

RAPID STRATEGIC BALANCED SCORECARD



What is a Rapid Strategic Balanced Scorecard?

Your Strategic Balanced Scorecard:

- Communicates your strategy
- Improves your decision making
- Balances short and long term objectives, internal and external focus, culture and results.
- Helps you to develop a culture of ownership and performance.
- Focuses attention on what matters, and on what will make the biggest difference.



Our Rapid Strategic Balanced Scorecard Approach helps you make progress and deliver this, more quickly.

Why do this? What will you gain?

Refresh your existing balanced scorecard

Perhaps your “balanced scorecard” has lost focus, been too operational or become too detailed. Perhaps it has lost its balance, become irrelevant, or is seen as a “beast that needs feeding”. It should serve management better, but does not communicate your strategy, create ownership or influence the right behaviours. You aren’t getting the benefits you imagined. The rapid strategic balanced scorecard approach is designed to address these problems.

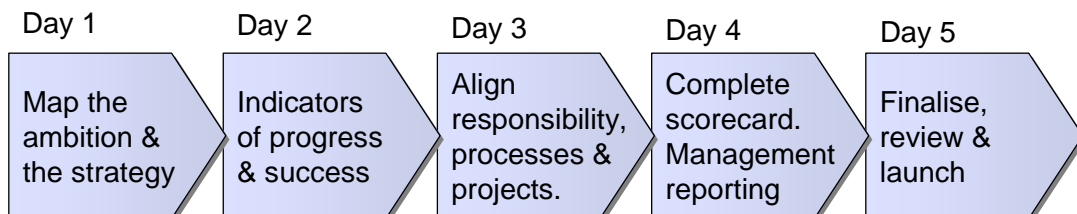


Get a fast start on your software investment

You are about to invest in performance management software and you want to see some benefits quickly. The rapid balanced scorecard approach helps you develop a prototype of your software solution, quickly. You will be able to see some immediate results. If your existing software is not giving the benefits you expected, you can use the approach to refresh that solution, so it is more useful for you.

Objectives and application

The objective is to help you to get a working strategy map and balanced scorecard, quickly, so you can show immediate progress and benefits. Once complete, you can refine the deliverables as you learn how powerful the approach is. At the same time, we help you develop your 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.



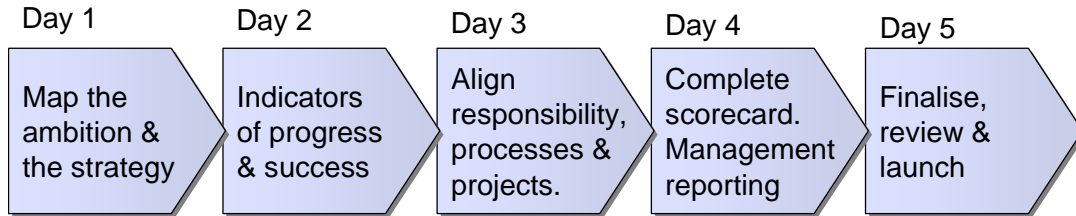
You can apply this approach where there is an existing strategy, such as business units, or to individual functions or departments. (eg IT, finance, sales, operations, etc) When you are developing a new strategy, we have a more extensive approach that helps you to detail, develop and communicate that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

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The Approach

A five day intensive approach designed to get you up and running quickly, with maximum value. A collaborative approach to develop your team and ensure it represents your strategy.



Preparation

Activities

Jointly

- 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. Arrange room.

Then

- Book our consultancy support. We can then start reviewing existing strategy documentation, and preparing the workshop material and pre-models.

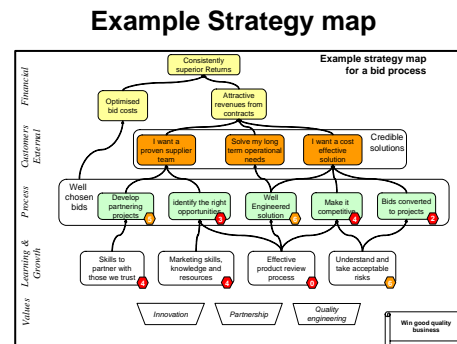
Stage 1 (Day 1): Map the ambition and strategy

Activities

Introduction and training on the principles of a Strategic Balanced scorecard.

