Initiatives - 1

Together with Scorecards, Dashboards and Reports **Initiatives** can be added into an Organisation container. First Click on the Briefcase icon and select an Organisation into which you want to add an **Initiative**.



The **Create Initiative** dialogue will appear. Give the Initiative a name and complete the Initiative overview details. Tasks/milestones are added in the next step. **Remember to click Save**

Brand Awareness Improvement Plan				0
Overview				Edit
Name	Туре			
Brand Awareness Improvement Plan	i Initiative			•
Description	Start Date		Due Date	
Associated to the Improve Brand Awareness objective, this plan is required to determine what set of actions will be undertaken over the next six months to improve our brand awareness	1/1/2017	31	6/29/2017	31
	Total Budget			
	25,000		\$	
	Advanced Options			

intrafocus

i Initiatives - 2

Click on Overview at the top of the screen to see what you Initiative looks like so far:



To add Tasks and Milestones to this Initiative (this is optional) click on Edit at the bottom of the Menu list and then on the **+ New Initiative Item** button (see previous page). Change the Type to **Task** or **Milestone** and complete the details.

Remember to click Save after each entry

intrafocus

Initiatives - 3

Once you Initiative is complete you can start to update the progress by clicking on the **Add Status Update** button in any of the Tasks or Milestones. This data will be automatically rolled up to the top view.

HISTORICAL PERFORMANCE			
DATE	PERCENT COMPLETE	BUDGET SPENT TO DATE	
Jan 6, 2017	20%	\$1.2K	P / 0
Jan 13, 2017	40%	\$2K	P / 1
Jan 20, 2017	60%	\$2.3K	P 🖊 🕆
Jan 23, 2017	80%	\$2.4K	P 🗡 🕆
12/15/2016	%	\$	Add

After the Tasks and Milestones and status update data has been added, the final Initiative might look something like this:

📋 International	Limited <	Brand Awareness Improvement Plan		☆ 0 b ×		
	Q Find	Overview		Edit		
Dashboards	Brand Awareness Improvement Plat Write Initial Plan Review Plan	Associated to the Improve Brand Awareness objective, this plan is required to determine what set of actions will be undertaken over the next six months to improve our brand awareness	PROJECTED SCHEDULE	PROJECTED TOTAL BUDGET		
	Armend Plan Plan Distribute Plan for Rollout Roll-out Programme Checkpoint Review *	total buoget \$25K buoget remaining \$25K	31			
	Completion Review	START DATE Jan 1, 2017	On schedule Projected End Date: Jun 29, 2017			
		DUE DATE Jun 29, 3017 HISTORICAL PERFORMANCE GRAPH TABLE VIEW Add Status Update				
		\$25K \$20K		100%		
		\$15K \$10K		- 60%		
		\$5K \$0 •••••				
		1/1/2017 1/15/2017 1/29/2017 2/12/2017 2/2	6/2017 3/12/2017 3/26/2017 4/9/2017 4/23/2017 5/7 Percent Complete Budget Spent to Date Goal	/2017 5/21/2017 6/4/2017 6/18/2017		
		RELATED ITEMS		+ Add		
			No related items			

You may have noticed there is a **Related Items** block at the bottom of the page. All objects in the system can be related to each other. This means you can create a link between an Objective or Metric and this Initiative.

This is very useful when you are tracking tasks due to poor performing Metrics or Objectives. Read the **Related Items** guide for more information

intrafocus