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BALANCED SCORECARD PROFESSIONAL (BSP) CERTIFICATION BOOT CAMP

Live Online Training: Learn How To Build And Implement An Integrated Strategic Planning And Management System Based On Use Of The Balanced Scorecard Methodology.

1 - 5 November 2021

Course will commence at **12:00** and end at **20:00 (AEDT)**. There will be short breaks during the course days.



Our Expert Course Faculty



Eddy Abou Chakra

Managing Partner, **Vanguards Consulting**

He has over 20 years of strategy and business transformation experience acquired through various engagements in Middle East, and Europe.



Rami Itani

Partner, **Vanguards Consulting**

President of the Association of Business Process Management International (ABPMP) Middle East Chapter).

Key Learning Objectives

- ▶ Understand the key concepts of the Balanced Scorecard, and why it is gaining so much attention in corporate, non-profit, and governmental organizations
- ▶ Learn a systematic, nine-step methodology for building and implementing the Balanced Scorecard, based on the performance management theory developed at Harvard University and the Institute's international Balanced Scorecard consulting experience
- ▶ Receive a Performance Scorecard Toolkit™ with worksheets for each step of the methodology, and a CD with course and reference material

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ABOUT THE COURSE

The Institute's Nine Steps to Success™ a framework is the basis of the course, where the emphasis is on shared participant experiences, lessons learned, and best practice. Small-group exercises are used for each step in the framework to reinforce the lectures, and you are encouraged to bring your organization's strategic planning material to share with the class and receive instructor feedback offline as time permits.

Topics covered by the course include:

- Basic concepts of the Balanced Scorecard and how it can be used to improve your organization's performance
- How the Balanced Scorecard applies to different types of organizations
- How to build and implement a Balanced Scorecard using the Institute's award-winning nine-step methodology
- How to develop meaningful performance measures and how a scorecard system can drive your performance-informed budget and accountability
- How to get performance information throughout the organization to better informed decision making through scorecard automation
- How to cascade the scorecard to all levels of an organization
- How to design and implement a scorecard where other frameworks have already been introduced
- How to revise poorly designed scorecard elements
- How to overcome obstacles and real world challenges
- How to evaluate planning documents and processes

WHO WILL BENEFIT

This course is recommended for executives, managers, planners and analysts who are part of a Balanced Scorecard development team, and are seeking the best practical ideas for improving organizational performance.

COURSE METHODOLOGY

Through case studies and a series of interactive small-group workshops, you will apply the Balanced Scorecard concepts to meet the challenges facing a typical organization. Exercises performed throughout this course include:

- Launching a BSC program and establishing work teams
- Incorporating communications planning and change management into the scorecard development process
- Using an organizational assessment to set vision, mission, and strategy
- Understanding who your customers and stakeholders are and what they need from your organization
- Developing an organization's strategic themes, strategic results and perspectives
- Developing and refining strategic objectives and strategy maps
- Developing and refining performance measures and targets aligned to strategy
- Developing and prioritizing new initiatives to execute strategy
- Sustaining the scorecard with a Strategy Management Office
- Defining enterprise performance information requirements and selecting software

OUR EXPERT COURSE FACULTY



Eddy Abou Chakra

Managing Partner, **Vanguards Consulting**

He has over 20 years of strategy and business transformation experience acquired through various engagements in Middle East, and Europe.

His key focus is on strategy formulation, strategy execution, performance management, organization transformation, business process improvement, information systems, marketing, and business development. Eddy has advised governments, financial institutions, telecom operators, construction and real estate companies. He has led major strategy and transformation engagements with key focus on value proposition enhancement, governance, technology, product development, service delivery, business models, due diligence, and HR. Eddy has extensive experience in leading focused strategy engagements as well as large transformation projects.

Eddy held various positions in international audit and consulting and headed the IS Audit and consulting function at two of the top 10 international audit and consulting firms.

