

Strategy Execution

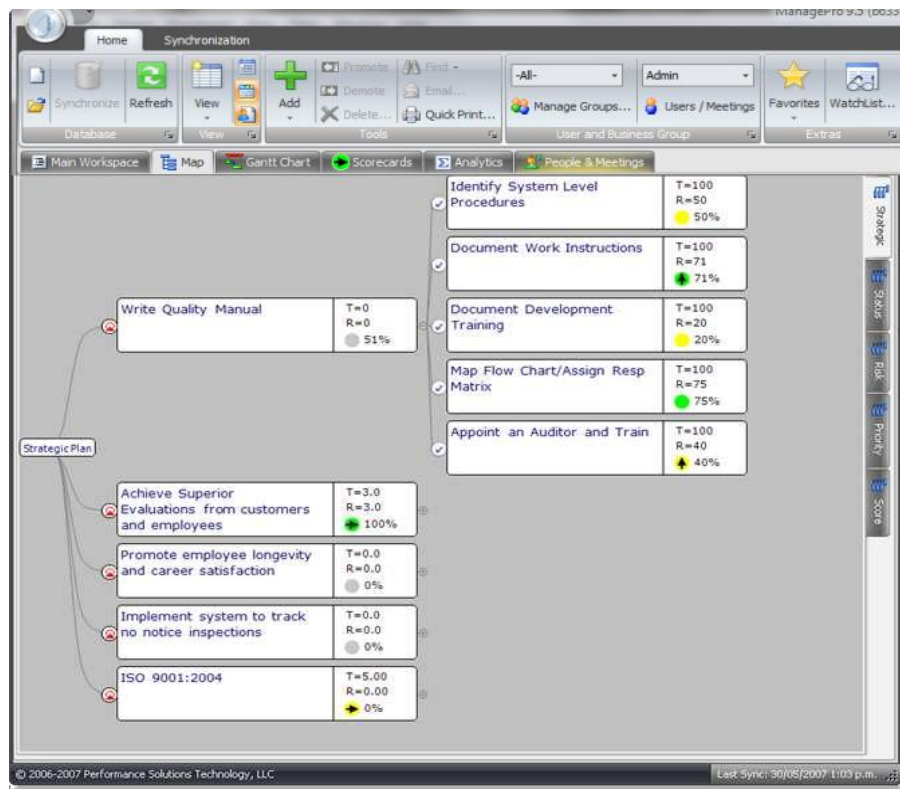
ManagePro 8 offers several new features to support you in the processes of strategic planning, visibility, tracking and execution. Three features are covered in this document, the Strategic Scorecard Map, the Strategic Plan Highlight filter button and Weighted Average Scores for strategy goal scorecards.

Strategic Scorecard Map

ManagePro makes it quick and easy to view the current target, result and scorecard of the action steps, initiatives or key performance indicators (KPIs) that are supporting each strategic goal. You'll find this view as the first tab (Strategic) in the map view. Note that the tree displays are based solely upon alignment with a strategic goal, not the standard tree (parent/child) structure found out through-out the rest of the program. E.g. the 2nd tier listing of records may be found under a completely different parent goal in any of the other Outline, Timeline or Map views.

Inclusion in this view requires using the right click Strategic Plan option to:

- 1) Select those records that are part of the strategic plan,
- 2) Select records (goals, projects, action items and/or tasks) that are aligned with a strategic plan initiative and linking them to that initiative



Note: For pre-ManagePro 8 users that are upgrading, you will need to add this view to your existing database by using the Utilities/Advanced Database/Technical support/Technical support functions/Create Strategic Map function. ONLY execute this command once for a given company if converting a ManagePro 7 database structure.

Strategic Plan Highlight

The ability to see across an entire organization's range of projects and goals and view those specific projects and tasks that are directly aligned with a goal or initiative in the strategic plan is a very useful tool. The Strategic Plan Highlight button provides just that feature and is located within the Filter ribbon control section. If you highlight a goal that has been identified as part of the strategic plan (using the right click option of Strategic Plan/Include in the Strategic Plan), clicking the Strategic Plan Highlight button reconfigures the display so that the goals linked to the selected Strategic Initiative are highlighted while all other goals are grayed out. In the screenshot below you can see that there are two goals and two action plan steps that are linked to the strategic goal IncreaseRevenuewithNewProductSolutions.

