# User Journeys

## Journey 1: Department Director Creates New Strategic Plan

**Actor:** Department Director Donna **Goal:** Create and submit a 3-year strategic plan for FY2026-2028 **Timeline:** 6 weeks (target: reduce to 3 weeks)

### Current Journey (As-Is) - Manual Process

1. **Week 1: Setup**
   * Download 1,400-line Word template from shared drive
   * Copy/paste data from last year’s plan
   * Update fiscal years and dates manually
   * Save as “Draft\_v1.docx”
2. **Weeks 2-3: Content Creation**
   * Meet with division managers to gather initiative ideas
   * Draft SWOT analysis based on notes
   * Create initiative descriptions in Word
   * Build budget tables in Excel, copy to Word
   * Email draft to Strategic Planner for formatting help
3. **Week 4: Internal Review**
   * Share “Draft\_v3.docx” with Assistant Director
   * Receive comments via Track Changes
   * Update document, save as “Draft\_v4\_AD\_reviewed.docx”
   * Email to Finance for budget validation
   * Receive Excel with corrections, manually update Word
4. **Week 5: City Manager Review**
   * Submit “Draft\_FINAL.docx” via email
   * City Manager reviews, adds comments in PDF
   * Donna receives PDF with annotations, interprets feedback
   * Updates Word document
   * Resubmits “Draft\_FINAL\_v2.docx”
5. **Week 6: Approval**
   * City Manager approves via email
   * Plan submitted to City Council packet (PDF export)
   * Council reviews in meeting
   * Approved plan published to website as PDF

**Pain Points in Current Journey:** - ❌ Version control nightmare (which file is latest?) - ❌ Manual data entry and copy/paste errors - ❌ Slow feedback loops (email turnaround) - ❌ Budget data consistency issues - ❌ No visibility until submitted

### Future Journey (To-Be) - Digital System

1. **Week 1: Setup** (2 hours)
   * Log into Stratic Plan system
   * Click “Create New Strategic Plan”
   * System pre-fills: Department, Fiscal Years, Previous Plan Data
   * Review/update department overview (mission, staffing, KPIs)
   * System auto-saves continuously
2. **Weeks 2-3: Content Creation** (10 hours)
   * Complete SWOT analysis with structured form
   * Click “Add Initiative” for each priority
   * Use initiative wizard: Name → Description → Budget → KPIs
   * System validates: required fields, budget math, funding sources
   * Invite Strategic Planner as collaborator (real-time co-editing)
   * Assign initiatives to goals, system tracks completion %
3. **Week 3: Internal Review** (Concurrent with creation)
   * Share plan link with Assistant Director (view-only or edit)
   * AD adds inline comments on specific initiatives
   * Donna responds and marks comments resolved
   * System notifies participants of updates
   * Finance reviews budget data via dashboard (no file exchange)
4. **Week 4: City Manager Review** (3 days)
   * Change plan status: Draft → Under Review
   * System notifies City Manager (link in email)
   * City Manager reviews online, adds comments
   * Donna receives notification, addresses feedback inline
   * City Manager marks plan Approved (single click)
5. **Week 5: Council Presentation**
   * Generate PDF export for Council packet (automated)
   * City Manager presents using live dashboard
   * Council members view summary online (optional)
   * Vote recorded in system
   * Status changes: Approved → Active
6. **Ongoing: Progress Tracking**
   * Monthly: Update KPI actual values (5 min)
   * Quarterly: Mark milestones complete (10 min)
   * Ad-hoc: Adjust budgets or status as needed
   * Public dashboard updates automatically

**Improvements:** - ✅ 50% time reduction (40 hours → 20 hours) - ✅ No version control issues (single source of truth) - ✅ Real-time collaboration and feedback - ✅ Automated data validation - ✅ Instant budget aggregation - ✅ Full audit trail

## Journey 2: City Manager Prepares for City Council Meeting

**Actor:** City Manager Chris **Goal:** Present consolidated strategic plan overview to City Council **Timeline:** Quarterly (4x per year)

