



beacon, by mercanix

Leadership Transformation Software

**Functional Overview**



# Clear Direction, Precise Measurement & Enterprise-wide Transparency

Quickly and easily define, share and collaborate around the enterprise's most important strategic Objectives and Key Results across the company, or only with the leaders you designate.

**Company Objectives & Key Results**

**F** Objective    **#** Key Results    **○** Supporting Key Result

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**Flag** **Increase Profits**    **#** **% Profit Growth**    Starting 0    Cur

- F** **Increase Profits**    Increase FY14 Profits to new high
  - #** **% Profit Growth**    Grow FY14 Profits by 15%
    - **Product Profit Growth**    Increase Product Profit growth to 20%
    - **Service Profit Growth**    Increase Services profit to 9%

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**Flag** **Customer Satisfaction**    **#** **Net Promoter Score**    Starting 40    Cur 4



## Consistency, Discipline & Accountability

Consistently capturing the right data ensures everyone can understand, support and collaborate with the highest levels of effectiveness.



### Company Objective Detail

**Name:**

**Created On:** 06-Nov-2013 7:27 PM

**Plan Type:**

**From:**  

**To:**  

**Objective:**

**Desired Outcome:**

**Assumptions:**

#### Team Members

Mercanix Admin (Creator), Dalai Lama, Nelson Ro  
Anita Roddick

[Edit Players](#)

**Units:**



## Single-source, Real-time Progress Data & Automatic Reporting

Each Key Result can be updated quickly with just a few keystrokes and is instantly updated and used in the calculation of real-time reporting across the enterprise.

### # Key Result Detail

**Name:** % Profit Growth

**Short Name: (for chart)** % Profit Growth

**Show Tracking Chart:**

**Goal:** Grow FY14 Profits by 15%

**Starting Value:** 0

**Current Value:** 5

**Current Forecast:** 0

**Target Value:** 15

**Start Date:** 01-Nov-2013 

**End Date:** 31-Dec-2014 

**Team Members**

Mercanix Admin (Creator), Dalai Lama, Nelson  
Anita Roddick

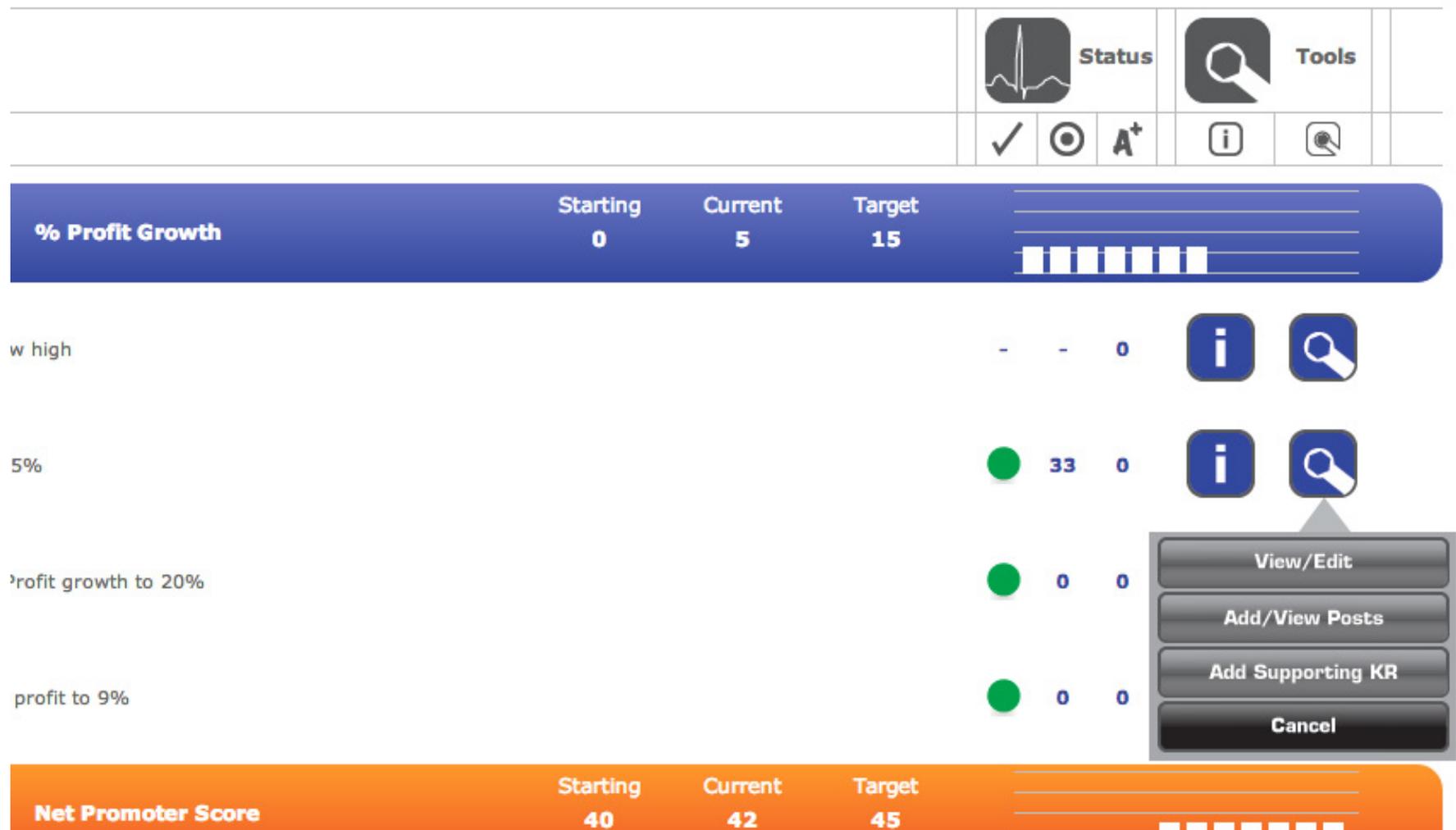
[Edit Players](#)

