



# SimpleStrata

Strategy Management and Execution Solution

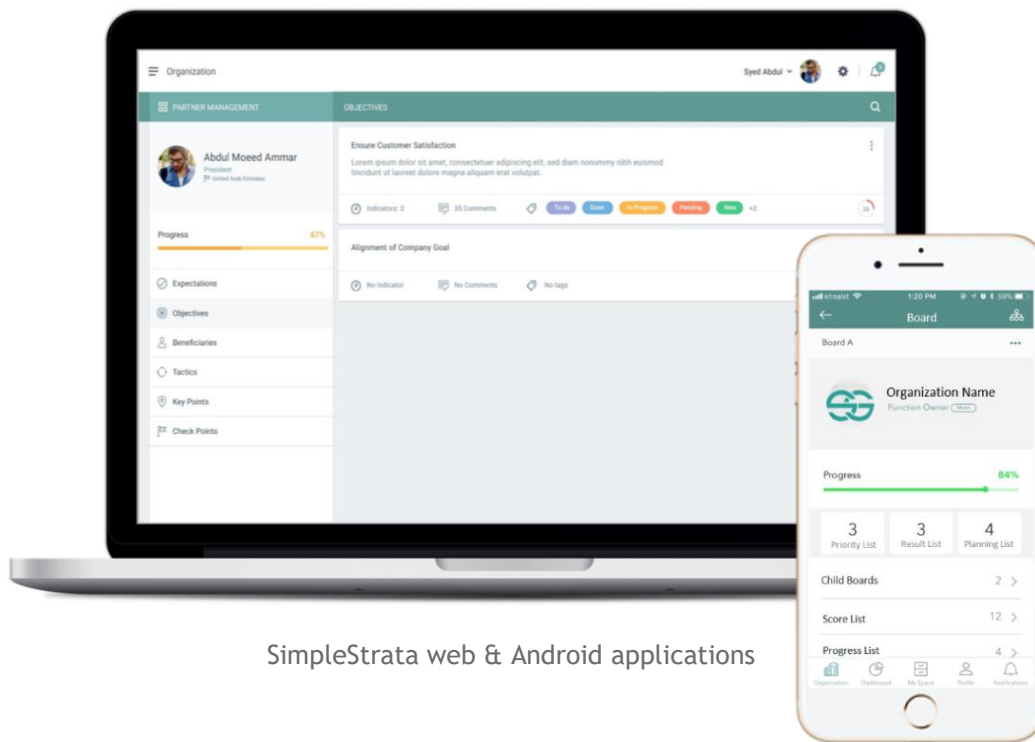


## System Features

# What is SimpleStrata?

SimpleStrata is a platform created to engage team members and enable them to collaborate effectively to achieve better results. It addresses issues of strategy creation, employee performance management and project monitoring. Through a wide range of features such as the feedback wall, comments, integrated live chat and instant notifications, users are engaged and connected at all times. These triggers combined with the planning module and the scoring system are your guarantee to get your employees hooked with your strategy execution and increase the organizational performance by at least 40%.

Due to its flexibility, SimpleStrata can easily be adopted into small and medium organizations, or enterprises.



SimpleStrata web & Android applications

# Concept

## Efforts, Results & Expectations

**Results** are the SMART outcomes or goals that are not moved by will. Results should be:

- Specific (simple, sensible, significant).
- Measurable (meaningful, motivating).
- Achievable (agreed, attainable).
- Relevant (reasonable, realistic and resourced, results-based).
- Time bound (time-based, time limited, time/cost limited, timely, time-sensitive).

**Efforts** are actions that lead to outcomes or results. They are usually moved by will meaning an individual can willingly spend some effort to create results. Efforts should be time bound in order to consider them tasks or assignments. If efforts have no due date they are considered **expectations**.

## Tracking – The 12/52/365 Method

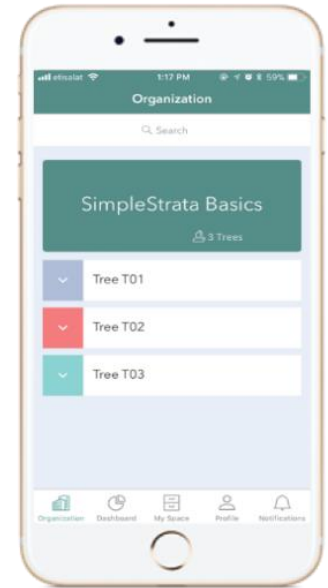
Best practices dictate that after you clearly define results and efforts, you should periodically track their progress over time. Results should be tracked monthly (12 months a year) to test their advancement. If after a specific period of time it is clear that the result is not on the rise, efforts performed to produce results should be tracked weekly (52 weeks a year). This will help you analyze the reason why a certain result isn't moving (or moving rapidly). You can go further to track your daily tasks (365 days a year)

Tracking is done in the form of reports grouped by the time period. Results that should be tracked within that period are specified before the period starts in order to create visibility on what will be measured during the upcoming review. Results and their targets within a time period are called **measures**.

