

Overview

This Job Aid defines the steps to follow for creating and maintaining Strategic Themes and Goals in Sensei IQ.

There are three (3) core actions required for creating and maintaining strategic themes and goals.

1. Creating and maintaining strategic themes
2. Creating and maintaining goals
3. Associating a goal with a project

Strategic Themes and Goals, while only available to Strategy customers, may be found in two areas of Sensei IQ; Strategy where the Strategic Themes and Goals are defined and managed and Project where the goals are delivered or realized via association with projects. We will be covering all components of managing themes and goals in this Job Aid.

For simplicity, we will create and maintain goals directly in the Strategy area to simplify the navigation to select and open themes, but you can perform the identical actions in the Project area after selecting the appropriate project and selecting the Strategy tab.

Please note that while there are two Strategy Management modes, Strategy Alignment and Strategy Realization, this Job Aid is focused only on the identification of Strategic Themes and Goals in Strategy Alignment mode. If your organization wishes to add the Benefits definition and tracking available in Strategy Realization mode, please work with your Sensei IQ Engagement Lead.

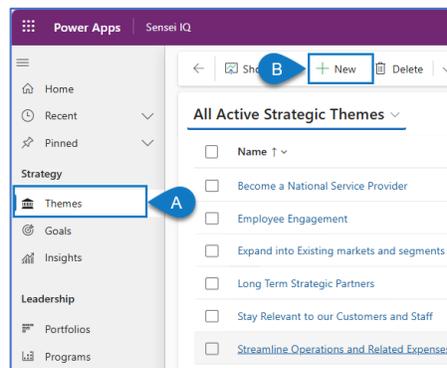
Creating and maintaining Strategic Themes

 **Strategy Manager**

 **Strategy – New Theme**

1. DEFINE A STRATEGIC THEME

- a. Ensure you are in the **Strategy area**, click **Themes** in the **Strategy** section.
- b. Click **+ New** from the command bar.



- c. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the theme in screens, reports, and dashboards.
- d. Complete the remaining fields in the **Details** pane.



The screenshot shows the 'New Strategic Theme' form. Callout 'D' points to the 'Name' field, and callout 'C' points to the 'Save & Close' button.

Name	---	Description	---
Sponsor	---		
Status	Active		

e. Click **Save & Close** to save the new Theme.

2. UPDATING A STRATEGIC THEME

- a. Ensure you are in the **Strategy area**, click **Themes** in the **Strategy** section. Find and select the Theme you wish to update in the list.
- b. Click on the **appropriate theme** from the list.

The screenshot shows the 'All Active Strategic Themes' list in Power Apps. Callout 'A' points to the 'Themes' menu item in the left navigation pane, and callout 'B' points to the 'Become a National Service Provider' theme in the list.

Name
<input type="checkbox"/> Become a National Service Provider
<input type="checkbox"/> Employee Engagement
<input type="checkbox"/> Expand into Existing markets and segments

c. **Update appropriate fields** and select Save & Close.

The screenshot shows the 'Establish a Best-in-Class Services Organization' goal form. Callout 'C' points to the 'Department' field.

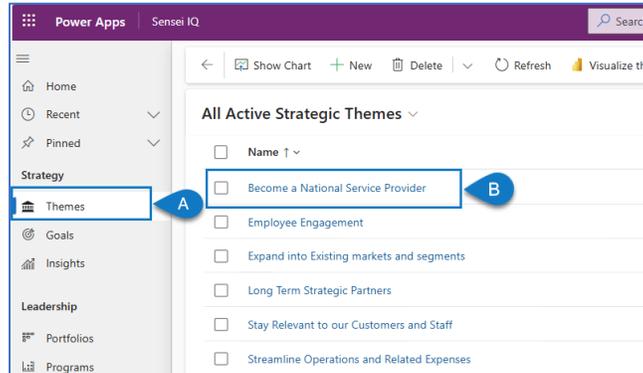
Name	Establish a Best-in-Class Services Organization
Description	Improve customer loyalty and stickiness
Department	---
Unit of Measure	Percent
Target	40.00
Actual	---
Target Date	1/1/2024
Status	On track

