5 Attachments:** An 'Add Attachment' button and an 'Attachments' section.

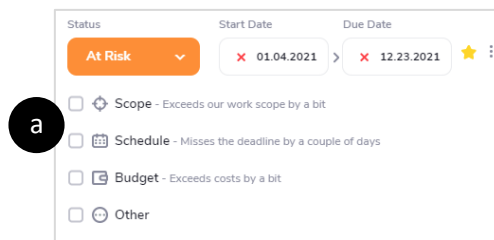
1. **Critical Details.** This section includes important item information like the item's *Title*, *Current Status*, *Start Date*, *Due Date*, *Favorite*, *Archive*, and *Strategic Alignment*.
2. **More Options.** This section includes *Leaders and Supporters*, *Priority*, *Visibility*, and *Department*. You can also add a *Description* to provide more information about your work item.
3. **Progress and Updates.** This section includes identifying the *Progress* of your work item and adding *Updates* to note your progress for yourself and others to see.
4. **Notes and Comments.** Provide important *Notes* about your work and exchange *Comments* with others.
5. **Attachments.** Add *Attachments* that are related to this work item.

### Critical Details

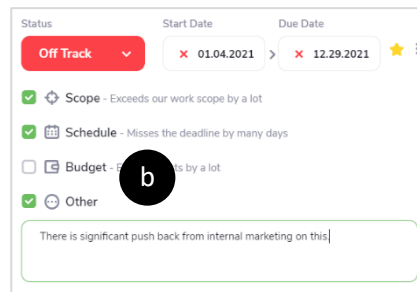
In this section in Edit, you can add your *Title*, *Status*, *Strategic Alignment*, *Start and Due Dates*, *Favorite*, and *Archive* an item.



1. **Title.** This describes the title of your Goal Level Type Item.
2. **Status.** This indicates the status of your Goal Level Type item (i.e., *Not Started*, *On Track*, *At Risk*, *Off Track*, or *Completed*).

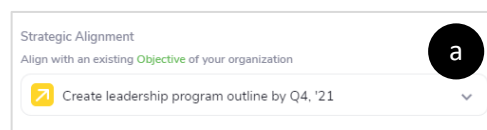


- a. **Select** additional information options about Scope, Schedule, Budget, and Other for *At Risk* and *Off Track*.

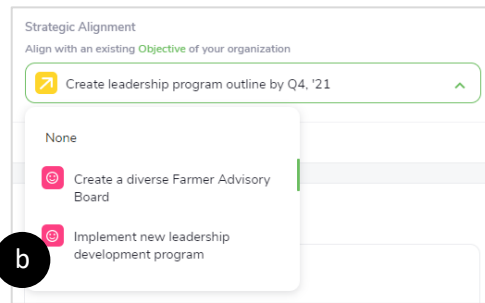


- b. **Provide** a more specific note here.

3. **Alignment.** This feature allows you to create a Goal Level Type item that is strategically aligned with a Parent item.



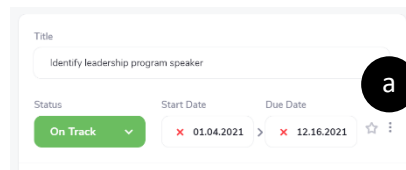
a. Click  in Strategic Alignment.



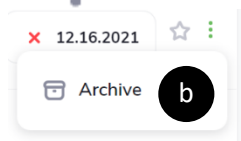
b. Select the Parent Item that your Child Item should be aligned with.

4. **Start and Due Dates.** Establish your *Start Date* and *Due Date* for your work item.

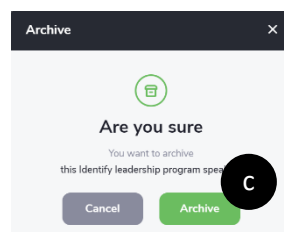
5. **Archive.** Archive (or store) this work item; it becomes in inactive status.



a. Click 

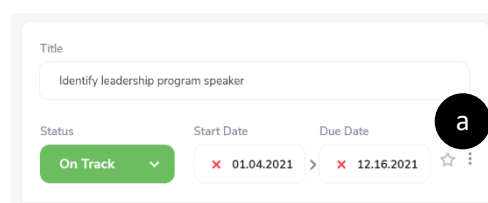


b. Click  Archive

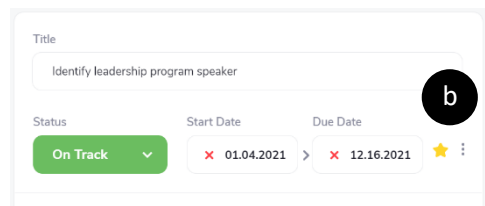


c. Click 

6. **Favorite.** This allows you to select and mark a favorite item or not.



