

CA Clarity PPM v13.3 and v14.x

Strategic Planning and Execution Documentation  
Release 4.1.1

# Version History

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| --- | --- | --- | --- |
| Author | Date | Version | Comments |
| Alexandre Assis | 15/Sep/2008 | 1.0 | * Initial Draft |
| Alexandre Assis | 16/12/2010 | 2.7 | * Finally started updating the document |
| Alexandre Assis | 13/05/2011 | 2.8 | * Bugs fixed * Timeslice Tables fixed |
| Alexandre Assis | 23/11/2011 | 2.9 | * Ported to v13 * Adapted to new Project Properties Page * New Project Dashboard Tab * Updated Doc with a brief of new Functionality * Partially updated Screenshots with v13 |
| Alexandre Assis | 23/12/2011 | 3.0 | * Customer-defined levels from 2 to N * Multi-level Strategic Items * Multi-scope, Multi-dimensional Strategic Plans * Simplified Data Model with no “Grandchild” Objects * Separated KPIs from Metrics * Eliminated direct table inserts and upates – all XOG now * Brand new Demo Data inspired on examples from Balanced Scorecard books |
| Alexandre Assis | 11/07/2012 | 3.1 | * Re-packaged for new v13.0.1 dataset including Idea, Project and Program "Business Alignment" subpages |
| Alexandre Assis | 24/09/2012 | 3.2 | * Updated Demo Data until 2012-09-30; verified installation on v13.1 with PMO Accelerator v3.1 |
| Alexandre Assis | 27/09/2012 | 3.3 | * Revised Translation to Portuguese * New feature on Strategic Cycles to consider pre-defined Supported Goals as a filter to the Distributed Evaluation Questionnaire |
| Alexandre Assis | 15/01/2015 | 4.0 | * Top-Down Planning (FTEs, Benefits, Funds) * KPIs are now called Indicators * Indicators Hierarchy with Roll-Up * Indicator Status defined by both Children Roll-up and Target x Measurement * Strategic Hierarchy Graphical Views * Normalized Item Status scale * Item Status defined by both Children Roll-up and Direct Indicators Roll-up |
| Alexandre Assis | 22/01/2015 | 4.0.1 | * New Demo Use Cases * Minor navigation adjustments |
| Alexandre Assis | 30/03/2015 | 4.1 | * Added a few Hierarchical Portlets using Word Trees and Sankey Diagrams (Package: Hierarchical Views 2.0) |
| Alexandre Assis | 01/05/2015 | 4.1.1 | * Fixed Commitment Rollup issues (now in sync with Portfolio date range) * Added two Timeslices to allow for Commitment tracking. |

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# Strategic Alignment - Demo Script

## Background

Strategic Alignment was born from several different opportunities in the Latin American market for relating Project & Portfolio Management to Balance Scorecard.

Very often customers asked “What is Business Alignment? How is it calculated? Can it be derived from how well my projects are aligned to my Strategic Goals? Can it be related to the metrics and goals in my Balance Scorecard?”

From those questions the first requirements for a Top-Down Strategic Map for Investment Selection were born. First version of Strategic Alignment was all about calculating Alignment Scores – Investment were assessed against metrics and given an Alignment Score. Metrics were part of a rigid 3-level Strategic Tree with “Strategy, Strategic Goals and Strategic Items”.

Soon enough more questions came: “Now how do I know that my projects are actually delivering results? How can I be know if by executing the right projects my goals are being met?” Strategic Alignment v2 started to answer those questions by capturing Targets and Measurements for those metrics.

But the questions never end and now customers want to know “Can I have a Corporate Strategy and a Department Strategy? Can those different Strategic Views be linked? Can they be Independent?” and that was the foundation for Strategic Alignment v3.

More questions need answers. Take a look at section 4 of this document and see the next steps for Strategic Alignment v3.4 and beyond.

## How to demo

Strategic Alignment v3.x provides much more functionality and a much more flexible and configurable Strategic Framework, so different use cases from different customers can be accommodated.

Therefore, it’s fundamental to have a previous understanding of your customer’s use cases so you can decide on how to demo. A few examples:

1. Basic Departmental Goals Demo: consider showing only the Department Strategy; much cleaner and appropriate for a quick 15-minute demo;
2. Basic Strategic Planner Demo: consider showing only the Corporate Strategy; more Item levels and Indicators are available than in the Basic Departmental Goals demo”; Demo would last about 30 minutes;
3. Advanced Strategic Planner Demo: add Top-Down Planning and Portfolio Integration to the Basic Strategic Planner Demo; Demo would last about 45 minutes.
4. Multi-dimensional Strategic Planner Demo: you will talk about how the Corporate Strategy can guide different areas of the company in building their local strategies; Demo would last about 60 minutes;
5. Full demo: you will talk about how the Corporate Strategy can guide different areas of the company in building their local strategies; then you will demonstrate how Top-Down Planning can fund and staff those strategies and generate the corresponding portfolios where decisions will be made based on the Portfolio priorities, including Strategic Alignment; Demo would last about 80 minutes.

## Roles

These are the roles that have been prepared for this Demo.

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| --- | --- | --- |
| **Login** | **Member of these Groups** | **Description** |
| PT | Corporate Strategic Planner | Peter Thompson is the **Corporate Strategy Manager** for this demo. He is responsible for creating the Corporate objectives, Indicators and Alignment Metrics and creating Evaluation Cycles to assess Investments against Corporate Objectives |
| PG | Business Unit Strategy Planner | Paula Granger is the **Online Order Business Unit Strategy Manager** for this demo. She is responsible for deriving her Business Unit’s objectives from the Corporate Strategy, defining the Business Unit’s Indicators and Alignment Metrics and running Evaluation Cycles to assess Investments against the Business Unit’s Objectives |
| SPM | Department Strategy Planner | Sarah Preston is the **IT Operations Department Strategy Manager** for this demo. She is responsible for deriving her Business Unit’s objectives from the Corporate Strategy, defining the Business Unit’s Indicators and Alignment Metrics and running Evaluation Cycles to assess Investments against the Business Unit’s Objectives |
| PM | Strategy User | Paul Martin is a Project Manager responsible for answering the Strategic Alignment Questionnaire (Strategic Evaluations) to evaluate how the Investments he manages contribute to the different aspects (scopes) of the Strategy. |

## Basic Department Goals Demo

This first demo script is the most basic one. It has less demo data and is very appropriate for those customers with a lower maturity level in Strategy Planning that just want the ability to create Strategic Goals and follow up on indicators and related projects. That’s described in part I of the script.

Optionally it can go on to the selection of new initiatives (ideas) to help boost the performance of one of the “red” indicators, to maximize the chances of the department to deliver on its strategy. That operation is described in the part II of the script.

### Part I: Drilling into department goals

Login: SPM (Sarah Preston)

Sarah Preston is responsible for Strategic Planning in the IT Operations department.

She understands the Corporate Strategy and defines, together with the IT Executives, how IT will work to help the company achieve their goals.

Sarah’s constantly monitoring the IT Operations department strategy according to the current Strategic Plan.

On the Strategic Review Page, Sarah can monitor the Company’s current Strategic Plan and see the current situation of the IT Operations Departments Strategies and Indicators.