# Functional Features

## Trees

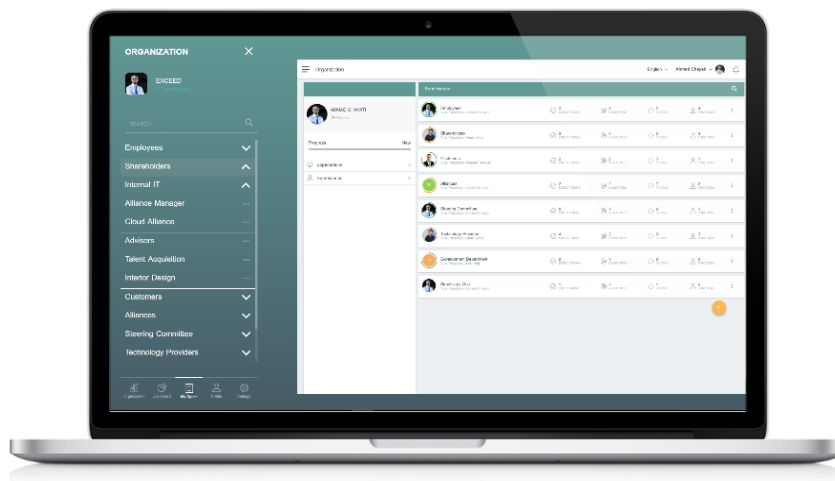
Trees in SimpleStrata are the top nodes in the organization. This could be interpreted into organizational structure, strategic objectives or programs. A tree is a collection of boards. The tree view is what makes the SimpleStrata navigation simple and easy to visualize.



Trees are a collection of Boards

## Navigation Flexibility

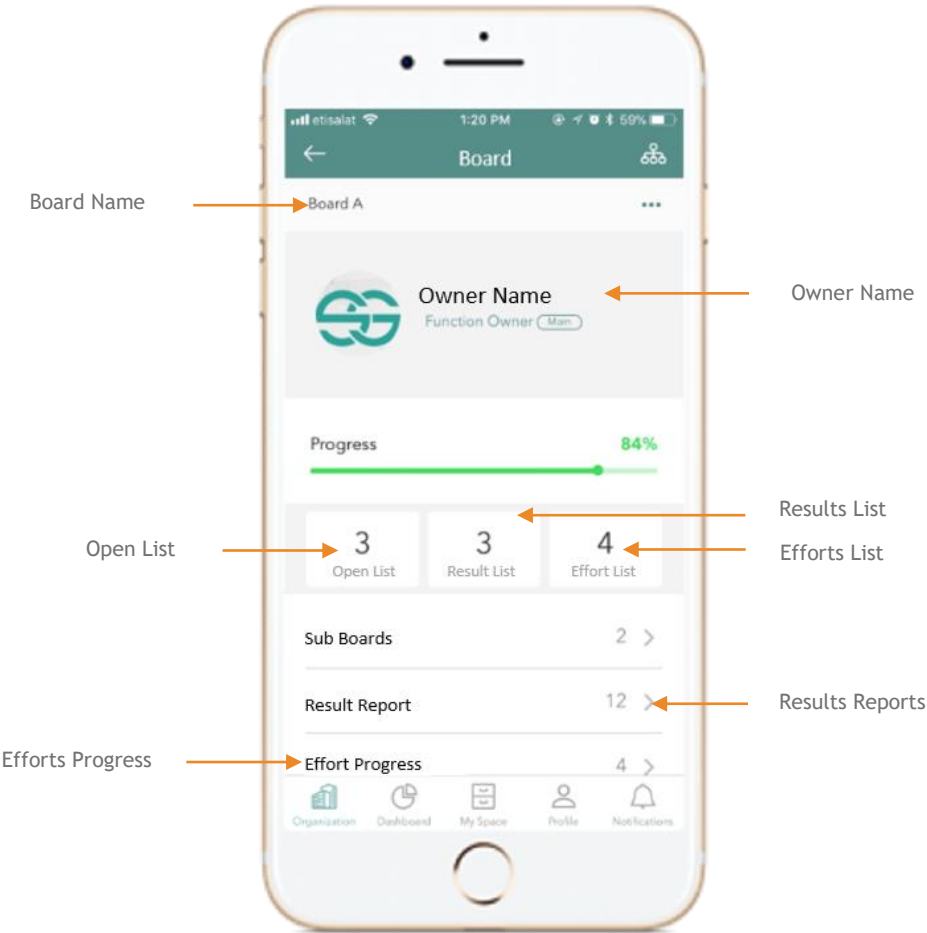
SimpleStrata is designed to have flexible navigation options to fit the processes of organizations instead of having to drastically adjust these processes and guidelines to fit SimpleStrata.



SimpleStrata Web: Main Navigation Screen

# Boards

Each node within a tree has a board of its own. Boards are a collection of lists and reports. Lists include an open list, a results list and an efforts list. Reports include results scoring and efforts progress reports. Boards can host other boards under them as branches.

