documentfocus

USER GUIDE

Creating a strategic plan with document focus

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The Document Focus Strategic Plan

The document focus strategic planning tool will help you to create a strategic plan following a tried and tested methodology. The tool provides help pages for every step and an example entry for ever section and sub-section.

The following document will guide you through each of the sections and sub-sections and explain how to get the most out of the application.

If you require help with the content of your strategy, then please go to the resources section of the Intrafocus (our parent company) website.

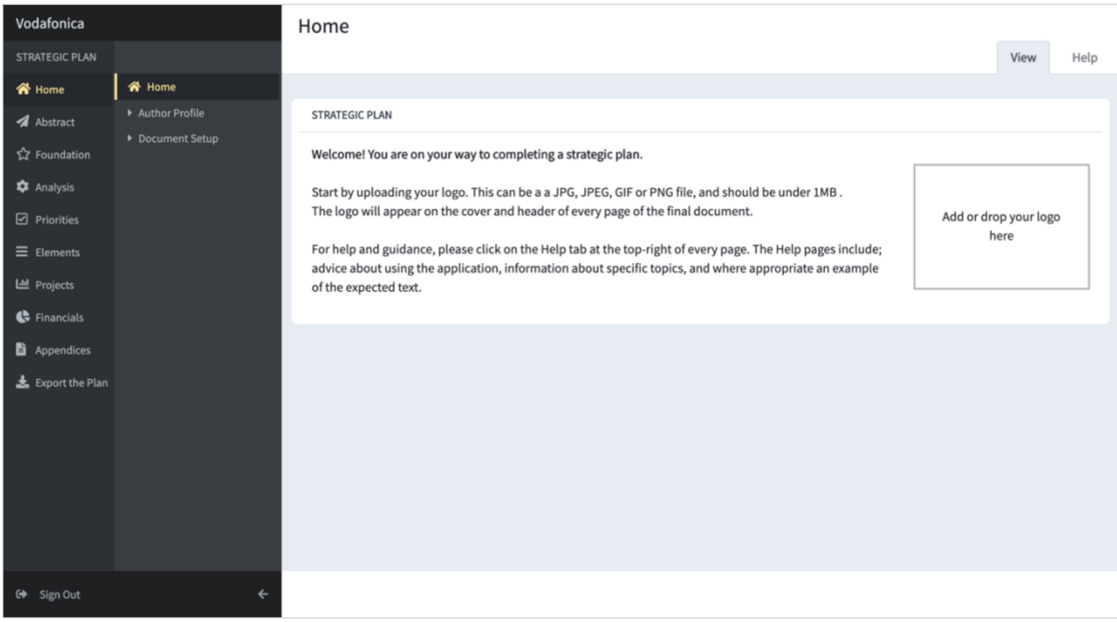
Home

Home Page

On entry to the system you will be presented with the home page. You can add a logo by dropping an image into the box on the right.

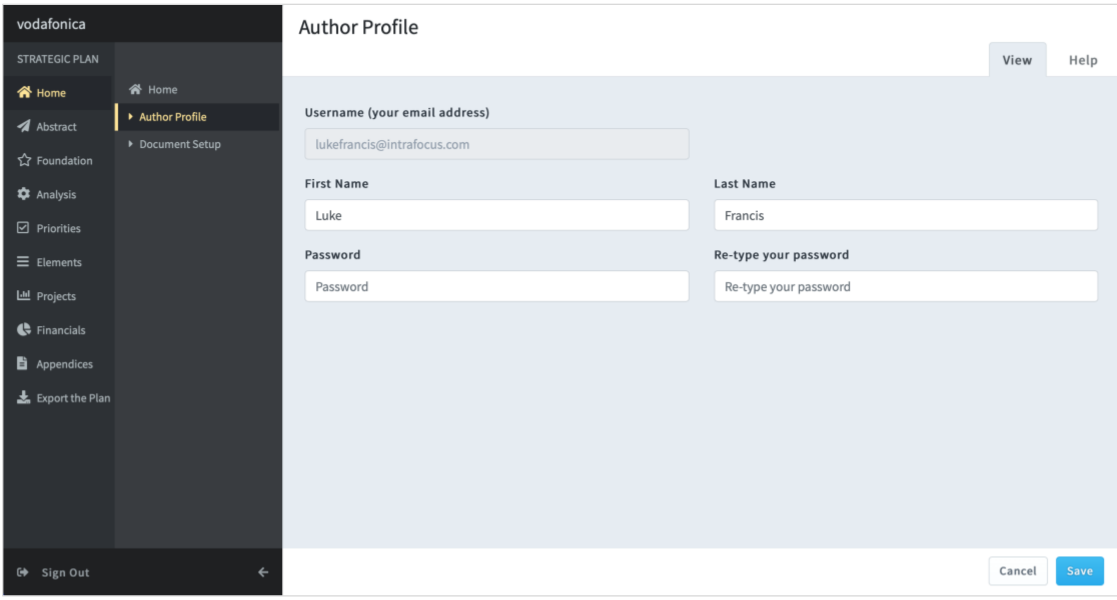
The main navigation for each document heading is on the left. The sub-navigation is for sub-headings related to the main sections.

