

## Overview

This Job Aid defines the steps to define the hierarchical relationship between delivery initiatives and goals,

There is only one action required for associating (and disassociating) projects, programs and/or projects with benefits and/or goals.

A theme can have many goals, and each goal can be delivered through multiple initiatives; or in other words, it could take multiple initiatives to realize the goal. As well, a goal can be measured through multiple benefits. Each benefit can be associated with only a single goal and a single initiative.

Each initiative can be associated with multiple goals and benefits, while still adhering to the rule that a specific benefit can be associated with only a single initiative.

While you can define these relationships top down from the goal to the portfolio, program, and project, most organizations do it from the bottom up by associating the projects, programs and portfolios with the appropriate goals and benefits. This Job Aid will review how to associate from the bottom up.

## Associate (and disassociate) Benefits and Goals

 **Strategy Manager**

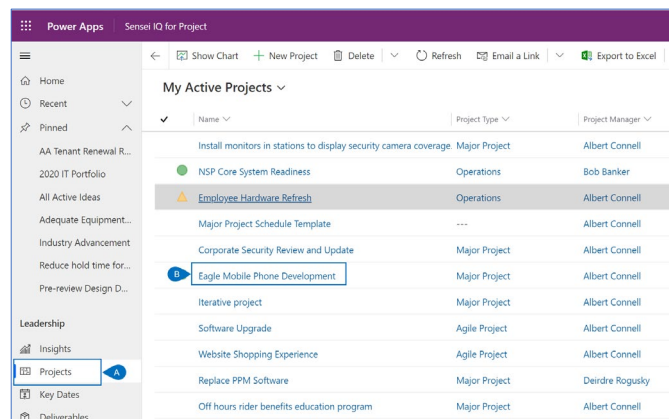


**Project IQ**

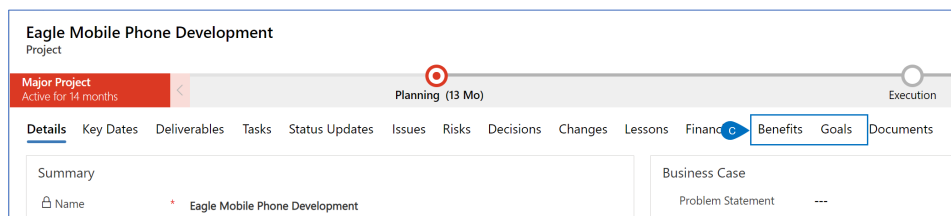
**Portfolio IQ**

### 1. ASSOCIATE A BENEFIT OR GIAL

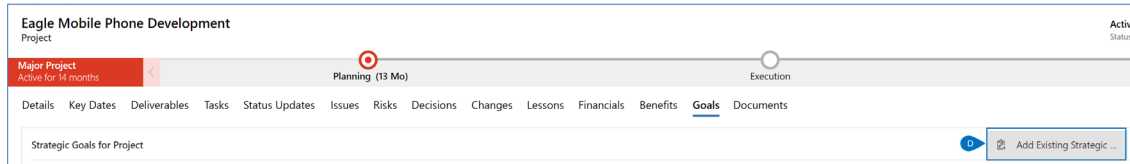
- Ensure you are in **Project IQ** (if associating a Project) or **Portfolio IQ** (if associating a Portfolio or Program).
- Select and open the appropriate **project** (or portfolio/program).



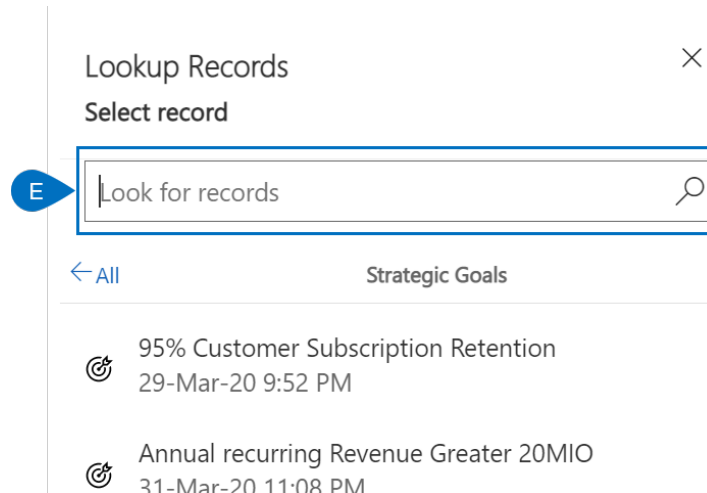
- Select the **Goals** (or **Benefits**) tab.



