CheckMATE©

Strategic Planning Software

User Manual (Condensed)

Welcome

This document is for you to use as you complete a Strategic Plan using CheckMATE Strategic Planning Software. This process is easy to follow and will give you a straightforward view of how to use the software and complete a strategic plan that can be use to better your company. Please remember, this process is different for the Administrator and the End User. Also, if you have a Single-User License, you are the Administrator and the End User. All of the information in this document can also be found in the within the program by pressing F1 or choosing “Help” from the menu.

I - Set up environment and install

Step 1 involves several sub-steps to help you get your CheckMATE Environment set up and get the program up and running.

Network Setup

- Setup the CheckMATE Environment - To setup the CheckMATE Environment for a network application, a couple of thing must be in place. The first thing you must have is a network server or desktop computer that all users can access over the network. This does not need to be a dedicated server, as CheckMATE does not use much space or many resources. This can even be the machine of one of the users, preferably the Administrator. Here are the steps to setup the network server/desktop computer:

  1. Create a folder on the hard drive just for CheckMATE. (Example: C:\CheckMATE)
  2. Share this folder out for the users to access. To do this:
     a. Right-Click on the folder and choose “Sharing”
     b. Go to the “Sharing” tab if it is not already active and choose “Shared As:”
     c. Type “CheckMATE$” in the “Share Name:” text box.
     d. Click “Permissions.” The default permissions for this folder should be “Everyone – Full Control.” This is fine, but can be changed if your network security requires it.
  3. Install CheckMATE Strategic Planning Software into the new folder that you created. To do this:
     a. Place the CheckMATE Strategic Planning Software in your CD-ROM drive.
     b. Right-Click on “My Computer”
     c. Find your CD-ROM drive (i.e. D:\) and double-click
     d. Find “cm_setup.exe,” double-click, and follow the on-screen instructions. NOTE: When you get to the step to choose the install directory, **STOP**. Here is where you will specify the new folder you created. (Example: C:\CheckMATE). Then, continue with the install.
  4. VERY IMPORTANT! You must now map the new folder to each user's computers INCLUDING THE ONE YOU INSTALLED THE SOFTWARE ON. To do this:
     a. Right-Click on “My Computer” and choose “Explore”
     b. Choose “Tools” on the menu bar and then choose “Map Network Drive…”
     c. Choose a “Drive:” letter. NOTE: The drive letter **MUST** be the same on all of the user's computers INCLUDING THE ONE YOU INSTALLED THE SOFTWARE ON. Choose a drive letter that is not being used and that is not likely to be use for any other network applications. (Example: X:\)
     d. Type the path to the folder that you shared out earlier. This path should look like: \\[computer name]\folder. The computer name is the name of the computer that you installed the software on and the folder is the one that you shared out earlier. (Example: \\ThisComputer\CheckMATE$)
     e. Leave “Connect As” blank.
     f. Check the “Reconnect at Logon” checkbox and click OK.
  5. Create a shortcut on each of the user’s computers INCLUDING THE ONE THAT YOU INSTALLED THE SOFTWARE ON. NOTE: You must first delete the default shortcut on the desktop of the computer you installed the software. To create a new shortcut:
     a. Right-Click on “My Computer” and choose “Explore”
     b. Navigate to the shared folder via the MAPPED DRIVE. (Example: X:\)

        c. Now find the file called “CheckMATE.EXE”. It is in the root of the mapped drive. (Example: X:\CheckMATE.EXE)
        d. Right-Click on this file and choose “Send To…” now choose “Desktop (Create Shortcut)”
6. Start CheckMATE Strategic Planning Software by double-clicking the new icon on your desktop called CheckMATE.

<u>Single-User Setup</u>

- The Single-User Version of CheckMATE Strategic Planning Software is much easier to setup. There are only two steps and you are on your way.

1. Install CheckMATE Strategic Planning Software into the new folder that you created. To do this:
    a. Place the CheckMATE Strategic Planning Software in your CD-ROM drive.
    b. Right-Click on “My Computer”
    c. Find your CD-ROM drive (i.e. D:\) and double-click
    d. Find “cm_setup.exe,” double-click, and follow the on-screen instructions. NOTE: The default install directory is acceptable but you may change it if you would like.
2. Start CheckMATE Strategic Planning Software by double-clicking the icon on your desktop called CheckMATE.