Important Note: Look to the top-right of the page. There is a View tab and a Help tab. These appear on every page. The Help tab provides contextual help for the application and the subject. You can also find an example by clicking on Help.



Author Profile

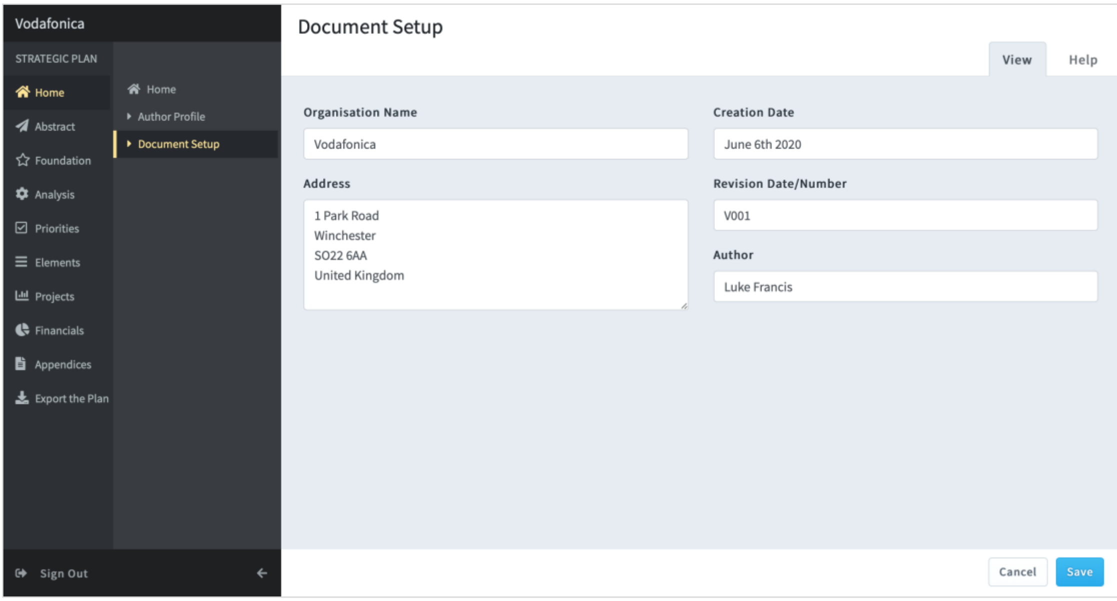
the Author Profile is a sub-menu. You can change your name and password in the author profile area. Your system author name will not appear in the document. The document author can be added in the document setup area.



Important Note: Be sure to click Save after any changed are made. The application does not automatically save your changes.

Document Setup

These fields will appear on the front page of the exported document. All text is free form so the entries will appear exactly as entered. **Tip:** if you have added a logo, then you can leave the Organisation Name blank.

