



Strategic Planning Software Category

SUMMER 2026
Customer Success Report





Strategic Planning Software Category

Strategic planning software enables businesses to create a company mission statement, draft a plan to achieve the mission, and monitor progress toward the goal. The platform helps you to effortlessly produce and share enterprise goals and values, and monitor key performance indicators needed to accomplish those objectives. Some tools permit you to craft organizational charts to map recruitment plans required to achieve the mission.

Customer Success Report Ranking Methodology

The FeaturedCustomers Customer Success ranking is based on data from our customer reference platform, market presence, web presence, & social presence as well as additional data aggregated from online sources and media properties. Our ranking engine applies an algorithm to all data collected to calculate the final Customer Success Report rankings.

The overall Customer Success ranking is a weighted average based on 3 parts:

CONTENT SCORE

- ✓ Total # of vendor generated customer references (case studies, success stories, testimonials, and customer videos)
- ✓ Customer reference rating score
- ✓ Year-over-year change in amount of customer references on FeaturedCustomers platform
- ✓ Total # of profile views on FeaturedCustomers platform
- ✓ Total # of customer reference views on FeaturedCustomers platform

MARKET PRESENCE SCORE

- ✓ Social media followers including LinkedIn, Twitter, & Facebook
- ✓ Vendor momentum based on web traffic and search trends
- ✓ Organic SEO key term rankings
- ✓ Company presence including # of press mentions

COMPANY SCORE

- ✓ Total # of employees (based on social media and public resources)
- ✓ Year-over-year change in # of employees over past 12 months
- ✓ Glassdoor ranking
- ✓ Venture capital raised

Award Levels



MARKET LEADER

Vendor on FeaturedCustomers.com with substantial customer base & market share. Leaders have the highest ratio of customer success content, content quality score, and social media presence relative to company size.



TOP PERFORMER

Vendor on FeaturedCustomers.com with significant market presence and resources and enough customer reference content to validate their vision. Top Performer's products are highly rated by its customers but have not achieved the customer base and scale of a Market Leader.



RISING STAR

Vendor on FeaturedCustomers.com that does not have the market presence of Market Leaders or Top Performers, but understands where the market is going and has disruptive technology. Rising Stars have been around long enough to establish momentum and a minimum amount of customer reference content along with a growing social presence.

2026 Customer Success Awards

Check out this list of the highest rated Strategic Planning Software based on the FeaturedCustomers Customer Success Report.



achieveit *Let's actually do this.™* OnStrategy planview® Stratsys

WorkBoard AI



cascade ClearPoint Strategy CORPORATER ENVISIO

MPOWR envision® StrategyBlocks Triskell SOFTWARE



ActionPlanner Business Execution Software align aye Q DECIDEACT

Elate EOS Software esm The Strategy Execution Company Peoplebox.ai

RESULTS Strategy Execution Made Easy RHYTHM SYSTEMS Spider Strategies®

* Companies listed in alphabetical order



2026
STRATEGIC
PLANNING
SOFTWARE

MARKET LEADER





ABOUT ACHIEVEIT

achieveit
Let's actually do this.™

Tired of manually collecting progress updates & managing siloed data across various plans & initiatives? Are these manual processes impeding your visibility and impacting execution? Strategy leaders trust Achieveit to connect, manage, & execute their most important plans and initiatives - improving visibility, increasing accountability, and driving collaboration. That's why leading organizations across industries trust Achieveit for their strategic plan management.

87

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“From day one, Achieveit helped us communicate the benefits to leadership. And whenever I have a question, the team takes the time to make sure we are successful. I think that is one of the biggest benefits that Achieveit offers. We don't ever feel like we have to just flounder to figure something out. We always have someone that we can reach out to. I can't say enough about the team. They're superb!”

ANGELA ELLIS
CHIEF ADMINISTRATIVE OFFICER, NORTH CAROLINA
BOARD OF NURSING

“Achieveit is a ground-breaking solution that ensures the success of our company's high-performing team. Leaders across all functional areas are provided with easy-to-access, up-to-date progress of ongoing projects, initiatives, and research & development. More timely, quality information has led to better decision making, allowing us to exceed our strategic goals.”

KIMBERLY RENSPIE
DIRECTOR OF STRATEGIC INITIATIVES, FLORIDA COURT
CLERKS & COMPTROLLERS

“[Achieveit] was very easy to implement, it was very simple, very user friendly. It took a little bit of time to get it up initially, but once you have it done, it is established and running well, and saves you so much time. I am not a technology guy, but I thought it was super simple. I feel like anybody could do it.”

