

# Balanced Scorecard Professional Certification Program Outline

Balanced Scorecard Professional Certification can be gained via a 5-day BSP Certification Boot Camp (plus exam) or by first taking the 3-day BSP Certification Part 1 course and then later adding the 2-day BSP Certification Part 2 course (plus exam).

## Program 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 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
- Develop Strategic Objectives and a Strategy Map
- Define performance measures, targets and thresholds
- Developing Initiatives and a prioritization plan
- Identify and understand the three implementation steps of Automation, Cascading and Evaluation
- Use software to communicate performance information
- Cascade the scorecard throughout the organization
- Using scorecard information to improve performance
- Overcome the challenges of integrating balanced scorecard systems with other enterprise-wide systems
- Apply the BSC to an organization's needs making it relevant to company-specific issues



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[www.balancedscorecard.org/BSP](http://www.balancedscorecard.org/BSP)

# Balanced Scorecard Professional Certification Part 1: Intro to the Balanced Scorecard

## 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

### 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

## 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

## 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
- 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

### 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 Professional Certification Part 2: Advanced Balanced Scorecard

## 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

### 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

## 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

### 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

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