Creating and maintaining Strategic Goals

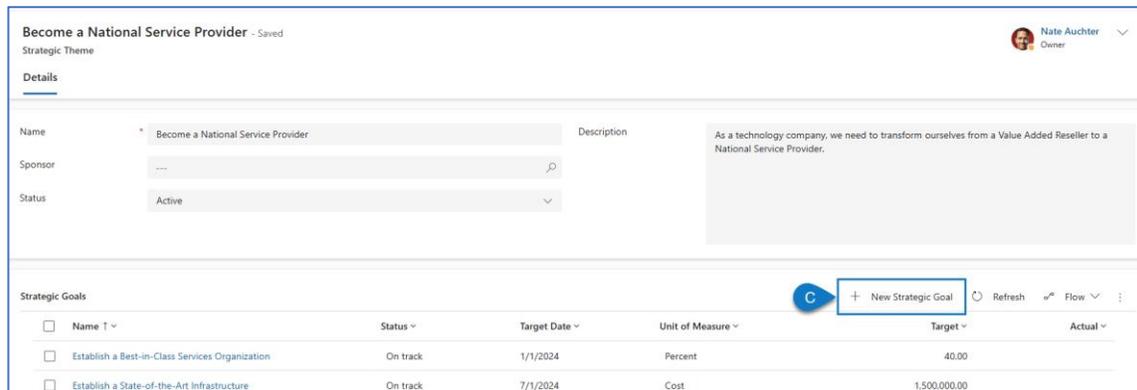


1. DEFINE A STRATEGIC GOAL

- a. Ensure you are in the **Strategy area**, click **Themes** in the **Strategy** section.
- b. Find and select the **theme** that you wish to add a **Strategic Goal** to.



- c. Click **+ New Strategic Goal** from the sub-ribbon.



- d. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the goal in screens, reports, and dashboards.
- e. Complete the remaining fields in the **Quick Create pane**.
- f. Define the quantitative measures for the goal using the **Unit of Measure, Target and Target Date** fields to define the expectations for the goal.

Quick Create: Strategic Goal

Name * ---

Description ---

Department ---

Unit of Measure ---

Target ---

Target Date ---

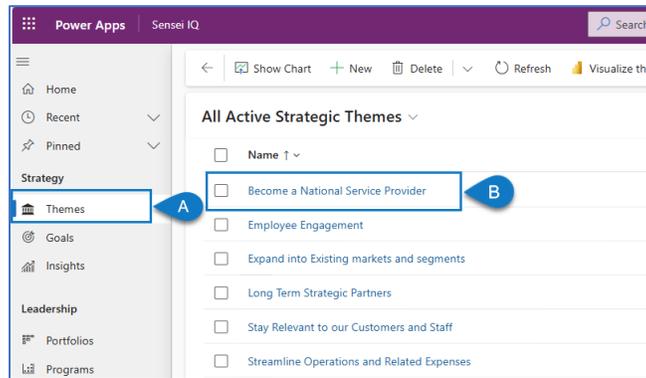
Status Not started

Owner * Steve Caseley (Available)

g. Click **Save & Close** to save the new goal.

2. UPDATING A STRATEGIC GOAL

- Ensure you are in the **Strategy area**, click **Themes** in the **Strategy** section.
- Find and select the **Theme** that has the **Strategic Goal** you wish to update.



c. Find and select the appropriate **Strategic Goal** from the list.

