














# ACTIONSTRATEGY USERS GUIDE



## ACTIONSTRATEGY PLAN STRUCTURE











The ActionStrategy system is designed to help you structure your strategic and action plans plan within the context of the key roles or goals of your organization or department.

## NAVIGATION COLUMN

 Organization	Organization – View team members. Can be edited by system administrator.
 My Strategic Plans 	My Strategic Plans – Lists teams. Useful when user is part of multiple teams.
 Team Plans 	Team Plans – Navigate to read-only view of team member plans.
 Archived Projects	Archived Projects – Shows projects that have been archived.
 My Profile 	My Profile – Change name, User name and Password
 Compass 	Compass – Mission, Vision and Values
 Execution Happens	Execution Happens – EH Charts
 Reports 	Reports -Export plan to MS Word or MS Excel

## ADDING GOALS

ABC Company My Strategic Plans John Jacobs  

EDIT	STRATEGY / PROJECT / TASK / SUBTASK	OWNER	RESOURCE	END DATE	%	DETAILS
 	1.0 Increase market share by 15%					
 	2.0 Reduce direct cost by 5%					
 	3.0 Expand the life time value of the customer					
 	4.0 Migrate all services to the cloud					
 	5.0 Introduce 5 new global markets					

*Note: Only the team leader or administrator can add categories. These categories will be visible to all team members.*

The first step to developing an plan is to establish a framework of high level goals, strategies or perspectives. This can include an organizational perspective (ex. FINANCIAL) plus a more detailed goals or objective statement. To add a planning category:

1. Click on Compass
2. Click on Strategy
3. Click on Add Strategy
4. Add detail.

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1.0

*TIP: Key objectives should be added under the categories at the 1.1 level (rather than the 1.0 level) for easier project documentation and management.*

Within each perspective, objectives and projects **designed to accomplish the goals** can be listed at the 1.1 level. These are often the drivers or the work needed to accomplish the goals. They often fall into the categories of projects, process improvement, policy, organizational design and work culture. Tasks and sub-tasks can be added to each driver.


For example:

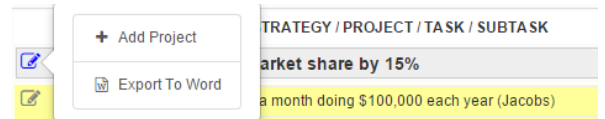
## 1.0 OPERATIONAL EFFECTIVENESS – Improve Quality Performance as Measured by X.

- 1.1 **Project** – Train (starts with verb/action) production teams in LEAN
  - 1.1.1 Task – Research vendors
    - 1.1.1.1 Sub-task – Identify top 3 vendors in region
- 1.2 **Process Improvement** – Improve materials management system
- 1.3 **Policy** – Modify employee leave policy
- 1.4 **Organizational Design and Structure** – Integrate sales and marketing departments
- 1.5 **Work Culture** – Provide Execution Happens team training

## STEP TWO: ADDING AND EDITING GOALS, PROJECTS AND WORK PLANS


### Add Projects

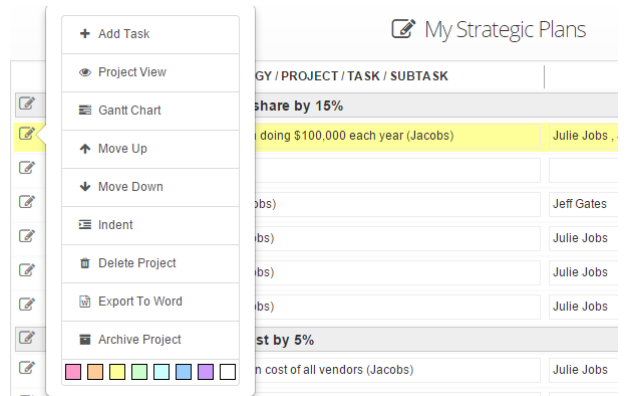
1. Click on the edit icon  to the left of the GOAL: ex. 1.0 FALLS PREVENTION
2. Click on **Add Project**
3. Click on New Project field and type project name
4. On that row, add project details:
  - a. Status
  - b. Project name
  - c. Owner – select from a pre-programmed drop-down
  - d. Resources – open field to document internal or external resources
  - e. Date
  - f. % Complete
  - g. Comments
  - h. Attachments




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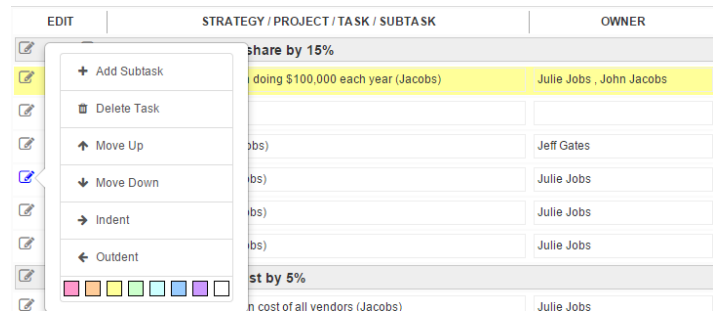
## Add Tasks

1. Click on the edit icon  to the left of the project name.
2. Click on **Add Task**. Click on multiple times to add additional task rows.
3. Click on New Task field and type your new task
4. On the task row, add task details:
  - a. Status
  - b. Task name
  - c. Owner – select from a pre-programmed drop-down
  - d. Resources – open field to document resources
  - e. Date
  - f. % Complete
  - g. Comments
  - h. Attachments



## Add Sub-Tasks

1. Click on the edit icon  to the left of the task name that you would add the subtask under
2. Click on **Add Sub-Tasks**. Click on multiple times to add additional task rows.
3. Click on Sub-Task field and type your new sub-task
4. On the sub-task row, add additional details:
  - a. Status
  - b. Project name
  - c. Owner – select from a pre-programmed drop-down
  - d. Resources – open field to document internal or external resources
  - e. Date
  - f. % Complete
  - g. Comments
  - h. Attachments



## Move Projects and Tasks

1. Click on the edit icon on the row to be moved
2. Down arrow moves 1 row down
3. Up arrow moves 1 row up
4. Right arrow indents – makes project a task
5. Left arrow outdents – moves from task to project

Or

1. Click to the left of the row to be moved
2. Hold down select and drag the project or task to the desired row
3. Release select

*TIP: Project plans can be added either in the My Strategic Plan view or in the Project View. To see only the selected project plan, click on the edit icon to the left of the project and select Project View.*