Senior management strategy review

- 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.



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

Activities

How you will know you are making progress

- Current status of performance
- First cut indicators and measures
- Indicative targets and levels of ambition from strategy map
- Gather existing measures and their status

Complete documentation from day 1

- On powerpoint and/or software solution

	What the strategy success be achieved	How will success be measured	The level of performance required	Key investments programmes required	Responsibilities
	Objective	Measure	Target	Initiative	Who
Financial	Example: Optimise planning costs	Example: Planning cost per Head of population	Example: 2007 8.9 2008 7.0	Example: Improved financial controls	CFO
	Example: Perception of Planning business	Example: Planning survey	Example: Perception of planning Dec 2007 30% good Jan 2008 30% good	Example: Introduce survey of opinion	CEO
Internal	Example: Improved planning process	Example: % planning applications determined in 5 weeks	Example: 2007 65% 2008 70%	Example: Train staff on new procedures	Planning
	Example: Build planning skills	Example: Skills matrix	Example: Staff with new skills Dec 2007 50% Feb 2008 60%	Example: Build new service skills	Planning
Learning & Growth	Example: Innovation	Example: Culture survey	Example: Feb 2008 80%	Example: Introduce 360 appraisal	All

Draft indicators for Scorecard

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Stage 3 (Day 3): Align processes and projects

Activities

Ensure the organisation is aligned:

- Clear actions resulting from the strategy
- Inventory of projects aligned to the strategy
- Identify processes and improvement areas

Document measures of success from day 1

- On powerpoint and software solution as available

Projects & processes
aligned to strategy



Stage 4 (Day 4): Detail Scorecard. Set up reporting & communication

Activities

Day four has three objectives.

- Finalise pieces of strategy map and balanced scorecard
- Set up the management processes
- Outline the communication and launch approach and plan
- Add further detail to the prototype software solution

Aligned Management processes.
Communication & launch plan.



Stage 5 (Day 5): Finalise and review with management for launch

Activities

Finally, the work is presented to the management team for their review and to develop the next steps.

- Finalise communication and launch plan.
- Presentation deliverables and recommendations to management team
- Agree next steps

Review with Management team



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.

Working alongside us as it is developed will help you gather the skills and expertise to maintain and keep this as a useful and strategic balanced scorecard. The pace at which this works 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.

RAPID STRATEGIC BALANCED SCORECARD

Strategy, People, Performance ⇒ Results

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Clients and quotes about our work

We have helped a large number of commercial and public sector organisations, from International banks, and FTSE100 companies, through FTSE350 companies, SMEs and start-ups. They include public sector organisations as diverse as City Councils, NHS Trusts, not-for-profit organisations and charities.

Typical quotes:

"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

"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." Managing Director, FTSE 350 organisation.

Software solutions

Clients often like to develop and document the solution in their performance management software. We can work with you to do this several ways:

1. Use your experienced staff to document the strategy map and scorecard as it develops.
2. Work with your software supplier to develop a rapid prototype. You can develop this further.
3. A combination, which helps your team learn about your software tool's capabilities, develop their skills and come out with a useful prototype.

Some clients may wish to use supplier staff to help them do this most effectively. Some software suppliers like to use this to provide rapid training and hands-on experience for new users. We can accommodate a variety of ways of working and are happy to discuss your requirements. Simply contact us to discuss your needs.

Fees and Expenses

We offer a fixed price fee for this rapid five day workshop process. This includes:

- Pre-work (preparation, reviewing documentation, preliminary models, etc)
- Course and training material. Delivery of workshops and training
- Co-development of deliverables with your staff. Documentation of the strategy map and Balanced Scorecard in MS Office (Powerpoint, Excel and Word).
- Follow up telephone activities.

The approach is designed to give you and your team maximum benefit in the minimum time. For details of pricing and availability, contact us

Contact us

Find out more and arrange a discussion, contact Phil Jones, Excitant Ltd,
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