ROSS BRADY
CHIEF OF STAFF, CITY OF COLLEGE STATION

“I think [Achieveit] is a good return on investment. It's saving me time and saving my department heads time. My county manager report is more focused and it's only 12 pages, as opposed to 90. But again, this departmental update with Achieveit is really the lynchpin to make that happen.”

KEITH MOFFETT
COUNTY MANAGER, MACON-BIBB COUNTY

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ABOUT ONSTRATEGY



OnStrategy is the enterprise, cloud-based leader in strategy management. Their online tools and hands-on services, including their flagship platform for empowering people to create and execute strategy, connects customers, employees and stakeholders to achieve enduring success. Their mission is to transform organizations by transforming the lives of people within them. When people have purpose and meaning in their work they're better employees. Better employees create a better work environment, which in turn creates happier customers.

56 TOTAL CUSTOMER REFERENCES [VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Today’s [facilitation] session with the board felt incredibly positive and productive. I am amazed at how much was accomplished in such a short time, and I’m surprised to find I left the meeting feeling energized rather than exhausted.”

EXECUTIVE DIRECTOR OF COMMUNICATIONS,
DEVELOPMENT, & ENGAGEMENT
WESTERN UNITED STATES SMALL SCHOOL DISTRICT

“Thank you so much for all your help with the process this year! Having your guidance and suggestions made it so much smoother, and now we are ready to kick off the execution stage!”

CHI NGUYEN
VICE PRESIDENT OF MARKETING, NEUROPACE

“The level of individual engagement is great all around! And your leadership through this strategic planning process has been excellent.”

DALLAS SMITH
EXECUTIVE VP, CO-FOUNDER, HEALING HEALTHCARE SYSTEMS

“Success is staying at least two steps ahead of your competition, even when they’re ten times your size.”

E. BARRY
CEO, ONPROCESS TECHNOLOGY





ABOUT PLANVIEW



Planview enables organizations to get the most out of their resources and achieve their goals. They are the global leader in work and resource management, with the industry's most comprehensive portfolio of solutions for strategic planning, portfolio and resource management, product innovation, capability and technology management, and collaborative work management. Their solutions span every class of work, resource, and organization; addressing the needs of teams, departments, and entire organizations, from the mid-market to global enterprises. Headquartered in Austin, Texas, their 700 employees serve more than 3,000 enterprise customers...

426 TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Using Planview, we have more effective cross-functional involvement and communication for gate management. It's very easy for all stakeholder groups to go into Planview and provide input. We also have better risk mitigation and a single source of truth now for gate management, instead of emails and Excel files on SharePoint. The integration with Anaplan was critical to import financial KPIs for products and do a more efficient analysis at gate review to decide if a product should move forward or not.”

GLOBAL DIRECTOR FOR IT GOVERNANCE AND PMO
GLOBAL CONSUMER BEAUTY COMPANY

“Planview's PSA solution is the trusted source of truth for all the data, replacing multiple spreadsheets, and housing project and financial data in one system. It integrates with Salesforce and Jira, which was a critical component of the evaluation process, so we can send and receive data to and from both platforms. That is key as we continue to grow, but also as we work with our clients. We have a premium product, so it's critical to offer a premium experience.”

ROSS SPEARMAN
INTERNATIONAL VP OF PROFESSIONAL SERVICES AND TRANSFORMATION, BENIFY

“The use of Planview is very important for us from a strategic point of view. All Viessmann Development projects are planned and controlled via this central platform.”

SÖREN BÖCKLER
PROCESS MANAGER & COMPETENCE LEAD TOOLS,
VISSMANN ITALY

“Planview helps us turn strategy into project deliverables.”

SEBASTIAN BÜCHLE
PMO LEAD & PPM PLATFORM OWNER,
ENDRESS+HAUSER GROUP

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ABOUT STRATSYS



Stratsys develop smart digital tools for hassle free collaboration on strategic plans and are determined to find new ways to simplify and improve their customers daily life. They call it work-life simplicity! As an ever-evolving and improving platform, Stratsys is the spine of business planning. The holy grail that gathers and engages all users in the same goals. A platform filled with smart tools, that optimizes work-life and helps your business stay in control on your way to success.

18

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“The long-term effect of Stratsys and our way of working is that we have become a more goal-oriented organisation. Today we are talking about achieving goals in a completely different way than before. Stratsys has also given us a collaborate place to store all information on. The system has replaced the Excel and Word documents that we previously worked with.”

JÖRGEN BROKÅS
BOSTADS AB MIMER

“Stratsys makes it easy to find the latest versions of plans and reports. It’s also useful to visualize the common thread through our planning and follow-up processes, which helps to create understanding, interest and commitment among employees.”