Become a National Service Provider - Saved

Strategic Theme

Details

Name * Become a National Service Provider

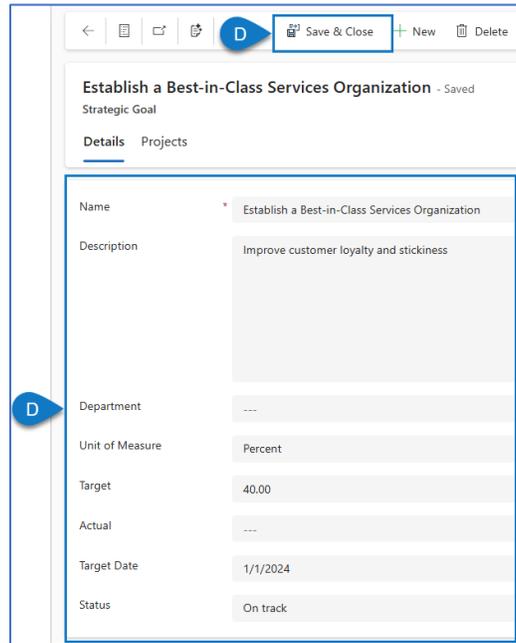
Sponsor ---

Status Active

Description: As a technology company, we need to transform ourselves from a Value Add National Service Provider.

Name ↑	Status	Target Date	Unit of Measure	Target
<input checked="" type="checkbox"/> Establish a Best-in-Class Services Organization	On track	1/1/2024	Percent	40.00
<input type="checkbox"/> Establish a State-of-the-Art Infrastructure	On track	7/1/2024	Cost	1,500,000.00
<input type="checkbox"/> Grow Services Sales	On track	7/1/2025	Revenue	1,500,000.00

d. **Update appropriate fields** and select **Save & Close**.



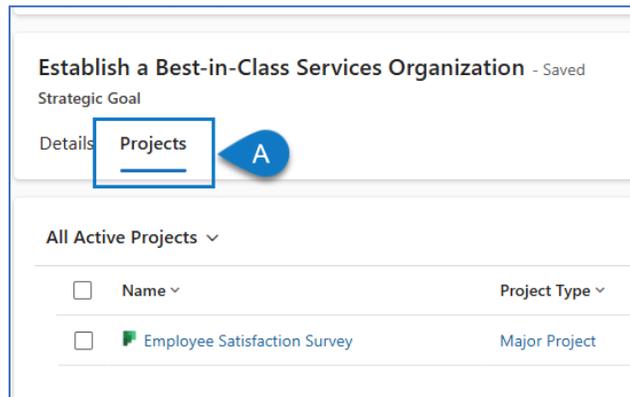
Associating a Goal with a Project

Strategy Manager

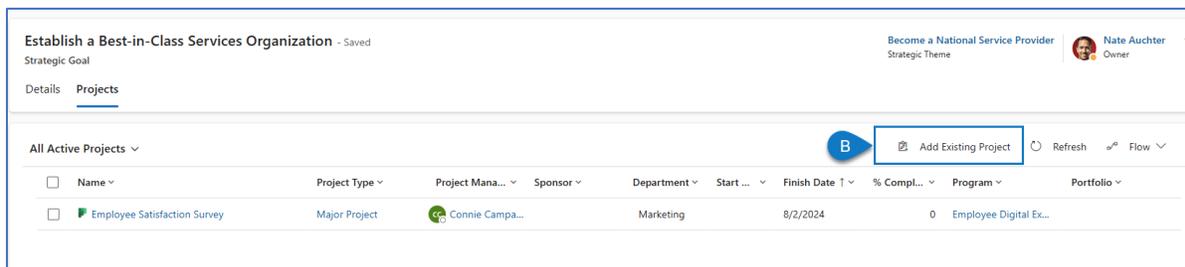
Strategy – Themes

1. ASSOCIATE A GOAL WITH A PROJECT

- a. Ensure you have the **goal** you wish to associate with a **Project open** and that the **Projects tab** is selected.



- b. Click **+ Add Existing Project** from the sub-ribbon.





- c. **Search for and select the Project** that supports this goal and select **Add**.