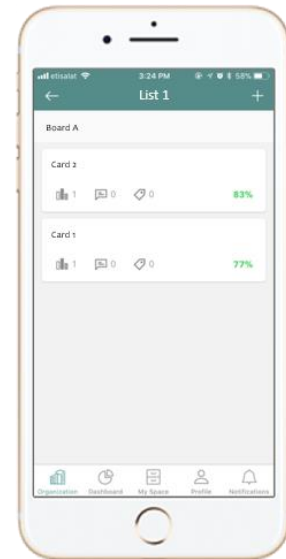


Boards are a collection of lists

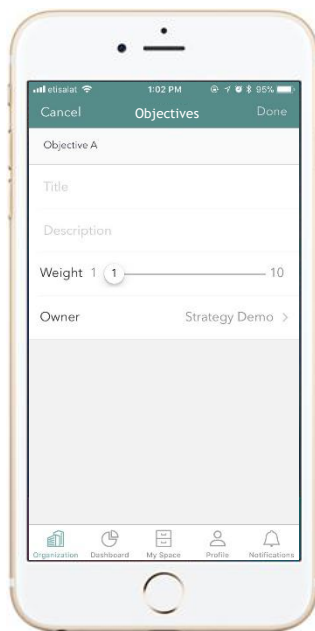
## Lists

Lists are a collection of cards. Each board has 3 main lists:

- Results list (aka objectives, KPIs, features, deliverables ... etc.)
- Efforts list (aka initiatives, projects, tactics, tasks....etc.)
- Open List (aka expectations,



Lists are a collection of cards

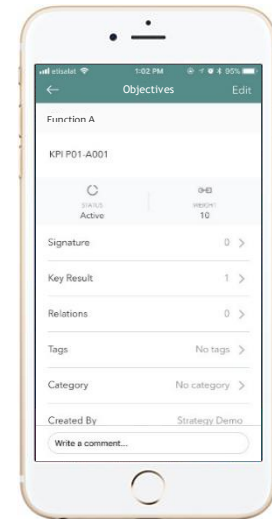


## Results Grouping Card

A result grouping card answers the question “what results should be achieved” rather than how they should be achieved. A results grouping card must have a title a weight and a user who is responsible for achieving the result. The score of the results grouping card is the average score of all the result cards within it.

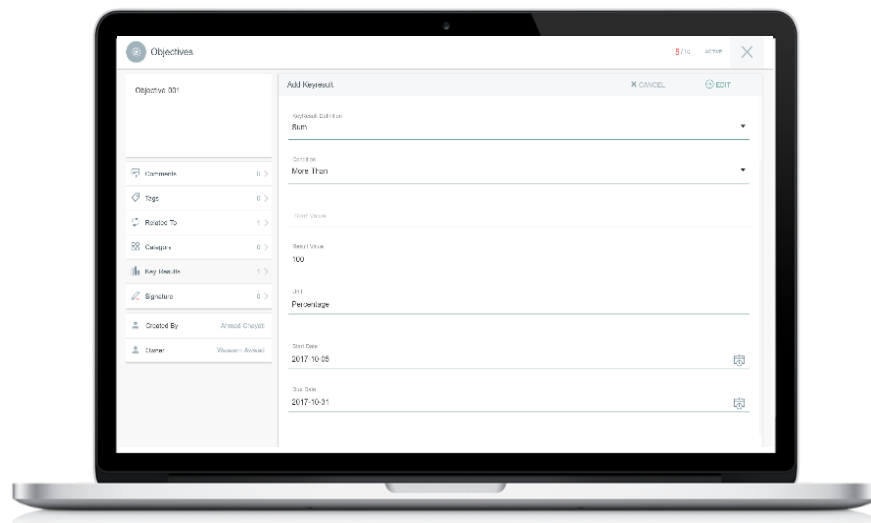
## Weight

Results don't always contribute equally to the success of the function or objective they are connected to. Some may have a larger impact than others. The impact is determined by the weight which the result is given when its being defined.



## Results Card

Results can be defined within results grouping cards and they answer the question “how will this result be achieved”. The progress of each board will depend on the achievement of those results. Results will have a definition and a condition to specify how to calculate their score. They also have the ‘actual result’ field that will change depending on the added reports throughout the year. If necessary, the result can have a baseline or a starting value.



SimpleStrata Web: Defining Results

## Scoring

Boards will have a score that is calculated as the average score of their results throughout the year. Result & efforts cards will have score based on the created reports. A report will also have a score that is the average of the scores of the results being measured within that report or the commitments being evaluated in that period. Scores are calculated as the actual value achieved over the preset target value.

## Reports on Results

To increase productivity, results should be tracked through periodic reports. Reports are also called key points, KPI reports, deliverables reports ... etc. They are created as time periods to track the progress of results. Results within a report are called **measures**.

## Measures

Measures are the results that will be measured within a specific report. They can be viewed from the reports list or from the results list.

## Inheritance

KPIs (results) on a board may be inherited to its child boards. This allows duplicating KPIs instead of re-creating them, as well as rolling up results from inherited KPIs to the parent KPIs.

