



# Introduction to Balanced Scorecard

## Program Overview

The Introduction to Balanced Scorecard course provides a clear, practical introduction to one of the world's most widely used strategic planning and performance management systems. Participants learn how organizations use the Balanced Scorecard to clarify strategy, align work across teams, prioritize initiatives, and monitor progress toward strategic goals.

This course introduces the core concepts behind strategy maps, performance measures, targets, initiatives, and cascading so participants can contribute more effectively to strategy execution and performance improvement efforts.

## Who Should Attend

This course is designed for professionals who need to turn strategy into action, not just create plans that sit on a shelf. It is ideal for strategic planning leaders, performance managers, executives, analysts, and team members responsible for aligning goals, measures, and initiatives across the organization.

It is also well suited for professionals in government, nonprofit, and private sector organizations who want a practical introduction to the Balanced Scorecard framework and its application in real world settings.

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## Course Learning Objectives

Participants will develop an introductory understanding of the concepts and skills needed to support Balanced Scorecard design and implementation:

- ▶ Understand what a Balanced Scorecard is and how it improves organizational performance
- ▶ Learn the basic principles of the Balanced Scorecard Institute's Nine Steps to Success™ framework
- ▶ Recognize how mission, vision, strategic objectives, measures, targets, and initiatives fit together in one strategic management system
- ▶ Understand how strategy maps are used to visualize and communicate cause and effect relationships in strategy
- ▶ Learn how performance measures and KPIs help track progress toward strategic results
- ▶ Explore how cascading and performance review support alignment and execution across the organization

## Course Benefits

As a participant, you will benefit by learning how to:

- ▶ Clarify strategy so people across the organization understand what success looks like
- ▶ Build alignment between goals, measures, initiatives, and daily work
- ▶ Improve accountability through meaningful performance measures and targets
- ▶ Use a practical framework to support strategic planning and execution
- ▶ Contribute more effectively to scorecard design, rollout, and performance discussions
- ▶ Apply Balanced Scorecard concepts in government, nonprofit, and private sector settings

## Course Outline

### Day 1 – Get Clear on Strategy and What to Focus On

- ▶ Clarify mission, vision, and strategic objectives so you know what success really looks like
- ▶ Translate high level goals into concrete results the scorecard must support
- ▶ Identify common strategy and alignment gaps that undermine performance

### Day 2 – Design a Practical Balanced Scorecard

- ▶ Use a simple, repeatable method to build a strategy map with clear cause and effect
- ▶ Turn strategic objectives into meaningful measures and targets that drive behavior
- ▶ Draft clear measure and objective documentation so everyone interprets them the same way

### Day 3 – Make the Balanced Scorecard Work in the Real World

- ▶ Link objectives and measures to initiatives, projects, and budgets so strategy shows up in daily work
- ▶ Explore basic approaches to cascading, governance, and performance review meetings
- ▶ Plan next steps for how to introduce, refine, and sustain a Balanced Scorecard in your own organization over time

## Teaching Style

This course uses a combination of short lectures, guided discussion, practical examples, and interactive exercises to help participants understand and apply Balanced Scorecard concepts.

Participants are introduced to proven frameworks, templates, and tools that reinforce learning and make the methodology easier to apply in their own organizations. The emphasis is on practical understanding, not theory alone.

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