Eddy is a Certified Information Systems Auditor (CISA – ISACA), certified Balanced Scorecard Master Professional (BSMP – George Washington University), and Certified E-business Consultant (CEC – ICECC).



Rami Itani

Partner, **Vanguards Consulting**

President of the Association of Business Process Management International (ABPMP) Middle East Chapter).

Rami is currently a Partner at VANGUARDS Consulting, a management consulting firm with deep functional knowledge spanning strategy formulation and execution, business process management and information technology. His areas of expertise include strategy formulation and execution (using the Balanced Scorecard framework), organisational design, business process optimisation and workflow, manpower optimisation, as well as developing and implementing policies and procedures relating to human resources, and finance and accounting.

Previously, Rami worked on performance improvement services at PriceWaterhouseCoopers. He has a vast exposure to multinational companies and his main focus is on helping clients translate their strategy into operations thus reengineering existing processes to accommodate the new strategic direction of the organisation, as well as increase efficiency and effectiveness. Rami is a member of the Association of Business Process Management International (ABPMP), an international organisation dedicated to the advancement of business process management concepts and practices.

Rami has led assignments across different industries including banking, contracting, F&B, media, manufacturing, production, etc. Such assignments ranged from complete turnaround situations (strategy formulation, organisation restructuring, and business process management) to scope specific projects like developing/cascading scorecards or restructuring of certain functions or processes.



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Course Outline

BSP Certification Part 1: Introduction To The Balanced Scorecard

Module I Introduction

Learning Objectives: Explain the concept and origin of the Balanced Scorecard; outline course modules; introduce the case studies; introduce participants; and discuss reference material.

- Introductions, expectations, and participant knowledge
- Workshop objectives
- Balanced Scorecard concept and origin
- Agenda, schedule and logistics
- References
- Introduction to the examples, case study, small-group exercises, performance measurement software, and the performance scorecard toolkit

Module II Overview Of The Balanced Scorecard (BSC)

Learning Objectives: Explain the evolution of measurement and strategic management systems; define terms; list reasons for adopting a Balanced Scorecard system; identify the six steps needed to build a scorecard system and the three steps needed to implement these systems; identify challenges that need to be overcome; discuss indicators of successful systems; discuss time periods for a scorecard project; contrast the differences and similarities in scorecard systems for different organizations; discuss a typical BSC cycle.

- Introduction to performance management and measurement
- Balanced Scorecard history
- Reasons for undertaking a Balanced Scorecard project
- Similarities and differences among BSC and other performance systems
- Advantages of using BSC performance systems
- Contrast private sector and public agency use of scorecards
- Key questions the BSC seeks to answer
- Sample BSC performance measures
- The Nine-Step Methodology for building and implementing a Balanced Scorecard project
- Meeting the challenges of scorecard systems
- Indicators of successful projects

Module III Building The Balanced Scorecard

Learning Objectives: Identify the six building steps - Using an organization assessment to set vision, mission and strategy, defining strategic themes, choosing perspectives and developing objectives, developing a Strategy Map, defining performance measures, developing initiatives.

Case studies and examples will be selected from among several commercial, public sector and not-for-profit organizations that use the Balanced Scorecard for strategic management

- Using an organizational assessment to set vision, mission, and strategy

- Identify customer groups and develop the Customer Value Proposition

Module III Building The Balanced Scorecard (Continued)

- Develop strategic themes and strategic results
- Develop strategic objectives and strategic success drivers
- Strategy mapping - develop cause-effect relationships among the objectives
- Derive strategic performance measures, targets and thresholds
- Develop strategic initiatives
- Define criteria for selecting initiatives

Module IV Implementing The Balanced Scorecard

Learning Objectives: Identify and understand the three implementation steps - Using computers to communicate performance information, cascading the scorecard throughout the organization, and using scorecard information to improve performance.