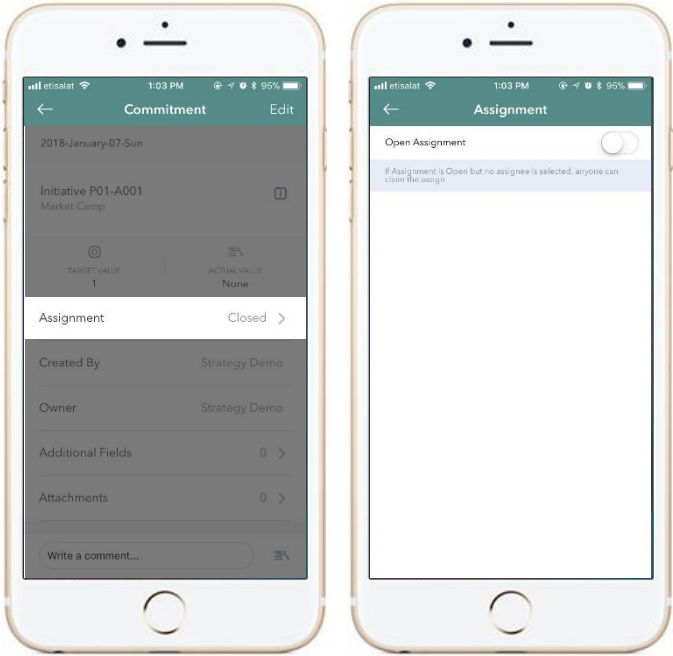
## Efforts Card

Efforts are tasks or assignments that are being executed by the owner of the board to achieve results. Efforts are also known as tactics, assignments, resources, initiatives, projects ...etc.



# Cascading

Commitments have the option “Assignment” that permits users to use the same commitment instead of recreating it. It also gives the owner of the original commitment to assign it to their subordinates.



SimpleStrata Mobile: Opening an assignment

# Reports on Efforts

To increase the commitment level within the organization, efforts are tracked through reports. Those reports can be called check points, initiatives/projects reports, tasks reports, resource usability reports...etc. When the user creates a report for an effort, they will be required to add **commitments** on this effort.

# Commitments

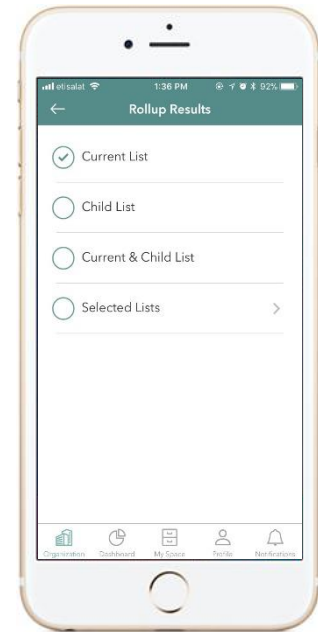
Commitments are the tasks that the user commits to executing or achieving for a certain effort within a specified time period. This feature encourages employees to enhance their productivity in the organization.

## Roll-up Boards' Score

Allows rolling up the scores of boards to other boards. Rolled-up scores may come from child boards, linked boards, other selected boards within the system, or a combination of the above.

## Roll-up Measures' Score

Allows rolling up measures of inherited KPIs to the parent KPI. Applying roll up on measures will disable user input and allow only reading results from the inherited KPIs.



## Swipe

Users can navigate between different reports by swiping them left and right. This applies to Key Points and Check Points.

Users can also navigate between measures within the same Key Point, and between commitments within the same Check Point, by swiping as well.

## Drag-Drop

Users can move measures and commitments from one report to another by drag and drop.

The same action can be performed by moving, or moving while creating a copy.

# Business Intelligence Dashboards

SimpleStrata comes with its own built in BI dashboards for the following benefits:

- Identify Negative Trends
- Correct Negative Trends
- Improve Efficiency
- Measure Organization's Parameters



All users have a default, built-in dashboard (that can be customized by administrators). This dashboard shows the user how well they are doing across their assigned functions and sub-functions.



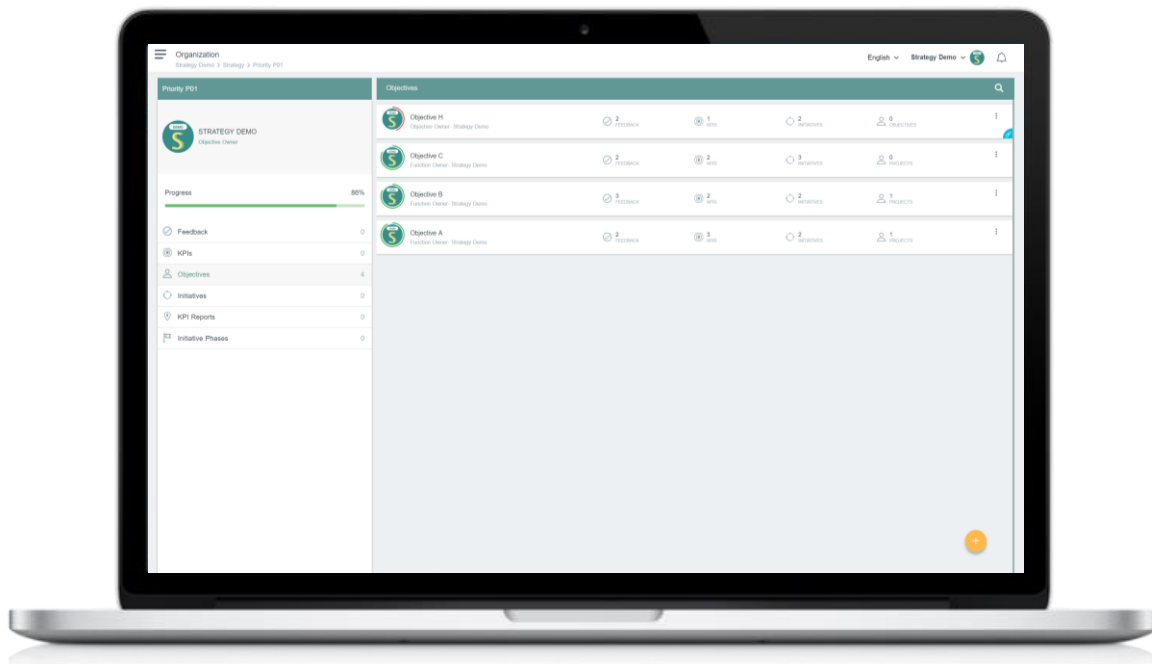
Built-in BI Dashboards - SimpleStrata Mobile App

