TRAINING
E-LEARNING
CONSULTING
FACILITATION
SOFTWARE
CERTIFICATION
The Balanced Scorecard Institute, a Strategy Management Group company, provides training, certification and consulting services to commercial, government, and non-profit organizations in applying best practices in strategic planning & management, balanced scorecard, strategic performance management & measurement, and transformation & change management.

Products and services include public and on-site courses, facilitation and consulting services, professional certification and information & tools used by executives, managers and analysts to transform their organizations into "performance excellence" organizations. Institute consultants and trainers focus on building the client organizational capacity needed to continue developing the elements of their performance management systems themselves. The Institute’s software, QuickScore™, is widely used to improve data-driven decision making in organizations. The Institute’s book, The Institute Way: Simplify Strategic Planning & Management with the Balanced Scorecard was published in 2013 and outlines a practical step-by-step process to formulate and execute strategy.

Members of the Institute team have worked for hundreds of organizations in 30 countries in the private, public, and not-for-profit sectors, and have provided consulting support to several countries, a dozen U.S. cities, several counties, seven Federal Cabinet level agencies and private companies ranging from the smallest entrepreneurs to the Fortune 200. The Institute was the first certifying body for Balanced Scorecard Practitioners, and offers a Professional Certification Program, jointly sponsored by the George Washington University College of Professional Studies, with two levels of certification: the Balanced Scorecard Master Professional (BSMP) and Balanced Scorecard Professional (BSP). The Institute’s practical framework for building and deploying balanced scorecards, the award winning Building and Implementing a Balanced Scorecard Framework: Nine Steps to Success™, is used worldwide.

The Institute also provides, through the balancedscorecard.org website, a resource to obtain information, ideas and best practices based on lessons learned from extensive experience in building strategic management and performance measurement systems using the Nine Steps to Success™ balanced scorecard methodology. The balancedscorecard.org website has been the number one website for balanced scorecard information for several years.

The Institute’s roots go back to 1997, when the Nine Steps To Success™ balanced scorecard methodology and course were developed and taught through the U.S. Foundation for Performance Measurement. In 1998, the Institute name and website were created. The Balanced Scorecard Institute became a full-service training, facilitation, and consulting business in 2003 when the Balanced Scorecard Institute (internet resource), the U.S. Foundation for Performance Measurement (training & consulting) and Howard Rohm Consulting, LLC (international consulting) merged to form a single organization. In 2005, the Institute became part of the Strategy Management Group, Inc., with offices in Cary, NC and Washington, DC. The company has since expanded into San Jose, California and has partners in Lagos, Nigeria; Nairobi, Kenya; Melbourne, Australia; Dubai, UAE; Johannesburg, South Africa, and Pretoria, South Africa.
"...the Institute helped us translate our strategy into something that employees can actually use."
- Laurent Auguste, President & CEO, Veolia Water America

"Our balanced scorecard is our corporate strategy in action..."
- David "Scott" Hencshel, Office of Strategy and Innovation, U.S. Army Medical Department
Howard Rohm, BSMP, CPT, is President and CEO of the Balanced Scorecard Institute. Howard developed the Nine Steps to Success™ balanced scorecard framework in 1997. An internationally known speaker and teacher with over 300 presentations to his credit, Howard has authored numerous articles, presentations, and training materials on strategic planning, performance management and measurement, and balanced scorecard systems.

Howard has been a management consultant to business and industry, a business owner, a college professor, and a Federal government manager. He has consulted with over 60 private and public organizations, including 18 Federal, and numerous state, local and not-for-profit organizations. He was a management consultant at Booz Allen Hamilton and the director of strategic planning and performance measurement at the U.S. Department of Energy/Office of Nuclear Energy. Howard has worked in energy, transportation, health care, research and development, finance and banking, telecommunications, information technology, education, and security. His clients include: UNICEF, Cisco, SAS, Intelsat, Susan G. Komen for the Cure, Euro Control (Brussels), LUKOIL (Russia), the U.S. Department of Interior, the U.S. Air Force and Marine Corps, the Ethiopian Ministry of Health, the government of Botswana, Austin (TX) Capital Metro System, the APGA, Passport Canada, the Blue Man Group, the U.S. House of Representatives and Arapahoe County (CO).