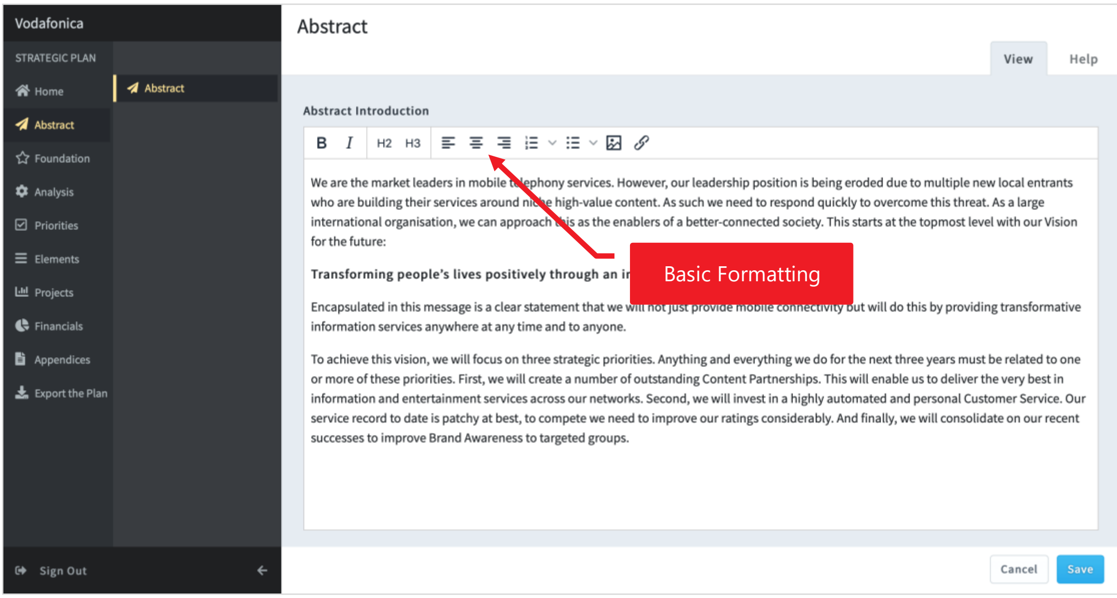


Abstract

This section will appear at the front of the document before the Table of Contents. Although at the front, the abstract is a summary of the documents contents and is usually written last.

Editing Tools

The input box has some editing tools. It is important to note the purpose of this tool is to guide you through the process of writing strategic content, not to create a beautiful document. We anticipate that you will either cut and paste the exported document into 'branded' company template or add branding to the final document.



Foundation and Analysis

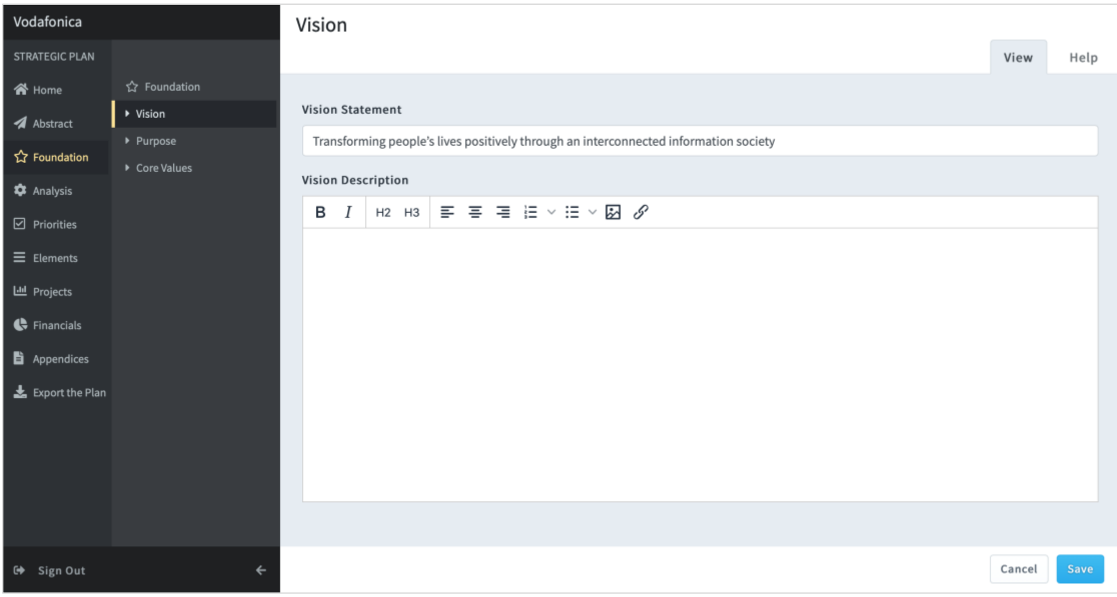
Foundation and Analysis are similar in format. Each section contains a fixed set of sub-sections. The main section will generate a main heading in the exported document. The sub-sections will generate sub-headings in the document.

By clicking on a main menu item, you will be presented with a text area for the section introduction.

