**Using the Strategy Planner Launchpad Plus**

**What Views are Populated?**

1. Strategy Planner  
   The strategy planner view is designed to enable you to sit down with your Senior Mngt and PM team and use the information in Essential to enable you to make strategic decisions, capture them as roadmaps and plans and pull them into Essential.  
     
   The view makes use of Value Streams and Customer Journeys – the customer feedback captured as part of customer journey’s is mapped to the processes, and the view identifies the capabilities, processes and applications that might impact this feedback and, potentially, improve it. This is the actual customer feedback, as opposed to the planned customer feedback identified in the value streams. To see how to use the view, watch this video here.

**What Initial Data do I Need?**

This view assumes that you have already captured your:

* Strategic Goals and Objectives
* Business Capabilities
* Business Processes
* Organisations
* Applications
* Application Services
* The relationships between the applications and services and the business processes, organisations and applications

If you have not already captured these, we recommend using the following to support you:

1. **Essential Launchpad Foundation** to capture –
   * Business Capabilities
   * Business Processes
   * Organisations
   * Applications
   * Application Services
   * Application to Application Service mapping
   * Business Process to App Service
   * Physical Process to App
2. **Essential** – to capture
   * Strategic Goals
   * Objectives
   * Map Objectives to Business Capabilities

Essential Launchpad and its instructions can be found here - <https://enterprise-architecture.org/howto.php#launchpad>

**How to use the Strategy Planner Launchpad Plus**

From the Strategy Planner with Customer Journeys section on the Launchpad page, click on the ‘Download Strategy Planner with Customer Journeys as Excel’ button. A spreadsheet populated with the data already in your repository will be downloaded. Complete the spreadsheet as describes below:

**Reference Worksheet**

This sheet will be pre-populated with any data that you already have in your repository and will not be re-imported. If you need to add additional data use the Business Process Editor or the Launchpad spreadsheet.

Physical Processes  
**Note**:

1. You will need to delete the data in either column E or F for the drop down to work correctly. See the instructions below

If Column D, Org Role, is populate delete the contents of column F  
If Column D is blank delete column E

1. Aside from the action above, do not change or add any of the data in this sheet – it will not be re-imported

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| ID | Unique ID – do not change | Completed |
| Business Process | Name of the Business Process | Completed |
| Organisation | Name of the Organisation | Completed |
| Role | Name of the Business Role – this is optional | Optional |
| Physical Process | A Concat of the process, org and role fields to form the Physical Process Name. **Note**: If you add any additional Physical Processes you will need to copy down this column to create the Concat | Completed |
| Physical Process Direct | A Concat of the process and organisation fields to form the Physical Process Name. **Note**: If you add any additional Physical Processes you will need to copy down this column to create the Concat | Completed |

**Enumeration Worksheets**

These worksheets are pre-loaded with data, but you can add your own as required.

**NOTE**: you will need to copy down the ID column to ensure that any new entries have an ID

Customer Emotion Ratings

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| ID | Unique ID – do not change |  |
| Name | The name of the customer emotion | Free Text |
| Description | A description of the emotion | Free Text |
| Colour | The colour code | Free Text |
| Style Class | Create a style class name in the format ‘emotion’Emotion, ie boredEmotion | Free Text |
| Index | Create an index | Free Text |
| Score | Score the emotions from -10 to 10 | Free Text |

Customer Experience Ratings

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| ID | Unique ID – do not change | Completed |
| Experience Rating | Create a rating for the customer experience, ie Exceptional Experience | Free Text |
| Description | A description of the experience rating | Free Text |
| Colour | The colour code | Free Text |
| Style Class | Create a style class | Free Text |
| Index | Create an index | Free Text |
| Score | Score the experience from -10 to 10 | Free Text |

Customer Service Qualities

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| ID | Unique ID – do not change |  |
| Service Quality | Name of the Service Quality | Free Text |
| Description | A description of the service quality | Free Text |

Customer Service Qualities Values

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| ID | Unique ID – do not change |  |
| Service Quality | Select the Service Quality from the dropdown list | Dropdown |
| Value | Rate the value, for example High, Medium, Low | Free Text |
| Description | A description of the service quality and value | Free Text |
| Colour | The colour code | Free Text |
| Style Class | Create a style class | Free Text |
| Score | Score the experience from -10 to 10 | Free Text |

**Definition Worksheets**

These sheets will be pre-populated with any data that you already have in your repository. If you need to add additional rows do so at the end and only import the new rows.   
**NOTE**: you will need to copy down the ID column to ensure that any new entries have an ID

Products

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| ID | Unique ID – do not change | Completed |
| Name | Name of the Customer Journey | Free Text |
| Description | Description of the Customer Journey | Free Text |

Value Streams

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| ID | Unique ID – do not change | Completed |
| Name | Name of the Value Stream | Completed |
| Description | Description of the Value Stream | Completed |

Value Stages

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| ID | Unique ID – do not change | Completed |
| Value Stream | The parent Value Stream – select from the drop down | Dropdown |
| Index | The order of the Stages | Number |
| Stage Name | The name of the Value Stage | Free Text |
| Description | Description of the Value Stage | Free Text |

Customer Journeys

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| ID | Unique ID – do not change |  |
| Name | Name of the Customer Journey | Free Text |
| Description | Description of the Customer Journey | Free Text |
| Product | Select the name of the product produced by the customer journey | Dropdown |

Customer Journey Phases

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| ID | Unique ID – do not change |  |
| Customer Journey | The parent Customer Journey – select from the drop down | Dropdown |
| Index | The order of the Phases | Number |
| Phase Name | The name of the Customer Journey Phase | Free Text |
| Description | Description of the Customer Journey Phase | Free Text |
| Customer Experience | Select the value according to the experience of the customer at this phase | Dropdown |

**Mapping Worksheets**

Customer Journey Phases to Value Stages

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| Customer Journey Phase | Select the Customer Journey Phase from the dropdown | Dropdown |
| Value Stages | Select the Value Stage that the Customer Journey Phase is part of | Dropdown |

Customer Journey Phases to Physical Process

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| Customer Journey Phase | Select the Customer Journey Phase from the dropdown | Dropdown |
| Physical Process | Select the Physical Process supports the Customer Journey Phase  **Note**: If the drop down contains duplicated names in one line go back to the Physical Processes worksheet and follow the instructions to delete the correct column. | Dropdown |

Customer Journey Phases to Emotions

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| Customer Journey Phase | Select the Customer Journey Phase from the dropdown | Dropdown |
| Emotion | Select the Emotion that describes how the Customer is feeling at this Phase in the Customer Journey | Dropdown |

Customer Journey Phases to Service Quality Values

|  |  |  |
| --- | --- | --- |
| Field | Description | Field Type |
| Customer Journey Phase | Select the Customer Journey Phase from the dropdown | Dropdown |
| Service Quality Value | Select the Service Quality Value that describes how the Customer is feeling at this Phase in the Customer Journey, for example, Empathy - Low | Dropdown |