Start on “Home/Strategic Alignment/Strategic Review”



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|  | She notices that “Delight the Customer” is Slightly Below Target (yellow), just like “Prepare and Motivate our Workforce” and she realizes that the IT Operations Strategic Initiatives related to those Corporate Strategies, “Deliver quality IT Services” and “Improve IT Operations Staff effectiveness”, respectively, are both Slightly Below Target (yellow), meaning they are indeed negatively influencing the Strategic Goal.  She intends to deliver better results on those objectives as well, but she will now focus on the most critical issues. |
|  | She notices “Maximize Profitability” is Slightly Below Target (yellow) as well, and immediately notices one of the reasons may be the Reduce IT Operations Costs which is Below Target (red).  She notices the IT Operations Efficiency Index is causing that, as it is Below Target (red) and decides to further investigate.  She clicks on the Dashboard Icon for the Indicator to get more information about that Indicator. |
|  | On the Indicator Dashboard she realizes that the IT Operations Efficiency Index is derived from its Children (notice the “Status Definition” column on the left that reads “From Children Roll-Up”, and the “Rollup Method” that reads “Minimum Value”).  She then realizes what is wrong: the IT Budget Variance versus Plan Indicator is influencing the results. The status for that Indicator comes from its Targets x Measurements comparison, and she sees a Lower Value is Better. Then she decides to drill further down to see what is going on.  Click on the “Dashboard” icon for the “IT Budget Variance versus Plan” Indicator. |
|  | Sarah immediately sees what is going on. In the past two Quarters the difference between Budget x Plan has consistently increased. Not too much, but enough to make them lose their targets. |
|  | Scrolling down on the same page she notices the last two quarters this indicator has increased.  Sarah contacts the IT Operations Manager to ask what happened and she now knows what is going on. She learned that there were some resource staffing issues and some emergency staffing was required in the past four months, causing the discrepancy. She now can decide on the best course of action – review the targets or help figure out ways to reduce the need for emergency staffing.  From this example we learn that CA PPM for Strategic Planning and Execution can help you keep your strategic goals and initiatives healthy, allowing you to take immediate corrective action when required.  Sarah closes this Modal Page to return to the Strategic Review page. |
|  | Sarah notices the “Create Foundation for Growth” Corporate Goal is Below Target (red). Her department’s Initiative, “Achieve IT Process Excellence” is Slightly Below Target (yellow) is not the direct cause, but even so, she decides to investigate as she notices something strange.  “Emergency Changes” was an indicator they have done a good job of equilibrating in the past couple of years, so she doesn’t understand what is going on.  Click on the “Indicator Details” tab |
|  | She filters the “Emergency Changes” Indicator and quickly realizes what is going on.  From 2014 to 2015 the target drops from 2 to 1.5; The Emergency Changes were last measured at 1.7 and will drop even more in the coming years.  The department definitely needs to invest in projects that help “Achieve IT Process Excellence” and drive the number of emergency changes down.  Sarah decides to take a look at the projects that are being executed to support that Strategic goal. She can see that from the Strategic Projects Tab on this same page. |
|  | Here Sarah can drill down into the Strategic Hierarchy again, but this time she is interested in seeing the Strategic Projects linked to the IT Operations Department strategy, and how these projects are doing.  She looks for something supporting the “Achieve IT Process Excellence”, that is part of the “Create Foundation for Growth” Corporate Goal.  But that Corporate Goal doesn’t even show up here, meaning the IT Operations Department has no projects supporting that goal.  Sarah makes a note to later launch an internal Ideation Campaign to gather suggestions on what can be done to improve IT Processes. |
|  | She also decides to check on the projects supporting their Financial Perspective and notices the “CRM Contact Center Development”, that was supposed to help “Reduce IT Operational Costs” is running late, has a high risk score and it also has warning signs on issues, cost and effort variation.  She clicks on the Project Link to see additional details. |
|  | That’s a bit odd. We have several bad KPIs on this project but the Status reports indicators are all green.  Why does Alex, the project manager, thinks all is going green when the KPIs are in such bad shape?  She decides to contact the Project Manager to understand the situation better, and offer them help to create an Action Plan that she can co-Sponsor, to make sure our strategy doesn’t fail because the project doesn’t deliver the expected results. |
|  | After her Ideation Campaign, Sarah can use an Evaluation Cycle to help her evaluate the Ideas supporting that strategic goal.  During an Evaluation Cycle Proposed and Existing projects are assessed against Strategic objectives and a Strategic Alignment Score is calculated.  With that strategic score she can use CA PPM Portfolio Management capabilities to select the best projects that fit the IT Operations department budget and resource constraints and that deliver the best strategic return. |

### Part II: Evaluating new Initiatives to boost Strategy execution

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|  | *Optional steps: Run An evaluation for new Ideas*  *Navigate to “Evaluation Cycles” and click on “New Evaluation Cycle”.* |
|  | Let’s create a new Evaluation Cycle for new Ideas that came from the Demand Management functionality of CA PPM.  First we give the Cycle a name; we link it to the Strategic Plan and define the Scope.  We’re selecting Ideas to help with the IT Operations Department strategy, so that’ll be our Scope.  *Click Save* |
|  | Now Sarah needs to see which investments are available and which ones she will pick to be evaluated.  She will do that by opening the Investments Browse.  Notice she can filter by Investment Type and Status.  Sarah wants to check on new Ideas that have been submitted for Approval.  She filters using those criteria and selects the appropriate investments.  *Click Add.*  *Click Save.* |
|  | Now Sarah can start the Evaluation Cycle. She will Change the “Action” attribute to “Start”.  *Select “Start”.*  *Click Save.* |
|  | This will tell Clarity workflow it is time to send the Evaluation Questionnaire to the Investment managers responsible for those investments.  Sarah can monitor the answers on the Strategic Evaluations page, but she cannot make any changes unless she is the Investment Manager for one or more investments. |
|  | Only the Investment Managers will be able to answer the questions.  Sarah takes a look at the questions and sees they haven’t been answered yet. Because the column “Investment Evaluation” is still blank.  We will now login again to Clarity as Paul Martin, who is the manager of those ideas. |
|  | *Logout and Log back in as “PM”*  Paul Martin will now answer to those the Questions regarding how the ideas support the IT Operations goals.  He navigates to the Strategic Evaluations page and use the filter to find the appropriate Evaluation Cycle.  He sees he needs to answer three questions on each idea.  He just clicks on the grid and enters the correct values for those questions.  When Paul is finished he will just save this page. |

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|  | Now, let’s go back to Sarah Preston and finish our Evaluation Cycle.  *While you log back in with Sarah Preston and Navigate to the Strategic Evaluations page, explain the following:*  These metrics will be configured by each Clarity customer. Some customers have fewer, more generic metrics; Some customers have more specific metrics. That’ll depend on your company’s maturity level for the Demand Management and Project Initiation processes and how you work with Business Cases.  Either way, Clarity can help you move away from subjective opinions and enable business executives to make fact-based decisions.  Notice that Sarah can see the answers from Paul but she cannot make changes. That is due to our role-based security model, that establishes who can view or edit any information of the system |
|  | Sarah will now go back to the Evaluation Cycle and close it.  *Set Cycle Action to Close.*  *Click Save.*  When she does that Clarity workflow knows it’s time to calculate the Alignment Score for those ideas.  The answers given by Paul Martin are then processed by and those investments are updated with their new Department Alignment Score. That score can later be used for selecting investments using Clarity’s Portfolio management capabilities. |
|  | *Navigate back to the Strategic Review Page, Evaluation Cycle Results Tab.*  As a result from this new evaluation cycle Sarah realizes these two ideas have good cost reduction values and also help on other Indicators – they have the potential to speed up the IT Cost Reduction Goal, and she may negotiate their approval with their Business sponsor. |
|  | *Navigate to Ideas and open one of the Ideas.*  *Go to the Alignment & Risk Sub-page.*  If Sarah navigates to one of those Ideas she will now see that they have a Department Alignment Score and Supported Goals. |

## Basic Strategic Planner Demo

This second demo script is targeted at the Strategic Planner. On this script we talk about monitoring on the execution of the Corporate Strategy as well as checking the alignment of investments according to that strategy, in opposition of local department or business unit objectives. It has more demo data and unlike the first script, it brings Corporate Strategy data, instead of department objectives and indicators.

