Role of the Strategic Planning Facilitation and Training Team (SPFTT)

- To develop strategic planning competencies, skills, and capabilities throughout the university
- To establish the processes to "cascade down" strategic planning for a system-wide intervention
- To ensure that strategic planning is owned by all constituents
- To ensure that strategic planning efforts will be sustainable over time
- To promote change agents at critical places in the organization

Balanced Scorecard
Training and Certification

- The Balanced Scorecard Certification Program is designed to give practitioners the tools and skills they need to help their organizations increase focus on strategy and results, improve organizational performance by measuring what matters, align the work people do on a day-to-day basis with strategy, focus on the drivers of future performance, improve communication of the organization's Vision and Strategy, and prioritize in tough economic times.
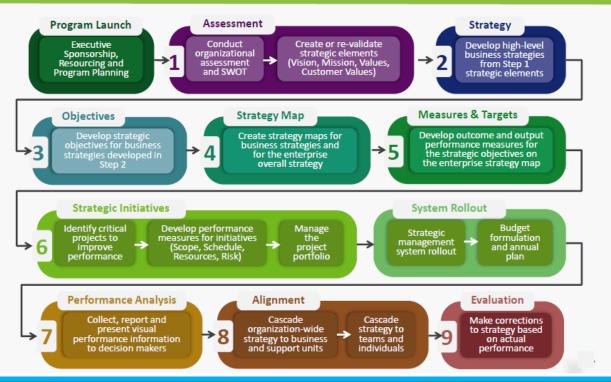
Balanced Scorecard
Training and Certification (cont.)

- With two levels of certification, Balanced Scorecard Professional (BSP) and Balanced Scorecard Master Professional (BSMP), the program is offered in association with the George Washington University College of Professional Studies.
- As a comprehensive program on leading a balanced scorecard strategic planning and management system implementation using the Balanced Scorecard Institute's Nine Steps™ methodology, it is ideal for participants charged with building, implementing, managing, and sustaining balanced scorecard planning and management systems.

Nine Steps to Success™ Framework

Program Launch

Executive Sponsorship, Resourcing and Program Planning

1

Assessment

Conduct organizational assessment and SWOT

Create or re-validate strategic elements (Vision, Mission, Values, Customer Values)

2

Strategy

Develop high-level business strategies from Step 1 strategic elements

3

Objectives

Develop strategic objectives for business strategies developed in Step 2

4

Strategy Map

Create strategy maps for business strategies and for the enterprise overall strategy

5

Measures & Targets

Develop outcome and output performance measures for the strategic objectives on the enterprise strategy map

6

Strategic Initiatives

Identify critical projects to improve performance

Develop performance measures for initiatives (Scope, Schedule, Resources, Risk)

Manage the project portfolio

System Rollout

Strategic management system rollout

Budget formulation and annual plan

7

Performance Analysis

Collect, report and present visual performance information to decision makers

8

Alignment

Cascade organization-wide strategy to business and support units

Cascade strategy to teams and individuals

9

Evaluation

Make corrections to strategy based on actual performance

Balanced Scorecard Certification Program: Program Learning Objectives

- Articulate the six steps needed to build a scorecard system and the three steps needed to implement these systems
- Explain the evolution of measurement and strategic management systems
- Identify reasons for adopting a balanced scorecard system
- Anticipate challenges that need to be overcome
- Contrast the differences and similarities in scorecard systems for different organizations
- Utilize an organization assessment to set vision, mission and Strategy
- Define strategic themes and results

Balanced Scorecard Certification Program

DAY ONE

Module I. Introduction

Module II. Overview of the Balanced Scorecard (BSC)

- Introduction to performance management and measurement
- Balanced scorecard history
- Reasons for undertaking a balanced scorecard project
- Advantages of using BSC performance systems
- Contrast private sector and public agency use of scorecards
- Key questions the BSC seeks to answer
- Sample BSC performance measures
- The Nine-Step Methodology for building and implementing a balanced scorecard project
- Anticipate challenges of scorecard systems
- Indicators of successful projects

Balanced Scorecard Certification Program

DAY ONE (cont.)

