



# COMPLETE GUIDE TO EXTENDING YOUR PLAN

## Extend Your Plan into the New Year

We created this guide to help your organization extend and refresh your strategic plan for the new planning year.

### This download includes:

- Steps for the strategy leader to initiate the plan extension process.
- Steps for department managers and team members to extend your plan.

# Plan Extension Guide Overview

## PLAN LEVEL AND OWNER

## EXTENSION STEPS

## PURPOSE

### Corporate Annual Goals x.x

Owner: Strategy Leader

#### Step 1A: Close Out & Step 1B: Carry Forward

Close out your annual corporate goals and decide which will extend into the next planning year.

*Review annual corporate goals from your current plan.*

#### Step 2: Request Close Out & Carry Forward

Use the automated functionality to request owners close out or carry forward their supporting children goals.

*Prompts your organization to review their supporting goals & actions.*

#### Step 3: Create New Goals

Create new annual corporate goals for the year and engage your team to create new supporting children goals.

*Creates new corporate goals & supporting children for the new year.*

### Department Annual Goals x.x.x

Owner: Department Manager

#### Step 1A: Close Out & Step 1B: Carry Forward

Follow prompts from your strategy leader to close out & carry forward your supporting department goals.

*Review department goals from your 2018 plan.*

#### Step 2: Create New Goals

Follow the prompts directed from your strategy leader to create new supporting department goals.

*Create new department goals & supporting children for the new year.*

### Individual Goals x.x.x.x

Owner: Team Members

#### Step 1A: Close Out & Step 1B: Carry Forward

Follow the prompts directed from your strategy leader to close out & carry forward your supporting department goals.

*Reviews department goals from your 2018 plan.*

#### Step 2: Create New Goals

Follow the prompts directed from your strategy leader to create new supporting department goals.

*Creates new department goals & supporting children for the new year.*



## STRATEGY LEADER: GUIDE TO EXTENDING YOUR PLAN INTO THE NEW YEAR

As the strategy leader, you are responsible for initiating the process to extend your strategic plan into the new year. You do this by reviewing and preparing annual corporate level goals (x.x). We've created the 3Cs to help guide you through extending your plan into 2019: **Carry Forward**, **Close Out**, and **Create New**. Here's a brief overview of the process:

### STEP 1: Close Out & Carry Forward Annual Corporate Goals

**1A: Close out annual corporate goals by updating the last period of actuals.**

**1B: Carry Forward annual corporate goals by extending them into the next year.**

The first step in the process is closing out your goals from 2018 and deciding which you will carry into your 2019 plan.

***Purpose:** Reviews annual corporate goals from your 2018 plan.*

### STEP 2: Request Your Team Members Close Out/Carry Forward

**Request your team members close out or carry forward supporting goals.**

Use the automated functionality to request your team members to close out or carry forward their supporting children goals.

***Purpose:** Reviews annual department and team member goals from your 2018 plan.*

### STEP 3: Create New Annual Corporate Goals

**Create & Refine New Annual Corporate Goals**

**Request New! Supporting Goals**

With the new year on the horizon, the last step in preparing your plan is creating new annual goals for your 2019 plan.

***Purpose:** Create new goals for your 2019 plan*

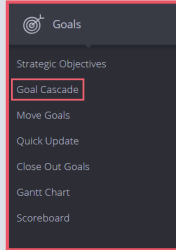
## STEP 1A: Close Out Annual Corporate Goals

The first step in the process is closing out your annual corporate goals from your 2018 plan.

**Purpose:** Reviews annual corporate goals from your 2018 plan.

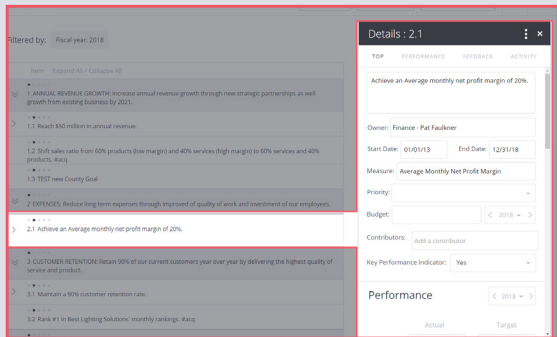
1

Go to the Goals > Goal Cascade section in the OnStrategy Platform.



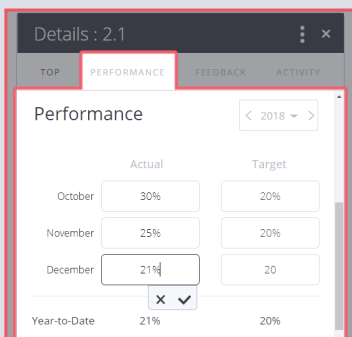
2

Select the annual goal you would like to close out. Click on it anywhere to open the “Details” tray.



3

Click the “Performance” tab in the details tray. Provide an update to the last period.