- Select **+ Add Existing Strategic Goals** (or **Benefits**) to the selected initiative.

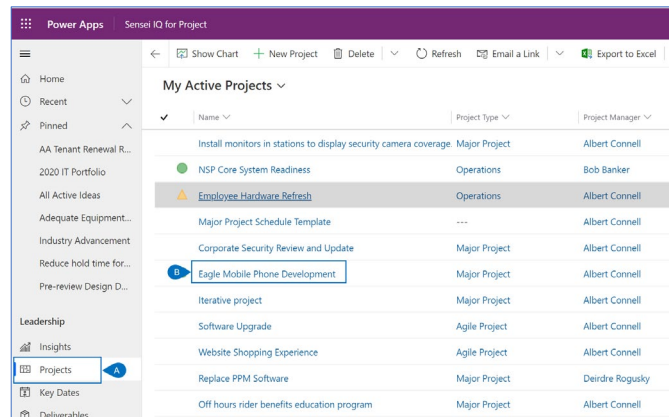


- e. Search for and select the appropriate **Goal** (or **Benefit**).

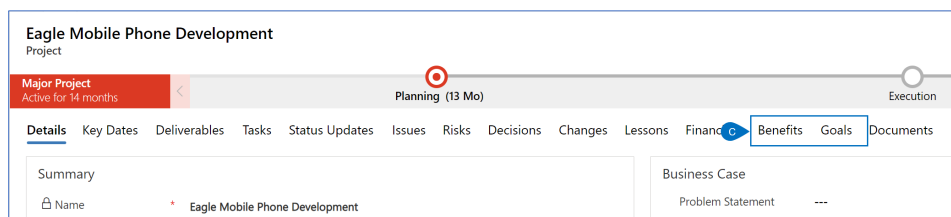


## 2. DIS-ASSOCIATE A BENEFIT OR GIAL

- a. Ensure you are in **Project IQ** (if associating a Project) or **Portfolio IQ** (if dis-associating a Portfolio or Program).  
b. Select and open the appropriate **project** (or portfolio/program).

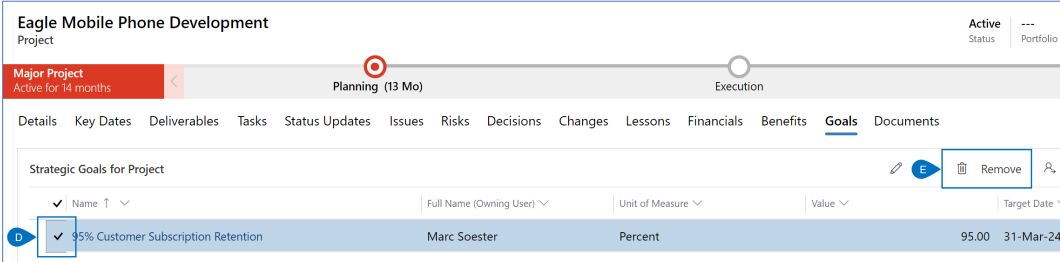


- c. Select the **Goals** (or **Benefits**) tab.



- d. Select the **Goal** (or **Benefit**) you wish to disassociate.

e. Select **Remove**.



**Eagle Mobile Phone Development**  
Project

Active Status --- Portfolio

Major Project  
Active for 14 months

Planning (13 Mo) Execution

Details Key Dates Deliverables Tasks Status Updates Issues Risks Decisions Changes Lessons Financials Benefits **Goals** Documents

Strategic Goals for Project

✓ Name ↑	Full Name (Owning User) ↓	Unit of Measure ↓	Value ↓	Target Date ↓
✓ 95% Customer Subscription Retention	Marc Soester	Percent	95.00	31-Mar-24

Remove