## Board Nesting

Boards can be nested to several layers down. In a company, this could translate into teams within a department, projects under programs and operational objectives to strategic objectives... etc.

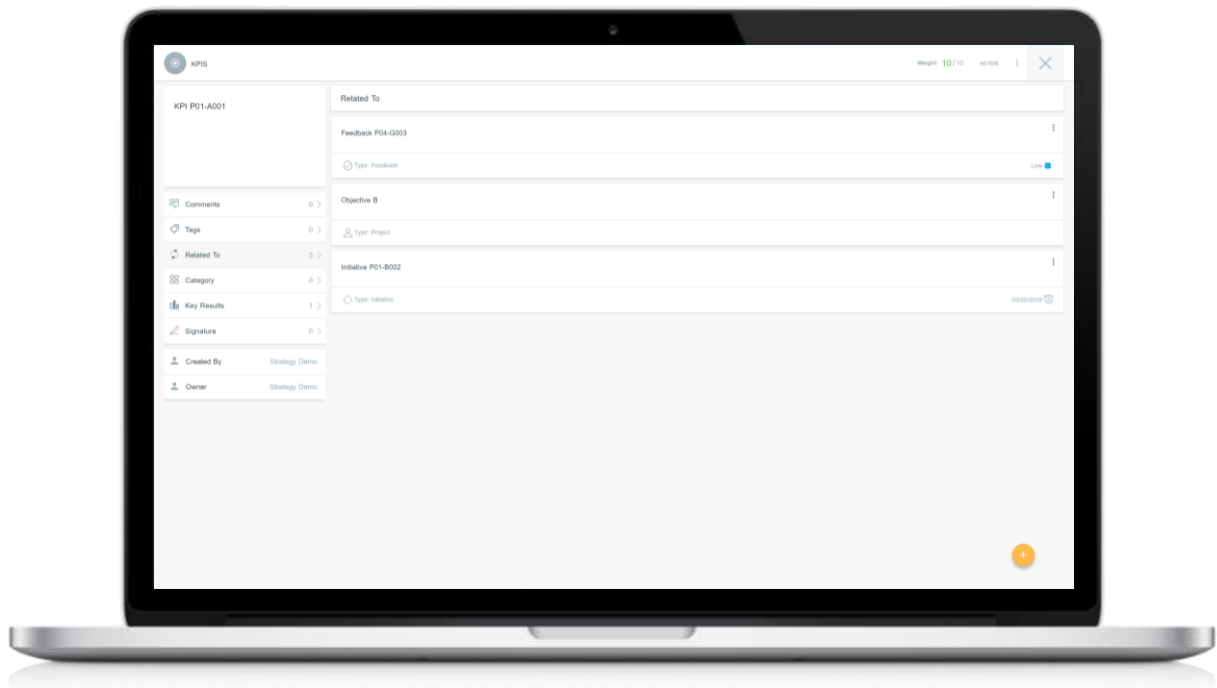
## Linked Boards

Linking can occur across boards. This flexibility allows the user to view connected boards from a single point rather than searching for connected boards across the organization. For example, the boards of the project team are linked to the board of the project.



## Relations

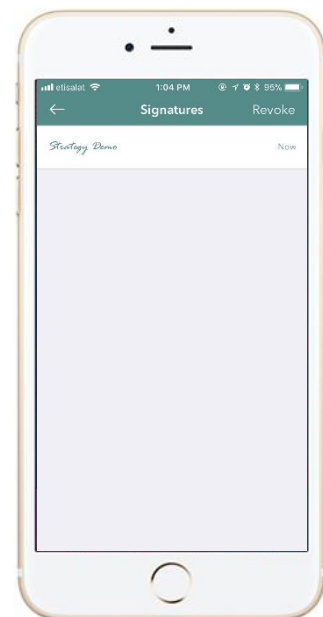
Results might be connected to other cards (expectations, results, efforts) or other boards. This connection is demonstrated in the relations feature.



## Signatures

Users can sign off results and their achievement, as well as efforts and their progress. This serves as a means of communicating approvals and helps to ensure data accuracy and integrity within the system.