Howard has taught and lectured at five colleges and universities and at the Federal Executive Institute. He is a team recipient of a Hammer Award (government reform) from Vice-President Al Gore. He co-authored, with three others, the Association for Strategic Planning SMP/SPP Certification Exam Study Guide. Howard also co-authored the Institute’s premier strategic planning and management book, The Institute Way: Simplify Strategic Planning with the Balanced Scorecard with 3 other members of the Institute. Howard has undergraduate and graduate degrees in engineering (Iowa State University and George Washington University), is a Certified Performance Technologist, a Certified Strategic Management Professional and a certified e-learning instructor. In a White House ceremony, he was awarded the 1000 Points of Light award for community service by first lady Barbara Bush.

David Wilsey, BSMP, SMP, is the Chief Operating Officer. He is a strategic planning and performance measurement specialist with a broad range of professional consulting experience helping organizations with strategic focus, communications, organizational alignment, prioritization and value proposition.

David manages BSI’s business operations and supports all business lines. He has many years of experience managing BSI’s certification programs and leading consulting and training client strategic planning and performance management projects, including Constellation Energy, UNICEF, KeyLogic Systems, National Cancer Institute, Greenville Utilities Commission, Wake County Community Services and Chicago Virtual Charter Schools. Other high profile clients have included Blue Man Group, Fort Bragg Army Garrison, the U.S. Centers for Medicare and Medicaid Services, Veolia Water NA, and many others. He teaches all of BSI’s public and client-site certification workshops and manages software partnerships. He has been a featured speaker at events hosted by organizations such as IQPC, Robert Half, the Association for Strategic Planning, Actuate, and ISPI. He is also a licensed PuMP® Consultant.

David has decades of experience in a wide range of fields, including consulting, engineering, marketing, manufacturing, design, programming, research, education, and multimedia production. His employment history also includes tenures at SAS Institute, Lunati Pistons, Holley Performance, Nesbit Engineering and the University of North Carolina – Chapel Hill. He is a member of the Association for Strategic Planning and is a certified Strategic Management Professional (SMP). He co-authored, with three others, the Association for Strategic Planning SMP/SPP Certification Exam Study Guide. David also co-authored the Institute’s premier strategic planning and management book, The Institute Way: Simplify Strategic Planning with the Balanced Scorecard with 3 other members of the Institute. He has a Bachelor’s degree in Music Education from Henderson State University and an MBA from North Carolina State University, with a concentration in Innovation Management.
**Gail Perry, BSMP**, is a Senior Associate and Vice President of Strategic Solutions. Gail has over 20 years of strategic planning and performance management consulting experience with corporate, nonprofit, and government organizations. Gail has trained several hundred scorecard students as the lead trainer for several of the Institute's public workshops. She has provided facilitation, training, and consulting services for several Institute clients worldwide including government/NPO/NGO organizations such as U.S. Air Force, Federal Government of Botswana, InterAmerican Development Bank, United Nations Development Program, DFAS, TARDEC, and U.S. Army Medical Command, as well as Fortune 500 and other corporations such as ADP, Bright Point, Tolko, Eric Mower & Associates, SmithGroup, TATA Chemicals North America, and Mary Kay Inc.

Gail also has many years experience working as a consultant to the nonprofit sector, focusing on engagements to improve strategic alignment and performance measurement. She served as the prime consultant to the Director of Strategic Planning at Susan G. Komen for the Cure, and led efforts to develop and implement Komen's cascaded balanced scorecard system, develop performance measures, implement a project management office and improve processes related to sustaining the balanced scorecard framework.

Gail has been a consultant with Accenture and Cincom Systems, and has experience in aerospace and defense, transportation, and manufacturing industries through her consulting work to Lockheed-Martin, General Dynamics, Greyhound Bus Lines, Vought Aircraft Industries, GulfStream Aerospace Corporation, British Aerospace, and Ericsson in enterprise resource planning optimization studies and system implementation. Gail co-authored the Institute's premier strategic planning and management book, *The Institute Way: Simplify Strategic Planning with the Balanced Scorecard* with 3 other members of the Institute. Gail has taught the Institute's Certification Program as well as taught performance management workshops as part of a certification program at Brookhaven College. Gail has a Bachelor's Degree in Industrial Engineering and a Master's Degree in Business Administration.

