

Strategy On a Page – Group Exercise Instructions

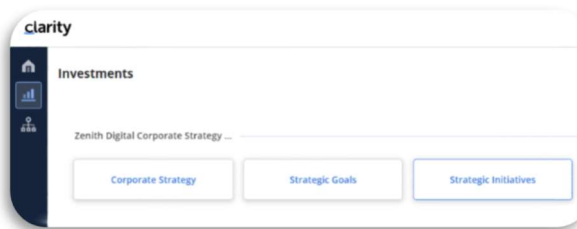
Your Group:

(See PowerPoint for login credentials)

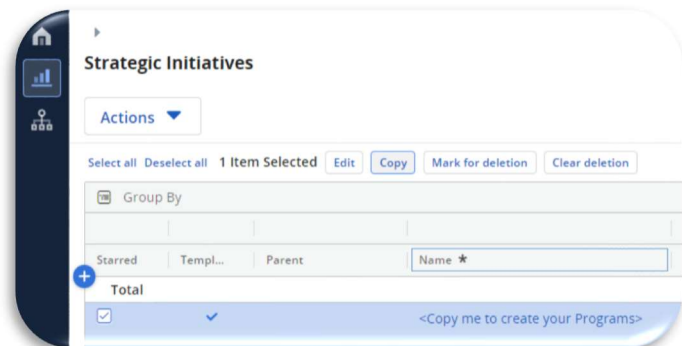
1. Login to the lab server: bit.ly/RegoU_Art2024 (case sensitive)
(<https://clarity-bat.regoconsulting.moventus.com/pm> or use QR code on the Powerpoint)
2. Create your Strategic Initiatives as follows, using the detailed instructions below:

Group	Parent Goal	Strategic Initiatives (Programs)	Descriptions
A	Accelerate Research and Development	Invest in emerging technologies	Prioritize research and development in areas such as artificial intelligence, machine learning, blockchain, and the Internet of Things.
		Foster innovation culture	Create a culture that encourages experimentation, risk-taking, and collaboration among employees.
B	Strengthen Customer Relationships	Enhance customer experience	Invest in customer relationship management (CRM) tools and processes to provide exceptional customer service.
		Gather customer feedback	Actively seek customer feedback to identify areas for improvement and tailor products and services to their needs.
C	Expand Global Footprint	Target new markets	Identify high-growth markets and develop strategies to enter and penetrate them effectively.
		Form strategic partnerships	Collaborate with local businesses and technology providers to establish a strong presence in new regions.
D	Foster a Sustainable Business Model	Reduce environmental impact	Implement sustainable practices and reduce the company's carbon footprint.
		Promote ethical sourcing	Ensure that all suppliers and partners adhere to ethical standards.
E	Invest in Talent Development	Attract top talent	Recruit and retain highly skilled professionals to drive innovation and growth.
		Provide ongoing training	Invest in employee development programs to enhance their skills and knowledge.

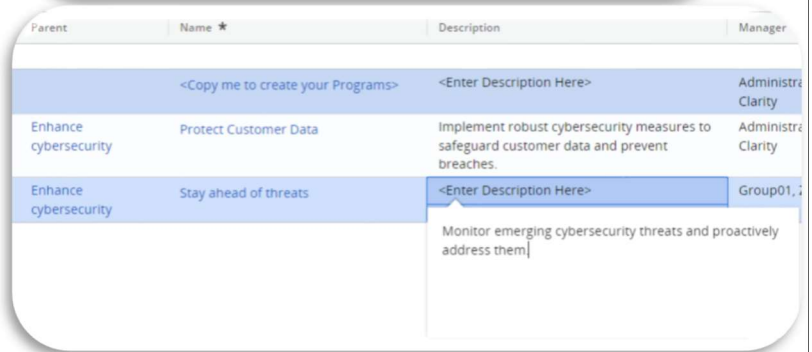
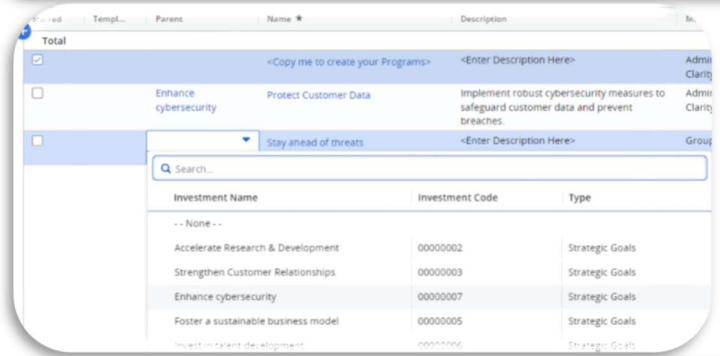
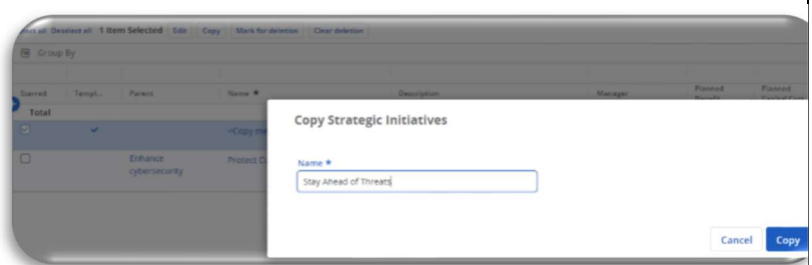
1. Navigate to Investments> Strategic Initiatives
(Ensure you are using the view "Standard View – RegoU")



