

THE “3 WORKSHOP” RAPID BALANCED SCORECARD



What benefits will you get?

This brochure describes how we can help you develop and introduce a modern balanced scorecard, quickly and effectively.



This approach is designed to allow a management team to improve how they communicate, manage and implement their existing strategy. The approach helps you describe, measure and inform the strategy,

The approach trains you in modern balanced scorecard thinking and techniques *at the same time as you* develop your modern balanced scorecard. We have used this approach with organisations as diverse as small and medium sized businesses, charities, departments within FTSE100 companies, and government bodies.

Refresh your existing Balanced Scorecard

Perhaps your existing measures or “balanced scorecard” has lost focus, become too operational or too detailed. Perhaps it has become a “beast that needs feeding”. Is it still communicating your strategy, fostering ownership and influencing the right behaviours? If your existing approach is failing you, then our modern balanced scorecard can quickly put these problems right for you.

The benefits of a Modern Strategic Balanced Scorecard

A Modern Strategic Balanced Scorecard:

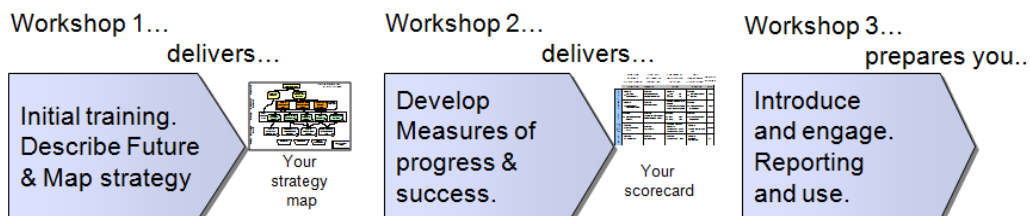
- Gives your Board confidence in the strategy and its execution.
- Focuses attention on what matters: that which will make the biggest difference.
- Communicates your strategy so your people can engage with it.
- Balances short and long term objectives, internal and external focus, culture and results.
- Improves your decision making, combining evidence and judgement.



Our Rapid Strategic Balanced Scorecard approach helps you achieve these benefits.

Objectives and application

Our approach helps you create a working strategy map and balanced scorecard. You can show make progress and show benefits in a short time. Once complete, you can refine the deliverables as you learn how powerful the approach is. At the same time, we help you to develop ownership and commitment. We immerse your team in the whole approach, so that you build the skills to maintain and support your Balanced Scorecard, in the future, yourselves.



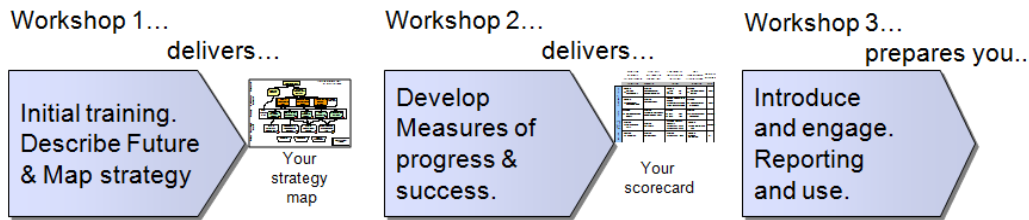
You can apply this approach where there is an existing strategy, such as business units, or to individual functions or departments. (eg IT, Finance, Sales, Operations, etc) When you are developing a new strategy, we have a more extensive approach that helps you to detail, develop and agree that strategy. In this case, talk to us and we can explore the most appropriate approach, together.



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The Approach

A three day workshop approach designed to deliver a usable Modern Balanced Scorecard quickly, with maximum value. You *learn and use* the approach at the same time, training while you work and develop your Strategy Map and Balanced Scorecard. You choose the pace of development to suit your circumstances and availability. Each of the three stages gives you a component of the approach.



1. The first stage develops your strategy map from your strategy.
2. The second stage develops your objectives, measures and your level of ambition (targets).
3. The final workshop prepares you for communicating the balanced scorecard and using it to manage and review progress.

Preparation

Activities

- Establish senior management ownership. Agree objectives & benefits. Get approval.
- Identify key team players from organisation. Ensure availability and commitment.
- Book times in diaries for executives & team. Book our consultancy support
- Then send us the existing strategy documentation, so we can prepare the workshop.

In some circumstances we will recommend that the first workshop is preceded by management interviews.

Workshop 1 (Day 1): Map the Future and strategy

Activities

Introduction to the principles of a Modern Strategic Balanced Scorecard.

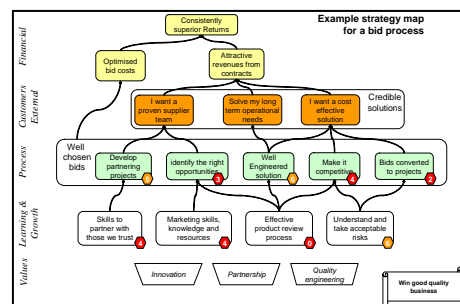
To speed up the workshop we have produced a draft future vision and strategy map from our discussions and your existing strategy documents. This means Senior Management can:

- Agree the future vision and context
- Build the draft strategy map
- Score the strategy map
- Identify major actions and initiatives
- Identify responsibilities, documenting any issues to be resolved.

Afterwards

After the workshop, we write up your work on the future vision and strategy map, and the details behind it that you have provided. This means you can review it prior to the next workshop and address any questions it has raised. You can even start to share it with your team.