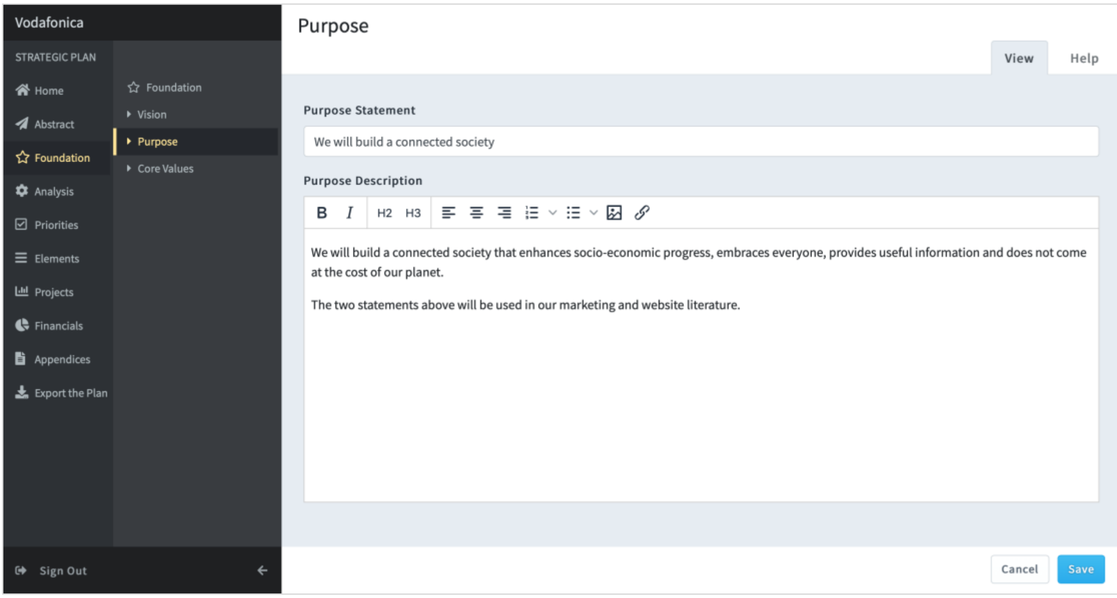
By clicking on a sub-menu item, you will be presented with two text areas. The first allows you to enter a short statement, for example a Vision Statement. The second larger area allows you to enter a longer description, which is optional.

You do not have to add the section or subsection headings, these will be generated automatically.

Example of a vision statement with no additional description:



Example of a purpose statement with an additional description:



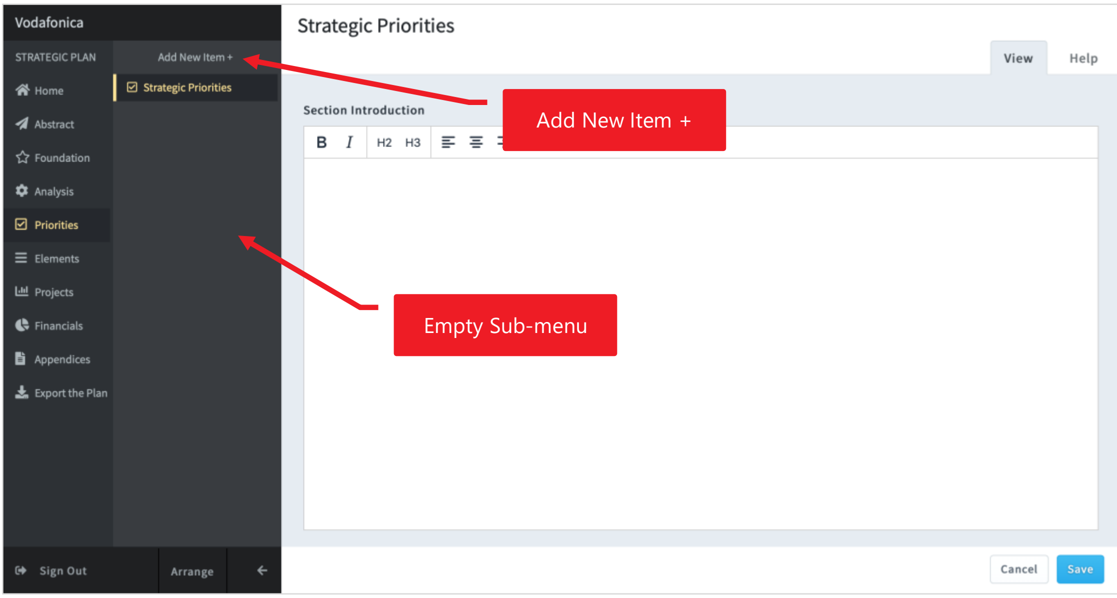
SWOT

Each of the Foundation and Analysis areas follow the format above with the exception of SWOT which includes four separate text entry boxes for Strengths, Weaknesses, Opportunities, and Threats respectively. There is also a free form commentary box.