FREDRIK HALLOR
IT COORDINATOR, FORUM SYD

“Thanks to Stratsys we’ve been able to work toward the school’s goals in a far more efficient and educational way.”

SARA CORNELIUSSON
DEVELOPMENT MANAGER, RAOUL
WALLENBERGSKOLAN

“Stratsys was the tool best positioned to help us manage our management system long-term.”

ROBERT RINDE
CHIEF INFORMATION SECURITY OFFICER, PULSEN
PRODUCTION

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ABOUT WORKBOARD

WorkBoard AI

WorkBoard Enterprise Results Management solution helps organizations align OKRs and FAST goals, automate business reviews and execute for growth. It's a data-driven, digital approach to defining, aligning and managing strategic outcomes so your organization competes at market speed.

178

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Using WorkBoard and OKRs, we get closer to simplicity in a very complex environment. And when we create that simplicity, we can focus. And when we can focus, we’re going to pick up speed.”

KATE VILLARI
SENIOR DIRECTOR OF TRANSFORMATION, STRATEGY & PERFORMANCE, ASTRAZENECA

“WorkBoard helps us stay focused on the important things and it's our source of truth. It's the rhythm of the business that really helps us make sure we're continuing to execute on our strategies.”

STEPHEN SHAFER
PRESIDENT AND CHIEF OPERATING OFFICER, A.O. SMITH

“WorkBoard is a superpower for building alignment at a time when we need it most.”

JOEL NEEB
CHIEF TRANSFORMATION AND BUSINESS OPERATIONS OFFICER, 8X8

“WorkBoard Biz Reviews changed our lives.”

HARRY BLEASE
SENIOR DIGITAL STRATEGY LEAD, VIRGIN MEDIA O2

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2026
STRATEGIC
PLANNING
SOFTWARE

TOP PERFORMER





ABOUT CASCADE



Cascade is the world's #1 strategy execution platform helping thousands of organizations make their visions happen, through building their business and departmental plans, right through to tracking and execution of initiatives, team performance and more. Their customers are redefining the world as they know it - from battling the AIDS epidemic and establishing a supply chain for COVID-19 vaccines, to building the world's fastest Formula One car.

64

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“ Cascade is easy to use and administer. The new enhanced Project Management tool has allowed us to get rid of our old tool and are now using Cascade to manage our projects. The reporting features are dynamic and help everyone in the organization understand where they fit in the "big picture" as they align their daily activities with the organization's high-level goals and vision. ”

ALISON SMITH
DETROIT WAYNE MENTAL HEALTH AUTHORITY

“ The cascading relationship of strategic objectives, goals & activities, and the ability to link them to multiple objectives, with easy tools to track progress & produce reports. It keeps our senior team focused on the big picture. ”

EXECUTIVE
MENTAL HEALTH CARE COMPANY

“ With Cascade, we maintain constant focus and can easily reprioritize what's important for the company. ”

IAN FARTHING
CHIEF FINANCIAL OFFICER, DOREL JUVENILE

“ With Cascade's support, we've become agile, insightful, and more efficient in our operations. ”

GARY SHIPP
DIRECTOR OF OPERATIONS STRATEGY, THE ALS ASSOCIATION

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Mercedes-Benz



ABOUT CLEARPOINT STRATEGY

ClearPoint Strategy

ClearPoint, the world's first integrated strategy reporting system, makes it easy to keep teams throughout your organization focused on the activities and metrics that matter most in achieving overall organizational goals. ClearPoint Strategy is a SaaS strategy reporting tool used by leading organizations to automate and streamline their strategy reporting process, including elements such as Business Performance Management and OKR metrics. ClearPoint integrates and automates the collection of data from all sources, making it faster and easier to report on strategic plan...

118

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“I was able to get a handle on ClearPoint very quickly on how it worked and what it did. Anywhere I had questions, our Account Manager was helpful in closing the gaps! Creating reports in ClearPoint is super straightforward. Once you get a handle on that construct, it's easy to generate them.”

ADAM BULLIED
VP OF STRATEGY AND OPERATIONS, NEST WEALTH

“It took an absurd amount of time to create what we would review for 30 minutes to an hour on a weekly basis.”

JACOB KING
ORGANIZATION AND DEVELOPMENT SUPERVISOR,
ELDOR AUTOMOTIVE POWERTRAIN

“ClearPoint is an excellent product with superior support. It has been an excellent tool to use!”

JULIE J.
DIRECTOR, OPERATIONAL EXCELLENCE, SANTEE COOPER

“Going from using PDFs to ClearPoint has helped us elevate visibility.”

