# Closing the gap

Visualizing strategic results with StratML.



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# Intro

How did I got here ?

- StratML Intro.
- Why StratML is valuable?
- New tooling, The new StratML Part 3 form.
- StratML Status.

***How should we advance?***

## What is StratML?

ANSI/ISO standard for Strategic planning.

- High level view.
- Considerable number of persons, resources or a long time span.

- *Purpose: Changes in how people behave, groups dynamics or infrastructure.*
  - Focus on key points, avoid unnecesary detail.
  - Subsequent planning.

- Why do we use a document format?

## Why does StratML matter?

- Valuable data format and model reference.
- Knowledge from a remarkable group of designers.
- Component, analysis and model re-utilization

- **Public entities:**
  - Increase the level of confidence and quality on initiatives reporting.
    - Traceability.
- **Private entities:**
  - Don’t reinvent the wheel / Cost saver.
  - Change enabler, reference.

## StratML Use Cases?

- Global Warming environment related
- Education and health services quality and coverage.
- Extremism.
- Polarization.

## Collaborative Planning

- Planning and management responsibilities are increasingly shared.
- Available platforms (StratNavApp).
- Document repositories with wth REST/services and databases.
- Shared document authoring with source code repositories .

# StratML Problems

Generic document based technology problems:

- Document based formats low popularity perception.
- Difficulty to manage a complex semantic model throught an UI.
- Complexity for non technical users to perform semistructured authoring.

## StratML Specific Problems

**Tooling.**

- Lack of editable, office like, export options.
- Lack of follow up dashboards.

**Simple result elements.**

- Lack of series of results and aggregation, weigthening on more elements (indicators, objectives, etc.), naming on results and measurement instances (needed for more descriptive result tracing).

**Imprecise natural language objectives.**

- Prevents easy machine based evaluation.
- Difficults the creation of follow up dashboards.

## New StratML 3 Form

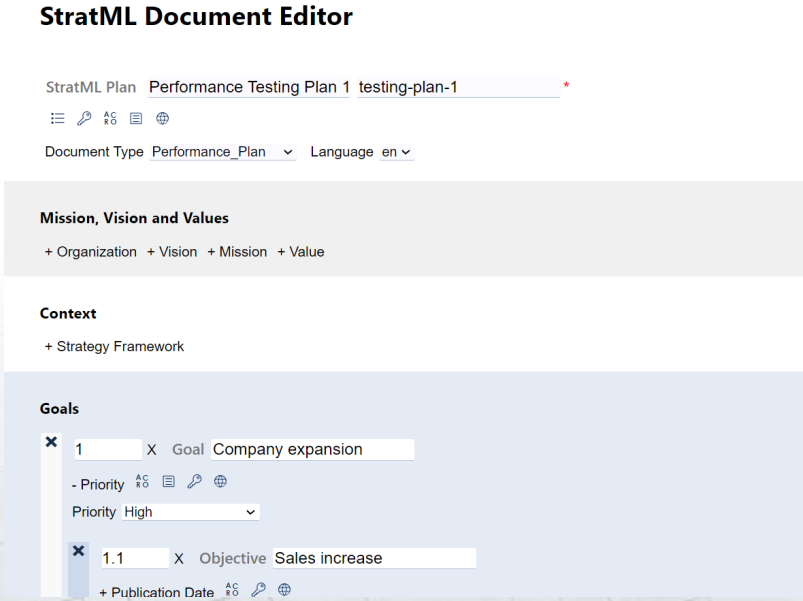
StratML part3 changes:
- Context description elements (SWOT, PESTLE, Driving Forces).
- Links, source and relation elements.
- Category/categorization, Links (Source, Web Source).
- Allow Integration with Ontology urls.

**Generation Process.**

- Minimizing the exposed complexity and form size.
- Generated from the StratML Schema (with small adjustments).

# The StratML Part 3 Form (Generation Process)

From the Schema to the actual form

# The StratML Part 3 Form (Generation Process)

From the Schema to the actual form


```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<PerformancePlanOrReport>
<!--A document identifying inputs and processes required to
 assessed within a single budgetary planning and resource a
..Debug.. complexContent ........ --><!-- ... Debug: Extensi
><!--A complex element that is used in multiple instances t
ence sequence - -->
    <element>
     <name>code</name>
     <cardinality>
        <mandatory/>
        <unique/>
     </cardinality>
     <type>xsd:string</type>
     <!--An alphanumeric identifier applied to an element t
  </element>
  <element>
     <name>SequenceIndicator</name>
     <cardinality>
        <optional/>
        <unique/>
     </cardinality>
     <type>xsd:string</type>
     <!--An alphanumeric identifier applied to an element t
  </element>
  <element>
     <name>Name</name>
     <cardinality>
        <optional/>
        <unique/>
     </cardinality>
     <type>xsd:string</type>
     <!--A word or short phrase intended to identify a cond
  </element>
```

## The Key

### Publishing only focus.

StratML was initially used as a mean to define strategic plans and publish them on the US administration.