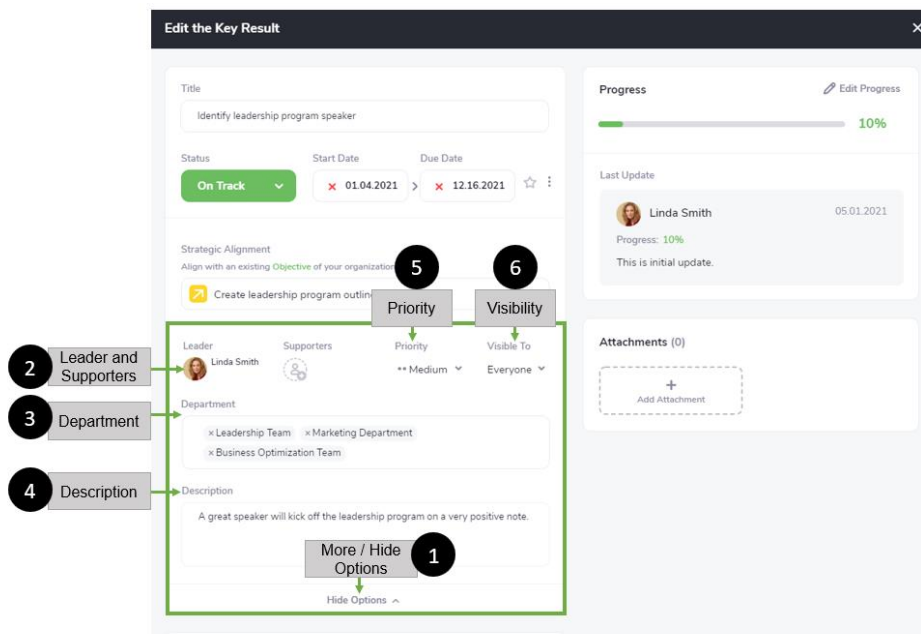
a. Click ☆ to mark an item as a “favorite.”



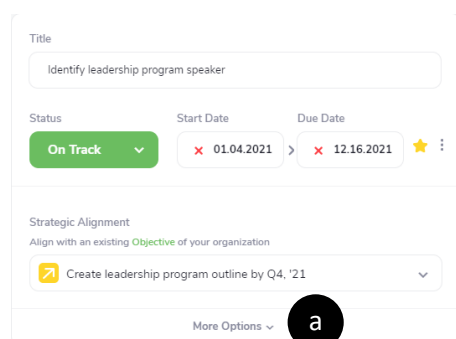
b. Notice the ☆ is now ★ indicating it is a “favorite.”

## More Options

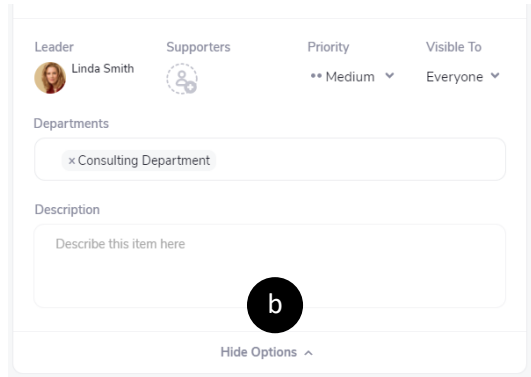
This feature allows you to edit the following items: *Leaders and Supporters*, *Priority*, *Visibility*, and *Department*. You can also add a *Description* to provide more information about your work item.



1. **More Options.** This feature allows you to edit the following items: *Leaders and Supporters*, *Priority*, *Visibility*, and *Department*. You can also add a *Description* to provide more information about your work item.

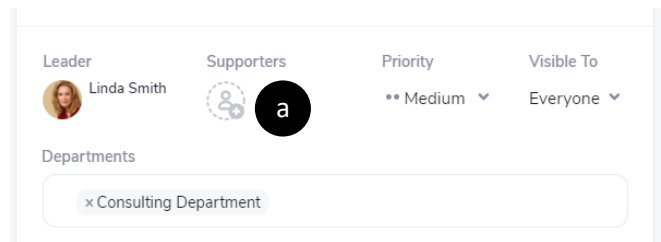


- a. **Click** More Options ▾ to access these features.

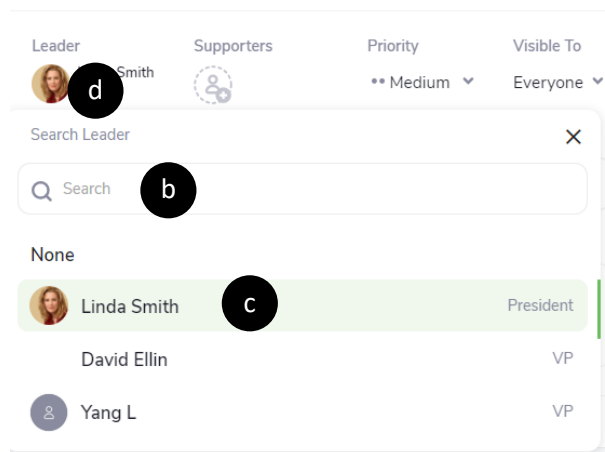


- b. **Click** Hide Options ▲ to hide these features.

2. **Leaders and Supporters.** You can add or delete a Leader and Supporters to the Goal Level Type Item. You can also view the Public Profile of the Item Owners.



