

Fourth Generation Balanced Scorecards – 2 hour workshop

The big picture, rabbit holes, and what modern developments mean for you

1 WHY IS STRATEGY IMPLEMENTATION AND PERFORMANCE IMPORTANT?

The implementation of strategy and the management of performance can cause as many problems as they solve. You want to manage strategy, as well as operations. You need a grip on the organisation, but not too many measures. You want targets that motivate, but don't distort behaviour. You want responsibility, yet want to avoid silo-thinking and working. This workshop is designed to help you solve these dilemmas, improve how you implement strategy, so you can manage performance better and deliver results with more confidence and reliability.

2 WHAT WILL YOU LEARN?

If you miss the big picture of governance and how strategy is managed, your performance management approach is likely to end up as a detailed operational tool. We help you understand the influence of the big picture, strategy and the context of performance management.



Avoid common mistakes. Many organisations are still using the older Balanced Scorecard models, missing out on proven developments. Modern developments include ways to manage during uncertainty, how to learn faster than your competitors and ways to engage your staff in the implementation and refinement of your strategy. Understand why the Balanced Scorecard has evolved through four generations.

“Measure mania”, “the tyranny of targets”, “silo-working” and “feeding the beast” are symptoms of a poor performance management culture. How can you manage your staff without these problems? We help you understand the implications for the discipline of performance, as well as your culture of performance.



How you design and implement your approach makes a big difference to gaining ownership and engagement. Learn why our clients say, “It is remarkable. There has been almost no resistance to the approach – everyone has signed up in a way that I have never seen before.” and “Even five years on, we are still using the balanced scorecard you helped us develop. It has been central to building our capability ...and focusing on delivery to our clients.”

3 THE BRIEFING

This two hour introductory session will help you and your team understand how modern balanced scorecards can help you implement strategy and improve how you manage performance.

You provide the team and the room. We will provide the information and stimulate discussion. Our clients say, “That was a tremendous session.” “The best training I have ever had.” and “You really got the team engaged and motivated”.

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4 WHAT WILL WE COVER?

4.1 THE BIG PICTURE AND FORGOTTEN STORY

- How organisational governance influences the ways performance is managed
- Connecting strategic and operational performance management
- What do Sesame Street and Balanced Scorecards have in common?
- Why you do *not* do a balanced scorecard for an organisation. And what you should do.

4.2 HOW AND WHY THE TECHNIQUES OF MODERN BALANCED SCORECARDS EVOLVED

- Early first and second generation balanced scorecards: Rabbit holes to avoid
- Modern, Third and Fourth Generation Balanced Scorecards: Opportunities to grasp
- Choosing the right approach that positions you to move forward

4.3 THE DISCIPLINE OF PERFORMANCE: THE CULTURE OF PERFORMANCE

- How common practices undermine the culture you are trying to achieve
- Doing the basics: ensuring the discipline of performance management
- Achieving results: developing the culture of performance management

4.4 DESIGN AND IMPLEMENTATION CHOICES AND APPROACHES

- The biggest factors that influence success: the biggest mistakes to undermine success

4.5 CUSTOMISATION

We can customise the event to suit your organisation, needs and situation. We often run a two hour session, but we facilitate workshops and training from one hour to two days. In our training days you also develop your balanced scorecard. Call us to discuss how we can best help you.

5 WHY US?



Excitant Ltd.

Phil Jones was involved in the early years of Balanced Scorecard development, working for the originators, Norton & Kaplan. He has been worked in the UK, Europe, US and Asia, and helped organisations as diverse as multinationals, SMEs, start-ups, the public sector and charities. Insights from these diverse clients have helped Phil develop Excitant's Fourth Generation Balanced Scorecard approach. He now runs

To find out more, contact Phil Jones, Strategy & Performance Specialist, Excitant Ltd.

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