

Creating and Maintaining Strategic Themes and Goals

 Strategy IQ

 Strategy Manager

Instructions: Use this lab work sheet to complete a set of short and meaningful tasks at your own time and pace to complement your formal learning of **senseiIQ™** in the classroom. While the examples used herein may be different from (or not available) in your organization's senseiIQ™ instance, you can populate the system with your own data and follow the exercises. Ensure that you are already an enabled user in the **Sensei.IQ for Project** application.



Please note the Job Aid for [Creating and Maintaining Strategic Themes and Goals](#) within Learning IQ compliments the following lab sets, each of which contains two sets of data; Set A and Set B.

- Lab Exercise 1.** Create a Strategic Theme
- Lab Exercise 2.** Create a Strategic Goal





1. Create a Strategic Theme

Set A

| | |
|-----------------|---|
| Name | Industry Advancement |
| Description | Through Innovation we provide to most Productive Work and PPM Solutions to our Customers and advance our industry by providing industry standards and best practices. |
| Sponsor | Select from the list  |
| Status | Active |
| Strategic Goals | Select from the list  |




Set B

| | |
|-----------------|---|
| Name | Long Term Strategic Partners |
| Description | Long Term mutual beneficial Partnership with our customers ensuring that we remain highly valuable and relevant |
| Sponsor | Select from the list  |
| Status | Active |
| Strategic Goals | Select from the list  |






2. Create a Strategic Goal

Set A

| | |
|-----------------|---|
| Name | 95% Customer Subscription Retention |
| Objective | Customer Subscriptions renewal rate is at 95% or higher from previous year |
| Unit of Measure | Percent |
| Scale | Greater or equal to |
| Value | 95.00 |
| Target Date | Select March of the current year from the date picker  |
| Owner | Select your name or another user from the list  |
| Status Reason | Active |
| Strategic Theme | Select from the list  |

Set B

| | |
|-----------------|---|
| Name | Establish a State-of-the-Art Infrastructure |
| Objective | As a technology company, we should have the best in class for both internal use and demonstration to our customers. |
| Unit of Measure | Cost |
| Scale | Less than or equal to |
| Value | 1,500,000.00 |
| Target Date | Select March of the current year from the date picker  |
| Owner | Select your name or another user from the list  |
| Status Reason | Active |
| Strategic Theme | Select from the list  |