Examples will be selected from among several commercial, public sector and not-for-profit organizations that use the Balanced Scorecard For strategic management

Software Demonstration: Performance Management Information Software options

- Implementation issues
- Aligning strategy and work throughout the organization
- Collect, verify and validate performance data
- Transforming data into information
- Software options for managing performance information
- Developing an internal and external communication plan
- Cascading the scorecard throughout the organization
- Employee motivation
- Linking strategy to resource decisions
- Linking performance to rewards
- Scorecard roll out, training, and change management
- Using performance information to improve organization performance

Module V Next Steps

Learning Objectives: Understand the challenges of integrating Balanced Scorecard systems with other enterprise-wide systems; overcoming challenges to implementation.

Exercise: Examine strategic change readiness in your organization

- Integrating the scorecard with other enterprise management systems
- Integrating the scorecard with other enterprise information systems
- Best practice

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Module VI Getting Your Scorecard On Track

Learning Objectives: Applying the BSC to your organization's needs; discuss company-specific issues.

Exercise: Develop a scorecard action plan for your organization

- Overcoming obstacles and challenges within your organization
- Integrating the scorecard with other enterprise management and information systems
- The role of consultants
- Time and schedule estimates
- Develop an action plan based on your organization's readiness

BSP Certification Part 2: Advanced Balanced Scorecard

Introduction

- Course overview and logistics
- Learning objectives

Module VII Evaluation To Assessment

- Best practice and terminology review related to Steps One and Nine of the Nine Steps to Success™
- Common evaluation and assessment challenges
- Small group facilitation primer

Case Study Exercise: Use various small group facilitation techniques to identify case study scorecard development issues and problems

Module VIII Advanced Strategic Foundations Development

- Short review of Steps One - Assessment, and Two - Strategy, of the Nine Steps to Success™
- Analyzing, identifying and correcting poor strategic foundation design
- Migrating from other planning models to the Balanced Scorecard
- Various pitfalls associated with poorly designed strategic themes and perspectives

Case Study Exercise: Revise poorly designed strategic foundation elements

Module IX Advanced Objective And Strategy Map Development

Strategic objective and strategy map best practices

How to facilitate the correction of poorly designed objectives and strategy maps

Case Study Exercise: Revise poor strategic objectives, and strategy map design and development facilitation

Module X Advanced Performance Management - Measure What Matters

- How to use several frameworks, such as the Logic Model, Process Flow Analysis, the Decision Model and the Critical Question Model, to develop a family of potential measurements for each objective
- Identification and correction of problems associated with poorly selected measurements

Exercise: Practice using a process flow analysis to develop meaningful measurements for various objectives

Module XI Measurement Definition, Implementation And Visualization

- Advanced measurement definition: ratios, frequency and accuracy requirements
- How to develop "roll up" measurements and indexes
- How to set targets and normalize data
- How to improve data visualization

Case Study Exercise: Identification and correction of poor measurement definition and visualization

Module XII Strategic Initiative Prioritization And Management

- Advanced strategic initiative prioritization techniques
- Project management primer

Case Study Exercise: Practice using a common initiative prioritization technique

Module XIII Advanced Scorecard Alignment And Cascading

- How to build organizational alignment through advanced cascading techniques
- Advanced Tier Two scorecard development
- How to build a pilot program at the Tier Two level without a Tier One level scorecard
- How to develop a Tier Three scorecard and align with an appraisal system

Case Study Exercises: Refine Tier Two scorecards and develop Tier Three scorecards

Module XIV Managing And Sustaining A Balanced Scorecard

- Day-to-day management with a Balanced Scorecard
- Performance-based budgeting
- Sustaining a scorecard
- Strategy Management Office (SMO) roles and responsibilities

"This is really a useful course and highly related to my job. The trainer was knowledgeable and gave good examples and case studies to practice and understand the concepts."

Head of Performance Management, SOCSO

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Speak with **Anton Long** or **Holly Baldwin** on **+61 (02) 9080 4455** to discuss your customised learning solution, or email training@informa.com.au