Signed elements cannot be edited unless the signatory revokes their signature.



## Uploading Documents

Reports in SimpleStrata are supported with attachments, which are used as evidence of the reported results. Attachments can be added to measures and commitments.

Types of attachments include: files, pictures from gallery or camera as well as voice notes.

## Board Sharing

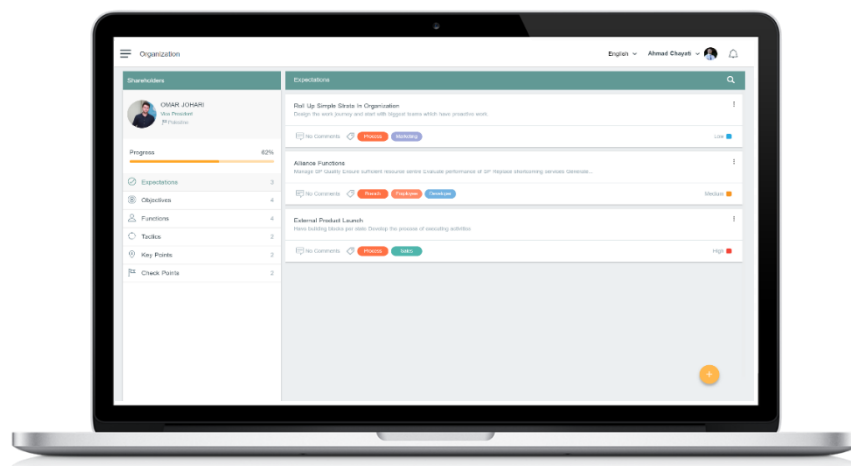
Boards can be shared both within the application and outside of it (via WhatsApp, email, etc.)

## Open Lists

Each board has an open list available for multiple uses including the following:

1. **Expectations:** All users can provide their expectations from the board owner or function.
2. **Tasks:** if tasks have no due date they can be added by users (depending on their privileges) to the board owner. The owner of the board can then convert them to efforts.
3. **Risks:** In the project monitoring module, the open list can be used as a risk register.

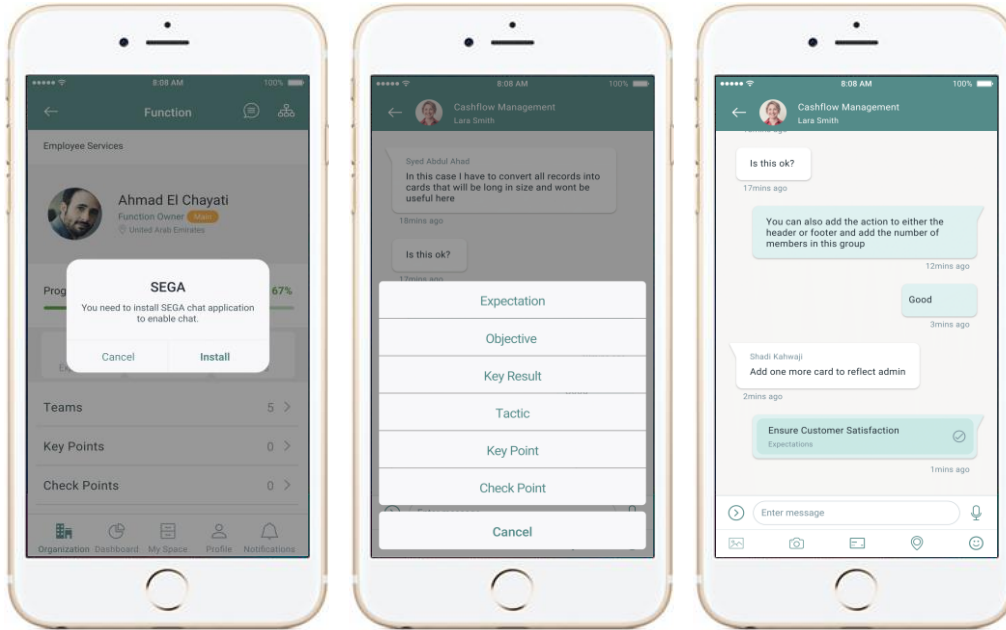
A card in the open list can have 3 levels of criticality (low-medium-high) and can be tagged using the tag feature. Other variations of this list include feedback, wishlist, risks...etc.



SimpleStrata Web: Expectations Page

## Live Chat

Chat groups give the user the opportunity to have a direct chat with the concerned party about any card or report through an external application connected to SimpleStrata. This eliminates the risk of using insecure applications such as WhatsApp. It also saves the users time when trying to retrieve information because it restricts the conversations to one channel.