ED F.
DIRECTOR, ENTERPRISE PROJECT MANAGEMENT,
METROPOLITAN COMMUNITY COLLEGE

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ABOUT CORPORATER



Corporater is a global software company that empowers medium and large organizations to evaluate, manage, and continually improve business performance. They provide a business management platform that adapts to clients' unique business models, out of the box. Corporater uses its gains to make a social impact.

56

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“Corporater has been instrumental in helping Gallagher in the UK to successfully move a range of manual Governance, Risk and Compliance processes onto a web-based platform. We have benefited from improved efficiencies in the management of these processes and access to higher quality MI and insights. We have found the Corporater team's approach to be collaborative and solutions-focused. Their subject matter experts have helped us to configure our solutions to align with current needs and we have been able to achieve a degree of future-proofing thanks to the functionality the platform provides.”

GALLAGHER

“Corporater's recognition as an IRM Market Leader is a testament to their innovative approach and comprehensive solutions in the IRM space. Their commitment to integrating advanced technologies and addressing diverse risk management needs across multiple segments highlights their pivotal role in the industry.”

JOHN A. WHEELER
FOUNDER AND CEO, WHEELHOUSE ADVISORS

“Corporater Business Management Platform guides planning, strategy execution, and on-going analysis of performance at both the strategic, tactical and operational level. Corporater places control of enterprise performance management software in the hands of business users.”

ADRIAN BLANCK
HEAD OF BUSINESS TRANSFORMATION AND OPERATIONAL EXCELLENCE, PETRO RABIGH

“Corporater was selected basically because they are one of the leaders in this field. Secondly, that really drew our attention was the ease of the use of the system. When we had to check the screens it was fantastic, amazing and had all the data needed and everything was clear.”

MOHAMMED HASAN ABDULLA AL-AWADHI
CIVIL SERVICE BUREAU





ABOUT ENVISIO



Execute strategy and improve performance. Envisio is the #1 strategic planning & performance management solution for local government, education, healthcare and nonprofit organizations. Envisio will transform how you develop and execute plans, measure performance and share results. And because we work exclusively with public sector and nonprofit organizations, Envisio is built to meet your unique needs around creating transparency and building trust with external stakeholders. Let's get started.

79

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“With Envisio, everyone is on the same page and we’re all working towards the same goal. The department plans align with the county plan, which aligns with the priorities set by the board. People are unified and they want to do a good job.”

MATTHEW RHOTEN
BUDGET ADMINISTRATOR, GASTON COUNTY

“We now have a system we love that is easy for our team to use and provides us with the priorities, goals, actions and performance measures needed to track the success of our strategic plan.”

ANGELA SMITH
CITY OF ROWLETT

“Envisio has been an outstanding platform for our organization to implement our strategic plan. The customer support is also the best I’ve ever experienced.”

KIM BRADFORD
ALLIANCE FOR INNOVATION

“Employees are more aware of the need to track their work more closely in relation to the Town's goals and strategic plan.”

TERI BANKHEAD
ASSISTANT TO THE TOWN MANAGER, SAHUARITA

TRUSTED BY





ABOUT MPOWR ENVISION



MPOWR Envision is simply built for strategy. Their strategy execution software and services align everyone for collaboration and engagement on living, flexible strategic plans to increase organizational performance.

15

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“We were really high level, not too detailed. How do I turn these three to four ideas into a business plan? MPOWR Envision helped us do that. It enables you to take high level, disparate ideas and narrow them down to the pillars required to run a successful business. We had these crazy ideas, and MPOWR Envision helped us organize the craziness and turned it into reality.”

KEVIN VERSINO
GENERAL MANAGER, ROCKTOWN ADVENTURES

“Developing our plan using MPOWR Envision has really helped us be more thoughtful about how each segment contributes to the vision of Attack Poverty while avoiding mission drift, which in the non-profit world can be pretty significant.”

DIRECTOR OF OPERATIONS
ATTACK POVERTY

“JJP's effort has been to activate our downtown, to prioritize and participate in the planning process of our community, and bring whatever we identify is lacking – higher education, ground-level retail, urban rituals.”

MARK STEFANIC
DIRECTOR OF PROJECTS, JOSEPH JAMES PARTNERS

“Envision is a great tool for guiding strategy execution within complex systems. We use Envision to help guide a community-wide strategic plan that involves multi-sector stakeholders and diverse participants.”

PROJECT DEVELOPMENT MANAGER
TRANSFORM ROCKFORD

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ABOUT STRATEGYBLOCKS



StrategyBlocks is the leading online strategic management and strategy planning software for enterprise communication, collaboration and reporting. Its SaaS-based platform is highly adaptable, visually creative, and seamlessly integrates with other business software. StrategyBlocks allows businesses to quickly implement a fully integrated solution that delivers strategic planning, improved communication and real-time execution capabilities across the entire organization.