The screenshot shows the ManagePro 9.5 (b633.55) interface. The top ribbon includes sections for Home, Synchronization, Database, View, Tools, Filter, and User and Business Group. The Strategic Plan Highlight button is highlighted in the Filter section. A tooltip for this button reads: "Click this button to toggle highlighting of goals that are linked to the selected Strategic Initiative." Below the ribbon, the Main Workspace shows a table with the following data:

Title	Admin*	7/3/20...	4/19/2...	Behind	
Increase Revenue with New Product Solutions	Admin*			On Track	
PROJECTS	Admin*	7/3/20...	4/19/2...	Behind	
Project Management [Use Proj. Mgmt view]	Admin*	7/3/20...	4/19/2...	Behind	
Complete Definition of the Solution and the required Scop...	AhmedM...	7/3/20...	10/29/...	Behind	7
Build the Solution Application	JohnB*	1/10/2...	3/20/2...	On Track	5
Task Management & Issue Tracking	Admin*	7/16/2...	11/21/...	On Track	
Task Tracking	Admin*	7/16/2...	11/21/...	On Track	
Issue Tracking	Admin*			On Track	

Note: When a Strategic Goal is not selected (or when in views other than Outline/Scorecard) the new button is disabled.

Weighted Average Score

ManagePro supports two types of weighted average scores in deriving score values for strategic plan score cards. Both are available as options when setting up the scorecard parameters for each strategic goal record in the Score Basis field:

Sub-Goal Weighted Average derives the score based upon those sub-goals having a scorecard configured with target and results and a weight value.

Strategic Weighted Average derives the score value from those goals linked to the selected record via the right click option of StrategicPlan/LinktoStrategic Initiative feature.

The screenshot shows the 'Scoring Criteria' configuration window. The 'Score Basis' dropdown menu is open, showing options: Results, Sub-Goal Average, Sub-Goal Weighted Average, and Strategic Weighted Average. The 'Strategic Weighted Average' option is selected. A tooltip titled 'Score Basis' is displayed, providing details on how the score value is determined for each option.

Performance Level	Indicator	Operator	Value
High Performance	Green	>=	15.
Borderline Performance	Yellow	>=	10.
Low Performance	Red	<	10.

In either case, the weighted average is computed using the following simple formula; where \bar{X} = the score, W = the weight of each sub-goal or linked goal and X_1 - X_n are the current scores of those sub-goals or linked goals:

$$\bar{x} = \frac{w_1x_1 + w_2x_2 + \dots + w_nx_n}{w_1 + w_2 + \dots + w_n}$$

As powerful as this is, it can also present a challenge in remembering exactly what sub-goals or linked goals are in play and at what weight values. We have a helpful aid. Notice that when hovering your cursor over the score of a record that is derived from a weighted average, you'll find a pop-up window letting you view exactly which records are contributing to the current score.

Write Quality Manual	SL,WB,TB*,	51%	5/01/2007 5:00 a.m.	13/08/2007 12:00
Document Development Training	SL,WB,TB*,	20%		
Map Flow Chart/Assign Resp Matrix	SL,WB,TB*,	75		
Document Work Instructions	SL,WB,TB*,	71		
Identify System Level Procedures	SL,WB,TB*,	50		
Appoint an Auditor and Train	SL,WB,TB*,	40		
PHASE THREE SYSTEM ASSESSMENT AND RE...	SL,WB,TB*,	0%		
Conduct an Internal Audit	SL,WB,TB*,	0%	21/06/2007 3:00 a.m.	21/09/2007 12:00

Score
Basis: Strategic Weighted Average

- Identify System Leve.. (Score: 50% Weight: 20%)
- Document Work Instru.. (Score: 71% Weight: 20%)
- Document Development.. (Score: 20% Weight: 20%)
- Map Flow Chart/Assig.. (Score: 75% Weight: 20%)
- Appoint an Auditor a.. (Score: 40% Weight: 20%)