Just like the previous one, this script has been broken in two parts, the first part targeted at strategy execution and the second one is targeted at selecting investments to “correct” the direction of the company by trying to search more investments to boost strategy.

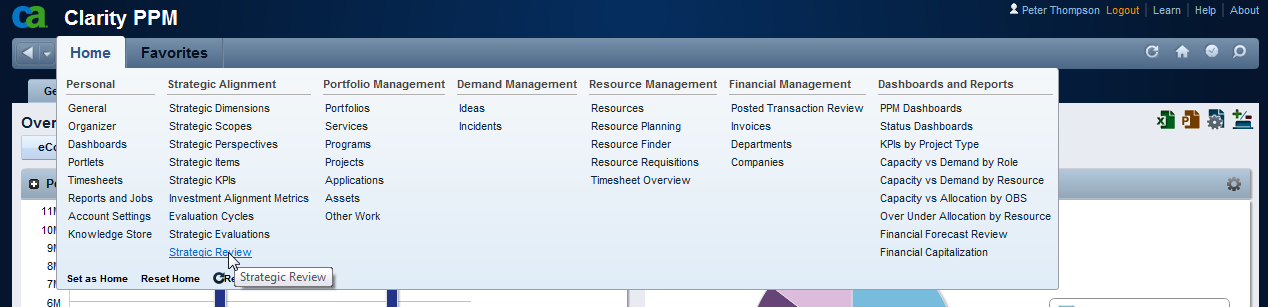
This script also brings a link to **Ideation** so if you have an ideation project with this customer it may be a good idea to talk about it or even run an integrated demo.

### Part I: Drilling into Corporate goals

Login: PT (Peter Thompson)

Peter Thompson is part of the Strategic Planning division of our company. He is one of the people responsible for the definition and monitoring of the Corporate Strategy. Peter is constantly monitoring the Corporate Strategy according to the current Strategic Plan.

Start on “Home/Strategic Alignment/Strategic Review”



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| --- | --- |
|  | On the Strategic Review Page, Peter can monitor the Company’s current Strategic Plan and see the current situation of the Strategies and Indicators.  He notices the Item Status for the “Create the Foundation for Growth” Strategic theme is Below Target (red). He decides to investigate to see what is going on in that front.  There are three Strategic Goals associated with that Theme; one of them is Below Target (red) and the other two are Slightly Below Target (Yellow). Peter will start his investigation by the worst case – the Strategic Goal called “Streamline Manual Processes”.  Click the Item Dashboard Icon for “Streamline Manual Process” |
|  | Peter sees the Status for this Item comes from its Direct Indicators. In this case – the only Direct Indicator is “Manual Process Index”. He also notices that, although it is not influencing the Item status directly, there is a Strategic Initiative from the Online Operations BU that is Far from Target (black). He will contact them to assess the situation later.  For now, he will take a closer look into the “Manual Process Index Indicator”.  Click the Dashboard icon for the Indicator. |
|  | Here Peter realizes that the Measurement values have improved in the past few years although never reaching the target. Maybe the targets are too aggressive, or maybe there are not enough Investments supporting that strategic goal of “Streamlining manual processes”. Peter knows that coming up with a strategy is not enough: we need to make it real, we need execution, and Projects are the engines that execute on our strategy to deliver actual results.  Peter decides to take a look at the projects that are being executed to support that Strategic goal.  He clicks on the Dashboard Icon for the Strategic Goal in “Strategic Items Related to Indicator” to go back to the Strategic Goal. |
|  | Now Peter can expand the “Streamline manual processes” goal in the “Strategic Item Hierarchy with Projects” portlet and he see the Strategic Projects linked directly to that Strategic Goal. There are quite a few of them.  The issue Peter notices is that most strategic projects are late, have pending critical issues to be solved or have high risk scores. But now he can pro-actively work with the Project Manager, the Business Sponsor and the Project Team in making sure those projects are successful, minimizing the chance of missing the company’s targets again for that strategic objective and the corresponding strategic Indicator. On the other hand, it is a lot of projects. And if they are consistently not delivering enough value, we may have set a very aggressive Target.  Peter will re-consider his options after talking to the Project Sponsors and better understanding the situation. |
|  | If necessary, Peter can also verify if there are more initiatives that can support that strategic goal by running a new Evaluation Cycle.  During an Evaluation Cycle Proposed and Existing projects are assessed against Strategic objectives and a Strategic Alignment Score is calculated.  With that strategic score he can use CA PPM Portfolio Management capabilities to select the best projects that fit the Corporate budget and that deliver the best strategic return. |

### Part II: Evaluating new Initiatives to boost Strategy execution

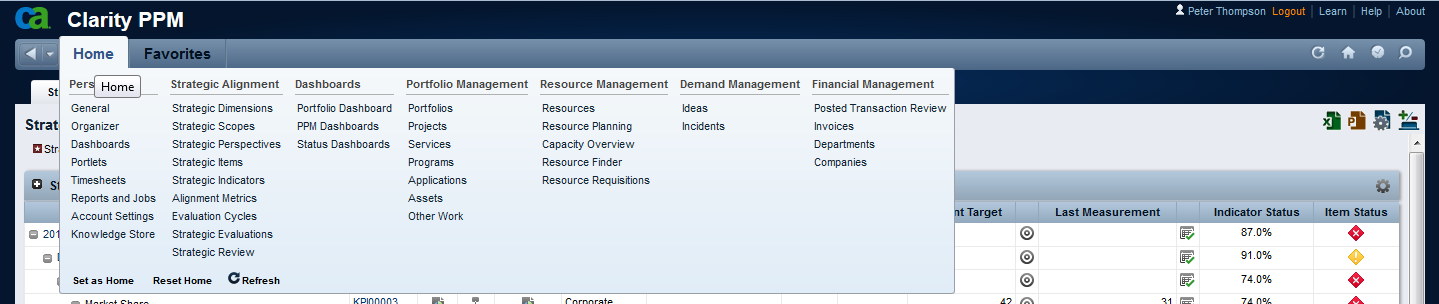
|  |  |
| --- | --- |
|  | *Optional Steps: Run An evaluation for new Ideas*  *Navigate to “Evaluation Cycles” and click on “New Evaluation Cycle”.* |
|  | Let’s create a new Evaluation Cycle for new Ideas that came from the Demand Management functionality of CA Clarity PPM.  First we give the Cycle a name; we link it to the Strategic Plan and define the Scope.  We’re selecting Ideas to help with the Corporate strategy, so that’ll be our Scope.  Now there are two Methods for Evaluating your Investments.  The first one allows you to have your Investments evaluated against ALL of the Metrics found on your Strategic Hierarchy. The system will find all the Metrics and prepare a questionnaire that asks for the Manager’s evaluation on all of them for each investment. The Supported Goals attribute on the Investments will then be updated automatically by the system taking into account the metrics influenced by the investment - according to answers provided by the Investment Managers in the Evaluation questionnaire.  The second one allows you to manually define which Investments support which Strategic Goals – and evaluate the Investments ONLY against the Metrics related to those Supported Goals.  *Click Save* |
|  | Now Peter needs to see which investments are available and which ones he will pick to be evaluated.  He will do that by opening the Investments Browse.  Notice he can filter by Investment Type and Status.  Peter wants to check on new Ideas that have been Submitted for Approval and maybe compare them with a previously Approved Idea.  He filters using the required criteria and selects the appropriate investments.  *Click Add.*  *Click Save.* |
|  | Now Peter can start the Evaluation Cycle. He will Change the “Action” attribute to “Start”.  *Select “Start”.*  *Click Save.* |
|  | This will tell Clarity workflow it is time to send the Evaluation Questionnaire to the Investment managers responsible for those investments.  Peter can monitor the answers on the Strategic Evaluations page, but he cannot make any changes unless he is the Investment Manager for one or more investments. |
|  | Only the Investment Managers will be able to answer the questions.  Peter takes a look at the questions and sees they haven’t been answered yet. Because the column “Investment Evaluation” is still blank.  We will now login again to Clarity as Paul Martin, who is the manager of those ideas. |
|  | *Logout and Log back in as “PM”*  Paul Martin will now answer to those the Questions regarding how the ideas support the IT Operations goals.  He navigates to the Strategic Evaluations page and use the filter to find the appropriate Evaluation Cycle.  He sees he needs to answer three questions on each idea.  He just clicks on the grid and enters the correct values for those questions.  When Paul is finished he will just save this page. |