Install SEGA Chat Application

Choose what you want to chat about

Have a discussion with your group

## Comments

Comments are the users' way of providing feedback on cards including:

- Expectations
- Results
- Efforts
- Measures
- Commitments

## Reminders & Alerts

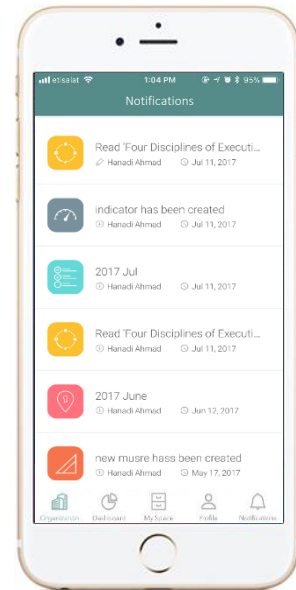
Users can receive reminders prior to deadlines on tasks through the system or through email if necessary.

## Notifications

Users are notified when they are assigned a new board or a card, or when current assignments are edited/amended, etc.

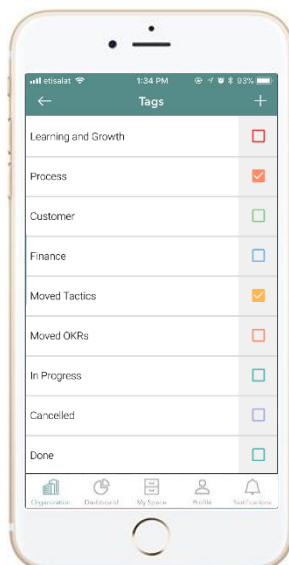
Types of notifications include:

- Upcoming/due checkpoints and key points
- Edited key points, check points, objectives, etc.
- New assignments or modified assignments

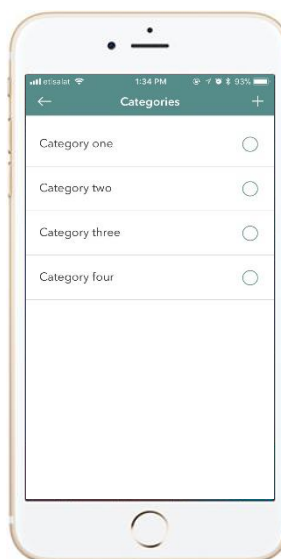


## Tags & Categories

SimpleStrata cards can be labeled by one or more tags and labeled by a single category. This feature provides further filtration and viewing options. For example, display all entities under Category A.



SimpleStrata Mobile: Tags



SimpleStrata Mobile: Categories



# User Experience

## Multiple Organization

SimpleStrata supports multiple organizations. The user can access different organizations using the same user name.

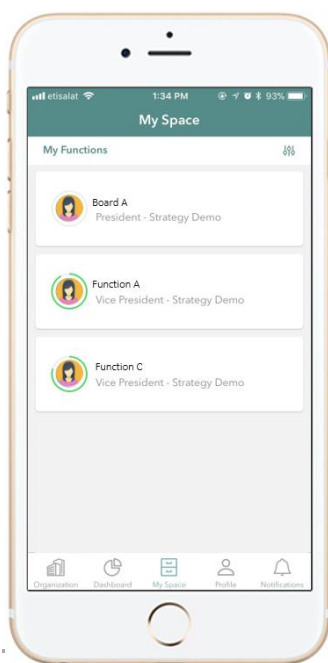
## User Role

SimpleStrata supports different levels of security based on user roles. Those roles will define users' rights to view and perform add, edit and delete actions.

Roles include: Admin, Supervisor, Member and Limited.

## Owner

For increased accountability, each board will have an owner responsible for its completion and success. For further tracking, each card will also show whom it was created by. This will give the owner a chance to discuss the new assigned responsibility with the person who assigned it.



## Myspace Views

This feature is available for all users. The My Space view gives the user an easy way to access all of their assigned functions in one space. The user can view their functions, expectations, results, and efforts. They can also view their monthly measures and their weekly commitments.

## Filters

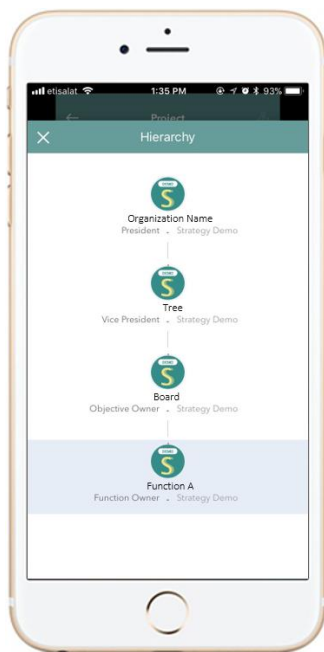
Filters feature allow managers to filter SimpleStrata cards according to predefined filters .

## Card Moving & Sorting

Cards can be moved automatically for reports. They can be sorted according to date or dragged and dropped using a mouse or finger.

## View Builder

Users can view records based on specific filters. Tables can be customized by selecting a column and setting the values. Results will be shown in the form of cards from different boards or lists. Views can be saved to be used later by the user.



## Multiple Hierarchies

There are multiple ways organizational hierarchy can be set up. SimpleStrata offers the option of having multiple hierarchies.

