

STracker Application Specification Document

Executive Summary

STracker is a web-based strategy tracking application designed to help organizations effectively manage and monitor their corporate strategies, initiatives, and key performance indicators (KPIs). Whether used by a single organization with multiple departments or a holding company with various Strategic Business Units (SBUs), STracker provides a centralized, intuitive platform for aligning strategic objectives with performance management using the Balanced Scorecard (BSC) methodology.

System Goals and Objectives

- ☐ To provide a unified platform for managing corporate and SBU strategies.
- ☐ To track strategic initiatives and goals under defined strategic themes.
- ☐ To align initiatives and goals with the four BSC perspectives.
- ☐ To provide real-time performance updates, document submissions, and approval workflows.
- ☐ To visualize strategy maps and initiative statuses using RAG (Red-Amber-Green) indicators.
- ☐ To generate reports and dashboards filtered by themes, departments, SBUs, and timeframes.

User Roles and Access Levels

1. **Administrator:** Manages system settings, users, and access permissions.
2. **Chief Strategy Officer (CSO):** Oversees the strategy execution and approves initiative updates.
3. **Department/Unit Heads:** Own specific initiatives and KPIs.
4. **Project/Initiative Leads:** Provide updates and upload evidence.
5. **View-Only Users:** Can view dashboards and reports without editing rights.

Core Functional Modules

Strategy Setup and Mapping

- ☐ **Define Organizational Structure:** We should be able to define the structure of the organization using SBUs, Divisions, Departments, Units, depending on the structure of each organization
- ☐ **Define strategic themes:** You could have several themes. Provision can be made for up to 12 themes. Typically, organizations have between 3-7 themes
- ☐ **Link themes to BSC perspectives:** The four BSC perspectives are: Financial; Customer; Process; People & Culture. The system should be such that using the BSC is NOT compulsory, as some organizations do not use the BSC as their strategy framework. So, this is optional.
- ☐ **Create a visual strategy map (matrix layout).** (See appendix for a sample)

Initiative and Goal Management

- ☐ Add high-Level goals under themes and align them with BSC (where applicable). This creates the Strategy Map.
- ☐ Add initiatives/projects (unlimited number) to each high-level goal
- ☐ Assign ownership (departments/units/SBUs/individuals) to the projects/initiatives.
- ☐ Define KPIs, targets, and timelines tied to each initiative, defining the key measure of success (time, budget, quality, etc.)
- ☐ The above creates an organizational strategy workplan, theme by theme (see appendix for example)

Shared Ownership and Collaboration

- ☐ Enable multi-department ownership of initiatives.
- ☐ Allow collaboration via comments and notes in reporting and updates

Monitoring and Reporting

- ☐ Initiative leads submit updates with narrative.
- ☐ Upload of supporting documents (evidence).
- ☐ Define thresholds for level of completion (RAG)
- ☐ Calculate and report RAG status based on defined thresholds and actual performance.
- ☐ Track dates of reporting.

Approval Workflow

- ☐ Updates submitted routed to CSO.
- ☐ Approve, Decline, or Request Revision.
- ☐ Email Updates for Update, Approval, Decline Status
- ☐ Logs maintained for all actions.

Dashboards and Visual Analytics

- ☐ Strategy Map
- ☐ Strategy Workplan by themes
- ☐ Real-time dashboards by theme, BSC pillar, department/SBU/Unit
- ☐ RAG color-coded status visualization.
- ☐ Filters by year, owner, status.
- ☐ Export options for Excel and PDF.

Data Architecture

Entities:

- ☐ Strategic Themes
- ☐ BSC Perspectives
- ☐ High-Level Goals
- ☐ Initiatives
- ☐ KPIs
- ☐ Departments/SBUs
- ☐ Users

Relationships:

- ☐ One-to-many: Theme → Initiatives

- ☐ Many-to-many: Initiative ↔ Departments
- ☐ One-to-many: Initiative → KPIs

Technical Requirements

- ☐ **Platform:** Web-based (desktop and tablet responsive)
- ☐ **Stack:** Our usual tools at LIM
- ☐ **Cloud Hosting:** On our server
- ☐ **Security:** Encrypted storage
- ☐ **Integration Ready:** APIs for ERP/HRIS/Project Tools/MS Teams/Google

Compliance and Audit

- ☐ Comprehensive audit trails
- ☐ Data encryption
- ☐ Role-based access logs
- ☐ Exportable logs for compliance

Future Features (Phase 2)

- ☐ AI-powered capabilities
- ☐ Mobile app version

9. Appendices

- ☐ Sample Organizational Strategy Map
- ☐ Sample Organizational Strategy Workplan by Theme
- ☐ Sample Scenarios for initiative Updates
- ☐ Sample Calculation of RAG Status
- ☐ Wireframe Mock-ups
- ☐ Glossary of Terms (BSC, KPI, RAG, SBU, etc.)
- ☐ Working papers on Strategy & Performance.