7

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“After a thorough comparison of StrategyBlocks with other tools on the market what stood out most, and continues to make a difference today, is the highly personalized support from the StrategyBlocks team. Working with larger vendors it is easy to feel like a small fish in their big pond of customers, but StrategyBlocks takes the time to listen to our questions, internalize our suggestions and tailor the solution to fit our needs with an incredibly fast response time.”

JACOB TONER
DIRECTOR, ENTERPRISE PORTFOLIO MANAGEMENT
OFFICE, AUCKLAND DISTRICT HEALTH BOARD

“Strategic planning is fast becoming part of our institutional DNA, and we will continue to approach our progress through a collaborative, transparent, strategic lens. We are excited to grow with StrategyBlocks and to take advantage of the various tools and features it offers as we build on our strategic planning and continue to strive to meet the needs of our students and the learning community we represent.”

TONI STROLLO HOLBROOK
ASSISTANT PROVOST, INSTITUTIONAL EFFECTIVENESS,
ROLLINS COLLEGE

“The overarching purpose in strategic planning for Rollins College is to make us better at delivering on our mission to educate students to be responsible leaders and productive citizens. As we implement effective strategies to meet this mission, we will be better as an institution and as a resource for the future leaders of the world who start their journey on our campus.”

GRANT CORNWELL
PRESIDENT, ROLLINS COLLEGE

“StrategyBlocks has proven an excellent planning system that, when combined with a leadership culture of delegation and empowerment across the organization, proves to be the perfect recipe for strategic success.”

JONATHAN BRADLEY
MANAGING DIRECTOR, FIRED UP CORPORATION

TRUSTED BY





ABOUT TRISKELL SOFTWARE



Triskell is an enterprise solution focusing on Strategy Execution Management with advanced Project Portfolio Management features, helping to fill the gap between planning and proper execution. Triskell allows companies to plan, prioritize, manage and monitor their organization's initiatives. It includes tools for demand management, capacity management, project portfolio management, application portfolio management, resource management, financial management, waterfall and agile project management, and IT service portfolio management.

41

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Triskell’s project management software improves the way we work at obvita. Thanks to the powerful tools, we can manage our projects more efficiently and plan our human resources more optimally. The user-friendly interface and versatile features increase our productivity and help us achieve our goals faster and more accurately.”

MIRJAM FRICK
OBVITA

“Thanks to Triskell, we now have visibility over the entire portfolio of Cora informatique’s activities. This visibility allows us to make projections that were impossible before. In terms of capacity planning, for example, thanks to information comparing the capacity needed and the capacity available.”

YANNICK LITAIZE
CORA

“We valued Triskell’s strong support for portfolio-level visibility, stage-gate frameworks, and customizable workflows. These capabilities were essential in structuring our transformation roadmap.”

MICHEL LEVESQUE
TRANSFORMATION DIRECTOR, MICRO BIRD

“The main use of Triskell has been to deliver planning and resourcing, as well as record monthly timesheets to allow for less manual reporting and financial accruals.”

CLARE EVANS
PMO, CARD FACTORY

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2026
STRATEGIC
PLANNING
SOFTWARE

RISING STAR





ABOUT ACTIONPLANNER



ActionPlanner was created to help teams achieve Business Execution Excellence. Most companies create business objectives, goals and plans but fail in execution. Unlike out-dated slides decks, ActionPlanner offers digital interactive business roadmaps with reminders and alerts that drive frequent feedback loops in all layers of the organization. Since everybody is using the same tool Execution becomes a dynamic interactive process where transparency drives agile collaboration across silos and clear delegation drives employee commitment, empowerment and accountability.

16

TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“ActionPlanner simply saves me a lot of time and helps me prioritize the tasks that are most important. This means I have an immediate overview of the challenges we are facing and I can address those directly. It makes my working day much more efficient and I recommend it to just about any company that is running projects.”

LARS TOFT KRAG
OPERATIONS DIRECTOR, METRO SERVICE

“ActionPlanner SOLO PRO helps me, like no other tool, to follow up on activities across the organization - from one place. It shows who is running which tasks, when they have a deadline and what is the latest status. Using ActionPlanner's color code language, we focus on the most important activities that need attention.”

JENS BOESEN
CHIEF OF STAFF, CONTINIA

“With the help of ActionPlanner, it's easy to follow the whole development portfolio. We can see realtime status updates and information about the responsibilities and initiatives. If an initiative hasn't been added to ActionPlanner, it doesn't exist.”