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|  | Now, let’s go back to Peter Thompson and finish our Evaluation Cycle.  *While you log back in with Peter Thompson and Navigate to the Strategic Evaluations page, explain the following:*  These metrics will be configured by each Clarity customer. Some customers have fewer, more generic metrics; Some customers have more specific metrics. That’ll depend on your company’s maturity level for the Demand Management and Project Initiation processes and how you work with Business Cases.  Either way, Clarity can help you move away from subjective opinions and enable business executives to make fact-based decisions.  Notice that Peter can see the answers from Paul but he cannot make changes. That is due to our role-based security model, that establishes who can view or edit any information of the system |
|  | Peter will now go back to the Evaluation Cycle and close it.  *Set Cycle Action to Close.*  *Click Save.*  When he does that Clarity workflow knows it’s time to calculate the Alignment Score for those ideas.  The answers given by Paul Martin are then processed by and those investments are updated with their new Corporate Alignment Score. That score can later be used for selecting investments using Clarity’s Portfolio management capabilities. |
|  | *Navigate back to the Strategic Review Page, Evaluation Cycle Results Tab.*  As a result from this new evaluation cycle Peter realizes these two ideas have good cost reduction values but will not help much in the Manual Processes Index.  **Link into Ideation**  Peter now decides he will run an Ideation campaign using Clarity’s Demand Management features to request that people collaborate and share their thoughts on how to achieve the company’s goals for streamlining or automating manual processes. |
|  | *Navigate to Ideas and open one of the Ideas.*  *Go to the Alignment & Risk Sub-page.*  Peter can also navigate to those ideas and see the final result of his evaluation. He will notice they now have a Corporate Alignment Score and Supported Goals.  *NOTE: in this case the Supported Goals have been updated* ***automatically*** *by the system – based on the answers of the questionnaires. The system will assume that the goals related to the metrics with answers other than “blank” or “zero” are the ones supported by that investment. This behavior is determined by the Evaluation Cycle Method - when it is set as “Evaluate against all metrics and update Supported Goals accordingly”.*  *The* ***other option*** *would be: have the Supported Goals* ***manually*** *updated and have the Evaluation Cycle only consider the metrics related to those Goals declared. To use this option, set the Evaluation Cycle Method as “Evaluate only against metrics related to the Supported Goals”.*  *NOTE 2: if you previously ran a Department Evaluation Cycle (see Basic Departmental Goals Demo Script) you may see a Department Alignment Score here.* ***Use this in your favor*** *– and maybe it’s actually worth doing this in advance, avoiding showing the same process twice, but still making the following talking point:*  Notice how this idea has a Department Alignment Score of 57, with a yellow stoplight, but a Corporate alignment score of only 13 with a red stoplight. This means that although it’s a not-such-a-bad idea from the department view, on a corporate level it scores really low. This doesn’t mean you won’t approve it, it just means that now you have more information to make better fact-based decision. |

## Advanced Strategic Planner Demo

For the Advanced Demo, add the Top-Down Planning demo.

Login: PT (Peter Thompson) – Start on “Home/Strategic Alignment/Strategic Review”



Start on “Home/Strategic Alignment/Strategic Review”

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|  | Another one of Peter’s responsibilities is to help the Board of Directors in their CAPEX and Headcount Top-Down Planning exercises.  He starts by reviewing how everything is going in the current Plan, by Comparing the Top-Down values with the Bottom-Up accumulated values.  He access the Strategic Review page once again, but now he will navigate to the Top-Down Planning Tab |
|  | At the Top-Down planning Tab there are three different views (portlets): one for FTEs, one for Benefits and one for Funding.  Peter starts by verifying the funding information.  Peter sees the basic descriptive information for the Strategic Items and Icons that drill down to the Strategic Item Dashboard and the Strategic Item Top-Down Planning page.  Peter sees the **% Allocation** that guides how the values were cascaded down to children level initially. |
|  | On the **Received Funding** column Peter can see the values that were initially distributed from the Top-Down (initially applying the % Allocation).  At the top level (2014 Strategic Planning) the initial Strategic CAPEX was USD 22M.  The **Distributed Funding** columnindicates how much was actually distributed to the lower levels. Please notice you may distribute an amount different from the **Received Funding.**  If you take a look at the “Delight the Customer” Strategic Theme, for instance, you will see it received USD 5,866,667 from the 2014 Strategic Planning – corresponding to 27% of the total of USD 22,000,000 strategic capex funding.  At the time, Peter had decided to reserve part of the funds – so he distributed only USD 5,000,000 to the lower levels. You can see the difference in the **Unused Funding** column. |
|  | Under “Delight the Customer” there are three Strategic Goals, each one equally receiving 33% of the parent value. Since the Distributed Value was USD 5M in total, each of the Strategic Goals has received USD 1,666,667 in strategic capex funds. |
|  | For the lower level items we need to Allocate the funds – again we don’t need to allocate all of the amount. Peter notices that for “Enhance customer Experience” he had allocated only USD 1,350,000 out of the USD 1,666,667 that were receive, leaving an amount of USD 316,667 as unallocated. You can verify those values in the **Allocated Funding** and **Unallocated Funding** columns, respectively.  The Allocated Funding is the limit of CAPEX available for Investments (Projects) funded by that Strategic Goal.  The Committed Funding column indicates how much CAPEX was actually planned and approved at the investment level. Peter notices there is a lack of balance here. Although only USD 1,350,000 were allocated, we currently have over USD 6M in approved investments. He needs to review the portfolio and cut the budget for some of those investments. But which investments can he cut?  CA PPM Portfolio Manager can help answer that question. |
|  | Peter will create a new Portfolio for the “Enhance Customer Experience” Strategic Goal.  He starts by drilling down to the Top-Down Planning page for that goal.  (Click on the corresponding icon). |
|  | Peter verifies that all of the information required for Portfolios is defined (Portfolio Manager, Currency Code, Start and Finish Dates).  *\**  *If the Start Date is Blank, enter 01/01/2014.*  *If the Finish Date is Blank, enter 12/31/2016.*  *Click Save.*  *Do NOT click Save and Return.* |
|  | Peter uses the Action Menu to start the “Generate Portfolio” Action. This process will create a new Portfolio with all of the investments related to that Strategic Goal. With this new Portfolio, Peter will be able to balance the approved investments against the budget and put the extra investments on hold. |
|  | After the process is finished Peter navigates to the Portfolios feature, so he can take a look at the situation. |
|  | Peter sees his new Portfolio called “Enhance Customer Experience” is available for analysis. He clicks on the Waterline icon to see the Portfolio Contents. |
|  | At the Waterline view, Peter notices There is one approved project that is below the waterline. This approved project should not be in this portfolio as it is not related to Enhancing Customer Experiences.  Peter will now correct the wrong data so he can have an accurate view of the situation.  Navigate to Projects, open the 2014 Winter Franchise Manager Release and go to the “Business Alignment” subpage. |
|  | At the Business Alignment Page Peter sees the issue right away: This project is mistakenly linked to the “Improve Delivery Process” Initiative as its Strategic Funding Source. This initiative is related to the Enhance Customer Experience goal, and thus, gets inserted into the portfolio.  Peter Clears that bad information and clicks “Save and Return”. |
|  | Back to the “Enhanced Customer Experience” goal, at the Top-Down Planning Tab, Peter starts the “Rollup Allocations and Commitments” Action, to correct the rolled-up data in the Strategic Plan. |
|  | Back to the Top-Down Planning Page Peter sees the Committed information is closer to USD 1.3M. |
|  | Back to the Portfolio, Peter Syncs the data using the “Sync Now” button in the Contents Editor, and verifies the information is correct now. He is ready to re-evaluate the portfolio when necessary. |