## Data Entry in SimpleStrata

Data entry is easy in SimpleStrata thanks to the following features:

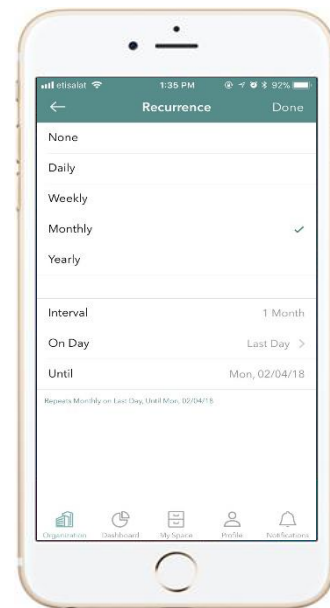
### Bulk Import

Data can be imported in bulk into the system with the use of spreadsheets and other tools.

## Flexible Configuration

### Flexibility in Creating Reporting Frequency

The recurrence wizards give the user the option to create reports at different frequencies easily including daily, weekly, monthly and yearly.



### Convert Cards

Cards that are added into the open list such as expectation or feedback can easily be converted into a results card or an efforts card without having to duplicate the data or re-entering it.

### Field Flexibility

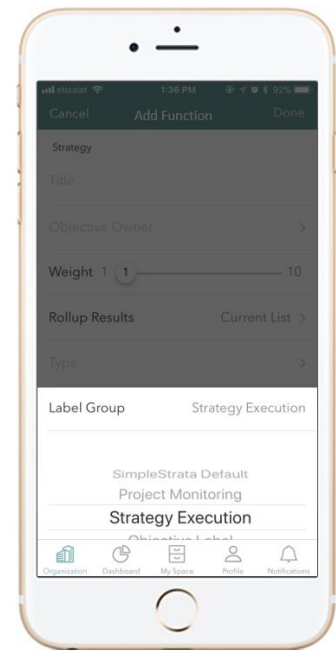
Your organization may have further details related to an entity than the default fields available in the system. SimpleStrata gives you the option to add a field and choose its label and its type (text, number...etc.)

## Label Editing

Labels in SimpleStrata can be easily and instantly changed by the admin user to match the organization's preferences.

## Label Groups

When adding a new board in SimpleStrata, you can the board labels to be from the strategy execution module, the project monitoring module, or the default SimpleStrata labels that are in line with employee performance module. You always have the option of creating your own label groups or editing any of the labels to fit the terms used by your organization.



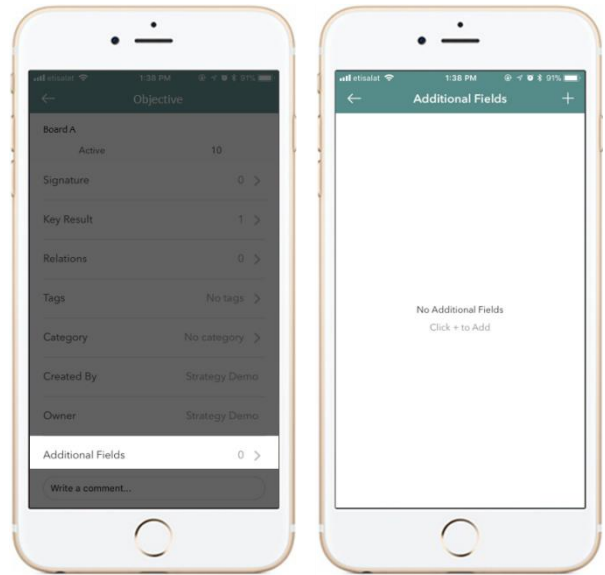
## Board Templates

When creating a new board, the user has the option to choose the board labels from 3 different label groups:

- Strategy Management Labels
- Project Monitoring Labels
- Employee Performance Labels

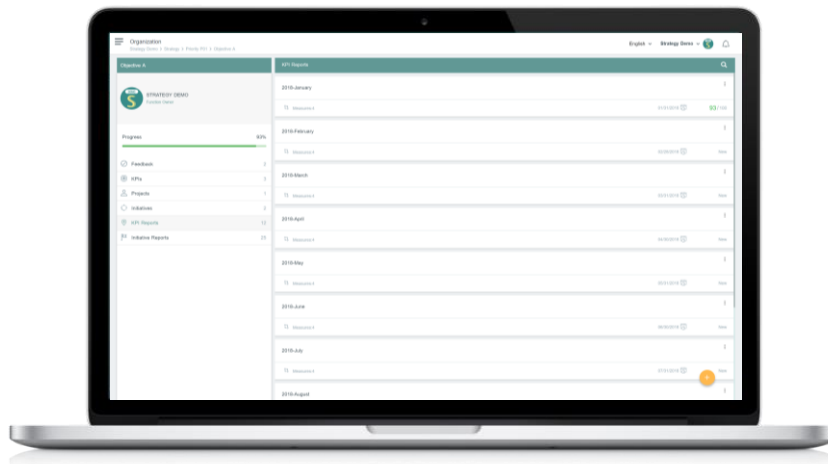
## Additional Fields

System admin can add new customized fields which can accommodate data of different types. This will serve in defining data fields specific to the organization, which are not originally included in the system.



## Multiple Year Plans

Plans for multiple years can be mapped into the application to allow for long-term strategy or extended initiatives.



## Archiving

Users can archive items they are not using to maintain an organized system that is free from distractions. Instead of deleting items, they will be archived for future reference if needed.