**Units:** Mercanix Demo



## Context, Coordination & (just enough) Control

Developing effective plans is accomplished much more easily when you understand the context of your work and others. Coordinating multiple parties simultaneously is made possible when you each act on a single source of interdependent Objectives and Key Results.





## Fat-free & Focused Communication

Simply powerful communication and tracking tools ensure any personal updates and change history details are available to everyone affected.

No searching through emails or documents for status updates. It's all contextually presented and summarized in real-time.

**% Profit Growth**

Update  
Idea  
Question  
Customer Feedback  
Problem  
Praise

Email Copy:  **Post**

**06-Nov-2013**

 % Profit Growth - Nelson Rockefeller - 11/6/2013 9:10:20 PM  
Start Date was changed from: '01-Jan-2014' to '01-Nov-2013'.

 % Profit Growth - Nelson Rockefeller - 11/6/2013 9:09:11 PM  
Current Value was changed from: '0' to '5'.

 % Profit Growth - Mercanix Admin - 11/6/2013 7:33:35 PM  
Added User(s): Dalai Lama, Nelson Rockefeller, Anita Roddick



## Bottom-up, Top-down & Edge-to-Edge Input

Working within the context of the Company-wide Objectives & Key Results means Teams & Individuals can have the flexibility and autonomy to devise the best course of action and appropriate measures. By building on the organically-built plan, everyone can communicate their own plans automatically to the rest of the organization.

The screenshot displays a software interface for managing Objectives and Key Results (OKRs). At the top, there is a 'Filters' section with a red icon and several toggle switches. Below this is a filter configuration bar with a person icon, a 'Type:' dropdown menu set to 'All', an 'Objective:' dropdown menu set to 'All', and a 'Unit/Team:' dropdown menu set to 'All'. The main content area is titled 'Team & Personal OKRs' and features a navigation bar with four categories: 'Objectives' (with a blue 'N' icon), 'Sub Objectives' (with a blue '1' icon), 'Supporting Objectives' (with a blue 'ii' icon), and 'Key Results' (with a blue '#' icon). The primary objective is 'Increase Profits', which is marked as a 'Key Result' (indicated by a blue '#' icon) and has a value of 'Starting 0'. Below this, a hierarchy of sub-objectives is shown, each with a person icon and a blue category icon: 'Increase Revenues' (marked as a 'New' objective with a blue 'N' icon) with the description 'Increase revenues for FY14 in support of the increased profit targets'; 'Company Sales Growth' (marked as a 'Key Result' with a blue '#' icon) with the description 'Grow total company sales by 25% for FY14'; and 'Product Sales Growth' (marked as a 'New' objective with a blue 'N' icon) with the description 'Grow Product Sales by 10%'.



## Distributed & Disciplined Scalability

No matter how far apart your teams and people are, you can understand what is being worked on by the people you are connected to and the progress that is being made toward both your individual Key Results, your Team's, and the Company's.