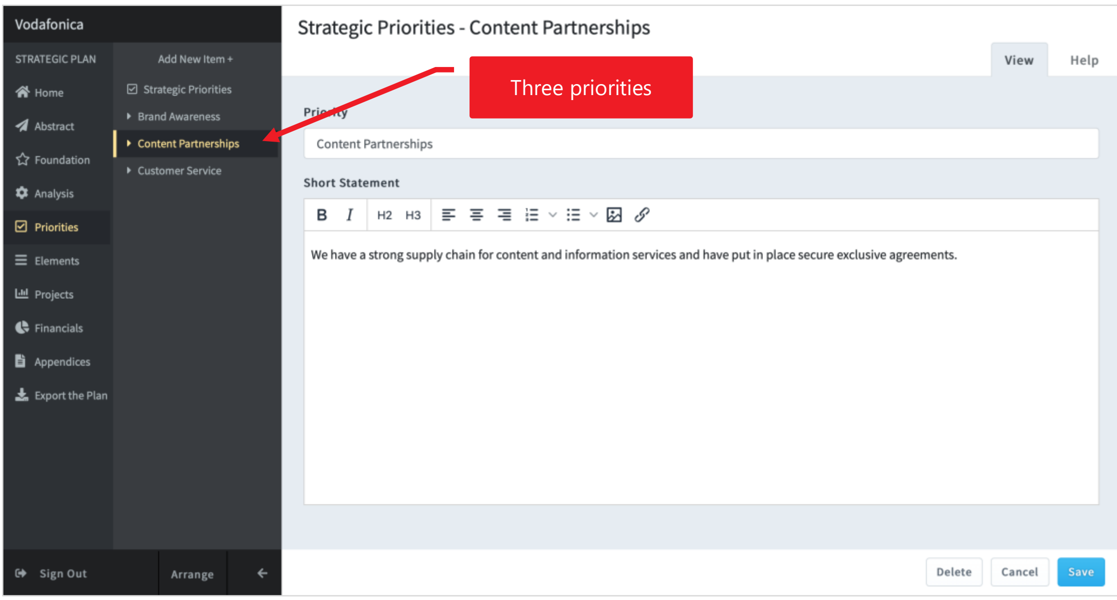
Priorities

When you click on Priorities you will be presented with the Strategic Priorities section introduction.

Important Note: There is an empty sub-menu. You can add as many priorities as required by clicking on **Add New Item +** at the top of the sub-menu



Example with three priorities added:



We recommend three strategic priorities as being optimum for a strategic plan. For more information on creating the content for your strategy go to the Intrafocus Strategic Planning Process (SPP).

Elements

There are three different 'Element' types. The language we use to describe them is largely irrelevant as it will not appear in the final document.

However, the relationship between the elements is vitally important.

To add an Element, click on **Add New Item +** at the top of the sub-menu

Item Type & Parent Element - Parameters

It is important to ensure the relationship between the Item Type and the Parent Element is correct. Notice at the top of the input page there are drop-down menus. When you create an element, first select the Element Type.

When clicking on the **Add New Item +** it will default to **Perspective**, for which no relationship is required as perspective is the top level

If you change the Item Type to **Objective**, then you will notice the **Parent Element** drop-down list will appear. You need to select a parent Perspective, for the Objective, from the list.

If you change the Item Type to **Measure**, then you will notice the **Parent Element** drop-down list will appear. You need to select a parent Objective, for the Measure, from the list.

Important Note:

If there is no parent in the list, then you MUST create a Parent item first.

Perspectives

These are high-level containers of Objectives. A Perspective could be a theme, a functional area or even a geography. The labels you provide are entirely up to you. The key thing to remember is that a perspective contains a number of Objectives. You MUST create at least one perspective before creating an Objective.

Select the Element Type **Perspective** to create a perspective

Objectives

These are business Objectives, not personal objectives. They are NOT projects or initiatives. Typically, a business objective is an improvement activity and usually starts with one of the following words: Improve, Increase, Decrease, Reduce, Strengthen, Enhance, Maximise, Minimise.

For example, 'Improve Sales Revenue' is a financial objective. 'Improve Customer Satisfaction' is a customer-based objective.