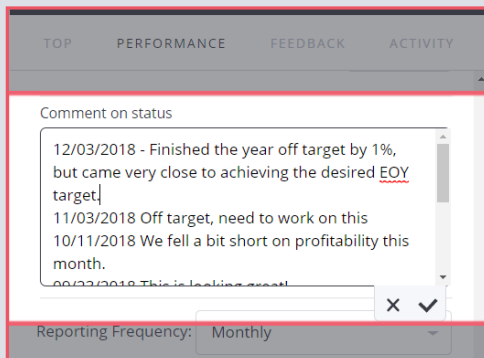
4

If Auto-Status is off, select the appropriate status. If Auto-Status is on, it will update automatically once you've entered your last period of actuals.



5

Add a comment with a date.



6

Keep the details tray open and move on to Step 1B.

## STEP 1B: Carry Forward Annual Corporate Goals

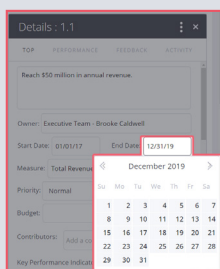
After closing out the goal, decide if you want to carry forward the corporate goal into 2019. **Goals we recommend extending into the next year include:**

- Multi-year goals with strong performance measures, indicating the progress of your strategy over the life of the plan.
- Goals that are not completed and need to be extended into the next planning year.
- An ongoing process goal continuing into the next year.
- Projects that aren't complete.

**If you wish to carry forward an annual corporate goal into the next planning year, complete the following:**

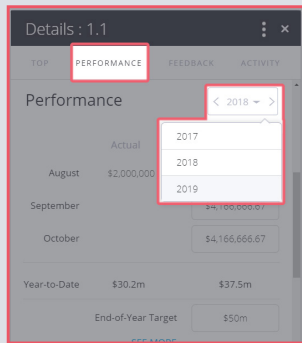
1

With the detail tray still open from Step 1A, click the "Top" section to find the end date. Change the end date to the appropriate time in the next planning year.

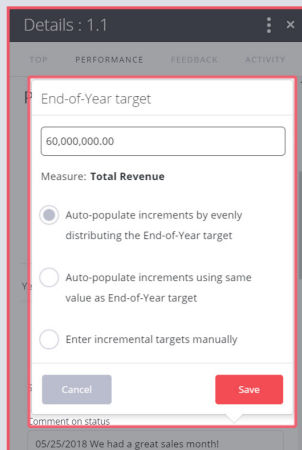


**2**

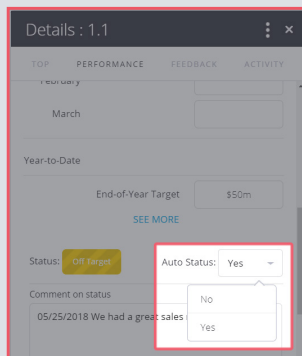
Click the “Performance” tab in the top navigation. Once you are in the performance section, use the drop down to select the next planning year. In this instance, it is the “2019” year.

**3**

Add an end-of-year target to the next planning year. Select how you would like incremental targets distributed.

**4**

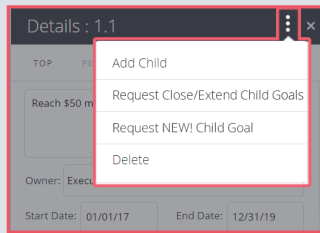
Turn Auto Status OFF if you prefer to manually select your status from the drop down; or leave it ON if you prefer automation based on current performance against target.



## STEP 2: Request Carry Forward of Supporting Children Goals

**Purpose:** Prompts your organization to review their supporting goals & actions.

- Using the 3-dot navigation in the top right hand of the details tray, select “Request Close/Extend Child Goals”. The platform will notify all child goal owners they need to close out and carry forward their supporting goals. For example, if you are carrying forward your corporate goal 1.1, the functionality will notify the owners the children goals 1.1.1, 1.1.2, and 1.1.3 they also need to close out and carry forward their goals in your 2019 plan.



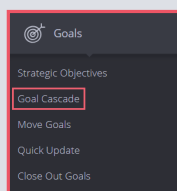
- Close the details tray and repeat the process until all annual corporate goals (x.x) have been closed out, carried forward, and all children goal owners have been notified to complete the same process.

## Step 3: Create New Goals

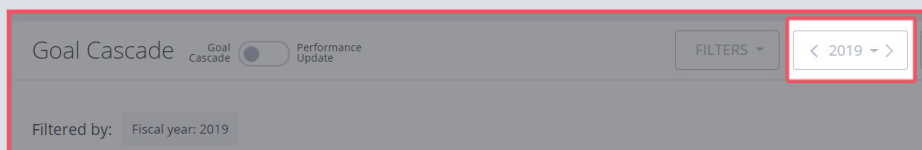
With the new year on the horizon, the last step in preparing your plan is creating new annual goals for your 2019 plan.

**Purpose:** Create new goals for your 2019 plan.

- Go to the Goals > Goal Cascade section in the OnStrategy Platform.