EXECUTIVE ADVISOR
LEADING FINANCIAL INSTITUTION

“ActionPlanner has been an important part of planning 54 initiatives, creating overview and ensuring progress until successful completion.”

NIELS WINGESØ FALK
VICE PRESIDENT, MT HØJGAARD



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ABOUT ALIGN



Align falls into a category of business management software they call growth management. Unlike task or project management software that focus on the gritty details of your daily or project-specific workload, Align helps manage the higher level strategic goals of the organization as a whole.

38

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“There is nothing out there like Align. We could go back to using spreadsheets like we were before, but that would be like going back to using a typewriter after using a computer.”

DAN WYKOFF
CHIEF FINANCIAL OFFICER, BRANCH TECHNOLOGY

“Align has made such a difference in my businesses and I think any coach or organization that engages fully and utilizes it effectively will achieve something similar.”

DONNA BATES
CHIEF EXECUTIVE OFFICER, ON POINT! STRATEGY

“When you’re growing fast, it’s easy to get distracted. Align keeps us hyper-focused on our individual and strategic goals.”

MCKEEL HAGERTY
CHIEF EXECUTIVE OFFICER, HAGERTY

“Align has streamlined our daily huddles and helped track organizational priorities, resulting in millions in savings.”

TODD AHERN
VICE PRESIDENT, RICOH





ABOUT AYEQ



ayeQ is designed for organizations seeking rapid growth, the ayeQ Strategy Platform™ is focused on data-driven performance improvement across all areas of marketing, inside sales, and sales – from strategy creation to tactical execution. The platform is comprised of 4 key areas for strategy automation: creation, activation, execution – with performance optimization built in from beginning to end.

12

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Using a platform like ayeQ adds a whole new level to driving RevOps and culture. ayeQ really creates a forcing function to identify all the revenue streams, and helps with alignment so your marketing leader, your sales leader, and your customer success leader – they’re talking to each other, and they’re talking about how we drive revenue, how we accelerate revenue, how we optimize our resources. I think that the cultural shift is a big one.”

CHRISTOPH RISCH
REVOPS LEADER, BIZZDESIGN

“The ayeQ Growth Platform gave me complete visibility into what our marketing plan needed to be, and exactly how our activities would impact revenue. I was able to build a marketing department at a small company much faster, and clearly show marketing’s impact.”

VICE PRESIDENT OF MARKETING
B2B MANUFACTURING SOFTWARE COMPANY

“ayeQ’s strategists were instrumental in repositioning us for growth. Their metrics-based approach allows us to look at our performance objectively and focus on the things that matter most. I would highly recommend the ayeQ team.”

CHIEF EXECUTIVE OFFICER
HEALTHCARE ANALYTICS COMPANY

“ayeQ gives us direction on how to grow our company faster, predict our sales results, and improve our marketing programs.”

CHIEF EXECUTIVE OFFICER
B2B QUALITY SAAS PLATFORM

TRUSTED BY

basware
Now it all just happens™

BiZZdesign



ABOUT DECIDEACT

DECIDEACT

DecideAct is a cloud-based strategy execution management & governance platform that makes fulfilling business strategy as tangible, transparent and quantifiable as tracking financial performance. It creates accountability and aligns the entire organization to key goals. It helps to achieve strong engagement, clear progress overview and strategic governance. DecideAct is on a mission to help companies and organizations transform their strategies into action. They want to modernize leadership through technology.

22 TOTAL CUSTOMER REFERENCES [VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“With DecideAct's digital tool, we can document, keep an overview and make our results and commitments as a business center visible - in an easy, digital and modern way.”

PER MADSEN
SLAGELSE BUSINESS CENTER

“DecideAct is an important strategy execution tool to ensure that everything is transparent to everyone in the organization.”

HRONN ÓLÍNA JORUNSDÓTTIR
DIRECTOR GENERAL, MAST

“DecideAct is a digital platform that has made a difference for Inpay and deserves wider distribution.”

THOMAS JUL
CHIEF EXECUTIVE OFFICER, INPAY

“DecideAct has been a great help in implementing our strategy, making sure that we meet the deadlines.”

GUNNAR MÁR SIGURFINNSSON
MANAGING DIRECTOR, ICELANDAIR CARGO

TRUSTED BY



ABOUT ELATE



Elate Build your strategic plan, increase visibility, and drive engagement leveraging Elate's Dynamic Strategic Planning platform. Connect long-term vision, annual goals, and quarterly objectives with ease in Elate. Strategy & Operations leaders of high growth companies have been ignored for far too long. It's time change that. Let's tackle strategic planning together, and give your strategy the focus it deserve.

28

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“We're excited to leverage Elate to help monitor the health of our strategic plan. With Elate's ability to track execution and continuously monitor key results, our leadership can make faster, more informed decisions.”

