

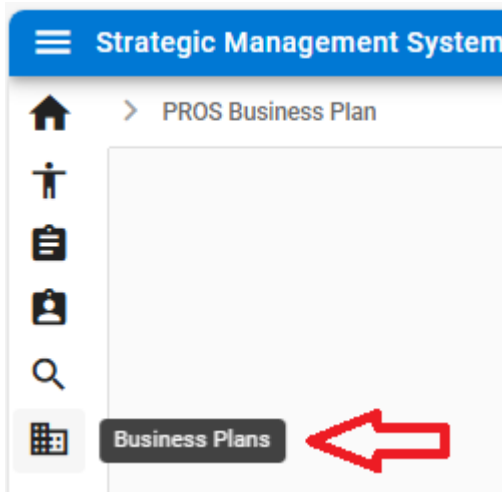
Quick Reference Guide on how to Generate and Complete the Business Plan in SMS

1. Log in to SMS.

Use your regular credentials to access the Strategic Management System (SMS).

2. Access the Business Plan module.

On the **left-side menu**, select the **last icon** labeled “**Business Plans**.”



3. Select the appropriate Fiscal Years.

- Ensure the fiscal years displayed in the selection box are correct.
- Click “**Select**” to open your Business Plan template.

Select Fiscal Year

Fiscal Year

4. Complete the Business Plan template.

Business Plan - Department Name - Fiscal Years 2025-26 and 2026-27

7

5 Save For Later Submit Business Plan Generate Business Plan Draft **6**

In order to submit, all fields must be filled and the Business Plan Report section must be acknowledged. Clicking "Save For Later" allows you to save your progress until you are ready to submit.

Department Overview

Please enter the name of the Department Director in Firstname Lastname format. (e.g. John Smith).

Department Director **1** **2** 5/100

Describe your departmental vision (optional) and mission or purpose statement.

Purpose, Vision, Mission and Values* 5/1500

Provide an overview of the department's major duties, services, and programs.

Major Functions* 8/1500

Division Descriptions

Provide a name and description of each division within the department.

Division 1 **3** **4**

- Fill out **all required fields** in the form (1).
- Be aware of the character limit (2). Focus on the three **Cs**: Clear, Concise, and Compelling
- Use the **“+”** icon to add a new item (3) or the **trash can** icon to delete an entry (4).
- Make sure all sections are fully completed.
- Check the box confirming that the **Business Plan Report is completed**.

Business Plan Report

OMB will include the latest Business Plan Report in this section.

☒ By checking this box, you acknowledge that the Business Plan Report is accurate and up to date at the time of this Business Plan submission.

5. Save your work.

- Click **“Save for later”** at any time to ensure your progress is not lost (5).

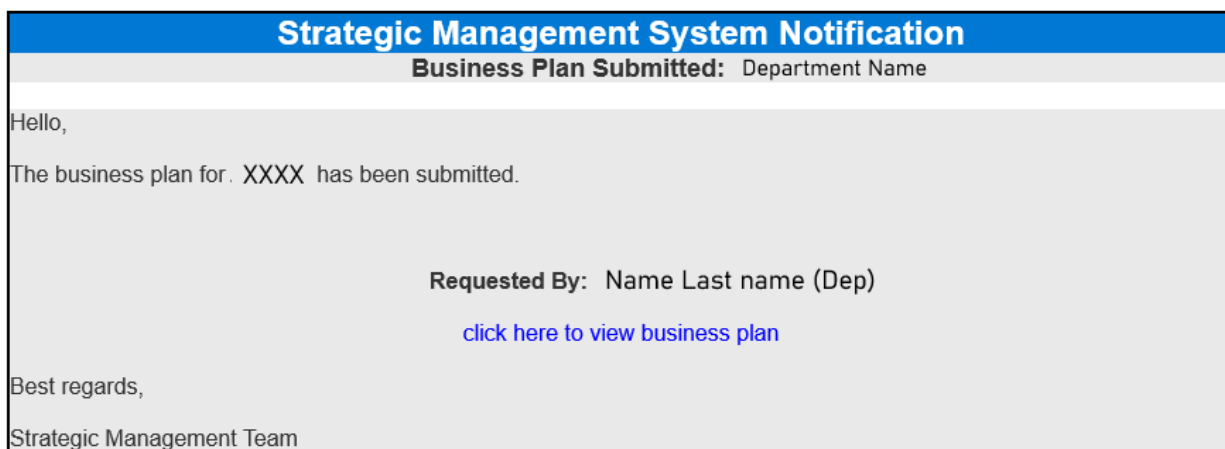
- You can also **view your Business Plan in Word** format to review or print (6).

6. **Submit for approval.**

- Once your Business Plan is complete and has been **reviewed and approved by your Director**, click **“Submit Business Plan.”** (7) .
- A message will be displayed: **“The Business Plan has been submitted, is now locked for editing, and is undergoing review. Should you need to make changes, please contact an administrator as soon as possible.”**

7. **OMB Review – Initial Submission.**

OMB will receive an email notification from ‘noreply@miamidade.gov’ with the subject line: “Business Plan Submitted: [Department Name]”



8. **OMB Feedback and Revision Access.**

Once OMB reviews your submission and provides feedback, the Business Plan will be reopened for edits.

- You will receive an email from ‘noreply@miamidade.gov’ with the subject line: “Business Plan Revision Request: [Department Name]”
- You may then make the requested updates

Strategic Management System Notification	
Business Plan Revision Request:	
Hello,	
The xxxxxxxx	Department Business Plan has been unlocked for revisions by an administrator. Please log in to view their comments, make the necessary changes and resubmit.
<p style="text-align: center;">Requested By: Administrator</p> <p style="text-align: center;">click here to view business plan</p>	
Best regards,	
Strategic Management Team	

9. Final Review and Completion.

After revisions are made, submit the Business Plan again.

- OMB will complete the final review and mark it as **Completed**.
- You will receive an email from '**noreply@miamidade.gov**' with the subject line:
"Business Plan Completed: [Department Name]"
- At this point, your Business Plan has been successfully finalized.

Strategic Management System Notification	
Business Plan Completed: Department Name	
Hello,	
The XXX	Department Business Plan has been marked as complete by an administrator.
<p style="text-align: center;">Requested By: Administrator</p> <p style="text-align: center;">click here to view business plan</p>	
Best regards,	
Strategic Management Team	

OMB will include your Department Table of Organization and Business Plan report, convert it to pdf and send it to your Department Director.