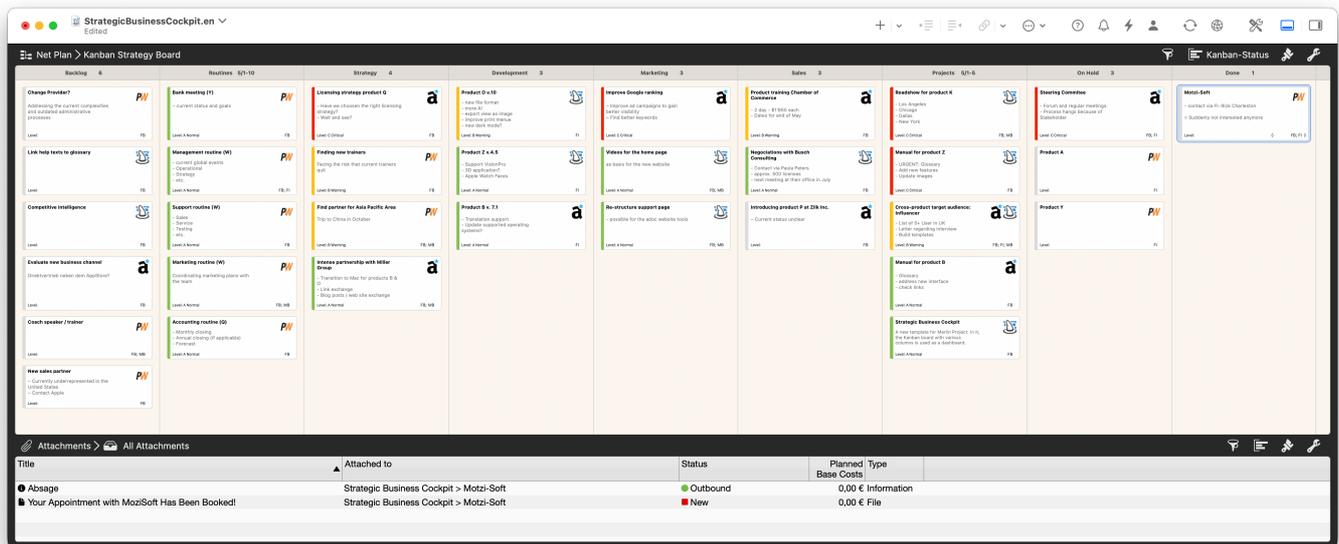# Strategic Business Cockpit

Successfully running a business above all means maintaining a clear overview. Goals, strategies, routines, projects, customers, and internal developments all run in parallel — and it is easy to get lost in the details. In smaller companies, there is the added challenge that systems designed to provide this kind of overview are often complex and expensive. Even so, as the person in charge, you do not want to lose sight of the bigger picture. This is exactly where our new application for Merlin Project comes in.

The *Strategic Business Cockpit* is a central dashboard that clearly structures the most important topics in your company and makes them easy to grasp visually. Instead of managing multiple projects, endless to-do lists, or scattered notes, all business-relevant aspects are brought together in a single view.

Goals and benefits

The *Strategic Business Cockpit* pursues three main goals:

1. **Focus** – a clear visual representation of all key topics.
2. **Set priorities** – with color codes and clear limits for routines and projects.
3. **Ensure the ability to act** – by making it visible at all times where action is needed and what can wait.

Using the principles of the Kanban method, the Business Cockpit helps reduce complexity and create a clear thread through many parallel activities. This is exactly where our

template for Merlin Project comes in. It provides a ready-to-use structure that can be adapted as needed. Color bars, logos, tags, and columns are designed to offer quick orientation while still providing plenty of flexibility.

[Download this template for free.](#) Try it in your own environment and see how a Strategic Business Cockpit can simplify your daily work and sharpen your focus on what really matters.

Attachments

Use Anhänge attachments] in Merlin Project to qualify and enrich your topics. They give you additional context and supporting information directly within your cards. You may attach to checklists, files, events, information, issues, and risks

Backlog

This is one of the preconfigured columns in the template. Anything that may, can, or should be on your agenda in the future belongs in this column. Feel free to collect ideas freely here. What matters is what will eventually be moved into another column.

Development

This is one of the preconfigured columns in the template. If your company is developing something, this is the place for those topics. If that does not fit your workflow, simply rename or remove the column.

Done

This is one of the preconfigured columns in the template. At the very end of all columns, there is space for your completed cards. These should be removed and archived as part of a monthly or quarterly routine.

Card

A card on the board shows the title in bold and an optional note in a more subtle style. If you have assigned an image to the resources, it appears in the upper-right corner.

At the bottom left, the priority is displayed, and next to it you manage the responsible person.

Marketing

This is one of the preconfigured columns in the template. Those who do not advertise will disappear.

Languages

The Strategic Business Cockpit can be used in all languages supported by Merlin Project: German, English, French, Spanish, Japanese, and Traditional Chinese.

Resources

Describes the area or category for which a card was created. If you assign an image to that area, it will appear on every card created for it.

Routines

This is one of the preconfigured columns in the template. It contains all recurring events and activities in which you need to participate. Limit these as much as possible, since they take away valuable time from other important topics.

Columns

The Strategic Business Cockpit provides columns for Backlog, Routines, Strategy, Development, Marketing, Sales, Projects, On Hold, and Done. You can adjust the columns in the Kanban board in Merlin Project using the dialog Group by status field.

On Hold

This is one of the preconfigured columns in the template. Anything that is currently not moving forward belongs in this column.

Projects

This is one of the preconfigured columns in the template. All projects for which you are directly responsible, or that you need to monitor as a stakeholder, belong here.

Strategy

This is one of the preconfigured columns in the template. All topics that are not operational belong here.

Priority (short: prio)

Your attention should be guided by the color-highlighted priority. You set it on the card at the bottom left. If something is marked in red, the topic is critical and should have your highest attention. The level before that is yellow and serves as a warning. Green marks normal priorities, and anything without a color has no priority, meaning it is currently not a focus topic for you.

Responsible person

To make sure you always have one or more contacts for a topic, responsible persons are implemented as tags. These are managed in the inspector. That is where you should first enter your team and replace the sample data. You can then assign the appropriate responsible persons on the card at the bottom right.

Sales

This is one of the preconfigured columns in the template. If there are specific sales initiatives or key accounts that require your attention, this is the place for those cards.

License & Download

The Strategic Business Cockpit is a template for Merlin Project and can be downloaded free of charge from the page listing all templates.

This fact sheet was created with adoc Studio.