## Multi-dimensional Strategic Planner Demo

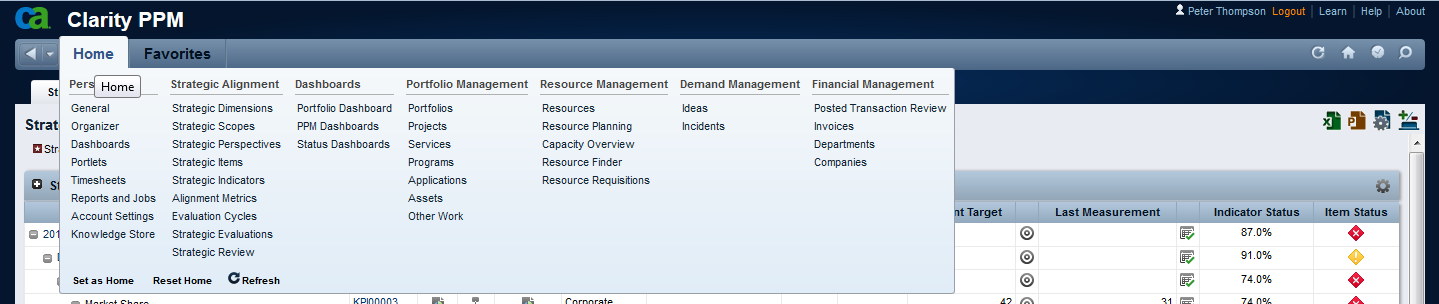
This third demo script is also targeted at the Strategic Planner. On this script we talk about monitoring on the execution of the Corporate Strategy and verifying how local strategies defined by Business Units and Departments support the Corporate Strategy as well. It brings together Corporate, Business Unit and Department demo data – the message is really interesting but should be presented carefully not to cause any confusions.

Just like the previous ones, this script has been broken in two parts, the first part targeted at strategy execution and the second one is targeted at selecting investments to “correct” the direction of the company by trying to search more investments to boost strategy.

This script also brings a link to **Ideation** so if you have an ideation project with this customer it may be a good idea to talk about it or even run an integrated demo.

### Part I: Drilling into Corporate and Local goals

Login: PT (Peter Thompson)



Start on “Home/Strategic Alignment/Strategic Review”

|  |  |
| --- | --- |
|  | Peter Thompson is part of the Strategic Planning division of our company. He is one of the people responsible for the definition and monitoring of the Corporate Strategy.  Peter is constantly monitoring the Corporate Strategy according to the current Strategic Plan. |
|  | On the Strategic Review Page, Peter can drill into the Company’s current Strategic Plan and see the current situation of the Strategies and Indicators.  He notices a red stoplight icon on the Indicator Status column for the “Create the Foundation for Growth” Strategic theme and drills into it to see what’s going on. There are three Strategic Goals associated with that Theme, and one of them is responsible for the red light. It’s “Streamline manual processes”. He verifies the Indicator for that goal is currently off-target. |
|  | Peter navigates to the Strategic Indicator tab so he can take a closer look at the “Manual Process Index” Indicator  Here Peter realizes that the Measurement values have improved in the past three years although always far from target. Maybe the targets have been set too low, or maybe there are not enough Projects supporting the strategic goal of eliminating or streamlining manual processes.  Peter decides to take a look at the projects that are being executed to support that Strategic goal. He can see that from the Strategic Projects Tab on this same page. |
|  | Here Peter can drill down into the Strategic Hierarchy again, but this time he is interested in seeing the Strategic Projects linked to the Corporate Department strategy, and how these projects are doing.  Peter also verifies that some strategic projects are on target, but most of them are late, or have pending critical issues to be solved. But now he can pro-actively work with the Project Manager, the Business Sponsor and the Project Team in making sure those projects are successful, minimizing the chance of missing the company’s targets again for that strategic objective and the corresponding strategic Indicator |
|  | Now let’s go back to our Strategy Hierarchy and observe some other aspects.  We have seen how we can drill down into the Corporate Strategy but some companies define strategies at different levels, such as the Business Unit level or even the Department level. These companies will want to see how those lower-level strategies interconnect with the Corporate Strategy. |
|  | Peter notices the “Delight the Customer” Strategic Theme has a yellow light and he doesn’t want to take any chances that anything will go wrong with this major theme.  He wants do drill not only into the corporate strategy, but also on local strategies and initiatives, so he can make sure he minimizes the risk of having issues in that area.  Peter will drill down into this item to see what he finds out.  *Click on the “Delight the Customers” link* |
|  | Now we’re looking at the Delight the Customers Strategic Item. Let’s take a look at its Dashboard and see what we find.  *Click on the “Datshboard” tab* |
|  | On the Strategic Item Dashboard page we have views very similar to those we’ve seen before, but they are filtered to show only that item’s children. Also notice that although you have a page filter for Scope it’s optional, so you can actually verify multiple scopes at the same time. That’s what we’ll do now.  We’ll drill into “Delight the Customer”.  *Click on the “plus sign” and expand the tree n the first portlet.* |
|  | You see we have two Indicators and three Strategic Goals linked to “Delight the Customer”.  Let’s drill down into those Strategic Goals.  *Click on the “plus sign” expanding the tree for the three Goals.* |
|  | Peter notices that there are no local strategies and initiatives associated with two of those goals, “Transform our Brand” and “Launch New Innovative Products”.  But Peter also notices there are two Strategic Initiatives under “Enhance Customer Experience”. One of them comes from the IT Operations Scope. The other one comes from the Online Operations Business Unit Scope.  He realizes both those initiatives are on track with their targets so he is more confident to achieve the objectives of “Enahance Customer Experience”.  Now he needs to work on other aspects such as “Launch New Innovative Products” that hasn’t met its target.  Let’s go to the Indicator Dashboard and see if we get a feel of the tendency for this Indicator.  *Click on the Indicator link for “New Products Launched”* |
|  | This is the Indicator main properties page. Let’s navigate to the Dashboard page.  *Click on the Dashboard Tab* |
|  | On the Dashboard page we see that the number of products launched is actually increasing and we’re speeding up the launches. We are not on target but we’re on our way.  Peter decides to take a look at the projects that are supporting this goal. Let’s go back to the Strategic Item Dashboard so we can see that.  *Navigation Options:*  *The Indicator Dashboard was opened on a new page or TAB in your browser. Close this tab/page and go back to the previous one.*  *OR, just click on the “Launch new Innovative Products” link on the first portlet of the Indicator Dashboard.* |
|  | Back to the Strategic Item Dashboard Peter collapses Indicator view and expands the Projects view. He then realizes there are just a couple projects supporting the launch on new products.  He then decides to search for more projects that support the strategic goal of Launching new Products.  To do so, Peter can run a new Evaluation Cycle.  During an Evaluation Cycle Proposed and Existing projects are assessed against Strategic objectives and a Strategic Alignment Score is calculated.  With that strategic score he can use Clarity’s Portfolio Management capabilities to select the best projects that fit the Corporate budget and that deliver the best strategic return. |

