

# Simbli Planning Software

Bring Your Strategic and Operational Plans to Life.

## Simbli's Planning software helps your organization:

- Customize and manage ALL of your organizational plans to fit your needs
- Assign items to users to facilitate easy updates and reporting on plan progress
- Link plan items to meeting agendas
- Link plan items to performance evaluations
- View or print your plan in a variety of ways:
  - Strategy Map
  - Balanced Scorecard
  - Goal Scorecard
  - Key Performance Indicators (KPIs)
  - Plan Outline
  - Plan Packet
- Print your entire plan and supporting documents in a single PDF



Contact us for a personalized demonstration today!

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**Manage, Measure, Communicate. Turn long-term plans into everyday action.**

Simbli's Planning Software allows for the development of multiple plan types and transforms static plans into helpful guides, showing board members and staff what to focus on, and how their work fits into the bigger picture.

## The Simbli Planning software organizes your plan into four sections

- 1. Summary** – executive summary, background information, planning information, and more
- 2. Items** – Vision, mission, beliefs, and plan items
- 3. KPIs** – Key performance indicators that will be used to measure progress within the plan
- 4. Reports** – Strategy Map, Balanced Scorecard, Goal Scorecard, Plan Packet, Plan Export



### CREATE UNLIMITED PLAN TYPES

- Strategic and Operational Plans
- School Improvement Plan
- Technology Plan
- Facilities Plan
- Professional Development Plan
- ...and many more



### PLAN REPORTS AND PRINTING

- Plan Outline
- Plan Packet (print full plan to PDF)
- Key Performance Indicators
- Strategy Map
- Balanced Scorecard
- Goal Scorecard
- Export Plan to Excel



### EASY ENTRY AND DATA MANAGEMENT

- Create plan and item templates
- Customize item fields to plan type
- Assign plan items and KPI's (Key Performance Indicators) to empower users to manage and update their own items
- Create and update plan items from outline or spreadsheet views
- Send notifications to remind your team to update their items and/or KPI's



### PLAN VISIBILITY

- Customize visibility of sections, plan items, and reports so users see what is relevant
- Responsive design allows plan access from a mobile device



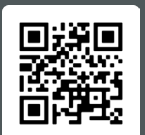
### INTEGRATION

- Simbli's Planning software integrates with the Simbli Meetings, Policy, and Evaluation software

**SIMBLI'S PLANNING SOFTWARE COMES WITH**  
FREE PRODUCT UPDATES | TRAINING | SUPPORT

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