Read: [Strategic Objectives]() for more information on this subject. You MUST create at least one Objective before creating a Measure.

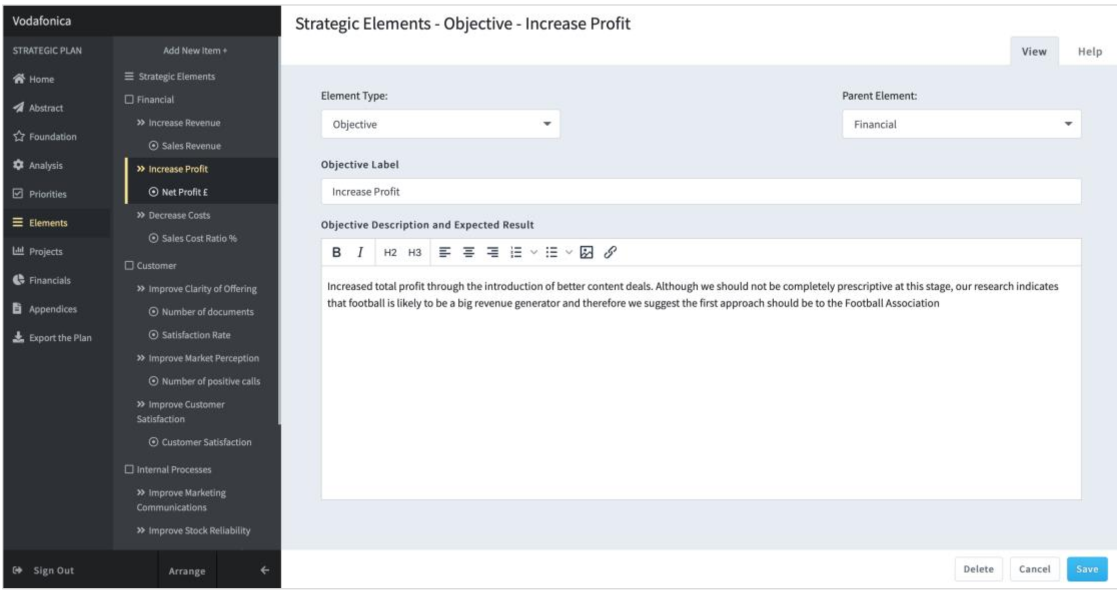
Select the Element Type **Objective** to create an objective, then you MUST select the **Parent Element** to create a relationship.

Measures

A measure, often called a KPI, is used to measure how well you are achieving an Objective. There may be multiple measures within an objective. We suggest you start small and have one or two key measures per objective. Measure can ONLY appear under Objectives.

Select the Element Type **Measure** to create a measure, then you MUST select the **Parent Element** to create a relationship.

The image below shows and example of a completed Elements section:



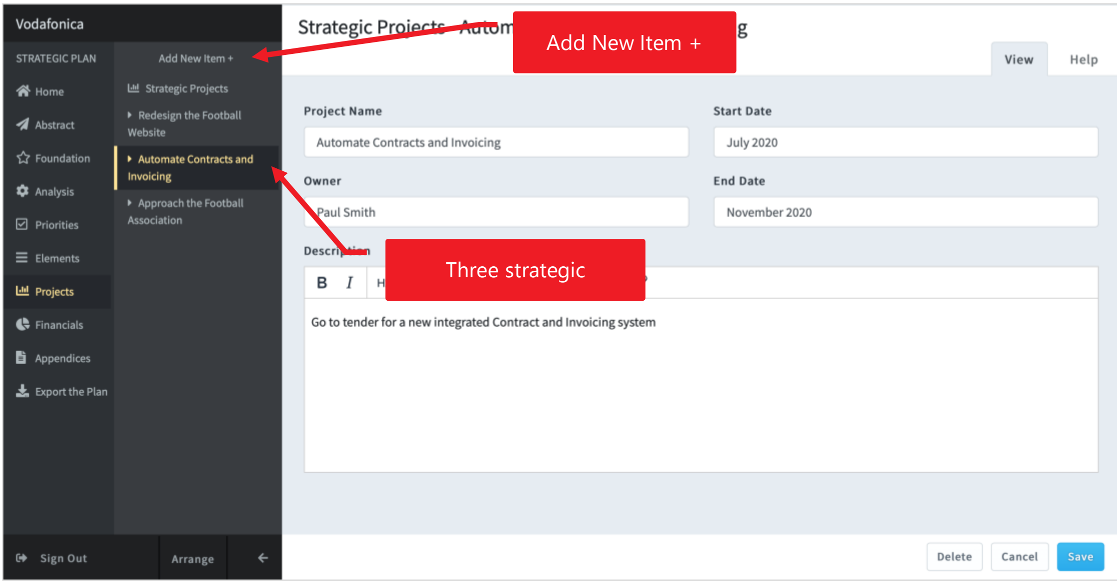
See 'Arrange' below for information about Arranging your Elements

Projects

Projects work in the same way as Priorities. When you click on Projects you will be presented with the Strategic Projects section introduction.