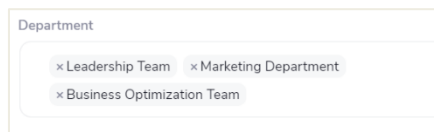
- a. **Click**  to add or delete a Leader or Supporter(s).



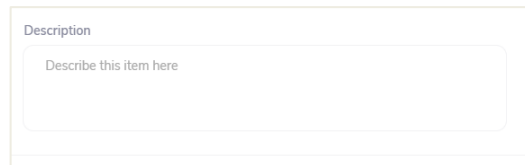
- b. **Search** for or **Click** a User that is not highlighted to add that person as a Leader or Supporter.
- c. **Click** a User that is highlighted to delete them as a Leader or Supporter.

d. **Click** the Item Owner's Profile Picture to view their Public Profile.

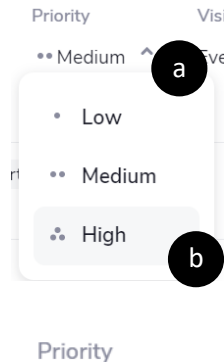
3. **Department.** This section displays which departments are affiliated with this work item.



4. **Description.** Add more descriptions of your work item here.



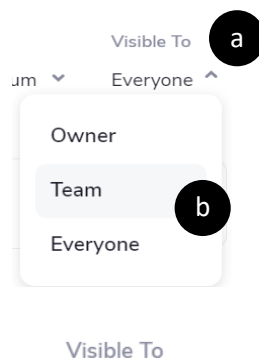
5. **Priority.** This displays the priority level of the Goal Level Type item (i.e., High, Medium, or Low).



- a. **Click** •• Medium ▾
- b. **Select** the preferred Priority level of the work item.

Note: By default, Priority is set to Medium.

6. **Visibility.** This displays who can see the Goal Level Type item (i.e., Everyone, the Team, or just the Owner.)



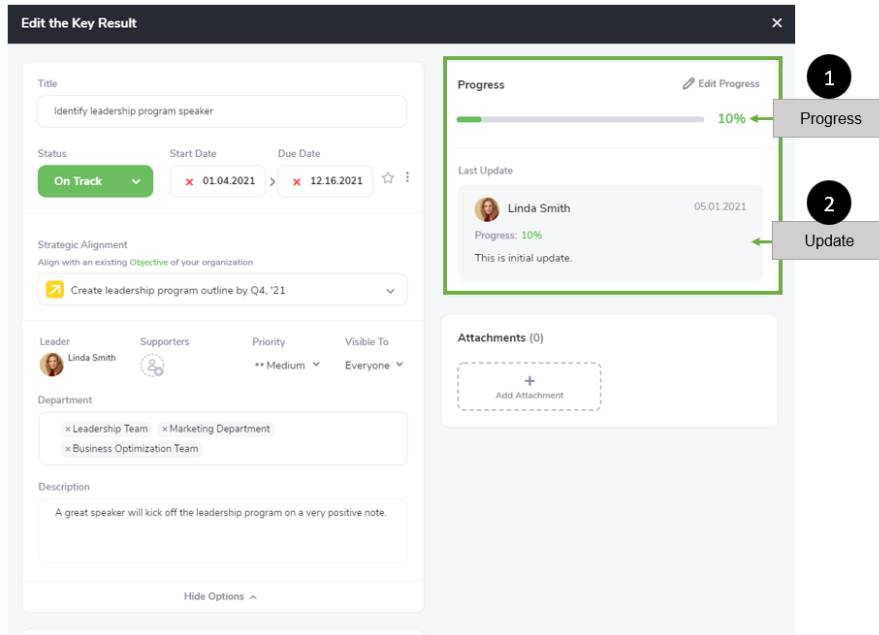
- a. **Click** Everyone ▾

b. **Select** the preferred Visibility level of the work item.

Note: By default, Visibility is set to Everyone.

## Progress and Updates

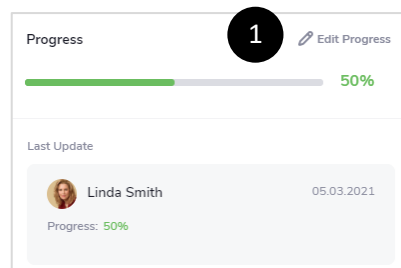
Share important progress updates with your team.



The screenshot shows the 'Edit the Key Result' window. The title is 'Identify leadership program speaker'. The status is 'On Track'. The start date is 01.04.2021 and the due date is 12.16.2021. The strategic alignment is 'Create leadership program outline by Q4 '21'. The leader is Linda Smith, and the department includes Leadership Team, Marketing Department, and Business Optimization Team. The description is 'A great speaker will kick off the leadership program on a very positive note.' On the right, the 'Progress' section shows a 10% progress bar and an 'Edit Progress' link. Below it, the 'Last Update' section shows a message from Linda Smith dated 05.01.2021 with the text 'This is initial update.' and a progress of 10%. There are callouts: '1' pointing to the 'Edit Progress' link and '2' pointing to the 'Update' button in the 'Last Update' section.