HEATHER ELLIOTT
KEY SPONSOR, HEAPY

“Elate is where our most important strategic priorities for the year come to life and it is the single source of truth for the most important things that need to happen at our organization.”

MARGIE EGGEN
CHIEF OF STAFF, SEISMIC

“Elate has allowed me to show my peers how they can do this work without needing me or the data team to do it for them.”

BEN CABEZA
CHIEF STRATEGY OFFICER, KIPP ATLANTA SCHOOLS

“Elate isn't just giving us software. It's giving us a new way to lead.”

LORI BORDEN
CHIEF OF STAFF, ONEDIGITAL

TRUSTED BY





ABOUT EOS SOFTWARE



EOS Software helps Strategy Realization Officers, Program Managers, Enterprise Architects, and Agile Planners to define, sustain, plan and share their strategic, work, architecture, and IT portfolios.

15

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“EOS is extremely customer focused and responsive. Their agile approach to deployment by working sprints as part of their standard subscription service, not as an incremental implementation consultation project, is exactly what I wanted!”

ENTERPRISE ARCHITECT
\$30B MANUFACTURING COMPANY

“Fantastic support by EOS in all phases of the solution implementation!”

ENTERPRISE ARCHITECT
\$30B MANUFACTURING COMPANY

“Flexible, cost effective, and easy to implement.”

IT DIRECTOR
\$50M U.S. GOVERNMENT DEPARTMENT

“Powerful Strategic Portfolio Mgmt. tool with amazing user experience.”

\$12B+ LOGISTICS COMPANY



ABOUT ESM SOFTWARE



ESM Software, LLC, formerly known as Palladium Group Inc. was founded by Dr. Robert S. Kaplan and Dr. David P. Norton, creators of the Balanced Scorecard framework. They have developed an industry leading suite of cloud based software products and FastTrack® coaching support solely focused on helping clients successfully execute their strategy. Their complementary combination of expertise of strategy development and management with Enterprise Performance Management (EPM) methodologies and technologies is changing the way the world manages. They do business throughout the Americas, Europe, the Middle East, and Asia-Pacific and enjoy a successful...

22

TOTAL CUSTOMER REFERENCES

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FEATURED TESTIMONIALS

“ESM is flexible enough to accommodate the nuances of our strategy management system. And the team provided excellent support during setup and responsiveness regarding inquiries.”

JOSHUA SCIANNA
PROCESS CONSULTANT - PLANNING AND STRATEGY,
HEALTH CARE SERVICE CORPORATION

“ESM's intuitive, easy to use interface allows organizations to spend more time making critical decisions and less time on the process.”

ROBIN CHAMP
CHIEF STRATEGIST, DTRA

“ESM aligned the Board of Directors, brought the strategic plan to life, and engaged employees with how they support the strategy.”

SEAN CARTER
CHIEF EXECUTIVE OFFICER, NEACH

“ESM provides one stop shopping for our balanced scorecard needs for both enterprise strategic plans and cascaded plans.”

JOHN ARCHBOLD
SENIOR STRATEGY DIRECTOR, MAYO CLINIC

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ABOUT PEOPLEBOX



Peoplebox is an OKR & strategy execution platform that helps companies align teams and execute fast. Their vision is to become the OS of Strategy Execution for hyper-growth startups and help them achieve moonshot goals faster. Peoplebox is a SaaS platform offering a centralized system to track cross-aligned goals and initiatives.

33

TOTAL CUSTOMER REFERENCES

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FEATURED TESTIMONIALS

“We have been a big advocate of the OKR framework. We have earlier explored moving from Google sheets to a tool for the same but nothing has come close to Peoplebox. What stood out in this partnership is the deep understanding of the Peoplebox team and their willingness to listen and enhance their platform to scale with our long-term needs. Peoplebox's seamless connection with Asana, Looker and a solid management dashboard on top of the same has made this possible.”

KHILAN HARIA
VP AND HEAD OF PAYMENTS PRODUCT, RAZORPAY

“Peoplebox is a tool that we use more and better than we expected. It is simple and easy to get started. Several executives and employees went out of their way to say that they like this tool better than what it replaced for us.”

HOWARD GETSON
CHIEF EXECUTIVE OFFICER, CAPITALGIX

“Experience with Peoplebox has been so much better than all other tools we tried the ability of the team to understand our concerns, turn around features quickly and support our adoption effort has been great.”

ANIKET SINGH
HEAD-STRATEGY, DUNZO

“PeopleBox has simplified the goal-setting and review process and made it much easier to manage. Now our teams can submit goals, track progress, and complete reviews all in one centralized location.”