2. Tick the box next to the existing <Copy me> initiative, then select **COPY**.



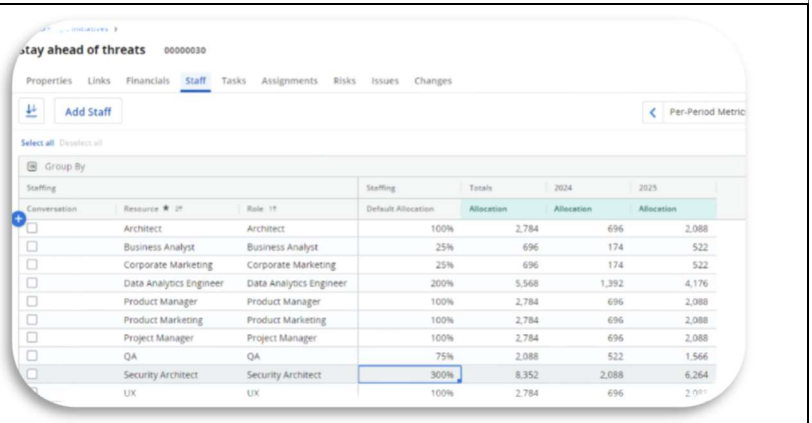
3. Create the two new Programs for your group. Assign each the correct Parent Goal and give it the Description shown in the table above.



Adjust the amounts for the Planned Benefit, Capital Cost, and Operating Cost at your own discretion (just for variance in data).

Planned Benefit	Planned Capital Cost	Planned Operating Cost
1,750,000	1,800,000	600,000
500,000	150,000	50,000
750,000	1,500,000	500,000
1,250,000	25,000	350,000

Open each of your newly created Programs and navigate to Staff. Make some adjustments to the Role default allocation %s (at your discretion)

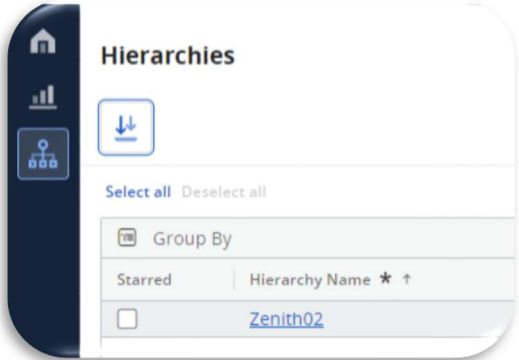
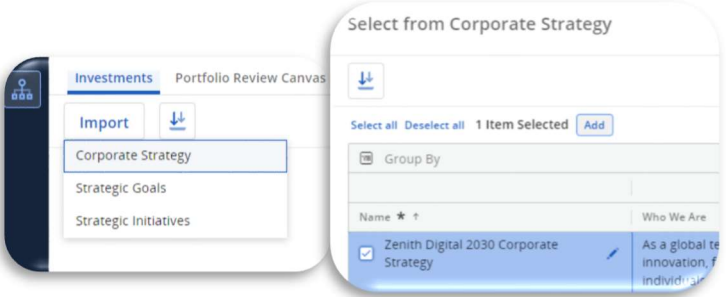
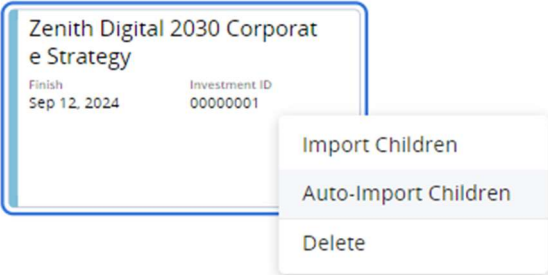





****DO NOT PROCEED TO THE NEXT STEP UNTIL ALL 5 GROUPS HAVE CREATED THEIR INITIATIVES****



3. Populate your assigned Hierarchy, as follows:

<p>1. Navigate to Hierarchies, and open your group's assigned Hierarchy (see PowerPoint)</p>	
<p>2. Import the Corporate Strategy CIT, "Zenith Digital 2030 Corporate Strategy".</p>	
<p>3. Right-Click the Zenith Digital Corporate Strategy tile and select "Auto-Import Children"</p> <p>Note that <u>after</u> all 5 groups have created their Initiatives, each Strategic Goal (level 2) should have 2 children (Strategic Initiatives, Level 3)</p>	
<p>4. Select "Edit Diagram". Locate any orphaned investments and drag a line from each of them to a Level 2 Strategic Goal of your choosing. When finished, click "Done".</p>	
<p>5. Navigate to the Portfolio Review Canvas tab and view your results (Feel free to review the other tabs as well) When all groups have completed these steps, the facilitators will refresh and display the PowerBI Dashboard</p>	