1. **Progress (Manual or Dynamic).** This is the display showing the progress of your Goal Level Type items. Progress is updated *manually* or *dynamically*.


a. **Manual Progress Update.** Enter your progress manually.



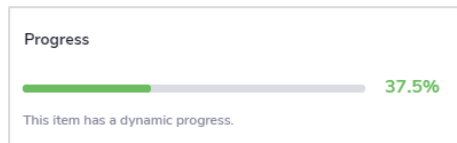
This close-up shows the 'Progress' section with a 50% progress bar and an 'Edit Progress' link. Below it, the 'Last Update' section shows a message from Linda Smith dated 05.03.2021 with the text 'Progress: 50%'.

1) **Click**  **Edit Progress**



- 2) **Adjust** Progress, either by moving the *Slider* or by inputting the progress.
- 3) **Consider** adding an **Update** to offer information about the Progress.
- 4) **Click**  .

b. **Dynamic Progress Update.** Unlike Manual Progress Updates, Dynamic Progress Updates occur automatically. If you are managing a Parent Item, then the progress updates occur automatically as the Child Items are updated manually.



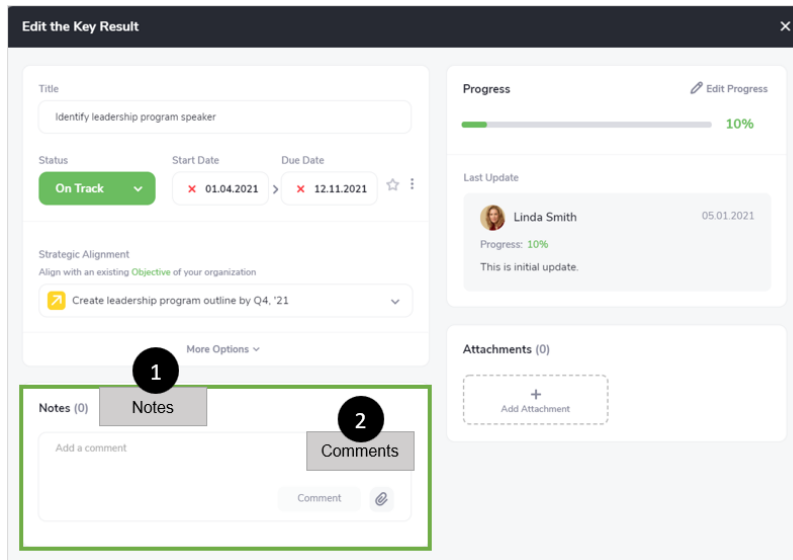
Dynamic Progress Updates for a Parent Item are the *average* of the Progress of all of the Child Items.

Example

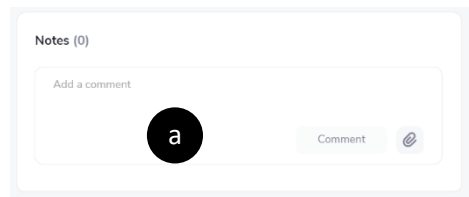
Linda Smith is responsible to Improve customer onboarding. The current progress of this item is **1** 37.5% complete. This item has two Child Items, **2** *Devleop Sales in the Northeast* (25% complete) and **3** *Create dedicated customer onboarding framework* (50% complete).

## Notes and Comments

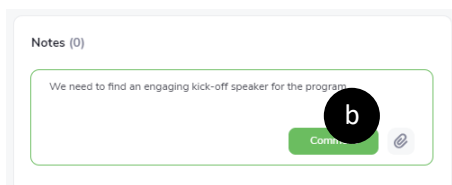
This feature allows you to provide notes for your team members, as well as share a thread of exchanged comments.



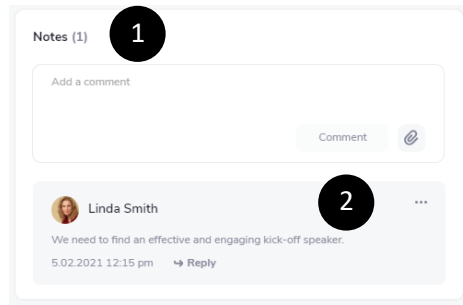
- Notes.** Share notes or information about a work item with fellow team members connected to this work.



- Click** in the area that says *Add a comment*.

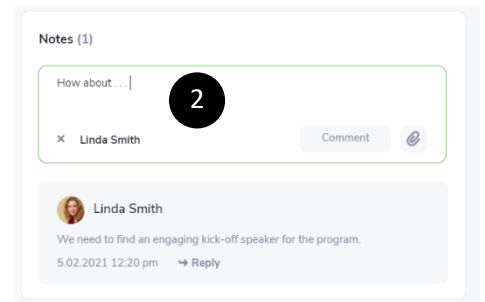
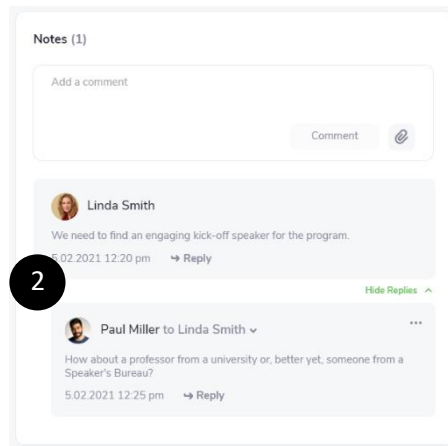



- Type** your comment and **Click** Comment.