II – Setup users accounts and grant access

Step 2 is for the Administrator in the network environment. If you have an Individual License, you do not need to do this step, but you may want to be familiar with the procedure in case you upgrade to a Network License. You can review this information in the “Security Interface” section of the help (F1) file. The steps to add the users and grant access are as follows:

1. Start CheckMATE Strategic Planning Software by double-clicking the CheckMATE Icon on your desktop.
2. If this is not your first time running CheckMATE, skip to number 3. If this is the first time you have run CheckMATE, you will need to set the database location. The first screen you will see is the “Set Database Location” screen. To set the location:
    a. Press “Browse”
    b. You will see a dialog box pop up with the default location of the database. (Example: X:\Data). You will see a file there called “CheckMATE.mdb”.
    c. Double-Click “CheckMATE.mdb”
    d. Click “Set Location”

    NOTE: Each of your users will have to set the database location on the first time that CheckMATE is run. The location should be the same as on your computer. (Example: X:\Data)
3. You will now see the login screen. Type in the username and password supplied with your license and hit OK.
4. Once logged on, choose “Tools” and then choose “Security” or you can press F2 to invoke the “Security Interface.”
5. You will see the “Security Interface” with one user. The one user is the Administrator. Press “Add User” to add your first End User.
6. On the “Add User Information” form, fill in the information for this user. The fields with asterisks (*) are required. NOTE: Try to use a standard form for the username (Example: Bill Johnson = bjohnson or johnsbi1) and use the same password for each user, ask them to change them when they run the program for the first time.
7. Choose Administrator or End User. If you choose Administrator, this user will have all of the same privileges that you have. The End User will have limited privileges. See “Security Interface” in the help (F1) file for more information on this topic.
8. Click “Save” and then “Close”
9. Click your new user and click “Properties” or double-click the user’s name to invoke the “User Properties” screen. On this screen, you can change the type of user, reset their password, choose “Reports Enabled”, or choose “Notify for Rankings”. By default, each user will have “Reports Enabled” and “Notify for Rankings” checked. For more information on the “User Properties” screen

see “Security Interface” in the help (F1) file.
10. Repeat this process for each user that want to participate in completing the Strategic Plan.

III – Work through the Strategic Plan

In Step 3, the users will complete the “meat” of the CheckMATE Strategic Planning Software. This is the step where the users will enter the actual data to be considered for the Strategic Plan. This is the longest step and will take some thought and consideration to complete. If you are using CheckMATE in a network environment, the Administrator should meet with all of the users to explain the process to follow. For more information on this topic see “Steps in the CheckMATE Strategic Planning Process” in the help (F1) file. Below are the steps to work through the software as you complete the plan. NOTE: Each user, including the Administrator if desired, should complete all of the described steps to have a comprehensive Strategic Plan.

1. Start a new Strategic Plan by choosing “File” and then choose “New” or press CTRL-N. When you start a new Strategic Plan, you will see two things: the “CheckMATE Navigation” bar and the “Vision Statement” form. NOTE: This document will not go into detail about the “CheckMATE Navigation” bar but to say that this is the tool the users will use to navigate around the program. Some buttons will not be available until other sections are complete. Also, when you switch between forms, your work will be save for you. See “CheckMATE Navigation” in the help (F1) file for more information on this topic.
2. It is recommended that the users work through the CheckMATE Strategic Planning Software in order although it is not necessary. So, we will start with the Vision Statement. To complete the Vision Statement:
    a. Think of a Vision Statement that you feel fits your company. The Vision Statement should be one sentence and not too detailed. See “Vision Statement” in the help (F1) file for more information on this topic.
    b. Type the Vision Statement in the text box.
    c. Click “Save”
3. Click “Mission” on the “CheckMATE Navigation” bar. In this section you will write a Mission Statement for your firm. See “Mission Statement” in the help (F1) file for more information on this topic. To complete the Mission Statement:
    a. Type 1 or 2 sentences in each tab of the Mission Statement interface.
    b. On each tab, you will see a brief explanation of what should go in that tab along with an example to follow.
    c. After you have entered data in each tab, click the “Compile Mission” button. With this interface, you can combine you input into a flowing, comprehensive mission statement.
    d. Once finished, click “Save Mission” and then “Close”
    e. Click “Save”
4. Click “Int” on the “CheckMATE Navigation” bar. This section is the Internal Audit. Here you will list some of your firms Strengths and Weaknesses. See “Internal Audit” in the help (F1) file for more information on this topic. To complete the Internal Audit:
    a. Type at lease 10 strengths of your firm in order of importance as you see them.
    b. Type at lease 10 weaknesses of your firm in order of importance as you see them.
    c. Click “Save”
5. Click “Ext” on the “CheckMATE Navigation” bar. This section is the External Audit. Here you will list some of your firms Opportunities and Threats. See “External Audit” in the help (F1) file for more information on this topic. To complete the External Audit:
    a. Type at lease 10 opportunities of your firm in order of importance as you see them.
    b. Type at lease 10 threats to your firm in order of importance as you see them.
    c. Click “Save”
6. Click “Obj” on the “CheckMATE Navigation” bar. This section is the Objectives interface. Here you will list some objectives that you think that your firm should pursue. See “Objectives” in the help (F1) file for more information on this topic. To complete the Objectives section:
    a. Type a few objectives that you think your firm should pursue in order of importance as you see them.

