

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 goals with benefits.

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

Therefore, goals can be defined and updated across all three levels on Sensei IQ. For simplicity, we will create and maintain goals directly in Strategy IQ to simplify the navigation to select and open themes, but you can perform the identical actions in Portfolio and Project IQ after selecting the appropriate portfolio, program, or project and selecting the Strategic Goals tab.

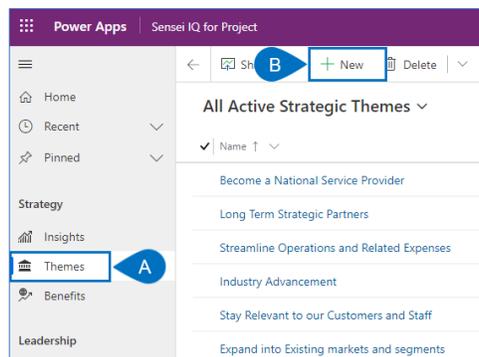
Creating and maintaining Strategic Themes

 **Strategy Manager**

 **Strategy IQ – New Theme**

1. DEFINE A STRATEGIC THEME

- a. Ensure you are in **Strategy IQ**, 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.

New Strategic Theme

Details

Name * --- **C**

Description --- **D**

Sponsor ---

Status **Active**

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

2. UPDATING A STRATEGIC THEME

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

Power Apps | Sensei IQ for Project

← Show **B** + New Delete | ▾

All Active Strategic Themes ▾

✓ | Name ↑ ▾

- Become a National Service Provider
- Long Term Strategic Partners
- Streamline Operations and Related Expenses
- Industry Advancement
- Stay Relevant to our Customers and Staff
- Expand into Existing markets and segments

Home

Recent ▾

Pinned ▾

Strategy

Insights

Themes **A**

Benefits

Leadership

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

← **C** Save & Close + New Delete Refresh Export to PDF Assign Share

Become a National Service Provider
Strategic Theme

Details

Name * **Become a National Service Provider**

Description **As a technology company, we need to transform ourselves from a Value Added Reseller to a National Service Provider.**

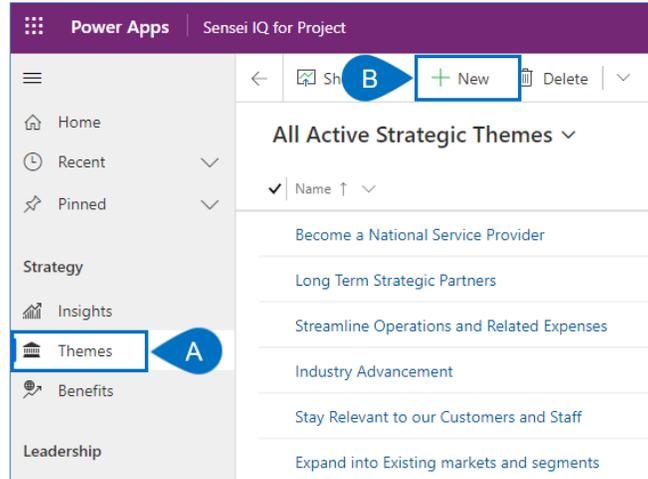
Sponsor **Albert Connell**

Status **Active**

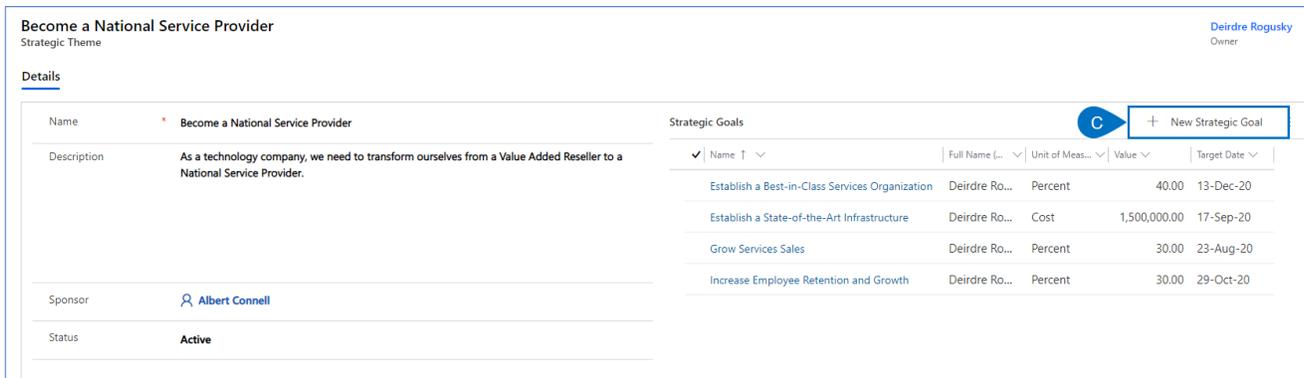
Creating and maintaining Strategic Goals

1. DEFINE A STRATEGIC GOAL

- a. Ensure you are in **Strategy IQ**, 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.