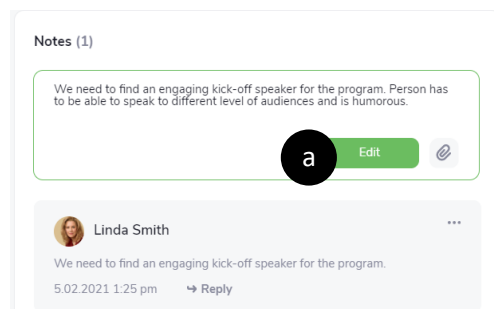
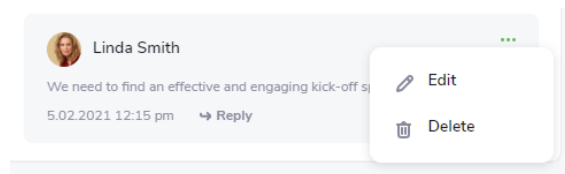


### Note

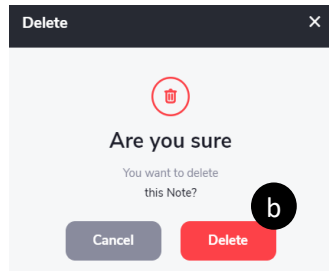
1. The number of comments is displayed here.
2. You or other people connected to this work item can *Reply* to the comment.



2. Click  to *Edit* or *Delete* this comment.

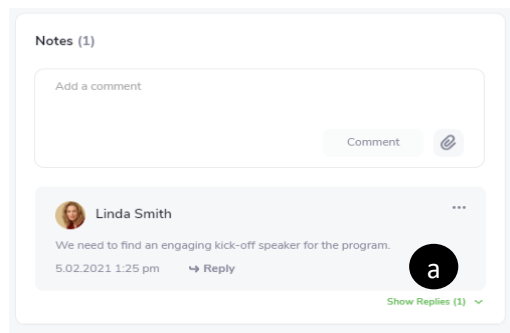


- a. Click *Edit*, make your revision to the comment, and click *Edit* again.

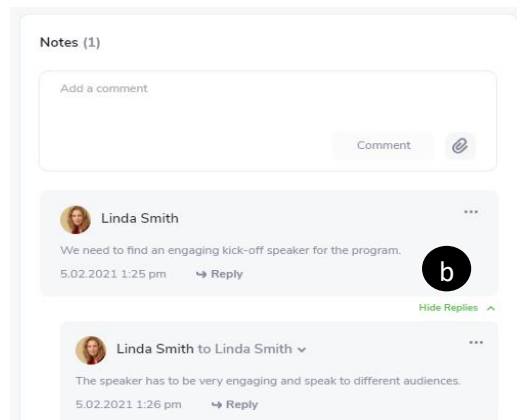


b. **Click Delete and Delete again to remove this Note.**

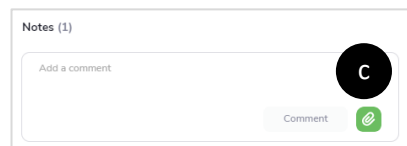
3. **Show or Hide Replies.** Select whether you want to *Show* or *Hide* replies in Comments.



a. **Click to Show Replies.**

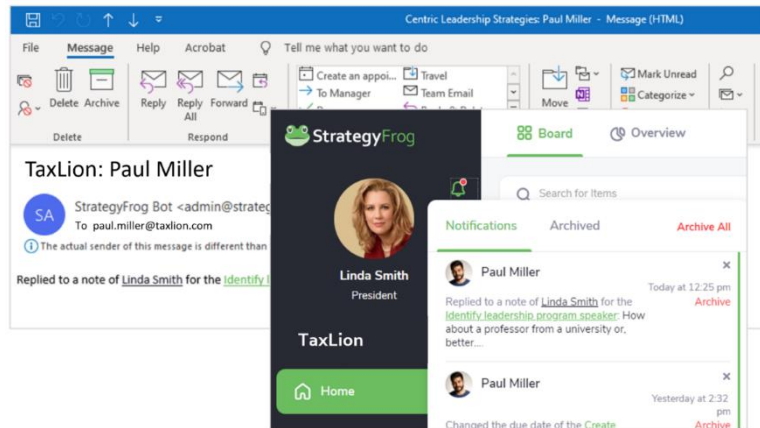


b. **Click to Show Replies.**



c. **Click  to add an Attachment to Notes.** Include an attachment in your comments to others.