### Part II: Evaluating new Initiatives to boost Strategy execution

|  |  |
| --- | --- |
|  | *Optional Steps: Run An evaluation for new Ideas*  *Navigate to “Evaluation Cycles” and click on “New Evaluation Cycle”.* |
|  | Let’s create a new Evaluation Cycle for new Ideas that came from the Demand Management functionality of CA Clarity PPM.  First we give the Cycle a name; we link it to the Strategic Plan and define the Scope.  We’re selecting Ideas to help with the Corporate strategy, so that’ll be our Scope.  Now there are two Methods for Evaluating your Investments.  The first one allows you to have your Investments evaluated against ALL of the Metrics found on your Strategic Hierarchy. The system will find all the Metrics and prepare a questionnaire that asks for the Manager’s evaluation on all of them for each investment. The Supported Goals attribute on the Investments will then be updated automatically by the system taking into account the metrics influenced by the investment - according to answers provided by the Investment Managers in the Evaluation questionnaire.  The second one allows you to manually define which Investments support which Strategic Goals – and evaluate the Investments ONLY against the Metrics related to those Supported Goals.  *Click Save* |
|  | Now Peter needs to see which investments are available and which ones he will pick to be evaluated.  He will do that by opening the Investments Browse.  Notice he can filter by Investment Type and Status.  Peter wants to check on new Ideas that have been submitted for Approval.  He filters using those criteria and selects the appropriate investments.  *Click Add.*  *Click Save.* |
|  | Now Peter can start the Evaluation Cycle. She will Change the “Action” attribute to “Start”.  *Select “Start”.*  *Click Save.* |
|  | This will tell Clarity workflow it is time to send the Evaluation Questionnaire to the Investment managers responsible for those investments.  Peter can monitor the answers on the Strategic Evaluations page, but he cannot make any changes unless he is the Investment Manager for one or more investments. |
|  | Only the Investment Managers will be able to answer the questions.  Peter takes a look at the questions and sees they haven’t been answered yet. Because the column “Investment Evaluation” is still blank.  We will now login again to Clarity as Paul Martin, who is the manager of those ideas. |
|  | *Logout and Log back in as “PM”*  Paul Martin will now answer to those the Questions regarding how the ideas support the IT Operations goals.  He navigates to the Strategic Evaluations page and use the filter to find the appropriate Evaluation Cycle.  He sees he needs to answer three questions on each idea.  He just clicks on the grid and enters the correct values for those questions.  When Paul is finished he will just save this page. |

|  |  |
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|  | Now, let’s go back to Peter Thompson and finish our Evaluation Cycle.  *While you log back in with Peter Thompson and Navigate to the Strategic Evaluations page, explain the following:*  These metrics will be configured by each Clarity customer. Some customers have fewer, more generic metrics; Some customers have more specific metrics. That’ll depend on your company’s maturity level for the Demand Management and Project Initiation processes and how you work with Business Cases.  Either way, Clarity can help you move away from subjective opinions and enable business executives to make fact-based decisions.  Notice that Peter can see the answers from Paul but he cannot make changes. That is due to our role-based security model, that establishes who can view or edit any information of the system |
|  | Peter will now go back to the Evaluation Cycle and close it.  *Set Cycle Action to Close.*  *Click Save.*  When he does that Clarity workflow knows it’s time to calculate the Alignment Score for those ideas.  The answers given by Paul Martin are then processed by and those investments are updated with their new Corporate Alignment Score. That score can later be used for selecting investments using Clarity’s Portfolio management capabilities. |
|  | *Navigate back to the Strategic Review Page, Evaluation Cycle Results Tab.*  As a result from this new evaluation cycle Peter realizes these two ideas have good cost reduction values but will not help much in the Launching new products.  Peter now decides he will run an Ideation campaign using CA PPM demand management features to request that people collaborate and share their thoughts on how to achieve the company’s goals for launching new innovative products.  If you’re interested in see how that works, we can talk more about our Ideation process.  *Link to Idea Vision demo: If you can and if it’s appropriate you can stop and demo Idea Vision or just assess the customer’s interest and schedule another meeting specifically for that.* |
|  | *Navigate to Ideas and open one of the Ideas.*  *Go to the Alignment & Risk Sub-page.*  Peter can also navigate to those ideas and see the final result of his evaluation. He will notice they now have a Corporate Alignment Score and Supported Goals.  *NOTE: in this case the Supported Goals have been updated* ***automatically*** *by the system – based on the answers of the questionnaires. The system will assume that the goals related to the metrics with answers other than “blank” or “zero” are the ones supported by that investment. This behavior is determined by the Evaluation Cycle Method - when it is set as “Evaluate against all metrics and update Supported Goals accordingly”.*  *The* ***other option*** *would be: have the Supported Goals* ***manually*** *updated and have the Evaluation Cycle only consider the metrics related to those Goals declared. To use this option, set the Evaluation Cycle Method as “Evaluate only against metrics related to the Supported Goals”.*  *NOTE 2: if you previously ran a Department Evaluation Cycle (see Basic Departmental Goals Demo Script) you may see a Department Alignment Score here.* ***Use this in your favor*** *– and maybe it’s actually worth doing this in advance, avoiding showing the same process twice, but still making the following talking point:*    Notice how this idea has a Department Alignment Score of 57, with a yellow stoplight, but a Corporate alignment score of only 13 with a red stoplight. This means that although it’s a not-such-a-bad idea from the department view, on a corporate level it scores really low. This doesn’t mean you won’t approve it, it just means that now you have more information to make better fact-based decision. |

# Maintenance

## Implementing Strategic Planning and Execution Accelerator

Implementing this Accelerator is very easy, provided you have all the pre-requisites. There are three basic steps:

1. Install the Accelerator
2. Create or Load your Basic Strategic Data
3. Start using

Now, what are the pre-requisites, you may ask… and those are listed here:

1. For Strategic Plan Monitoring
   1. You have a Strategic Plan defined
   2. You have your Indicators defined
   3. You know how your Indicators influence your Strategic Plan and Each Other
   4. You know which (existing) Investments are linked to which Strategic Items
   5. You know how to determine which (new) Investments are linked to which Strategic Items
   6. You are using CA PPM’s standard KPIs (from PMO Accelerator) to monitor Project Health
   7. You have a process in place to define Targets and perform Measurements for each Indicator
2. For Investment Selection (calculate alignment)
   1. You have a Periodic Evaluation Process in place to assess Investment value
   2. You have a defined Business Case for each Investment, with specific metrics
   3. You have an association between the metrics used to assess Investments and the corresponding Strategic Items
   4. You may know which (existing) Investments are linked to which Strategic Item OR use this process to find this information
   5. You may know which (new) Investments are linked to which Strategic Item OR use this process to find this information
3. For Top-Down Planning
   1. You have defined a Top-Level value for Capex, Expected Benefits and Head-count (FTEs)
   2. You have defined the Allocation % to lower levels (or assume the Weights from the Strategic Plan will be used)
   3. You have defined on which levels/items you are going to link Portfolios
   4. You know which (existing) Investments are funded by which Strategic Item
   5. You know how to determine which (new) Investments are funded by which Strategic Item

Final advice: before you start customizing, creating attributes, portlets and processes, implement this accelerator as-is. Once you start using it – you will be more qualified to realize what is missing and what is not working well for your company. Then you may plan to implement your changes (and please provide feedback so it may be incorporated in the future versions of the Accelerator).

