OnStrategy

Strategic Planning Software Comparison

In this guide we will cover:

- ◆ **How do you know if you need Strategic Planning Software?**
- ◆ **How to compare strategic planning software.**
- ◆ **OnStrategy vs Excel**
- ◆ **OnStrategy vs. SmartSheet**
- ◆ **OnStrategy vs. Monday.com**
- ◆ **OnStrategy vs. Cascade**
- ◆ **OnStrategy vs. Clearpoint Strategy**
- ◆ **Software Comparison Grid**

Phone
Main: + 1 -775-747-7407

Online
Email: hello@onstrategyhq.com
Web: www.OnStrategyHQ.com

@OnStrategyHQ
@OnStrategyHQ
@OnStrategyHQ
@VirtualStrategist

How Do You Know If You Need Strategic Planning Software?

Strategic planning and action plans have a higher success rate when they're backed by a purpose-built application.

But in a sea of choices, how are you supposed to decide which strategic planning software or OKR app is best for your organization?

At OnStrategy, we are partial to our own application. We'd love to be your software vendor, but we would be providing a disservice if we didn't explain how to know if you need software, what to look for when choosing software, and how our approach to strategy and OKRs is different.

How Do You Know You Need Strategy or OKR Software?

Before deciding which application is the best for you, step back and make sure you need software. You know you need an application when you can check off each of the following criteria:

You have at least 10+ people in your OKR or strategic planning process.

If you have less than 10 people supporting your process [or in your entire organization], you might not see the benefit of implementing a dedicated tool to manage strategy and OKRs. Teams with less than 10 contributors could use a tool like Smartsheet to manage their process.

You are a committed CEO or have a committed CEO for the strategy execution cycle.
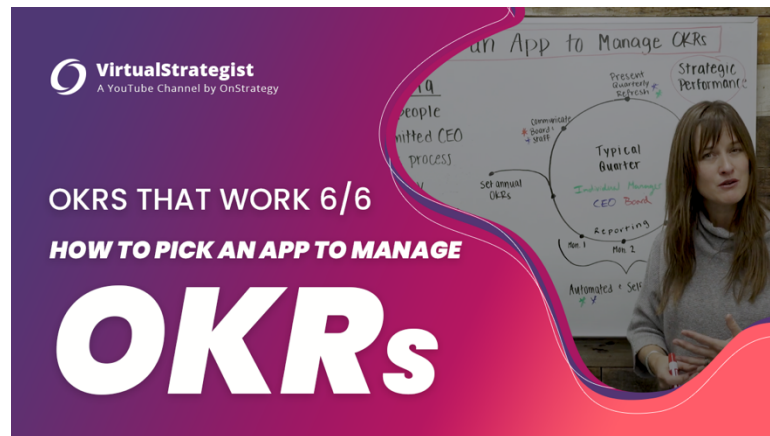
From our experience, having CEO buy-in is critical for success in planning and OKRs.

Your organization is committed to the strategy execution cycle.

Success with strategy and OKRs requires a commitment to managing OKRs quarterly. Without that commitment, it's an uphill battle to make this process work.

You need strategy and OKR reports.

Reporting is the most critical feature of any strategy software application. If you already have a tool that does OKR reporting, you might not see the full benefit of an OKR software platform.

Watch the Video Here

How to Compare Strategy and OKR Software

As you compare different offerings, we consider these factors critical during any OKR software evaluation.

✓ Apps should support OKRs and strategy out of the box.

An app should be purpose-built for creating and managing strategy and OKRs. The best apps build strategy right out of the box. If your selected OKR app needs endless customization and set-up, proceed with caution.

A good app makes it easy to align OKRs to your direction, provides guided inputs, and creates OKRs based on best practices.

✓ Your organization can self-report progress from anywhere.

Self-reporting isn't just a nice-to-have. It's mandatory! Your organization needs to be able to report results from anywhere.

One of the most significant pain points software applications solve is collecting results reporting. A good app makes it easy for your team to update their progress, select status, and see what needs their attention. **It needs to be fast, efficient, and painless to update OKRs.**

✓ **Alerts and notifications are a must-have.**

Everyone needs reminders from time to time. Your] app should have built-in notifications and reminders to nudge your team when it's time to provide a progress check-in.

✓ **Data should be easily managed, dynamic, and visualized in dashboards.**

Strategy and OKR data needs visualization to make it easier to see what is helping or hindering your performance as an organization. A good OKR application visualizes this data and makes it easy to digest.

✓ **Reports should be automated and effortless.**

To drive your daily, weekly, monthly, and quarterly OKR process, you need an application that provides a suite of reports to help you drive your 1:1s and strategic performance reviews.