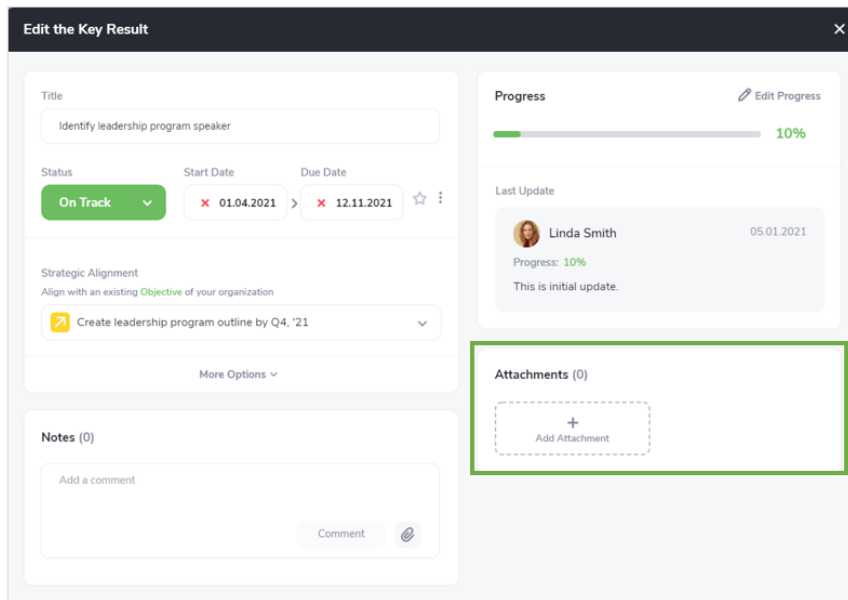
- d. **Note:** All connected users to a work item will receive a notification of a comment or note in their *Email* or within *Notifications* in the app. See the image below.





These notifications are dependent on how users set up their Notifications in their User Settings/Notifications.

## Attachments

Add an attachment related to your work item.



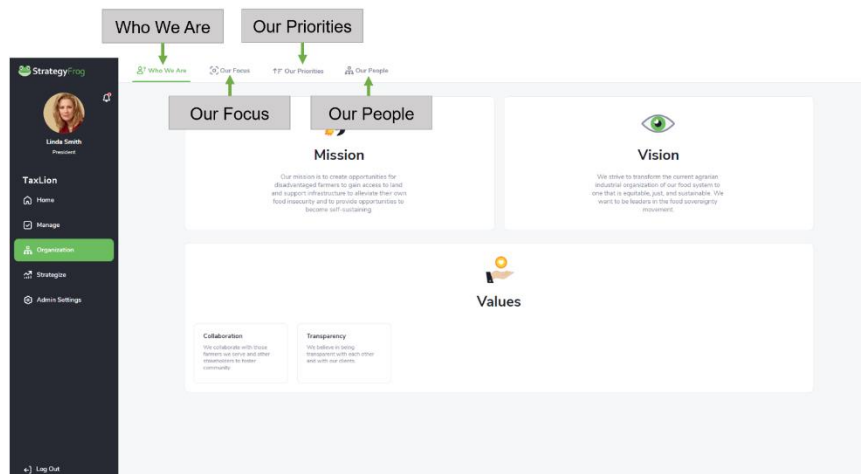


- a. **Click**  and **Select** your file.
- b. **Click**  to either *Open* or *Delete* Attachment.

## Organization

### Introduction

Organization is the area that allows you to see a summary of your organization’s strategy. It includes the followings sections: *Who We Are*, *Our Focus*, *Our Priorities*, and *Our People*. (This is a view only section; no edits can be made.)

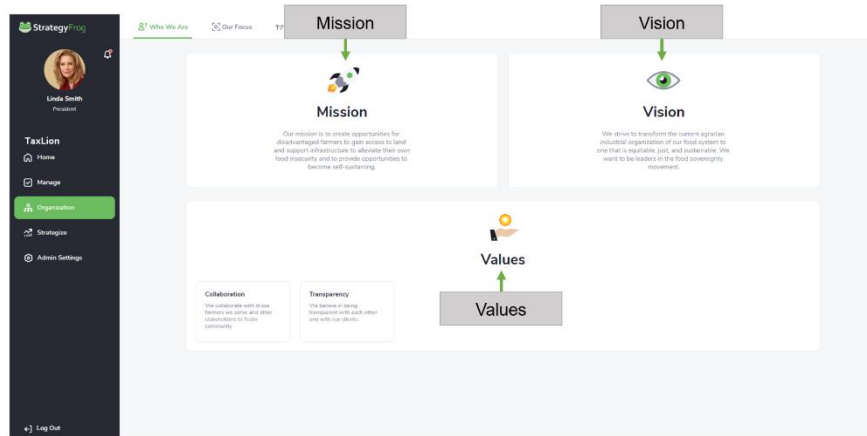


- **Who We Are.** This section displays your organization’s *Mission*, *Vision*, and *Values*.
- **Our Focus.** This section displays your organization’s *Value Discipline*, *Targets*, and *Differentiators*.
- **Our Priorities.** This section displays your organization’s Financial, Customer, Internal Process, and Learning and Growth Strategic Objectives. It also includes your organization’s Strategic Initiatives and Key Performance Indicators (KPIs).
- **Our People.** This section displays your organization’s hierarchical chart of employees.