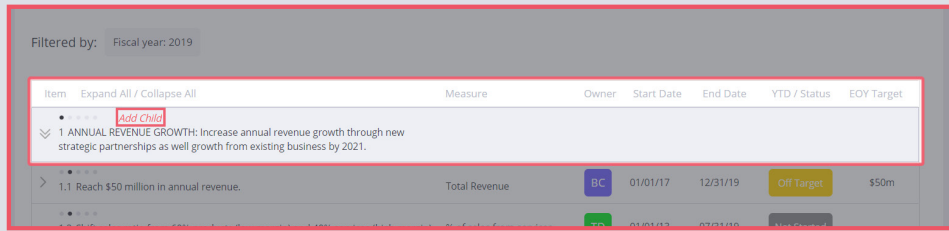


- Filter the page to show 2019 goals.

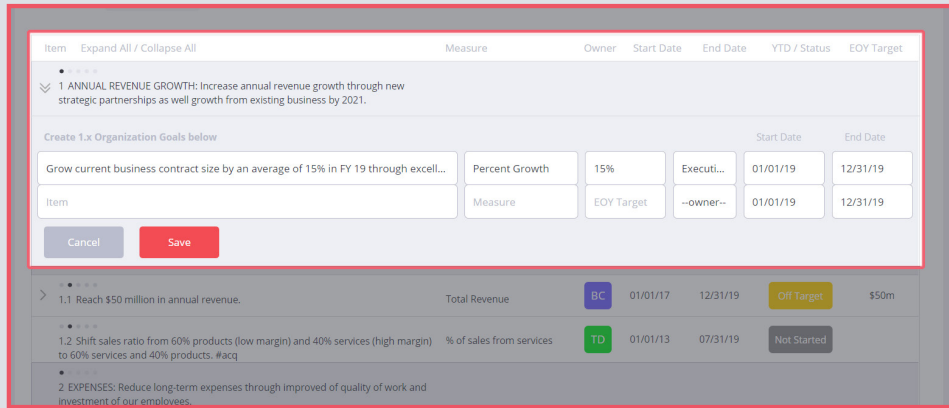


**3**

Select the Strategic Objective for which you would like to add an annual corporate goal. Hover above the goal description to find and select the “Add Child” function.

**4**

Type the goal's description, measure, EOY target, add an owner, and select a start- and end-date.

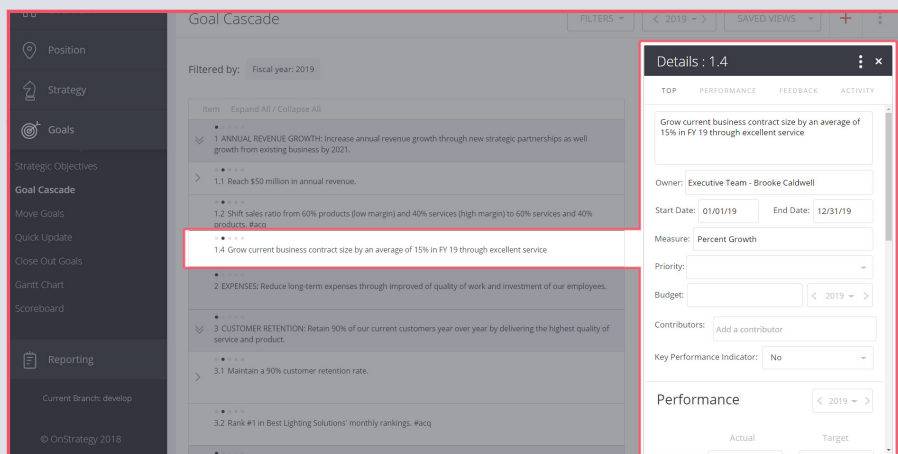
**5**

Repeat the process until you've added all the new annual corporate goals you need.

*Once you've created your goals, use the following steps to refine them further:*

**1**

Select the annual goal you want to refine. Click on the goal to open the “Details” tray.





**3**

Select if the Goal should be a KPI. If it is, select “Yes”.

Budget: < 2019 >

Contributors: Finance - Pat Faulkner  
Operations - Bobby Joyce

Key Performance Indicator: No

Performance: No  
Yes

**4**

Click the “Performance” tab in the top navigation.

Details : 1.4

TOP PERFORMANCE FEEDBACK ACTIVITY

Performance < 2019 >

	Actual	Target
January		2%
February		3%
March		4%

**5**

If you haven't already done so, add a 2019 end-of-year target. Select how you would like incremental targets distributed.

Details : 1.4

TOP PERFORMANCE FEEDBACK ACTIVITY

End-of-Year target

15.00

Measure: Percent Growth

☒ Auto-populate increments by evenly distributing the End-of-Year target

☐ Auto-populate increments using same value as End-of-Year target

☐ Enter incremental targets manually

Cancel Save

**6**

Turn Auto Status OFF if you prefer to manually select your status from the drop down; or leave it ON if you prefer automation based on current performance against target.

Year-to-Date

End-of-Year Target 15%

SEE MORE

Status: Not Started

Auto Status: Yes

Comment on status

Add a comment

No  
Yes

**7**

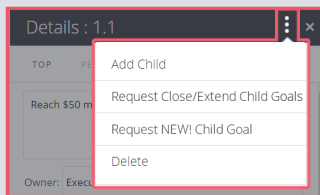
Repeat the process until you've refined all your goals.