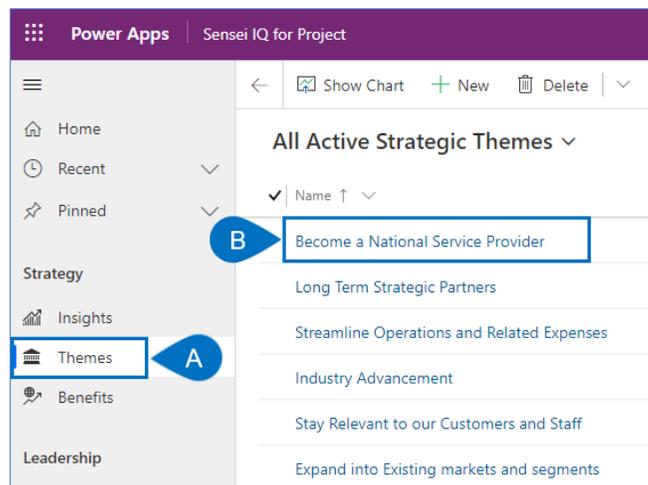


- d. Fill in the **Name** field. It is mandatory and it should be clear and concise to help users identify the goal in screens, reports, and dashboards.
- e. Complete the remaining fields in the **Quick Create** pane.
- f. Define the quantitative measures for the goal using the **Unit of Measure, Target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

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

2. UPDATING A STRATEGIC GOAL

- a. Ensure you are in **Strategy IQ**, click **Themes** in the **Strategy** section.
- b. 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		Strategic Goals				
Strategic Theme		+ New Strategic Goal				
Name	* Become a National Service Provider	Name	Full Name	Unit of Meas...	Value	Target Date
Description	As a technology company, we need to transform ourselves from a Value Added Reseller to a National Service Provider.	Establish a Best-in-Class Services Organization	Deirdre Ro...	Percent	40.00	13-Dec-20
		Establish a State-of-the-Art Infrastructure	Deirdre Ro...	Cost	1,500,000.00	17-Sep-20
		Grow Services Sales	Deirdre Ro...	Percent	30.00	23-Aug-20
		Increase Employee Retention and Growth	Deirdre Ro...	Percent	30.00	29-Oct-20

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

Establish a Best-in-Class Services Organization	
Strategic Goal	
<p>Details Benefits Portfolios/Programs/Projects</p>	
Name	Establish a Best-in-Class Services Organization
Objective	Improve customer loyalty and stickiness
Unit of Measure	Percent
Scale	Equal to
Value	40.00
Target Date	13-Dec-20
Owner	Deirdre Rogusky
Status Reason	Active

Associating goals with benefits

Strategy Manager

Strategy IQ – Themes

1. ASSOCIATE GOALS WITH BENEFITS

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

Power Apps | Sensei IQ for Project

Home Recent Pinned Strategy Insights Themes Benefits Leadership

Show Chart + New Delete

All Active Strategic Themes

Name ↑

Become a National Service Provider

Long Term Strategic Partners

Streamline Operations and Related Expenses

Industry Advancement

Stay Relevant to our Customers and Staff

Expand into Existing markets and segments

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



Become a National Service Provider
Strategic Theme

Owner: Deirdre Rogusky

Details

Name: Become a National Service Provider

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

Sponsor: Albert Connell

Status: Active

Name	Full Name (L...)	Unit of Meas...	Value	Target Date
Establish a Best-in-Class Services Organization	Deirdre Ro...	Percent	40.00	13-Dec-20
Establish a State-of-the-Art Infrastructure	Deirdre Ro...	Cost	1,500,000.00	17-Sep-20
Grow Services Sales	Deirdre Ro...	Percent	30.00	23-Aug-20
Increase Employee Retention and Growth	Deirdre Ro...	Percent	30.00	29-Oct-20

- d. Click on the **Benefits** tab.
- e. Click **Add Existing Benefit**.

Establish a Best-in-Class Services Organization
Strategic Goal

Theme: Become a National Service Provider

Portfolios/Programs/Projects

+ New **Add Existing Benefit**

Search this view

Name	Full Name (O...)	Department	Sponsor	Start	Finish	Created On
Attract Subject Matter Experts	---	IT	Bill Collett	02-Sep-20	29-Dec-24	02-Sep-20 5:01 ...

- f. Click in the **Search** box.
- g. Search for and **select the appropriate item** from the list.

Lookup Records

Select record

Look for records

Recent records All records

- Attract Subject Matter Experts
- Improved customer satisfaction
- Increase Number of Gold Partnerships by 5

Pinned records

- Adequate Equipment/Consumables

2. DISASSOCIATE GOALS WITH BENEFITS

- a. Select the **area to the left** of the benefit to select it.
- b. Click **Remove** from the sub-ribbon.

Establish a Best-in-Class Services Organization
Strategic Goal

Theme: Become a National Service Provider

Details **Benefits** Portfolios/Programs/Projects

Remove Share Email a Link

Search this view

Name	Full Name (Owning User)	Department	Sponsor	Start	Finish	Created On
Attract Subject Matter Experts	---	IT	Bill Collett	02-Sep-20	29-Dec-24	02-Sep-20 5:01 PM
Attract Subject Matter Experts	---	IT	Marc Soester	29-May-20	30-Dec-22	30-May-20 7:34 AM
Increase Number of Gold Partnerships by 5	Deirdre Rogusky	Corporate	Bill Speker	31-May-20	29-Sep-20	14-Apr-20 2:20 PM