## Who We Are

### Introduction

This section displays your organization’s *Mission*, *Vision*, and *Values*.

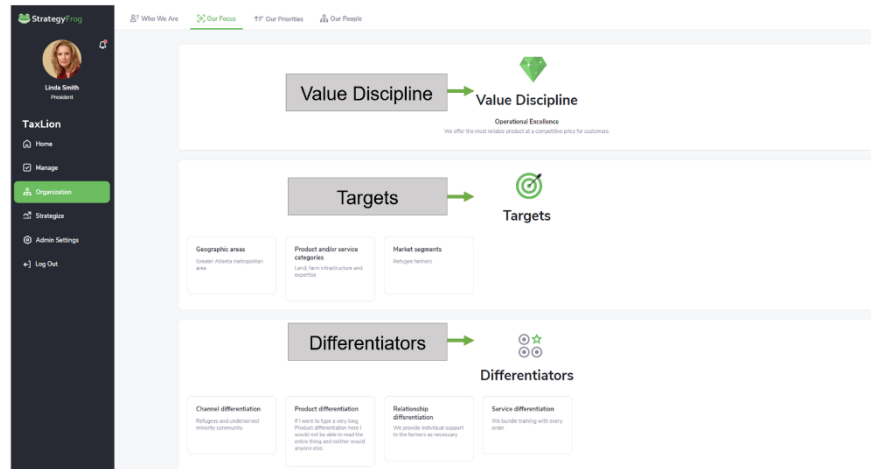


- **Mission.** A mission statement is a brief, powerful statement of why the organization exists. It uses bold, clear, and memorable language, inspiring people to support the work done by the organization. Mission statements describe what the organization accomplishes.
- **Vision.** A vision statement describes the ultimate goals and overarching purpose of a for-profit or nonprofit organization. It serves as the cornerstone of strategic planning, providing an organization with direction and a general destination, as well as defining its aspirations and values. A well-defined organizational identity is critical to inspire and align your leaders toward successfully implementing your strategy. It is part emotional, intending to inspire people to imagine a better future, and part rational, presenting a view of the future that everyone can believe in.
- **Values.** Core values are the guiding principles that dictate behavior and action within an organization. They help organizations determine if they are fulfilling their purpose and achieving their goals through the right behaviors. They create an unwavering and unchanging guide. Values answer “What are our guiding principles?”

## Our Focus

### Introduction

Having a clear focus is an essential part of an organization’s strategy. This allows your organization to manage its resources effectively by paying attention to things that will help and avoiding distractions that will hurt. A clear focus involves clarifying a value discipline, selecting target arenas, and defining differentiators. This section displays your organization’s *Value Discipline*, *Target Arenas*, and *Differentiators*.



- **Value Discipline.** The *Value Discipline Model* is a strategic tool that helps organizations understand what value they offer to their customers. This model looks at three different areas in which an organization may focus its energies: *Operational Excellence*, *Product Leadership*, and *Customer Intimacy*.
- **Target Arenas.** The most fundamental choices strategists make are those of where, or in what arenas, the organization will be active. What is your organization's focus? For example, which product categories, market segments, or geographic areas will your organization pursue? How much emphasis does your organization place in these arenas?
- **Differentiators.** Differentiation allows your organization to provide superior value to your customers that increases your viability or success. There are six primary ways to differentiate your organization: product, service, channel, relationships, reputation (or image), and price. How does your organization distinguish itself from others?

## Our Priorities

### Introduction

Successful organizations narrow their priorities and use strategic measures to track progress toward strategic objectives. These organizations do the following:

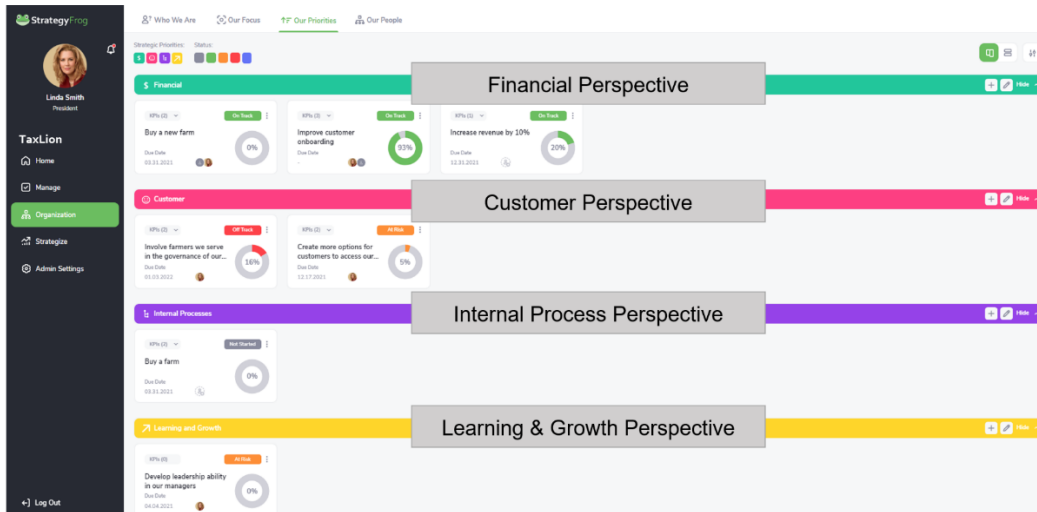
- Align the day-to-day work that everyone is doing with the vision and strategy of the organization,
- Communicate what they are trying to accomplish,
- Use consistent nomenclature to describe their strategy so everyone understands,
- Prioritize projects, products, and services, and
- Measure and monitor progress towards strategic targets.

