Fiscal Planning Quick Reference Card

RMU Athletics Strategic Planning - One-Page Cheat Sheet

7-Step Workflow

Step	Action	Location	Time
1	Create fiscal plan + dates	Fiscal Planning Dashboard	1 min
2	Define 3 core priorities	Plan Setup	2 min
3	Generate AI strategies	AI Strategy Generator	1 min
4	Review & approve strategies	Plan Setup	5 min
5	Create KPIs (optional)	Strategy cards	3 min
6	Convert to OGSM	Plan Detail page	1 min
7	Activate plan	Plan Detail page	1 min

Total Time: ~15 minutes

Dashboard Statistics

Color	Status	Meaning
⚫ Gray	Total	All strategies in plan
🟡 Yellow	Draft	Needs review
🔵 Blue	Under Review	Being evaluated
🟢 Green	Approved	Ready to convert ⭐
🟣 Indigo	Converted	Now in OGSM
🟣 Purple	KPIs	Tracking metrics

Key Buttons & Actions

Main Actions

- **"Generate AI Strategies"** → Creates draft strategies from priorities
- ✅ **Green Checkmark** → Approves a strategy
- 🎯 **Red Icon** → Rejects a strategy
- **"Create KPIs"** → Creates trackable metrics from strategy
- **"Convert to OGSM"** → Makes strategies official (blue banner)
- **"Activate Plan"** → Sets plan as active fiscal year

Navigation

- **"Review Strategies"** → Goes to plan setup to approve/reject
- **Priority Cards** → Click to view/edit strategies
- **"Continue Planning"** → Returns to AI Strategy Generator

Visual Indicators

Blue Alert Banner

"Ready to Convert Strategies"

- Appears when approved strategies exist
- Shows count of strategies ready
- Click "Convert to OGSM" to proceed

Progress Bar

Shows: (Converted ÷ Total) × 100%

- 0% = Just started
- 50% = Half converted
- 100% = Ready to activate

Status Badges

- **DRAFT** = Not reviewed
- **APPROVED** = Ready to convert ✨
- **CONVERTED** = In OGSM framework
- **REJECTED** = Not using this strategy

Common Tasks

Generate Strategies for One Priority

1. Click "Generate AI Strategies"
2. Select only one priority checkbox
3. Add context about that priority
4. Click "Generate"

Convert Only High-Priority Strategies

1. Wait for blue "Convert" banner
2. Click "Convert to OGSM"
3. Uncheck low-priority strategies in modal
4. Convert only selected ones

Track Strategy with KPIs

1. Find approved strategy
2. Click "Create KPIs"
3. Review auto-populated metrics
4. Add targets and units
5. Click "Create Selected KPIs"

Edit Priorities After Creation

1. Go to Plan Detail
2. Click priority card
3. Edit title/description in Setup page

Troubleshooting Quick Fixes

Problem	Quick Fix
Can't activate plan	Convert all approved strategies first
No blue banner	Approve at least one strategy
"Add to Plan" fails	Ensure plan is in draft status
Strategies won't generate	Add more context to AI prompt
KPI creation failed	Ensure KPI has a name

Pro Tips ⚡

✅ **DO:**

- Be specific with priority titles
- Provide context to AI (budget, resources)
- Review strategies before approving
- Create KPIs before converting
- Convert strategically (not all at once)

❌ **DON'T:**

- Approve without reviewing
- Skip KPI creation
- Activate with unconverted approved strategies
- Use vague priority descriptions

Priority Examples

❌ Vague	✅ Specific
"Improve revenue"	"Increase hockey ticket sales by 25%"
"Better facilities"	"Maximize turf field utilization to 80%"

❌ Vague	✅ Specific
"Help students"	"Improve student-athlete GPA to 3.2 average"

Workflow Checklist

- ☐ Fiscal plan created with dates
- ☐ 3 priorities defined
- ☐ Strategies generated by AI
- ☐ Strategies reviewed and approved
- ☐ KPIs created for key strategies
- ☐ All approved strategies converted
- ☐ Plan activated

✅ **When all checked = Fiscal plan is complete!**