## Request New Supporting Children Goals

Using the 3-dot navigation above to “Request New Child Goals” will notify your identified team members to create new supporting children goals for your 2019 plan. Team members will be both notified via email and the new notifications icon in the top right-hand navigation. For example, if you create a new goal 1.1, you can notify John Smith, Jane Doe, and Jimmy Chang they need to add supporting children goals into your 2019 plan. ***To do this, take the following steps:***

1

Using the 3-dot navigation in the top right hand of the details tray, select “Request New! Children Goals.” Select team members whom need to add supporting goals and actions to the annual parent goal. Selecting this option will notify all goal owners they need to create new supporting children goals.



2

Close the details tray and repeat the process until your annual corporate goals have been refined and you have notified your team members they need to create new children goals to support your annual plan. Identified members will be notified via email if you selected that option. Additionally, a new notification will appear in the navigation informing the new owner of the request.

## 2 Create New Goals & Actions

A) Navigate to the Goal Cascade page in the Goals section of the left-hand navigation.

**B)** Filter the page to show 2019 goals,

- c) To add a goal, hover over the goal description and select "Add a Child".

- c) Tab through the fields to create the new goal:

- 
- The screenshot displays the 'Goal Cascade' application interface. At the top, there's a header with the title 'Goal Cascade', a toggle for 'Performance Update', and buttons for 'FILTERS', '2019', and 'SAVED VIEWS'. Below the header, a filter is set to 'Fiscal year: 2018'. The main content area shows a goal hierarchy. A goal titled '1.1.1 REVENUE GROWTH: Increase annual revenue growth through new strategic partnerships as well growth from existing business by 2021.' is expanded, showing a sub-goal '1.1 Reach \$15 million in annual revenue.' The detailed view of this sub-goal is shown below, with a table of metrics and dates. The table has columns for 'Measure', 'Owner', 'Start Date', 'End Date', 'YTD / Status', and 'EOY Target'. The first row shows 'Revenue Achieved' with a value of '\$15,000,000' and a status of 'Recut...'. The second row shows 'Revenue' with a value of '\$15,000,000' and a status of 'Recut...'. The table also includes 'Start Date' and 'End Date' columns with values '01/01/19' and '12/31/19'. At the bottom, there are 'Cancel' and 'Save' buttons.
- Goal Cascade Goal Cascade Performance Update FILTERS 2019 SAVED VIEWS
- Filtered by: Fiscal year: 2018
- Item Expand All / Collapse All Measure Owner Start Date End Date YTD / Status EOY Target
- 1.1.1 REVENUE GROWTH: Increase annual revenue growth through new strategic partnerships as well growth from existing business by 2021.
- 1.1 Reach \$15 million in annual revenue. Total Revenue BC 01/01/17 12/31/19 \$34.2m \$50m
- Create 1.1.x Department Goals below
- | Measure   | Owner | Start Date | End Date |
|---|-------|------------|----------|
| 1.1.1.1 Develop strategic partnerships with 3 national organizations over the next 12 months  | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.2 Develop strategic partnerships with 3 national organizations over the next 12 months  | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.3 Develop strategic partnerships with 3 national organizations over the next 12 months  | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.4 Develop strategic partnerships with 3 national organizations over the next 12 months  | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.5 Develop strategic partnerships with 3 national organizations over the next 12 months  | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.6 Develop strategic partnerships with 3 national organizations over the next 12 months  | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.7 Develop strategic partnerships with 3 national organizations over the next 12 months  | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.8 Develop strategic partnerships with 3 national organizations over the next 12 months  | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.9 Develop strategic partnerships with 3 national organizations over the next 12 months  | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.10 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.11 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.12 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.13 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.14 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.15 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.16 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.17 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.18 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.19 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.20 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.21 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.22 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.23 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.24 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.25 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.26 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.27 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.28 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.29 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.30 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.31 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.32 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.33 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.34 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.35 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.36 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.37 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.38 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.39 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.40 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.41 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.42 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.43 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.44 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.45 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.46 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.47 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.48 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.49 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/17   | 12/31/17 |
| 1.1.1.50 Develop strategic partnerships with 3 national organizations over the next 12 months | BC    | 01/01/     |          |

- D) Once you've created your new goal, click on it to open the "Details" tray.

1. In the “Top” section, click the 3-dot menu.
2. Select “Request NEW! Child Goals” to notify team members to create new supporting children goals for the next planning year.

