



# DATE: BALANCED SCORECARD

**Recognized as a great breakthrough in management tools**

First published in 1996 by Kaplan & Norton of Harvard University, this tool gained rapid acceptance worldwide by management teams in both private and government institutions. Now we can automatically analyze the trends in our data and generate a series of scenarios for next year for consideration by management. Our automated, online documented planning scenarios provide such a facility, together with an extraordinary learning tool.

# Amplios

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Timing:

# BALANCED SCORECARD SELECTING STRATEGY

## Monitoring strategy implementation

**Amplios**

Applied Future Studies

### INTRODUCTION

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This program is an important member of our corporate management performance improvement training and implementation sequence.

As the international political developments have their impacts on the global economies, corporations, both public and private, are finding it necessary to re-visit their strategies for short and long term development more frequently. This is so in a mature business-as-usual environment as well as one driven by growth by acquisition.

To assist with this, we have developed a set of interactive tools suitable for use in any organization at both the corporate and individual product segment level. These are based on the Balanced Scorecard. Our tools are fully compliant with the Kaplan & Norton Balanced Scorecard principles. Further, they add new value not available from other systems.

### OBJECTIVES

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Upon completion of this training program participants will be able to return to their workplaces and perform:

- Strategy Mapping to establish your strategic objectives, action plans and performance measures;
- Preparation of a Corporate Balanced Scorecard;
- Preparation of Key Performance Indicators at the corporate, strategic business unit, operations and support services levels.

### TRAINING METHODOLOGY

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We emphasize learning by doing. After explaining the planned outcomes and our path towards achieving them, we communicate the learning messages in small chunks. These are reinforced by brief video examples, case studies from our experience and cases from the participants' experiences. Group exercises using interactive software and audience opinion polls are employed. We take care to avoid information overload.

During the training, we check progress via training effectiveness testing. For this, we employ the Kirkpatrick Model to measure reaction, learning, behavior and results.

### IMPACT ON THE ORGANIZATION

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The program is designed to have impacts such as improved understanding of:

- The four failure points of Balanced Scorecard implementation;
- Market and competition research methods;
- Strategy selection based on the company's competitive rank;
- Performance management via Scorecards.

### IMPACT ON THE PARTICIPANT

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The program is designed to have impacts such as:

- Literacy in performance measurement
- Understanding of the corporate value add
- Readiness for promotion

### WHO SHOULD ATTEND?

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The program is designed for:

- Senior executives
- Strategic Business Unit managers
- Shared services managers

# BALANCED SCORECARD SELECTING STRATEGY Monitoring strategy implementation

## AGENDA

The program agenda is:

- Introduction to Strategy
- Structure of the Balanced Scorecard
- Interactive Strategy Training
- Interactive Strategy Maps
- Strategy Monitoring Scorecards
- Key Performance Indicators
- Building a Balanced Scorecard
- Question Time

## CONTENT EXAMPLES

An example of the content is shown in the graphic below:

### Overall Scorecard

This facility provides an example of a full corporate Balanced Scorecard operating with 6 objectives in each of the 4 perspectives. All of the assumptions can be edited by visiting the various tabs as shown below. We suggest that you start by reading the "Introduction" tab.

Perspective	Signals to Management		
Financial	OK	Good	Poor
Customer	Poor	OK	OK
Internal Processes	OK	OK	OK
Learning & Growth	OK	Poor	OK
<b>Overall Balanced Scorecard</b>	OK	OK	OK

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### Financial

KPI Label	Unit of measure	Current Month	YTD	Revised Full Year
Net Profit per Share	Dollars 000's	OK	Good	Poor
Quick Ratio (Cash+Debtors+Stock/Creditors)	Ratio	Good	Good	Poor
Net Profit per Period	Dollars 000's	Poor	Poor	Poor
Interest Cover (Profit Bef. Interest / Interest)	Ratio	Good	Poor	Poor
Revenue Growth % per Period	Percent	Good	Poor	Good
Risk Level (Compliance Score)	Percent	Good	OK	Poor
Weighted Average - Set		OK	Good	Poor

### Customer

KPI Label	Unit of measure	Current Month	YTD	Revised Full Year
Customer Retention	Percent	Good	OK	OK
Customer Profitability % of Sales	Percent	Poor	OK	Good
Market Share	Percent	Poor	OK	Good
Customer Satisfaction Index	Ratio	Poor	OK	OK
Number of New Customers per Period	Customers	Poor	Poor	OK
Competitive Ranking in Market Survey	Rank	Poor	Poor	OK
Weighted Average - Set		Poor	OK	OK

## FACILITATORS

Our lead facilitator is Wilson Fyffe. He is supported by our regional team of trainers.