    b. Click “Save”

7. Click “I/E” on the “CheckMATE Navigation” bar. This section is the IE Analysis interface. Here you will rate your firm’s internal and external position against your major competitor. See “IE Analysis” in the help (F1) file for more information on this topic. To complete the IE Analysis section:
    a. Choose your firm’s internal and external position. NOTE: Low = Performing Much Worse, Medium = Performing about the same, and High = Performing Much Better.
    b. Click “Save”
8. Click “SPACE” on the “CheckMATE Navigation” bar. This section is the SPACE Analysis interface. Here you will rate your firm in 4 key areas of business including Financial Strengths, Competitive Advantage, Industry Strength, and Environmental Stability. See “SPACE Analysis” in the help (F1) file for more information on this topic. To complete the SPACE Analysis section:
    a. Go through each tab and rate your firm on that category. On each tab, you will see a brief explanation as to what should be rated.
    b. Click “Save”
9. Click “GRAND” on the “CheckMATE Navigation” bar. This section is the GRAND Analysis interface. Here you will rate your firm’s competitive position within the industry and the industry’s revenue growth rate. See “GRAND Analysis” in the help (F1) file for more information on this topic. To complete the GRAND Analysis section:
    a. Choose your firm’s competitive position and your industry’s revenue growth rate.
    b. Click “Save”
10. Click “TOWS” on the “CheckMATE Navigation” bar. This section is the TOWS Analysis interface. Here you will develop a few strategies based on the strengths, weaknesses, opportunities, and threats that you entered earlier. See “TOWS Analysis” in the help (F1) file for more information on this topic. To complete the TOWS Analysis section:
    a. Go through each tab and list a few strategies for each section. On each tab, you will see a brief explanation of how you should develop you strategies.
    b. Click “Save”
11. Click “Refine” on the “CheckMATE Navigation” bar. This section is where you will refine some pre-defined strategies for your firm to pursue. The Refine Strategies section gives you a list of strategy “groups” from which you may want to define more precise strategies to pursue. You will see a brief explanation and also where your firm falls in the spectrum based on your input. See “Refine Strategies” in the help (F1) file for more information on this topic. To complete the Refine Strategies section:
    a. Go through each tab and list a few strategies for each section. On each tab, you will see a brief explanation of how you should develop you strategies.
    b. Click “Save”
12. Click “Select” on the “CheckMATE Navigation” bar. This section is where you will select the strategies that you feel will be the most feasible and most beneficial for your firm. You should only choose those strategies that you feel your firm should seriously pursue to completion. See “Select Strategies” in the help (F1) file for more information on this topic. To complete the Select Strategies section:
    a. First, you will see a list of all the strategies that you have entered, both from the TOWS and the Refine Strategies sections. Look through and choose the strategies that you feel your firm should pursue.
    b. To select a strategy, Click on that strategy and click “Select”. You may also select a strategy by Double-Clicking on the strategy.
    c. You may also select all of the strategies in the list by Clicking “Select All”.
    d. To remove a strategy from your selected list highlight the strategy and Click “Remove”, Double-Click the strategy, or you can remove all of the strategies in your list by clicking “Remove All”
    e. Click “Save”

