Initiatives - 1

Together with Scorecards, Dashboards and Reports **Initiatives** can be added into an Organisation container. First Click on the Briefcase icon and select an Organisation into which you want to add an **Initiative**.



The **Create Initiative** dialogue will appear. Give the Initiative a name and complete the Initiative overview details. Tasks/milestones are added in the next step. **Remember to click Save**

Brand Awareness Improvement Plan				
Overview				Edit
No. of Control of Cont	Ture			
Name Brand Awareness Improvement Plan	iype I≣ Initiative		•	
Description	Start Date		Due Date	
Associated to the Improve Brand Awareness objective, this plan is required to determine what set of actions will be undertaken over the next six months to improve our brand awareness	1/1/2017	31	6/29/2017	31
	Total Budget			
	25,000		\$	
	Advanced Options			

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i Initiatives - 2

Click on Overview at the top of the screen to see what you Initiative looks like so far:



To add Tasks and Milestones to this Initiative (this is optional) click on Edit at the bottom of the Menu list and then on the **+ New Initiative Item** button (see previous page). Change the Type to **Task** or **Milestone** and complete the details.

Remember to click Save after each entry

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Initiatives - 3

Once you Initiative is complete you can start to update the progress by clicking on the **Add Status Update** button in any of the Tasks or Milestones. This data will be automatically rolled up to the top view.

HISTORICAL PERFORMANCE			
DATE	PERCENT COMPLETE	BUDGET SPENT TO DATE	
Jan 6, 2017	20%	\$1.2K	P 🗡 🕆
Jan 13, 2017	40%	\$2K	P / 1
Jan 20, 2017	60%	\$2.3K	P / 🕆
Jan 23, 2017	80%	\$2.4K	P / 🕆
12/15/2016	%	\$	Add

After the Tasks and Milestones and status update data has been added, the final Initiative might look something like this:

International	I Limited <	Brand Awareness Improvement Plan			
SECTIONS	Q Find	Overview		Edit	
E Scorecards	Brand Awareness Improvement Plar				
Dashboards	 Write Initial Plan 	Associated to the Improve Brand Awareness objective, this plan is	PROJECTED SCHEDULE	PROJECTED TOTAL BUDGET	
✓ Initiatives	 Review Plan 	six months to improve our brand awareness			
🐣 Reports	 Amend Plan 	TOTAL BUDGET		×	
- Briefings	 Distribute Plan for Rollout 	\$25K			
	 Roll-out Programme 	BUDGET REMAINING			
PERSONAL	Checkpoint Review	923N	On schedule	9.6% over budget	
요 Home	 Completion Keview 	START DATE Jan 1, 2017	Projected End Date: Jun 29, 2017	Projected Variance: \$2.4K over budget	
🔂 Bookmarks		DUE DATE Jun 29, 2017			
		HISTORICAL PERFORMANCE 525K 520K 515K 510K 50 1/1/2017 1/15/2017 1/29/2017 2/12/2017 2/26	GRAPH TALLEVIEW 2017 3/122017 3/28/2017 4/3/2017 5/ • Percent Complete • Budget Spent to Date = Goal	Add Status Update	
		RELATED ITEMS			
			No related items		

You may have noticed there is a **Related Items** block at the bottom of the page. All objects in the system can be related to each other. This means you can create a link between an Objective or Metric and this Initiative.

This is very useful when you are tracking tasks due to poor performing Metrics or Objectives. Read the **Related Items** guide for more information

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