MATT BENSON
HR SYSTEMS MANAGER, PROPEL SCHOOLS

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ABOUT RESULTSBI



ResultsBI is passionate about helping companies improve their results. They help companies take their vision, turn it into an actionable strategic plan and provide tools to execute their strategy. Using the RESULTS platform keeps your communications focused on business, and saves enormous amounts of time by collecting everything relevant into the same place.

9

TOTAL CUSTOMER REFERENCES

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FEATURED TESTIMONIALS

“The strategic planning was a game changer for us and helped us get all on the same page. Now we run all our meetings on ResultsBI.com and love the ability to make all our notes in a central system the leadership team have regular reviews of the strategy and we derive our strategic goals from the same platform. We’ve achieved and implemented more in the first quarter than we have for the past 2 years.”

SPENCER DORMER
DYNAMICS GEX

“The Strategic Planning Workshop was just superb and deeply inspirational. This was easily the best two hours I have spent on any new endeavour in the past several years.”

MAURICE O’CONNOR
CHIEF EXECUTIVE OFFICER, VEARSA

“ResultsBI.com is a must for CEO’s and business owners. It’s the best tool I’ve used to both define and align my team to our company’s strategy.”

PETER STEELE
CEO, REVENUE AUTOMATION

“With the help of the ResultsBI.com Platform we exceeded our growth target by 23%.”

GERRY SUCKLING
GENERAL MANAGER, INTEX GROUP

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ABOUT RHYTHM SYSTEMS



Rhythm Systems provides software and consulting for mid-market companies to achieve successful business execution. Their cloud-based software streamlines strategic planning and execution for mid-market CEOs, executive leaders and departmental teams – ensuring all employees are aligned and working toward long-term, annual, quarterly, weekly and daily goals. They enjoy working with the top mid-market growth companies in the world – many of them Inc. 500 Winners, Best Place to Work Recipients and leaders in their industry.

64

TOTAL CUSTOMER REFERENCES

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REFERENCES**

FEATURED TESTIMONIALS

“Rhythm is grounded in basic principles of focus and accountability. That’s what makes it so powerful. I have seen our organization transform its ability to define where we’re going and execute as a result of applying those principles and using the Rhythm tools to facilitate that.”

RICK WALDRON
VP, STRATEGY & INNOVATION, MOBE

“I have used Rhythm on four separate companies. It’s been instrumental in helping us Start. Scale. Exit. and Repeat. It benefits us by getting everyone in alignment and making sure nothing falls through the cracks.”

COLIN CAMPBELL
SERIAL ENTREPRENEUR, CLUB

“Rhythm has enabled us to keep our focus on the right things to grow. It’s a consistent, structured routine around identifying, measuring, and achieving our strategic priorities.”

ANGELICA DELBASO
STRATEGIC PLAN COORDINATOR, MOBILITYWORKS

“Rhythm has been instrumental in elevating visibility and focus for the company.”

DIANE BRISTOL
VP OF CULTURE & COMMUNITY, SIMMS FISHING

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ABOUT SPIDER STRATEGIES



Spider Strategies--a team of performance management enthusiasts, software developers, and support staff whose sole focus is to help their customers achieve their best strategic performance. They're the creators of Spider Impact--the industry's leading strategy planning, execution, and management software. Spider Impact easily automates your balanced scorecard and your KPIs and metrics to optimize your business performance. But its real differentiation is its ability to assist businesses in rapidly adapting and executing their strategies to survive today's ever-changing market environment and...

35

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REFERENCES**

FEATURED TESTIMONIALS

“The Spider Impact application continues to provide benefit to our team. It is easy to use, our records are maintained correctly, and we have the bonus of being able to create useful dashboards and reports that update automatically when the scorecard data are entered. Intrafocus has been a great supplier, they are quick to respond and eager to help.”

CAROLINA BACHARIOU
STRATEGY MANAGEMENT DIRECTOR, ALMI TANKERS

“Gexcon UK has been using Spider Impact religiously for 5 years. With around 20% growth per annum, you can conclude that the Balanced Scorecard and the Spider Impact tool has certainly helped me achieve this consistently positive result.”

DAVE PRICE
UK PRESIDENT, GEXCON

“Spider Impact has improved how we work and how our data is managed. It is quite intuitive to use and a vast improvement over Excel spreadsheets.”

SENIOR MANAGER, PROGRAMME & STRATEGY
GRENADA CO-OPERATIVE BANK

“We knew during our trial that Spider Impact was the solution to taking our initiatives to the next level.”

ODOMA OGBADU
SENIOR COMPENSATION OFFICER, AFRICAN
DEVELOPMENT BANK

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