### The Balanced Scorecard

The *Balanced Scorecard* is a strategic planning and management system used extensively in organizations worldwide. It creates a system of linked objectives, measures, targets, and initiatives



that collectively describe an organization's strategy and how that strategy can be achieved. The *Balanced Scorecard* suggests that an organization should be viewed from at least four perspectives (Financial, Customer, Internal Process, and Learning & Growth), develop metrics, collect data, and analyze it relative to these perspectives.



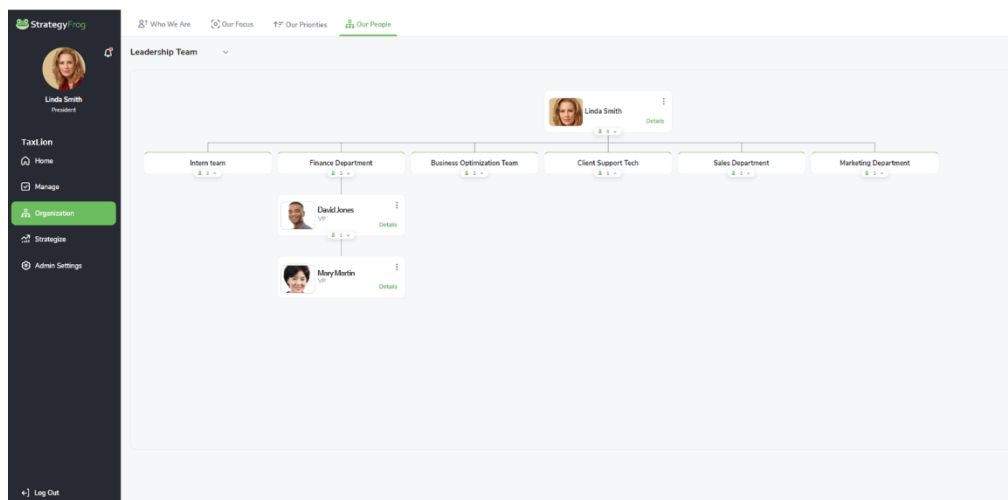
- **Financial Perspective.** Timely and accurate financial data is always a top organizational priority. This perspective includes any critical objective that is related to an organization's financial health and performance. Revenue and profit are obvious objectives that most organizations list in this perspective. Other financial goals might include cost savings and efficiencies, profit margins, and revenue sources.
- **Customer Perspective.** Focusing on customers and their satisfaction is critical for every organization. If customers are not satisfied, they will eventually find other suppliers that will meet their needs. In developing metrics for satisfaction, customers should be analyzed in terms of the kinds of customers and the kinds of processes we are providing a product or service to those customer groups. Typical objectives include customer service and satisfaction (e.g., increasing net promoter scores), market share (e.g., growing market share in a segment or country), and brand awareness (e.g., increasing interactions on social media).
- **Internal Process Perspective.** Metrics based on this perspective allow managers to know how well their organization is running and whether its products and services conform to customer requirements (the mission). These metrics must be carefully designed by those who know these processes most intimately. Examples of internal process objectives include process improvements (e.g., streamlining an internal approval process), quality optimization (e.g., reducing manufacturing waste), and capacity utilization (e.g., using technology to boost efficiency).
- **Learning & Growth Perspective.** This perspective focuses on both individual and organizational self-improvement. In a knowledge-worker organization, people -- the only repository of knowledge -- are the primary resource. In the current climate of rapid

technological change, knowledge workers must be in a continuous learning mode. Metrics can be put into place to guide managers in focusing on training and learning funds to help the most. In any case, learning and growth constitute the essential foundation for the success of any knowledge-worker organization. Examples of these objectives include human capital – skills, talent and knowledge (e.g., skills assessments, performance management scores, training effectiveness), information capital – databases, information systems, networks, and technology infrastructure (e.g., safety systems, data protection systems, infrastructure investments), and organizational capital – culture, leadership, employee alignment, teamwork and knowledge management (e.g., staff engagement, employee net promoter score, corporate culture audits).

## Our People

### Introduction

This section provides an organizational chart of your employees. These charts clearly outline the hierarchy within an organization and indicate the relationships shared among each individual employee. These insights help employees understand who to report to and ensure that managers are properly delegating tasks and responsibilities amongst their team.



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