### Current Journey (As-Is)

1. **Week Before Meeting: Data Gathering** (8 hours)
   * Request status updates from all departments via email
   * Receive mix of PDFs, Word docs, Excel sheets
   * Manually extract key data points
   * Build PowerPoint slides with charts
2. **3 Days Before: Analysis** (4 hours)
   * Calculate total budget across all departments (Excel)
   * Count initiatives by priority (NEEDS/WANTS/NICE TO HAVES)
   * Identify at-risk initiatives from status emails
   * Manually update slides
3. **Day Before: Final Prep** (2 hours)
   * Review slides with Assistant City Manager
   * Print copies for Council members
   * Prepare talking points
4. **Council Meeting: Presentation** (30 min)
   * Present static slides
   * Council asks questions (“What’s Public Works’ total grant funding?”)
   * Chris doesn’t have answer readily, promises follow-up email
   * Meeting notes taken manually

**Pain Points:** - ❌ Labor-intensive data gathering - ❌ Data potentially out-of-date (departments may not have responded) - ❌ Can’t answer ad-hoc questions live - ❌ Static presentation, no drill-down

### Future Journey (To-Be)

1. **Week Before Meeting: Generate Report** (30 minutes)
   * Log into Stratic Plan dashboard
   * Select “City Council Report - Q2 FY2025”
   * System generates report with live data:
     + Total investment by department
     + Initiatives by priority and status
     + KPI progress summary
     + At-risk initiatives alert
   * Review report, add narrative comments if needed
2. **3 Days Before: Collaborate** (15 minutes)
   * Share report link with Assistant City Manager
   * Review together in real-time
   * Export to PDF for Council packet (optional)
3. **Day Before: Final Prep** (5 minutes)
   * Refresh report to ensure latest data
   * Prepare talking points (data is current)
4. **Council Meeting: Presentation** (30 min)
   * Present live dashboard (or export)
   * Council asks question: “What’s Public Works’ grant funding?”
   * Chris filters dashboard: Department=Public Works, Funding Source=Grants
   * Answer instantly: “$2.3M across 5 initiatives”
   * Council members can access read-only dashboard on their tablets

**Improvements:** - ✅ 90% time reduction (14 hours → 1 hour) - ✅ Always current data (real-time) - ✅ Can answer questions live - ✅ Interactive exploration vs. static slides

## Journey 3: Finance Director Validates Initiative Budgets

**Actor:** Finance Director Fran **Goal:** Ensure all initiative budgets are accurate and fundable **Timeline:** During plan creation (August-September)

### Current Journey (As-Is)

1. **Receive Budget Data** (Ongoing, 2 weeks)
   * Departments email Word docs with budget tables
   * Budget tables have inconsistent formats
   * Extract data to Excel for validation
   * Check math (totals, funding sources)
2. **Validate Funding Sources** (1 week)
   * Cross-reference grants with grants database
   * Confirm General Fund capacity
   * Identify funding gaps
   * Create correction notes in Excel
3. **Provide Feedback** (1 week)
   * Email departments with correction requests
   * Wait for updated documents
   * Re-validate (repeat cycle)
4. **Consolidate Budgets** (3 days)
   * Manually sum budgets across all departments
   * Create budget summary spreadsheet
   * Generate charts for City Manager

**Pain Points:** - ❌ Inconsistent data formats - ❌ Manual data entry and extraction - ❌ Slow feedback loops - ❌ Errors in budget math

### Future Journey (To-Be)

1. **Real-Time Budget Review** (Concurrent with plan creation)
   * Finance has read access to all department plans as they’re created
   * Dashboard shows: All initiatives with budget data
   * Filter by: Funding status “Pending” or “Requested”
   * Drill into any initiative for detailed breakdown
2. **Inline Validation** (Ongoing)
   * System auto-validates budget math (sum of categories = total)
   * Fran adds comments directly on initiative budgets
   * Department notified instantly
   * Corrections made inline, Fran sees immediately
3. **Funding Source Tracking** (Automated)
   * Dashboard shows total by funding source:
     + General Fund: $12.3M (80% of capacity)
     + Grants (secured): $3.2M
     + Grants (pending): $5.1M
     + Bonds: $8.0M
   * Identify over-committed sources instantly
4. **Consolidated Reporting** (5 minutes)
   * Export consolidated budget report (auto-generated)
   * Charts and tables up-to-date automatically
   * Share with City Manager via system link

**Improvements:** - ✅ 80% time reduction (4 weeks → 1 week) - ✅ No data entry (direct database access) - ✅ Real-time validation and feedback - ✅ Automated consolidation