Details : 1.1

TOP

PERFORMANCE

FEEDBACK

ACTIVITY

Owner:

Executive Team - Brooke Caldwell

B

Start Date:

01/01/17

End Date:

12/31/19

Measure:

Total Revenue

Priority:

Budget:

< 2018 >

Contributors:

Add a contributor

Key Performance Indicator:

Yes

C

Performance

1

< 2019 >

Actual

Target

January

February

March

Year-to-Date

2

End-of-Year Target

\$50m

**Details : 1.1.10**

TOP Add Child

Achievement service co

Request NEW! Child Goal

Request Close/Extend Child Goals

Delete

Owner: Ex

Start Date: 01/01/19 End Date: 12/31/19

Measure: Revenue Achieved

Priority:



## DEPARTMENT MEMBER & TEAM MEMBER: GUIDE TO EXTENDING YOUR PLAN INTO THE NEW YEAR

As the department manager or team member, you are responsible for continuing the process initiated by your strategy leader to extend the department and team level portion (x.x.x and beyond) of your 2019 strategic plan. We've created the 3Cs to help guide you to extend your 2019 plan: **Carry Forward, Close Out, and Create New**. Here's a brief overview of the process:

### STEP 1: Close Out & Carry Forward Goals

1A: Close out annual goals not extending into the new year.

1B: Carry Forward annual goals extending into the next year.

Follow the prompts given by your strategy leader to close out identified supporting goals at the end of 2018 and carry forward your supporting goals that need to continue in 2019.

**Purpose:** *Reviews department and individual goals from your 2018 plan.*

### STEP 2: Create New Annual Corporate Goals

Create & Refine New Department & Team Goals

Request New Supporting Goals

With the new year on the horizon, your strategy leader will request that you create new supporting children goals in your 2019 plan.

**Purpose:** *Create new goals for your 2019 plan.*

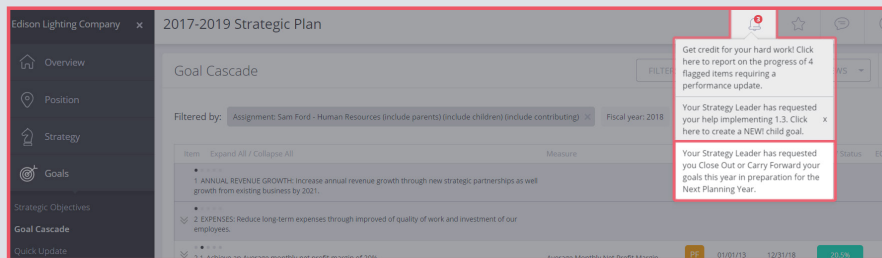
## STEP 1A: Close Out Goals

The first step in the process is following the prompts given by your strategy leader to close out your 2018 goals and assess which goals you want to carry into your 2019 plan.

**Purpose: Reviews annual department & team goals from your 2018 plan.**

1

Open the notifications drop down from the icon in the top right-hand navigation. Click on the notification for a goal you've been notified to close out or extend. This will open the Close Out Goals page that will be populated with goals you need close out or carry forward.



2

For each goal, select the close out checkbox.

Description	End Date	YTD Status	EDY Target	Close Out 2018	Carry Forward into 2019
1 ANNUAL REVENUE GROWTH: Increase annual revenue growth through new strategic partnerships as well growth from existing business by 2021.					
1.1 Reach \$50 million in annual revenue.	12/31/19	\$34,377,000	\$50,000,000	<input type="checkbox"/>	<input type="checkbox"/>
1.1.1 Develop strategic partnerships with 3 national organizations over the next year.	12/31/19	24	24	<input type="checkbox"/>	<input type="checkbox"/>
1.1.1.3 Create a new targeted partnership program during this year to help gain new strategic partnerships.	12/31/18	90	100	<input type="checkbox"/>	<input type="checkbox"/>
1.1.2 Achieve average Internal Rate of Return of 20% for all new projects.	12/31/18	20.36%	20%	<input type="checkbox"/>	<input type="checkbox"/>
1.1.5 Maintain \$20 million in recurring revenue from existing client base.	12/31/18	\$18,000,000	\$20,000,000	<input type="checkbox"/>	<input type="checkbox"/>
1.1.6 Reach \$10 million in new revenue from existing clients.	12/31/18	\$6,200,000	\$10,000,000	<input type="checkbox"/>	<input type="checkbox"/>
2 EXPENSES: Reduce long-term expenses through improved quality of work and investment of our employees.					
2.1 Achieve an Average monthly net profit margin of 20%.	12/31/18	21.50%	20%	<input type="checkbox"/>	<input type="checkbox"/>
2.1.2 Reduce Cost of Goods Sold by 3% through improved supply chain efficiency.	12/31/18	5%	3%	<input type="checkbox"/>	<input type="checkbox"/>
2.1.2.1 Achieve 2% reduction in cost for inputs through upcoming supplier negotiations.	12/31/18	1.76%	2%	<input type="checkbox"/>	<input type="checkbox"/>
6 PROCESS IMPROVEMENT: Improve processes companywide in order to minimize costs.					

3

In the modal, type the projected result for the last period, select a status, and add a date-stamped comment.

Close Out		
Date:	Target:	Actual:
Oct 2018	8.33	10
Date:	Target:	Actual:
Nov 2018	8.33	9
Date:	Target:	Actual:
Dec 2018	8.33	10
Status: <span>On Target</span>		
Comments: 11/19/2018 - We hit our goal for the end of the year, but we will continue working on this goal		
Cancel		Save

4

Continue this process until all of your goals have been closed out.