	Status	Tools	
# Key Results	✓	🎯	A+

Profit Growth	Starting	Current	Target	
	0	5	15	

Support of the increased profit targets

25% for FY14

0 0 >

### Increase Revenues

**Objective:** Increase revenues for FY14 in support of the increased profit targets

**Desired End-State:**

**Why:**

**Due Date:** Ongoing

**Creator:** Anita Roddick

**Accountable:** Nelson Rockefeller(w)

**Team:** Dalai Lama,

**Percent Achieved:** 0

**Status:** Active



## Focused Execution & Sure-fire Hand-offs

Individuals can focus on those items that are most important, with full assurance that they are supporting and working to support the Company-wide plan. And when it's time to enlist the assistance of others on your team, handing the item over happens without delay and accompanied by a full history and audit trail.

**W** My Workbook Increase Revenues

---

< Current Items >

---

**Today's Worklist:**

Company Sales G...

Increase Revenues

**Current initiative:** Increase Revenues **Current action:** ---

Show Completed:

**i**

<b>Objective</b>	Increase revenues for FY14 in support of the increased profit targets
<b>Creator</b>	Anita Roddick
<b>Accountable</b>	Nelson Rockefeller
<b>Team</b>	Dalai Lama

UpdatePass To ✓ ---Email Copy:

Post



# From Traditional Hierarchy to Lattice & All Points Between

Organizational structure and design can evolve over time without losing any history, learning, or your people in the process. This includes supporting the way points between where you are now organizationally, and your ultimate destination.

 People & Units	
 Mercanix Demo	phone: fax:    
 Drucker, Peter	email: drucker@mercanix.com phone: fax:  
 Fuller, Buckminster	email: bucky@mercanix.com phone: fax:  
 Lama, Dalai HH	email: thelama@mercanix.com phone: fax:  
 Rockefeller, Nelson	email: nelly@mercanix.com phone: fax:  
 Roddick, Anita	email: anita@mercanix.com phone: fax:  
 M&A Team	phone: fax:    
 Rockefeller, Nelson	email: nelly@mercanix.com phone: fax:  



# Enterprise-wide Sense & Respond Support

When you have a single, real-time view of all enterprise activity being taken to further your vision, you can quickly sense and respond to changes in your market, and the needs of your people.

 Listen By: **Company Objectives & Key Results** Team & Personal OKRs Tag Feedback Type Huddle Notes

**Start Date:**   **End Date:**   **Objective:**   **Unit/Team:**   **Person:**  

**06-Nov-2013**

 **% Profit Growth** - Nelson Rockefeller - 11/6/2013 9:10:20 PM  
Start Date was changed from: '01-Jan-2014' to '01-Nov-2013'.

 **Net Promoter Score** - Nelson Rockefeller - 11/6/2013 9:09:59 PM  
Current Value was changed from: '40' to '42'.

 **% Profit Growth** - Nelson Rockefeller - 11/6/2013 9:09:11 PM  
Current Value was changed from: '0' to '5'.

 **Product Profit Growth** - Anita Roddick - 11/6/2013 7:41:03 PM  
This new target is steep for the Product Group, but we welcome the challenge.



# Relationship-based Updates & Summaries

From a single screen, all of the activity that has taken place in the enterprise that relates to you is summarized for quick access, comprehension and action.

 Home  Nelson Rockefeller

 Increase Profits  % Profit Growth

 Customer Satisfaction  Net Promoter Score

**W** Recent Work Activity

	Unread	7 Days	14 Days
Current Worklist	0	0	0
Team Activity	5	0	0
Unit/Dept. Activity	3	0	0
KR Related	5	0	0

 Recent Feedback

	Unread	7 Days	14 Days
Ideas	0	0	0
Questions	1	0	0
Customer Feedback	0	0	0
Problems	0	0	0
Praise	0	0	0

 Team - Unread

**06-Nov-2013**

 **Product Profit Growth** - Anita Roddick - 11/6/2013 7:36 AM  
This new target is steep for the Product Group, but v

 **Service Profit Growth** - Dalai Lama - 11/6/2013 7:36 AM  
I'm not sure that targeting 9% growth is possible for

 Nelson Rockefeller - 06-Nov-2013 7:37 PM  
Sure we can discuss at our weekly meeting

**16-Jul-2013**

 **Net Promoter Score** - Mercanix Admin - 7/16/2013 8:00 AM  
Grade was changed from: '0' to '0.7'.



## ABOUT MERCANIX

We were founded on the belief that transformative leadership has the power to help people and organizations to **Perform Better and Go Home Happier.**

We help transformational leaders to develop, deploy and lead with evidence-based high performance practices.

We offer workshops, consulting, software development services and beacon, our cloud-based software platform for evidence-based management.

[www.mercanix.com](http://www.mercanix.com)