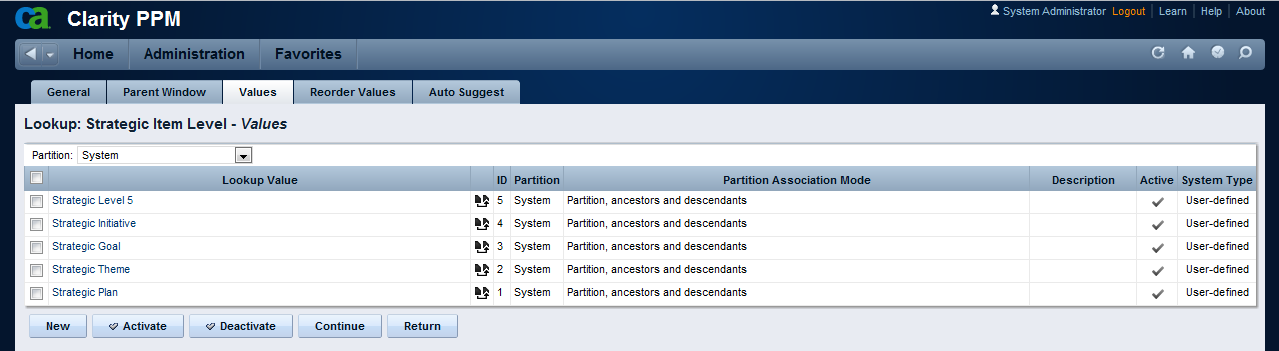
## Preparing for a Proof-of-Concept

### Changing Strategic Item Levels

Strategic Items are organized in Levels. Levels are determined by a Static Lookup called “Strategic Item Level”, ID “STRAT\_ITEM\_LEVEL”.

The levels in Strategic Alignment algorithms are dynamic – these means you can Add/Remove/Rename levels according to your customer’s needs.

We deliver, by default, five Levels, named as: “Strategic Plan”, “Strategic Theme”, “Strategic Goal”, “Strategic Initiative” and an additional level called”Strategic Level 5”.



To Add a new Level, click on New and add anew value.

To Remove an existing Level, select it on the list and click “Deactivate”.

To Rename an existing Level, click on it and change the “Lookup Value Name”. If you need multi-language, don’t forget to click on the multi-language icon and translate the new value to the desired languages.

*Note: please avoid leaving gaps in the numbering of levels (ID, a.k.a. Lookup\_Enum) as this untested condition may trigger undesirable results. Keep the levels in a direct numbered order (“1, 2, 3, 4” instead of “1, 3, 4, 6”).*

### Creating a new Balanced Scorecard Perspective

Balanced Scorecards are tailored to each company. The four basic perspectives are delivered as “seed data” in this application but you may need to create other perspectives. For government agencies you may create the “Citizen” perspective instead of “Customer” or “Financial”.

Login: PT or ADMIN

|  |  |
| --- | --- |
|  | Navigate to Strategic Perspectives |
|  | Click “New BSC Perspective” |
|  | Enter the Perspective Name and Save. |
|  | If you don’t need one of the other perspectives you may delete it or de-activate it.  Just keep in mind you may invalidate existing demo data if you delete a Perspective. |
| Customer Perspective Dashboard for the IT Operations department Scope”: | Notice you have a Dashboard for BSC Perspectives.  They show the items in the Strategic Hierarchy that are linked to the Perspective.  Also notice you may use scope on the filter or not. |

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| Customer Perspective Dashboard for all Scopes: | If you don’t use scope you have a complete view of the influence of the BU’s and Department’s strategies on the corporate strategy for that perspective. |

### Creating a completely new Strategic Plan

To create a completely new Plan after you created a new scope, login with your Demo User and start by creating Strategic Items. After you have your Hierarchy Tree, Create the Indicators – the information in Indicators will be used to monitor your Strategy Execution. After the Indicators, create the Investment Alignment Metrics. The metrics will be used in the Investment Evaluation Cycles to calculate the Strategic Alignment Score of your Investments.

Her you’ll see how to create your Strategic Items. For Indicators and Metrics, please take a look at the corresponding topic.

|  |  |
| --- | --- |
|  | Navigate to Strategic Items |

### Creating a new Indicator

You will probably need to create new Indicators with their targets and measurements and link them to Strategic Items. You should do this using the appropriate user – depending on the Scope you will demo.

For Online Order Business Unit Indicators, use PG (Paula Granger);

For IT Operations Department Indicators, use SPM (Sarah Preston);

For Corporate Indicators, use (Peter Thompson); OR

If you created a new Scope, login that same user who created the new Scope. If you use Admin you will have to deal with “Access Rights” later to do your demo.

|  |  |
| --- | --- |
|  | Navigate to Strategic Indicators |
|  | Click “New Strategic Indicator” |
|  | Enter the Indicator name and the related scope (what you’re going to use this Indicator for)  Click Save |
|  | Enter a Description that clearly identifies what the Indicator means.  Enter Calculation Instructions, Indicator Periodicity (that’s related to the Measurements but it’s for information purposes only)  On Indicator Settings you will define where the Indicator Status % and comes from:   * From Target x Measurement comparison * From Children Indicators Roll-up * The Best, Worst or the Average value between those two   On Indicator Roll-Up you will define how Indicator Status from Children is calculated:   * Relate the indicator to its Children using the Multi-valued-Lookup attribute * Choose an operation (Max, Min or Avg value from those children)   On Target x Measurement you choose the “sign” of the Indicator, whether a Higher or a Lower value indicate a better result. |
|  | Navigate to the Indicator Targets subobject.  The list will be empty. Click New. |
|  | Enter a description, a Target Date (the date on which you expect to reach the target) and a Target Value (the value you expect to reach for that Indicator on the target date). |
|  | Save and Return and repeat this operation as many times as necessary.  Our standard demo data delivers yearly Indicator targets from 2009 to 2019. |
|  | Navigate to the Indicator Measurements subobject.  The list will be empty. Click New. |
|  | Enter a description, a Measurement Date (the date on which you measured the Indicator) and a Measurement Value (the value you measured for that Indicator on the measurement date). |
|  | Save and Return and repeat this operation as many times as necessary.  Our standard demo data delivers yearly or quarterly or monthly Indicator measurements from 2009 to 2014. |
|  | You can change the Item Status Scale – the ranges that result in the Item Status Color indicators from Black to Blue.  Navigate to Item Status Scale in Properties. |
|  | We provide a predefined Scale by default. You don’t need to make adjustments unless you want to.  Each indicator can have a different Scale. |
|  | Indicator is now Created. We will associate it with one or more items in the Strategic Tree.  Navigate to Strategic Items |
|  | Select the Item on which you will link this new Indicator (or create a new Item if that’s more appropriate).  Add the Indicator to the “Related Indicators” attribute on the “Relationships” section of the page.  There may already be an Indicator on that item. You may have multiple Indicators for each item.  Indicator is now created and associated to the Strategy tree.  Now the Indicator Status attributes need be updated.  To do that, please follow the steps described in the “Updating Indicators” procedure. |

### Creating a new Investment Alignment Metric

You will probably need to create new Investment Alignment Metrics with their Alignment Scale and link them to Strategic Items. You should do this using the appropriate user – depending on the Scope you will demo.