**Mitchell Weisberg, BSMP**, is the Director of International Business. Mitchell was on the original team that developed the Balanced Scorecard with Drs. Norton and Kaplan. He has over 30 years of experience advising executives on Strategy Execution for High Business Performance. Mitchell has led organizations to achieve greater profitability through implementation of performance metrics/management, balanced scorecard, predictive analytics, business intelligence (BI), process improvement, IT/business alignment, and change management.

He was the Global Practice Leader for Business Performance Management at Hewlett Packard and led global practices at Arthur D. Little and Nolan, Norton/KPMG. Mitchell was Managing Director of Corporate Performance Management at Robbins-Gioia, and Group Director of Strategic Planning at Motorola and Lumen, Inc. Mitchell has broad cross-industry and extensive international experience and leads engagements across industries, including the Health/Life Sciences, Communications/Media, Financial and Energy verticals.

Mitchell is on the Advisory Board of the IBM Innovation Center for Performance Management. He is a Fellow of the Suffolk University Center for Innovation and Change Leadership, on the Advisory Board for the Sawyer Business School and a Lecturer in the Department of Strategy and International Business. He teaches courses in Health Informatics at University of Massachusetts, and Management Strategy in Healthcare at Northeastern University. Mitchell is a recognized speaker on Business Performance Management and Disruptive Technology at international conferences and has published several books and numerous articles in professional journals. He received his BS Degree from Cornell University in Mechanical/Biomedical Engineering and his MS Degree from University of North Carolina, School of Public Health in Organizational Change and Health Behavior. He has completed the Advanced Marketing Management Executive Program (AMMP) at the Wharton School. He is fluent in Spanish and French.
Beth Rosenkampff-Joyner, BSP, is the Institute’s Director of Client and Corporate Services. She serves as the organization’s primary link to its customers, affiliates and other key stakeholders by managing customer service & long-term relationships, proposal writing and contract administration & evaluation. Beth has helped numerous clients with balanced scorecard development including CISCO Spend Management, KeyLogic Systems, the Ethiopian Federal Ministry of Health and Liebherr Mining Equipment Co.

Beth has extensive experience in marketing and media services, advertising, sales, and event planning. Previously, Beth worked for the Village Companies in Chapel Hill, NC. She has degrees in Biology and Business Administration from the University of North Carolina at Chapel Hill.

Joe DeCarlo, BSMP, has over 40 years of experience in business structuring, strategy formulation & implementation, change management, and the design & execution of innovative operational business models in the private, public, and nonprofit sectors. Joe’s experiences include first-line and executive level management positions with profit and loss responsibilities in information technology with the IBM Corporation, university management at the Milwaukee School of Engineering, and technology start-ups at the Plug and Play Technology incubator in Silicon Valley. He has helped numerous clients with balanced scorecard development including CISCO Spend Management, KeyLogic Systems, the Ethiopian Federal Ministry of Health and Liebherr Mining Equipment Co.

Joe has extensive experience focused on product marketing, consulting, sales, technical design solutions, project management, team collaboration, worldwide education and training, publishing, systems and software engineering, and customer relationship management in 31 international and domestic locations.

Joe holds a BS in Industrial Management from the Milwaukee School of Engineering and an MBA in Technology Management from the University of Phoenix, and is currently pursuing his Doctorate in Business Administration from the University of Phoenix.

Kirstin Dubuc, BSP, is a skilled recruiter and human resources professional with 21 years of experience in recruiting and HR management, resource management, annual assessment processes and programs, compensation, performance management, staff productivity and utilization, career counseling and mentoring, meeting retention and attrition goals, assisting with the career development of the staff, and handling reductions in force (RIFs). Kirsten is also knowledgeable of benefits planning and administration, and has experience with public relations and communications as well as event planning.

Kirsten’s career has spanned multiple industries including technology, government, nonprofits, and financial institutions. Kirsten is a certified Balanced Scorecard Professional (BSP) and holds a BS degree in Communications from James Madison University and has won several Service Awards during her career.
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