## STEP 1B: Carry Forward Goals

After closing out your goals for the current planning year, you need to decide if you will be carrying forward these goals into the next planning year. **To carry forward goals, complete the following:**

1

Goals needing to be carried forward will be indicated by the end-date of the included parent goal. If the parent goal has an end-date during the next year, you need to carry forward your goal. To carry forward the goal, select the “Carry Forward” checkbox and select “Yes” when asked if you want to carry forward the goal. If the parent goal is ending in the current planning year, select “No” when asked if you want to carry forward the goal.

Description	End Date	YTD Status	EOY Target	Close Out 2018	Carry Forward into 2019?
1 ANNUAL REVENUE GROWTH: Increase annual revenue growth through new strategic partnerships as well growth from existing business by 2021.					
1.1 Reach \$50 million in annual revenue.	12/31/19	\$30,800,000	\$50,000,000		
1.1.1 Develop strategic partnerships with 3 national organizations over the next year.	12/31/19	45	24		
1.1.1.3 Create a new targeted partnership program during Q2 of this year to help gain new strategic partnerships	07/01/18	148	100	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1.1.1.5 Maintain \$20 million in recurring revenue from existing client base.	12/31/18	43,000,000	20,000,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1.1.1.6 Reach \$10 million in new revenue from existing clients	12/31/18	8,500,000		<input checked="" type="checkbox"/>	<input type="checkbox"/>
1.1.2 Achieve average Internal Rate of Return of 20% for all new projects.	12/31/18	20.33%	20%	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 EXPENSES: Reduce long-term expenses through improved of quality of work and investment of our employees.					

2

After selecting yes, the carry forward modal will appear. In the modal, select a new future end-date, a new end-of-year target, and select if you want to carry forward the performance of that goal or start new performance from scratch.

<p>1 ANNUAL REVENUE GROWTH: Increase annual revenue growth through new strategic partnerships as well growth from existing business by 2021.</p> <p>1.1 Reach \$50 million in annual revenue.</p> <p>1.1.1 Develop strategic partnerships with 3 national organizations over the next year.</p> <p>1.1.1.3 Create a new targeted partnership program during this year to help gain new strategic partnerships</p> <p>1.1.2 Achieve average Internal Rate of Return of 20% for all new projects.</p> <p>1.1.5 Maintain \$20 million in recurring revenue from existing client base.</p> <p>1.1.6 Reach \$10 million in new revenue from existing clients.</p> <p>2 EXPENSES: Reduce long-term expenses through improved of quality of work and investment of our employees.</p> <p>2.1 Achieve an Average monthly net profit margin of 20%.</p> <p>2.1.2 Reduce Cost of Goods Sold by 3% through improved supply chain efficiency.</p> <p>2.1.2.1 Achieve 2% reduction in cost for inputs through upcoming supplier negotiations.</p>	<p>12/31/18</p> <p>12/31/18</p> <p>12/31/18</p> <p>12/31/18</p> <p>12/31/18</p> <p>12/31/18</p> <p>12/31/18</p> <p>12/31/18</p> <p>12/31/18</p> <p>12/31/18</p> <p>12/31/18</p>
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**Carry Forward**

Current End Date: 12/31/18      2018 End-of-Year Target: 100

New End Date: 12/31/2019      2019 End-of-Year Target: 120

Do you want to carry forward 2018 performance?

☐ Yes, carry forward performance.

☒ No, start from scratch.

Cancel      Save

3

Continue this process for all of your goals until each has been extended or not. When finished, click the “I’m done” toggle.

2.1.2.1 Achieve 2% reduction in cost for inputs through upcoming supplier negotiations. <td>12/31/18</td> <td>1.50%</td> <td>2%</td> <td><input checked="" type="checkbox"/></td>	12/31/18	1.50%	2%	<input checked="" type="checkbox"/>
6 PROCESS IMPROVEMENT: Improve processes companywide in order to minimize costs.				
6.1 Save \$500,000 per year through business process improvements.	12/31/19	\$450,000	\$500,000	
6.1.1 Maintain a decreased order fulfillment time of 33%	12/31/19	117%	33%	<input checked="" type="checkbox"/>

I'm not done ☐ I'm done

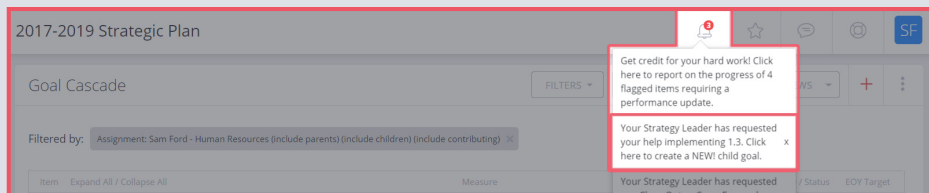
## Step 3: Create New Goals

With the new year on the horizon, your strategy leader will request that you create new supporting children goals in your 2019 plan.