For Online Order Business Unit Alignment Metrics, use PG (Paula Granger);

For IT Operations Department Alignment Metrics, use SPM (Sarah Preston);

For Corporate Alignment Metrics, use (Peter Thompson); OR

If you created a new Scope, login that same user who created the new Scope. If you use Admin you will have to deal with “Access Rights” later to do your demo.

|  |  |
| --- | --- |
|  | Navigate to Investment Alignment Metrics |
|  | Click on New Investment Alignment Metric |
|  | Enter the name of the Alignment Metric and click Save. |
|  | Enter a Scope and a description that identifies what the Metric will be used for.  You also need to define the Question the Investment Manager will receive about his investments during an Evaluation Cycle.  Click Save. |
|  | Now we need to enter the normalized Scale that will help Clarity calculate the Alignment Score of the investments. Navigate to the Subobject “Alignment Scale” |
|  | Notice the Alignment Scale has been Initialized for you. You just need to fill in the ranges.  The more detailed your scale, the more precise the results will be.  You don’t need to use all of the values and you may delete the values you’re not using. |
|  | Fill in the values (just click on each cell and enter the values) and click Save. |
|  | Investment Alignment Metric is now Created. We will associate it with one or more items in the Strategic Tree.  Navigate to Strategic Items |
|  | Select the Item on which you will link this new Alignment Metric (or create a new Item if that’s more appropriate).  Add the Alignment Metric to the “Related Alignment Metrics” attribute on the “Relationships” section of the page.  There may already be an Alignment Metric on that item. You may have multiple Metrics for each item. The Alignment Metrics is now created and associated to the Strategy tree.  You are now ready to use that Alignment Metric on a new Investment Evaluation Cycle. |

### Creating a new Scope

Scopes are used to deploy the strategic alignment functionalities to a new **instance** of an existing dimension.

In simple words: Scopes are new Departments or Business Units that will use Strategic Aligment.

Scopes are not visible to everyone, otherwise demo would be a mess. Because of that, it’s easier if you create the scope with the actual login that will use it.

Other than that, a scope is really easy to be created. Let’s say Sarah Preston will create a new scope for the IT Financials department.

|  |  |
| --- | --- |
|  | Navigate to Strategic Scopes |
|  | Click New Strategic Scope |
|  | Enter a Name for the Scope and Save. |
|  | Choose the appropriate Dimension.  Each user only has access to the dimensions according to the Security Group they are a part of.  Sarah Preston is in the “Department Strategy Planner” group and therefore has access to create Scopes only for the “Department” Dimension.  Save and Return. The scope is ready to be used. |

### Creating a new Dimension

Dimensions are used to deploy the strategic alignment functionalities to different segments of the enterprise, such as “Division”, “Business Unit”, “Department”, “Product Line”, etc.

In simple words: Dimensions are “types” of strategic trees and Indicators. They are used to create new Scopes.

Dimensions are not visible to everyone. Dimensions are visible depending on Group Security. Creating a Dimension is a more “technical” activity and should be done by someone who knows their way around Studio and Clarity Access Rights.

We will use “Admin” to create a new dimension. The dimension will be “Product Line”.

In a few words, this is all you need:

* a new attribute in the Investment Object including the string “align” in its code;
* a new Dimension;
* a new Security Group;

And optionally (but highly recommended):

* Add your new attribute to the Properties Page of the Investment Objects that you intend to use it for (i.e. Idea, Project, Product, Service … )
* Adjust the Overall Alignment Score formula;

|  |  |
| --- | --- |
|  | First step in creating a dimension is creating a number attribute in the Investment object. This attribute will receive alignment information when we evaluate initiatives using Strategic Alignment.  Here we created the “strat\_prod\_align” attribute in the Investment Object. |
|  | You will probably want to adjust the “Overall Alignment Score” formula to consider your new attribute. |
|  | Now we need to add the attribute to the appropriate views in the investment objects (Idea, Project, Program)  Examples in the screenshots for the Idea Object.  Remember to edit your “View Fields” to display the Image by the attribute. |
|  | You can now check the preliminary results, test your formula, see the Icons.  When you’re ready for it, go back to the investment object and set your attribute to “Read-only”. |
|  | Next step is to actually create the dimension.  Navigate to Strategic Dimensions |
|  | Click New Strategic Dimension |
|  | Give the dimension a name and map it to the Investment Attribute you’ve created.  Save and Return. |
|  | Final step is to create a new Security Group.  You may use XOG to “clone” an existing group. |
|  | Add to the group the person (username) you will use to demonstrate this new dimension of strategic planning.  If you “cloned” an existing group there may be a need to delete another user from this group. |
|  | These are the Instance-Level Access Rights you need to Grant.  Let’s review “Page View” first. |
|  | These are the pages you need to grant access to.  If you “cloned” an existing group there’s no need to change this. |
|  | Now Let’s review “Strategic Dimension – View”  Your new group should only view the newly created dimension.  If you “cloned” an existing group you will need to **remove the old access right and add access to the new dimension**. |
|  | Grant these Global Access Rights to your group.  If you “cloned” an existing group there’s no need to change anything here. |

List of Instance Access rights you need to Grant:

* Strategic Dimension – View
  + For the dimension you just created
* Page View – for the following pages:
  + Evaluation Cycle Results
  + Indicator Details
  + Indicator Hierarchy
  + Strategic Projects
  + Top-Down Planning
  + Strategic Review (the TAB)
  + Strategic Review (the FRAME)

List of Global Access rights you need to Grant:

* Alignment Scale – Create
* BSC Perspective – Navigate
* BSC Perspective - View All
* Evaluation Cycle – Create
* Evaluation Cycle – Navigate
* Indicator Measurement – Create
* Indicator Measurement – View All
* Indicator Target - Create
* Indicator Target – View All
* Investment Alignment Metric – Create
* Investment Alignment Metric – Navigate
* Indicator Measurement – Create
* Indicator Target – Create
* Item Status Scale – Create
* Strategic Evaluation – Navigate
* Strategic Item – Create
* Strategic Item – Navigate
* Strategic Item - View All
* Strategic Indicator – Create
* Strategic Indicator – Navigate
* Strategic Scope – Create
* Strategic Scope – Navigate

## Updating Indicators

Execute this procedure whenever you:

* Create a new Indicator
* Change Indicator Settings or Children
* Create or Update Indicator Targets
* Create or Update Indicator Measurements
* Associate or remove the association between an Indicator and a Strategic Item
* Change Strategic Item Settings or Parent

|  |  |
| --- | --- |
|  | Navigate to the Organizer. |
|  | On the Processes Tab, go to the Available Processes Page |
|  | Find a process called “Strategic Indicator Calculation”.  Start the process by selecting its checkbox and clicking on the “Start” button. |
|  | Wait for the process to end. |
|  | You will now see the correct Current Target, Current Measurement and Indicator Status on the Indicator.  The Measurements and the Targets also have an Indicator status comparing the current target and measurement on that date. |

## Keeping the Tree Flat structure up-to-date

The multi-dimension functionality asks for a parallel tree structure to be maintained to make it possible to build portlets that can filter on Scope.

There’s an object called “Strategic Tree Flat” that serves this purpose. This object is only exposed in the UI for the Administrator, but it should be maintained using these procedures.

### Updating Strategic Items - Bulding the Tree

The tree flat object is built automatically with the “Strategic Item – Build Tree Flat” process. Whenever a Strategic item is changed and its Parent or Level has changed the process is executed automatically. It eliminates the old records and creates new ones with the new structure.

### Deleting Strategic Items – Cleaning up

Unfortunatelly we cannot execute a process automatically when a record is deleted, so whenever you delete Strategic Items you must execute the “Strategic Item – CleanUp Tree” process manually using the Organizer page.

### Rebuilding the Strategic Tree Flat

On special occasions when you do mass changes or if there’s a problem with the “Strategic Item – Build Tree Flat” process you may need to rebuild the whole tree. If that happens execute the “Strategic Item – Rebuild Tree” process manually using the Organizer page.

# Roadmap

## Proposed Backlog for Strategic Alignment v4.1

* Measurement Dates Control – Missing Measurements
* Indicator Issue Log
* Copy Plan
* Archive Plan
* …

## Proposed Backlog for Strategic Alignment v4.x

* Measurements at Investment Level
* Integration with Playbook
* Replace Flat Tree Object with Z Table with Auto-deploy
* Add to DW and Jasper Domain
* New Jasper Reports and Dashboards
* Auto-Deploy of hierView.jsp
* …