They should be easy to access and take no input time to create. All of the data and results from your app should be present.

✓ **Reports should be automated and effortless.**

A good application includes board reporting capabilities to easily share your strategic priorities and performance to build a culture of transparency.

✓ **Bonus: An App that includes a dedicated software and OKR experts.**

Apps accomplish and automated a lot of the strategy execution cycle and OKR process. But what happens when you or your team get stuck?

Apps don't build strategy. People do. And you should have access to a person that can help. A good OKR app should have a dedicated expert to help you through the planning and implementation process.

OKR Software Comparisons

Using Excel to Manage OKRs vs OnStrategy

Best for: Organizations with limited budgets and less than 2 people managing the process.

Pros:

♦ Infinitely customizable

♦ Inexpensive/Free

Cons:

♦ Extremely Challenging to set up.

♦ Not purpose-built for strategy or OKRs

♦ No built-in templates for OKRs.

♦ No alerts or reminders.

♦ No visualizations or automated reports.

♦ No OKR expertise or support.

Why OnStrategy is Better

We built OnStrategy because managing strategy in Excel was a headache. Our app was purpose-built to support the strategy execution cycle process and solve the pain points of managing OKRs in static spreadsheets.

Using SmartSheet to Manage OKRs vs OnStrategy

Best for: Small organizations with 5 Or less contributors and limited budgets.

Pros:

♦ Easy templates to follow
♦ Infinitely customizable
♦ Inexpensive

Cons:

♦ Challenging to set up.
♦ Not purpose-built for strategy or OKRs.
♦ No alerts or reminders.
♦ No visualizations or automated reports.
♦ No OKR expertise or support.

Why OnStrategy is Better

OnStrategy is purpose-built for strategy and OKRs, automates reporting, makes it easy for your team to update their results, and we are here to support your entire process. SmartSheet is a great tool, but it's just a fancy spreadsheet.

Using Cascade to Manage Strategy vs OnStrategy

Best for: Enterprise or large organizations needing a dedicated OKR tool.

Pros:

♦ Easy to use and set up.

♦ Purpose-built for strategy and data management.

♦ Automated reporting and visualization.

♦ Many pre-built integrations connect your data.

Cons:

♦ Tech support only – no real planning expertise behind the app.

♦ The entire feature set costs extra.

♦ Built by engineers, not strategy experts.

Why OnStrategy is Better

OnStrategy provides every organization a dedicated expert strategist to help build and implement your OKR framework. From creation to execution, we're with you every step of the way. The best part? It is included in every software license.

Using Clearpoint to Manage Strategy vs. OnStrategy

Best for: Organizations who want an infinitely customizable strategic planning software and don't mind the heavy time investment to set it up.

Pros:

- ◆ Purpose-built for strategy and data management.
- ◆ Very customizable reporting and dashboards.
- ◆ Option for onboarding support

Cons:

- ◆ Very heavy to set up and use.
- ◆ No pre-built integrations for your other systems to support data or reporting.
- ◆ No expertise is available to build or roll out your plan.

Why OnStrategy is Better

OnStrategy provides a dedicated expert to help you build and roll out your plan. We give you an implementation-ready plan that's ready to go in the OnStrategy app. No setup, no configuration. Plus, we support you through the entire year for implementation.

Strategy Software Comparison Grid

Features	OnStrategy	cascade	ClearPoint Strategy	monday	smartsheet	Excel
Strategic Direction & Vision Statements - Aligns strategy to values, mission and vision statements.	✓	✓	—	—	—	—
Supports OKR Framework	✓	✓	✓	—	—	—
KPIs - Ability to OKRs as KPIs	✓	✓	✓	—	✓	✓
Collaboration - Allow users from multiple teams to collaborate for planning and implementation.	✓	✓	✓	✓	✓	—
Progress Tracking - Monitor the progress of all activities related to strategy and identify opportunities for improvement.	✓	✓	✓	✓	✓	✓
Notifications - Automated notifications keep teams focused on their strategy or OKRs	✓	✓	—	✓	—	—
Integrations - Integrates with other tools and communication apps.	✓	✓	—	✓	—	—
Reporting - Automates data and creates meeting-ready reports	✓	✓	✓	—	—	—
Board Reporting - Reports dedicated to communicating progress to your board of directors.	✓	—	✓	—	—	—
Onboarding - Provides built-in onboarding for adoption.	✓	✓	—	—	—	—
Dedicated, Real-World Expertise Included dedicated expert consultant with years of real-world experience creating and implementing OKR plans.	✓	—	—	—	—	—