- The target of plan publishing is the text represgentation of the information.
- The US administration context is so complex that requires requires dedicated BI solutions and data gathering processes outside StratML.
  Plans were defined with StratML and final results were published with StratML but plans follow up were not usually managed with StratML.
- Tooling, or a strong framework to follow up advances and visualize/evaluate results was not a need for StratML.

*This issue limits StratML use cases and as a consequence the potential user base*

# Proposal

Framework for objectives evaluation.

- Objectives evaluation Form and Follow up dashboard.

Evaluating Results:

- Rules (success criteria): Explicit value based limits.
  - References: Grade references and explicit evaluation criteria.

Evaluation process:

- Success criteria.
- References.
- Bottom-up result grouping.
- Threshold limits.

# Salvora Instance (Binding Doucments, Xslts, XProcs)

Xforms oriented Serverless tool.

- Quarkus,
- Vert.x,
- Saxonica,
- Morgana XProc

https://github.com/vionta/salvora

.

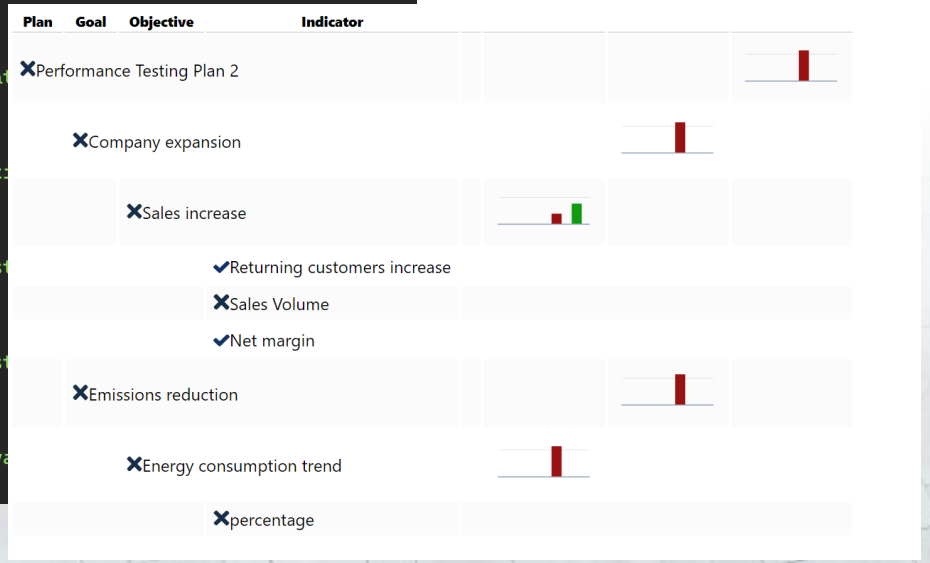
```
<!-- - Plan ..................... -->
<collection
    name="view-plan" path="view/plan/:code.html"
    internal-path="report/plan/:code.html" >
 <trigger name="evaluation-view" before="true"
          source="trigger/plan/evaluation.xpl" >
   <path-parameter key="code"
         transformation-param-name="code" />
 </trigger>
 <trigger name="plan-group-view" before="true"
           source="trigger/plan/view.xpl" >
    <path-parameter key="code"
          transformation-param-name="code" />
  </trigger>
</collection>
```

# The StratML Part 3 Form (Xproc Evaluation Process)

Fra

-...

```
<p:xslt name="reference-indicators">
  <p:with-input port="stylesheet" href="./evaluation-xsl/1-indicators.xsl"/>
</p:xslt>


<p:xslt name="rules-evaluation">
  <p:with-input port="stylesheet" href="./evaluation-xsl/1-1-success-criteria.xsl"/>
</p:xslt>

<p:xslt name="indicator-stats">
  <p:with-input port="stylesheet" href="./evaluation-xsl/2-indicat
</p:xslt>

<p:xslt name="objective-stats">
  <p:with-input port="stylesheet" href="./evaluation-xsl/3-object
</p:xslt>

<p:xslt name="goal-stats">
  <p:with-input port="stylesheet" href="./evaluation-xsl/4-goal-st
</p:xslt>

<p:xslt name="plan-stats">
  <p:with-input port="stylesheet" href="./evaluation-xsl/5-plan-st
</p:xslt>

<p:store name="report-serialization" >
  <p:with-option name="href" select="concat('../../report/plan-eva
</p:store>
```



## Conclusion

There's no reason why StratML should be limited to define and publishing the plans.

- Enrichment on result elements follows the natural evolution of the StratML Standard ( from plan definition to performance measuring detail).
- Plan follow up dashboards may attract a wider user base.
- StratML can help us with remarkable challenges in our society and organizations. It may also help you to reach remarkable clients.
- StratML is a supportive community that may help new initiatives.

**Thank You for your attention**

# References

- Presentation form code snippets:
  https://github.com/vionta/declarativeamsterdamstratml3
- Schema simplified view:
  https://github.com/vionta/declarativeamsterdamschemaview
- StratML3 FOSS Application:
  https://github.com/vionta/stratml3