**Purpose: Create new goals for your 2019 plan.**

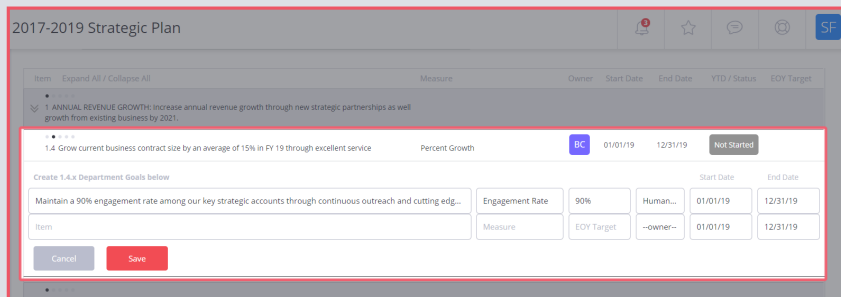
1

Open the notifications drop down from the icon in the top right-hand navigation. Click on the notification for a goal you've been notified to add a "New! Supporting Child Goal" to. This will open the field to add a new supporting goal.



2

Input the goal description, measure, EOY target, owner, and start- and end-dates.



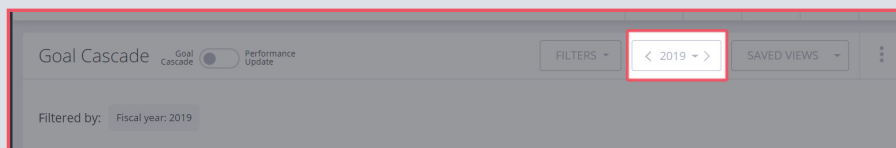
3

Repeat the process until you've added all the new annual department or individual goals as directed by your strategy leader.

*Once you've created your goals, use the following steps to refine them further:*

1

Filter the page to show 2019 goals.



2

Select the annual goal you would refine. Click on the goal to open the "Details" tray.



**3**

Add any additional contributors you would like to the goal.

Details : 1.4

TOP PERFORMANCE FEEDBACK ACTIVITY

Owner: Executive Team - Brooke Caldwell

Start Date: 01/01/19 End Date: 12/31/19

Measure: Percent Growth

Priority: ▼

Budget: < 2019 >

Contributors: Finance - Pat Faulkner ×

Key Performance Indicators: PF Finance - Pat Faulkner

Performance: BJ Operations - Bobby Joyce

TD Marketing - Terry Dreiser

**4**

Click the "Performance" tab in the top navigation.

Details : 1.4

TOP **PERFORMANCE** FEEDBACK ACTIVITY

Performance < 2019 >

	Actual	Target
January	<input type="text"/>	2%
February	<input type="text"/>	3%
March	<input type="text"/>	4%

Year-to-Date

**5**

If you haven't already done so, add a 2019 end-of-year target. Select how you would like incremental targets distributed.

Details : 1.4

TOP PERFORMANCE FEEDBACK ACTIVITY

End-of-Year target

Measure: **Percent Growth**

☒ Auto-populate increments by evenly distributing the End-of-Year target

☐ Auto-populate increments using same value as End-of-Year target

☐ Enter incremental targets manually

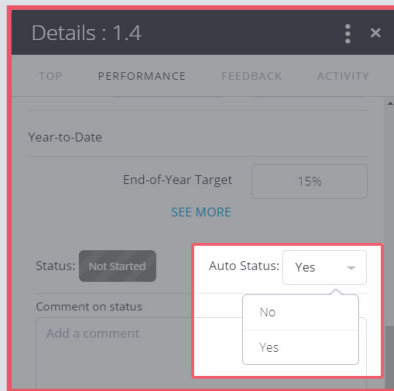
Cancel Save

Comment on status



**6**

Turn Auto Status OFF if you prefer to manually select your status from the drop down; or leave it ON if you prefer automation based on current performance against target.



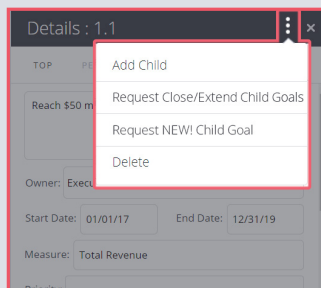
## Request New Supporting Children Goals

Using the 3-dot navigation above to “Request New! Child Goals” will notify your identified team members to create new supporting children goals for your 2019 plan. Team members will be both notified via email and the new notifications icon in the top right-hand navigation.

For example, if create a new goal 1.1, you can notify John Smith, Jane Doe, and Jimmy Chang they need to add supporting children goal into your 2019 plan. ***To do this, complete the following:***

**1**

Using the 3-dot navigation in the details tray, select “Request Children Goal.” Select team members whom need to add supporting goals and actions to the annual parent goal. Selecting this option will notify all goal owners they need create new supporting children goals.

**2**

Close the details tray and repeat the process until your annual corporate goals have been refined and you have notified your team members they need to create new children goals to support your annual plan. Identified members will be notified via email if you selected that option. Additionally, a new notification will appear in the navigation informing the new owner of the request.

