BALANCED SCORECARD PROFESSIONAL CERTIFICATION (BSP)



Understand and apply organisational performance management principles using the Balanced Scorecard Management System and Nine Steps to Success Framework.

ACCREDITATIONS:

Balanced Scorecard Institute

RELATED CERTIFICATIONS

- Balanced Scorecard Certification
- KPI Certification

COURSE OVERVIEW

Gain the requisite skills to guarantee that your organisation's balanced scorecard is methodically built, implemented explicitly with your unique needs, and sustained through careful planning and management.

The Balanced Scorecard Professional Certification Course provides delegates with the necessary tools for building, implementing, and sustaining balanced scorecard planning and management systems in their organisation. Created by the Balanced Scorecard Institute, the certification program is consistent with basic balanced scorecard concepts and terminology developed by Kaplan & Norton.

COURSE DELIVERY METHODS

In-Person Training (Onsite)
5 day training

In-Person Training (Public)
5 day training

Virtual Instructor-Led Training
10 × 3hr tutorials

OBJECTIVES & TOPICS



Learning objectives

The program is designed around practical techniques and templates, real-life case studies, and time for participants to practice what they learn with support from experts.

Participants will learn how to:

- Articulate the six steps needed to build a scorecard system and the three steps required 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 organisations
- Utilize an organisation assessment to set vision, mission, and strategy
- Define strategic themes and results
- Develop Strategic Objectives and a Strategy Map
- Define performance measures, targets and thresholds
- Developing Initiatives and a prioritisation plan
- Identify and understand the three implementation steps of Automation, Cascading and Evaluation
- Use software to communicate performance information
- Cascade the scorecard throughout the organisation
- Using scorecard information to improve performance
- Overcome the challenges of integrating balanced scorecard systems with other enterprise-wide systems
- Apply the BSC to an organisation's needs making it relevant to company-specific issues

Topics covered

- Why the balanced scorecard is still one of the most influential and effective management tools.
- Basic elements and concepts of a balanced scorecard.
- How scorecards are created using the Balanced Scorecard Institute's Nine Steps to Success™ methodology.
- How to contribute to your team's mission, vision, core values, and customer value proposition development.
- The basics of performance measure and target development.
- What cascading scorecards to all levels in the organisation can create in terms of strategic alignment.
- How to engage leaders and employees in the origination's shared direction.
- How to overcome anticipated challenges with proposed solutions.

Course modules

Module I. Introduction

- Introductions, expectations, and participant knowledge
- Balanced scorecard concept and origin
- Course and module overview

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

Module III. Building the Balanced Scorecard

- **Step One:** Assessment - Utilize an organisational assessment to set vision, mission, and strategy
- **Step Two:** Strategy - Identify customer groups and develop the Customer Value Proposition
- **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
- **Step Six:** Strategic Initiatives - Define criteria for Selecting and prioritising Initiatives

Module IV. Implementing the Balanced Scorecard

- **Step Seven:** Performance Analysis
  - Collect, verify, and validate performance data
  - Transform data into information
  - Software options for managing performance information
- **Step Eight:** Alignment
  - Cascade the scorecard throughout the organisation
  - Employee motivation
  - Link strategy to resource decisions
  - Link performance to rewards
- **Step Nine:** Evaluation
  - Utilize performance information to improve organisational performance
  - Implementation issues
  - Align strategy and work throughout the organisation
  - Develop an internal and external communication plan
  - Scorecard rollout, training, and change management

Module V. Next Steps

- Integrate the scorecard with other enterprise management and information systems
- Share best practices

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Module VI. Getting Your Scorecard on Track

- Overcome obstacles and challenges within your organisation
- 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 organisation's readiness

Module VII: Advanced Evaluation to Assessment Methods

- 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 VIII: 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

Module IX: Advanced Objective & Strategy Map Development

- Review of Step Three: Strategic Objective and Step Four: Strategy Maps 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 X: 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

Module XI: Advanced Measurement Definition, Implementation & Visualization

- Advanced measurement definition: ratios, frequency & accuracy requirements
- Develop "roll up" measurements and indexes
- Set targets & normalise data
- Improve data visualisation
- Case Study Exercise: Identification and correction of poor measurement definition & visualisation

Module XII: Advanced Strategic Initiative Prioritization & Management

- Review of Step Six: Strategic Initiatives best practices
- Advanced strategic initiative prioritisation techniques
- Project management primer
- Case study exercise: practice using a joint initiative prioritisation technique

Module XIII: Advanced Scorecard Alignment & Cascading

- Review of Step Eight: Alignment best practices
- Build organisational 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 it with an appraisal system
- Case Study Exercises: Refine Tier 2 scorecards and develop Tier 3 scorecards

Module XIV: Advanced 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

Balanced Scorecard Professional Exam

- The course assessment takes the form of an online exam



BENEFITS OF ATTENDING

Delegates gain a greater understanding of the critical concepts of the balanced scorecard and why it is gaining so much traction in corporate, non-profit, and governmental organisations. Delegates learn a systematic, nine-step methodology for building and implementing the balanced scorecard. This specifically designed methodology is based on the performance management theory developed at Harvard University and incorporates the years of experience garnered from the Institute's international balanced scorecard consulting experience. The course demonstrates and explains some practical steps to develop the various components of a balanced scorecard management system.

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WHO SHOULD ATTEND?

This course is recommended for delegates interested in building, implementing, and maintaining strategic performance management systems. And those wishing to develop practical ideas for improving overall organisational performance. Courses are taught by highly experienced instructors with backgrounds in training and consulting for private, public, and non-profit organisations.



COURSE FACILITATOR

Mark Van Rooyen

Senior Partner & Lead Consultant

The course will be facilitated by Mark van Rooyen, who has trained many Balanced Scorecard Bootcamps over the last 20 years, for various organisations. His experience in strategy, management and performance systems will ensure value for all delegates. His success in delivering many courses across the continent, and his understanding of various operational environments, make his presentation and training highly effective.