Important Note: There is an empty sub-menu. You can add as many Projects as required by clicking on **Add New Item +** at the top of the sub-menu.

The following example has three strategic projects added to the sub-menu:



Important Note: Whenever you add a Project, a corresponding **Financial** element will be added as well. We assume that any Project has an associated cost.

Arrange

You may have noticed the Arrange button at the bottom of the sub-menu. For sections where you can add items, you can also arrange them if you have created them in the wrong order.

When you use arrange in the Elements section, you can only Arrange within the vertical tree. That is, you can only arrange Perspectives, Objectives or Measures within their own tree, you cannot move them into another tree.

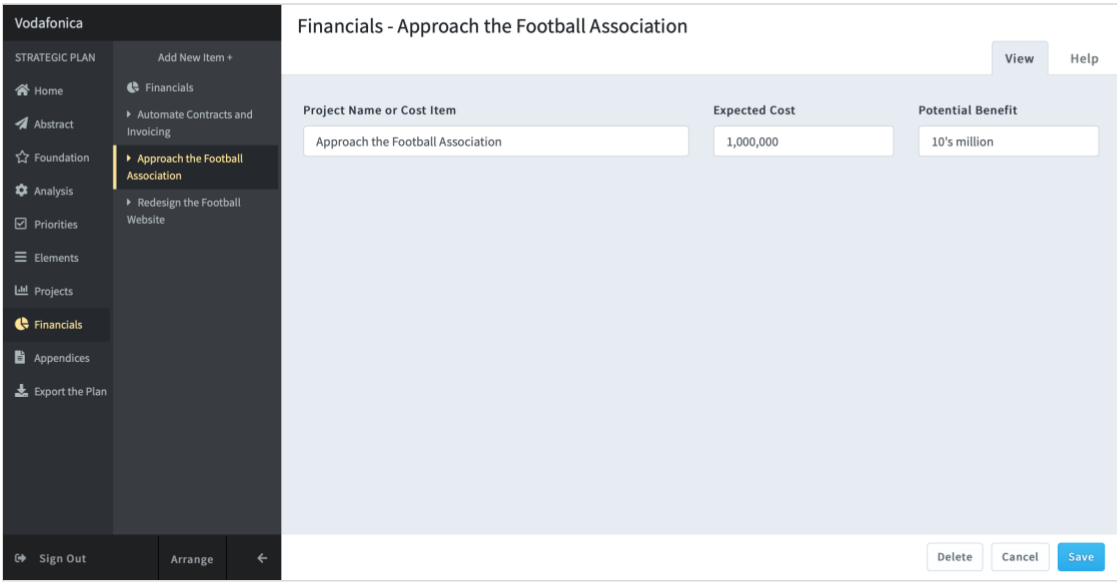
Moving and element has to be done using the Parent Type parameter described above.

Financials

You will not be able to determine the exact costs in a strategic plan, but you can make cost-benefit estimates.

As mentioned above in projects, for every project a financial entry will be generated automatically. If you need to delete the item, you can. You can also add items if required.