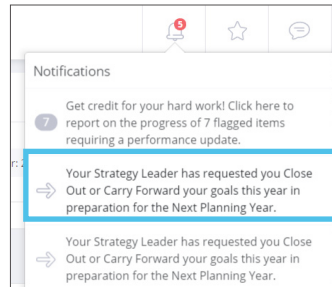
## 1 Close Out & Carry Forward Your Goals

Open the notifications drop down from the icon in the top right-hand navigation. Click on the notification for a goal you've been notified to close out or extend in the new year. This will open the Close Out Goals page that will be populated with goals you need to close out or carry forward.

### Step 1A: Close Out Your Goals

A) As directed by your strategy leader, close out your goals by completing the following steps:

1. To close out the goal, select the Close Out check box.
3. In the modal, type the result for the last period, select a status, and add a date-stamped comment.
4. Continue this process until all goals are closed out.



A

1.1.1 Develop strategic partnerships with 3 national organizations over the next year.	12/31/19	24	24	1	<input type="checkbox"/>
1.1.1.3 Create a new targeted partnership program during this year to help gain new strategic partnerships	12/31/18	80	100		<input type="checkbox"/>
1.1.2 Achieve average Internal Rate of Return of 20% for all new projects.	12/31/18	20.38%	20%		<input type="checkbox"/>
1.1.5 Maintain \$20 million in recurring revenue from existing client base.	12/31/18	\$15,000,000	\$20,000,000		<input type="checkbox"/>
1.1.6 Reach \$10 million in new revenue from existing clients.	12/31/18	\$6,200,000	\$10,000,000		<input type="checkbox"/>
2 EXPENSES: Reduce long-term expenses through improved quality of work and investment of our employees.					<input type="checkbox"/>

### Step 1B: Carry Forward Your Goals

B) As directed by your strategy leader, carry forward your goals by completing the following steps:

1. If the parent goal has an end-date during 2019, you need to carry forward the child goal you own.
2. To carry forward the goal, select the Carry Forward check box and then select Yes. If you do not want to carry forward the goal, select No to close out the goal.
3. If you are extending the goal, the next modal will prompt you to create a new end-date, add a new end-of-year target, and select if you would like performance to be carried forward into the next planning year or start the new year from scratch.
4. Continue this process for all goals until all goals are carried forward or marked as not extending.

B

1.1.1 Develop strategic partnerships with 3 national organizations over the next year.	12/31/19	45	24	2	<input type="checkbox"/>
1.1.1.3 Create a new targeted partnership program during Q2 of this year to help gain new strategic partnerships	07/01/18	148	100		<input checked="" type="checkbox"/>
1.1.1.5 Maintain \$20 million in recurring revenue from existing client base.	12/31/18	\$3,000,000	\$20,000,000		<input checked="" type="checkbox"/>
1.1.1.6 Reach \$10 million in new revenue from existing clients	12/31/18	\$8,500,000			<input checked="" type="checkbox"/>
1.1.2 Achieve average Internal Rate of Return of 20% for all new projects.	12/31/18	20.33%	20%		<input checked="" type="checkbox"/>
2 EXPENSES: Reduce long-term expenses through improved quality of work and investment of our					<input type="checkbox"/>

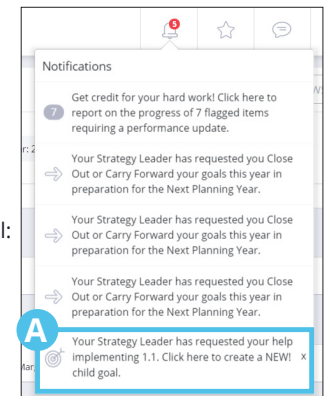
## 2 Create New Goals & Actions

A) Open the notifications drop down from the icon in the top right-hand navigation. Click on the notification for a goal you've been notified to add a "New! Supporting Child Goal" to. This will open the field to add a new supporting goal.

B) Filter the page to show 2019 goals,

C) Tab through the fields to create the new goal:

1. Type the goal description.
2. Input the measure.
3. Input the EOY target.
4. Assign the owner.
5. Select start- and end-dates.
6. Tab through to the next line to add additional children goals to the parent.



B

Goal Cascade

Filtered by: Fiscal year: 2018

Item	Expand All / Collapse All	Measure	Owner	Start Date	End Date	YTD / Status	EOY Target
1 ANNUAL REVENUE GROWTH: Increase annual revenue growth through new strategic partnerships as well growth from existing business by 2021.							
1.1 Reach \$50 million in annual revenue.		Total Revenue	BC	01/01/17	12/31/19	\$34.2m	\$50m
Create 1.1.x Department Goals below							
1.1.1.6 Reach \$15 million realized revenue from net-new service contracts during FY19		Revenue Achieved		01/01/19	12/31/19		
		Measure	EOY Target	--owner--	01/01/17	12/31/19	

Cancel Save

D) Once you've created your new goal, click on it to open the "Details" tray.

1. In the "Top" section, click the 3-dot menu.
2. Select "Request NEW! Child Goals" to notify team members to create new supporting children goals for the next planning year.