Module III. Building the Balanced Scorecard

- Step One: Assessment - Utilize an organizational assessment to set vision, mission, and strategy
- Step Two: Strategy - Identify customer groups and develop the Customer Value Proposition

Balanced Scorecard Certification Program

DAY TWO

Module III. Building the Balanced Scorecard (Continued)

- Step Two: Strategy - Develop Strategic Themes and Strategic Results
- Step Three: Strategic Objectives - Develop strategic success drivers
- Step Four: Strategy Mapping - Develop cause-effect relationships among the objectives
- Step Five: Performance Measures - Derive Strategic Measures, targets, & thresholds

Balanced Scorecard Certification Program

DAY THREE
- Step Five (cont'd): Performance Measures - Derive Strategic Measures, targets, & thresholds
- Step Six: Strategic Initiatives - Define criteria for Selecting and prioritizing Initiatives

Module IV. Implementing the Balanced Scorecard
- Implementation issues
- Align strategy and work throughout the organization
- Collect, verify and validate performance data
- Transform data into information
- Software options for managing performance information
- Develop an internal and external communication plan
- Cascade the scorecard throughout the organization
- Employee motivation

Balanced Scorecard Certification Program

DAY THREE (cont.)
- Link strategy to resource decisions
- Link performance to rewards
- Scorecard roll out, training, and change management
- Utilize performance information to improve organization performance

Module V. Next Steps
- Integrate the scorecard with other enterprise management and information systems
- Share best practices

Balanced Scorecard Certification Program

DAY THREE (cont.)
Module VI. Getting Your Scorecard on Track
- Overcome obstacles and challenges within your organization
- Continual review of Integration with other enterprise management and information systems
- The role of consultants
- Time and schedule estimates
- Develop an Action Plan based on your organization's readiness

Balanced Scorecard Certification Program

DAY FOUR

Module 1: Evaluation to Assessment
- Best practices and terminology review related to Steps Nine and One of the Nine Steps to Success
- Common Evaluation & Assessment challenges
- Small group facilitation primer
- Case Study Exercise: use various small group facilitation techniques to identify case study scorecard development issues and problems

Module 2: Advanced Strategic Foundations Development
- Review of Steps One: Assessment and Step Two: Strategy best practices
- Analyze, identify and correct poor strategic foundation design
- Migrate from other planning models to the balanced scorecard
- Anticipate Various pitfalls associated with poorly designed strategic themes and perspectives
- Case Study Exercise: Revise poorly designed strategic foundation elements

Balanced Scorecard Certification Program

DAY FOUR (cont.)

Module 3: Advanced Objective & Strategy Map Development
- Review of Step Three: Strategic Objective and Step Four: Strategy Map best practices
- Facilitate the correction of poorly designed objectives and strategy maps
- Case Study Exercise: Revise poor strategic objective and strategy map design & development facilitation

Module 4: Advanced Performance Management – Measure What Matters
- Review of Step Five: Performance Measurement best practices
- Utilize several frameworks, such as the Logic Model, the Decision Model and the Critical Question model, to develop a family of potential measurements for each objective
- Identify and correct problems associated with poorly selected measurements
- Exercise: Practice using the logic model to develop meaningful measurements for various objectives

Balanced Scorecard Certification Program

DAY FIVE

Module 5: Measurement Definition, Implementation & Visualization
- Advanced measurement definition: ratios, frequency & accuracy requirements
- Develop "roll up" measurements and indexes
- Set targets & normalize data
- Improve data visualization
- Case Study Exercise: Identification and correction of poor measurement definition & visualization

Module 6: Strategic Initiative Prioritization & Management
- Review of Step Six: Strategic Initiatives best practices
- Advanced strategic initiative prioritization techniques
- Project management primer
- Case study exercise: practice using a common initiative prioritization technique

Balanced Scorecard Certification Program

DAY FIVE (cont.)

Module 7: Advanced Scorecard Alignment & Cascading
- Review of Step Eight: Alignment best practices
- Build organizational alignment through advanced cascading techniques
- Advanced Tier 2 scorecard development
- Build a pilot program at the Tier 2 level without a Tier One level scorecard
- Develop a Tier Three scorecard and align with an appraisal system
- Case Study Exercises: Refine Tier 2 scorecards and develop Tier 3 scorecards

Module 8: Managing & Sustaining a Balanced Scorecard
- Day-to-day management with a Balanced Scorecard
- Performance-based budgeting
- Sustaining a Scorecard
- Strategy Management Office (SMO) roles & responsibilities