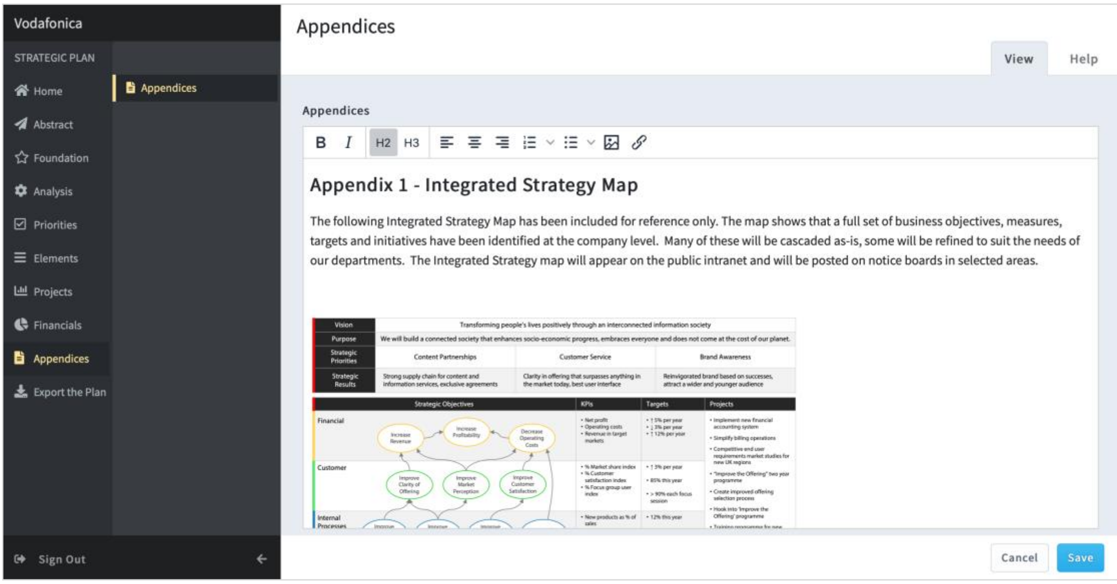
Click on **Add New Item +** at the top of the sub-menu and fill in the details. Below is an example of a completed Financial section:



Notice that the financial elements are the same as the project elements.

Appendices

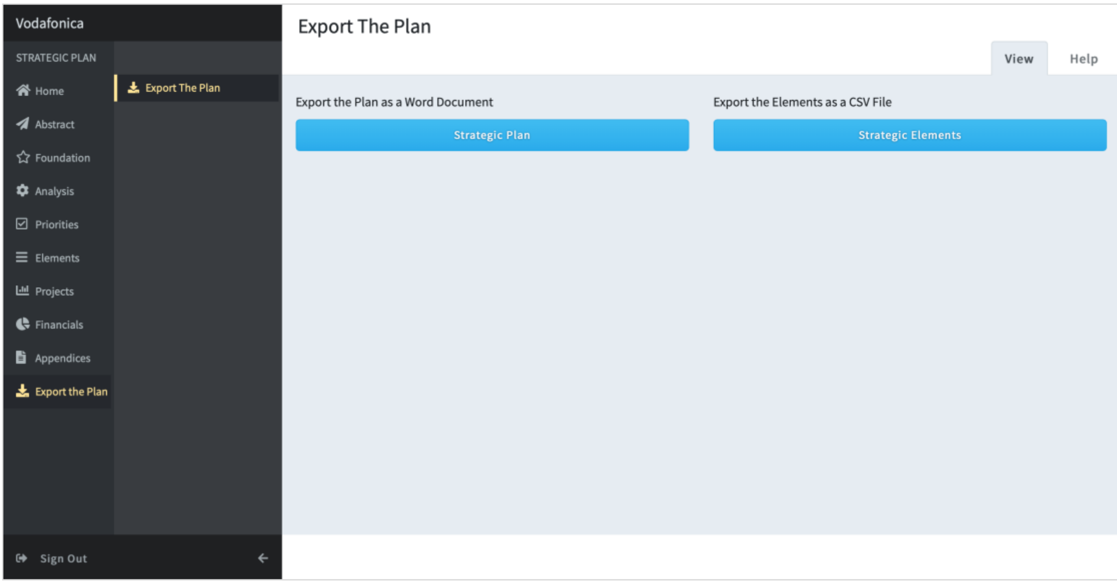
The Appendices section includes a single free form text area. You can add anything you like to the Appendix. In this example a heading, text and an image has been added:



Export the Plan

Strategic Plan

You can export the plan at any stage. Even on entry to the application. In fact, we recommend the first thing you do is fill in your details in the Document Setup sub-menu and export the plan. That way you will see what the application provides and what you need to add. Just click on the big blue Strategic Plan button.



Strategic Elements

If you use a Key Performance Indicator (KPI) management system like QuickScore, you can also export your Strategic Elements into a spreadsheet format. Click on the big blue Strategic Elements button.

The spreadsheet will be constructed in the exact format required to build a scorecard in QuickScore. It will not contain all of the information you need but it will give you a really good kickstart!

Thank You

Thank you for using the document focus strategy plan generator, we hope you find it useful. If you have any questions or need help, please feel free to contact us via the Intrafocus Helpdesk page at any time.