

### 1 Getting Started

Go to [www.OnStrategyHQ.com](http://www.OnStrategyHQ.com) and enter your login information

### 2 Setup Goals & Actions

A) Plan > Goals

Home Plan Performance Reports

B) Coordinate action by identifying who needs to do what, by user, to achieve organization goals

1: Plan levels 2: Parent goal 3: Plan perspectives  
4: Go back one level 5: Go up one level

**TIP: Think SMART when you develop your goals.**

**S**PECIFIC: Keep it simple, yet detailed

**M**EAURABLE: Start with #, \$, %, etc.

**A**CHIEVEABLE: Set a realistic target

**R**ESPONSIBLE: Ensure accountability by selecting an owner

**T**IME BOUND: Set a start and an end date

### 3 Manage Performance



Desktop

A) Go to **Performance > Track Performance**

B) Identify the goal you want to update

1. Choose a status
2. Update actual performance
3. Add a comment



Mobile

A) **Download the Mobile App**



- B) Login with your username and password
- C) Goals will be "flagged" when it's time for an update

1. Update actual performance
2. Choose a status
3. Add a comment

### 4 Review and communicate progress

A) Go to **Reports**

B) **Organizational, Department, and Team Reports** view the entire plan or user-specific progress

D) **The Dashboard** monitors real time performance of your strategy (Large and Multi-Team accounts)