IV – Review Data and Make Adjustments (ADMINISTRATOR ONLY)

In step 4, the administrator will take all of the data entered by all of the participants and review. During this step, the admin will delete any duplicate entries, any entries that are inappropriate, or any other entries that the admin feels are not relevant to the Strategic Plan. After the admin reviews all of the data, he/she will submit the data back to the users to review, rank, and complete the Strategic Plan. Below are the steps to using the "Administrator Interface". NOTE: If you are not the administrator, you do not need to review this section; you may skip to the next section.

1. Open the "Administrator Interface" by Clicking "Tools" and then "Administrator" from the menu bar, or you can press F3 on your keyboard.
2. Once open, you will see the "Administrator Interface". Along the top are the command buttons used to navigate around in the interface. Start by Clicking the Drop-Down arrow on the first button. Here you will see all of the sections of the Strategic Plan. Choose one.
3. After one of the sections has been chosen, you will see each of the users names in the column on the left. If you highlight one of the users name, you will see their input from that section in the boxes on the right.
4. To delete any of the items listed, simply highlight the item and Click the "Delete" button on the top.
5. If you notice, some of the information is read only and cannot be deleted. This is because they are either ratings or other entries that allow duplicates or were fixed answers that the users chose from a list.
6. Go through each section from the dropdown and make any adjustments that need to be made. After you are finished, put a check in the box called "Finished – Send To Users" in the bottom right corner and close the "Administrator Interface."

After you have completed this step and sent the data back to the users, you will not want to make any more changes to the data. The next step is for the users to rank the items in order of importance to them and you do not want to be deleting data as they are ranking it. Once this step is done, the users input is locked in and they cannot go in and add or delete any data. The "Complete Strategic Plan" menu option becomes available at this point. See "Administrator Interface" in the help (F1) file for more information on this topic.

V – Complete Strategic Plan

In Step 5, the users view and rank all of the data entered by all of the users. This is where the data will be assimilated into a logical order as decided by the rankings. This will allow the group and the administrator to see what is thought to be the most important to the group. Below are the steps for completing the Strategic Plan using the "Complete Strategic Plan" interface.

1. Open the "Complete Strategic Plan" interface by choosing "File" and then "Complete Planning" from the menu.
2. When the interface opens, you will see the command buttons across the top. These buttons are used to switch between the sections of the program and rank that particular data.
3. Choose one of the buttons to rank that data. When you choose a section, you will see all of that data listed in the grid. Use the Drop-Down list on the left of the grid to rank the data in order of importance as you see it. NOTE: You may only rank your top 10 items in the list. Please read each entry carefully and choose and rank your top ten items.
4. After you have ranked your ten, REMEMBER TO SAVE. Unlike the other sections of the program, the "Complete Strategic Plan" interface will not save your ranking if you change section. You will have to go back and redo your rankings.

After all of the users have completed all of their rankings, the "Complete Strategic Plan" menu option will not be available and the Strategic Plan will be almost finalized. The administrator will then take all of the input from the user and assimilate the Tentative Strategic Plan. After the administrator has completed the tentative plan, it will be presented and tweaked to come up with a final Strategic Plan. See "Complete Strategic Plan Interface" in the help (F1) file for more information on this topic.

VI – Viewing CheckMATE Reports

The CheckMATE Reports can be viewed at any time during use of the program. To view the reports, however, you must have the correct permissions. The reports compile all of the data entered to date by all of the users. To view the CheckMATE Reports:

1. Choose "Reports" from the menu.
2. Choose any one of the reports that you want to view.
3. The report viewer will open and show the report that you chose.
4. From the viewer, you may view, print, or export the report.

After you have finished viewing the report, you may close it by using the lower X in the top right corner. See "CheckMATE Reports" in the help (F1) file for more information on this topic.

VII – The CheckMATE Editor

This document will not go into any detail about the CheckMATE Editor. The Editor is used, by any of the users the have permission, to compile and view free-form reports. This is the tool that the administrator will use to compile the final Strategic Plan. See "CheckMATE Editor" in the help (F1) file for more information on this topic.