Example Strategy map



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Workshop 2 (Day 2): Indicators of progress and levels of success

Activities

In workshop 1 you decided what your strategy needed to achieve and detailed that thinking. In this workshop you develop that further. You ensure the organisation is aligned. You decide what is most important to measure, how best to measure it and the level of ambition you have. From this you will have:

- The current status of performance
- Indicative targets and levels of ambition from strategy map
- First cut indicators and measures
- Clear improvement areas
- Key projects critical to delivery of the strategy
- Clear actions resulting from the strategy

Afterwards

We document the workshop, updating your strategy map, detailing the measures, targets, projects and listing any actions or issues to be resolved. You can gather existing measures and develop any new ones.

Draft indicators for Scorecard

	What the strategy must achieve	How will success be measured	The level of performance required	Key investments programmes	Responsibilities
	Objective	Measure	Target	Initiative	Who
Financials	Example: <input type="checkbox"/> Optimise planning costs	Example: Planning cost per Head of population	Example: <input type="checkbox"/> 2007 8.9 <input type="checkbox"/> 2008 7.0	Example: <input type="checkbox"/> Improved financial controls	CFO
Customer	Example: <input type="checkbox"/> Perception of Planning fairness	Example: Planning survey	Example: Perception of planning <input type="checkbox"/> Dec 2007 30% good <input type="checkbox"/> Jun 2008 80% good	Example: <input type="checkbox"/> Introduce survey of opinions	CEO
Internal	Example: <input type="checkbox"/> Improved planning process	Example: % planning applications determined in 8 weeks	Example: <input type="checkbox"/> 2007 65% <input type="checkbox"/> 2008 70%	Example: <input type="checkbox"/> Train staff on new procedures	Planning
Learning & Growth	Example: <input type="checkbox"/> Build planning skills	Example: Skills matrix	Example: Staff with new skills: <input type="checkbox"/> Dec 2007 50% <input type="checkbox"/> Feb 2008 80%	Example: <input type="checkbox"/> Build new service skills	Planning
Values	Example: <input type="checkbox"/> Innovation	Example: Culture survey	Example: <input type="checkbox"/> Feb 2008 80%	Example: Introduce 360 appraisal	All

Your organisation is aligned to your strategy



Workshop 3 (Day 3): Communication, reporting, use and refinement

Activities

In the final workshop you:

- Finalise the strategy map and scorecard
- Plan how you will communicate and explain your new Balanced Scorecard to your Board and your staff to ensure maximum engagement.
- Agree the actions necessary to ensure the Balanced Scorecard is implemented successfully
- Put in place the management review processes to ensure your Balanced Scorecard becomes a valuable tool for you as managers.



Additional documentation and support

Supporting material

We give you supporting material:

- Presentation material to explain the approach to your staff and Board.
- A three part manual covering
 - 1) Design principles
 - 2) Communication & roll-out
 - 3) Reporting and use.
- An Excel based spreadsheet to track your measures and progress

Continued Support

Our support does not stop with the workshops.

As part of the package, we provide 3 months' telephone support, up to an hour a week.

This is to help you through the process, keep you on track, and to help you to implement your Balanced Scorecard successfully.

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Creating ownership and getting there quickly

Your management team and your scorecard team will be developing it, maintaining it and running meetings with it. It is your team's commitment and involvement that will make the difference.

We will help you gather the skills and expertise to maintain and keep this as a useful Strategic Balanced Scorecard. The pace will depend upon the quality and availability of your team, the clarity and understanding of the existing strategy amongst your team and the availability of information to support and detail the strategy.

Clients and quotes about our work

We have helped a large number of commercial and public sector organisations, from International banks, and FTSE100 companies, to SMEs and start-ups. They include public sector organisations as diverse as City Councils, NHS Trusts, not-for-profit organisations and charities.

Client quotes:

“You did in just a few days with us, what other consultants have taken much longer to do: the result has been just as effective, if not more so.”

Lindsay Stratton, Managing Director, Unite Modular Solutions (FTSE 350 organisation).

“Only use the Excitant approach if you are really committed to a strategy-focused organisation”

Ben Ticehurst Assistant Chief Executive, Peterborough City Council

“It has been very useful and will be a sustainable way of thinking and working differently for us. You have made a big difference.”

Simone Jordan, Chief Executive, LNR NHS, WDC

Software solutions

This approach is designed to be implemented using standard office products or subsequently translated into a management reporting tool.

Alternatively our 5 day intensive approach is designed to work with your experienced software staff, or your software suppliers, to document the strategy map and scorecard as it develops. If you are interested in this approach, contact us to discuss your circumstances.

Fees and Expenses

We offer a fixed price fee for this work. This includes:

- Pre-work (preparation, reviewing documentation, preliminary models, etc)
- Course and training material. Delivery of workshops and training
- Writing up material between workshops including the Strategy Map and Balanced Scorecard in MS Office (Powerpoint, Excel and Word).
- Follow up telephone support.

Contact us

The approach is designed to give you and your team maximum benefit in the minimum time. We can customise it to suit your specific circumstances. To find out more, discuss your needs, or for pricing and availability, Contact

Phil Jones, Managing Director Excitant Ltd,

phil.jones@excitant.co.uk

Office 08456 809 209. Mobile: 07 711 711 123 International: +44 1780 784887