CONCEPT

Balanced Scorecard and Strategy Maps: Scorecard Design and Cascading

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Technical depth: Practitioner · **Practical mode:** Case study

Introduction

Many organisations publish a strategy yet cannot show which results it depends on or how each unit contributes to it. Scorecards grow into long lists of measures with no causal logic, and departments pursue targets that pull against one another. This Core Concept course equips managers to design a Balanced Scorecard from strategy, build the strategy map that explains it and cascade it to business and support units without losing alignment. Participants apply each method to case material from several sectors and leave with a Cascaded Balanced Scorecard for their own organisation.

Course Objectives

- Translate mission, vision and strategic themes into objectives across the four Balanced Scorecard perspectives
- Construct a strategy map whose cause-and-effect links explain how the strategy is expected to work
- Define measures, baselines, targets and strategic initiatives for each objective, with named owners
- Cascade the corporate scorecard to business and support units while preserving vertical and horizontal alignment
- Identify scorecard design faults and strategic risks and correct them before the scorecard goes live
- Produce a Cascaded Balanced Scorecard ready for review by the strategy owner

Target Audience

- Strategy and planning managers responsible for strategy formulation and review
- Performance management office managers who maintain organisational scorecards
- Business unit managers accountable for delivering a share of corporate objectives
- Support function managers in finance, HR and IT aligning their units to strategy
- Internal consultants and excellence managers facilitating strategy execution

Course Outline

Day 1: Strategy Execution and the Scorecard Landscape

- Strategy Execution Gap Diagnosis Using the Four Barriers to Implementation
- Balanced Scorecard Evolution from Measurement System to Strategy Management System
- Value Proposition Choice with the Treacy and Wiersema Value Disciplines
- Strategic Theme Definition from SWOT Analysis
- Current Performance Measurement System Audit Checklist

Day 2: Balanced Scorecard Frameworks and Models

- Four Perspectives: Financial, Customer, Internal Process, Learning and Growth
- Strategy Map Architecture and Cause-and-Effect Logic
- Balanced Scorecard Institute Nine Steps to Success
- Execution Premium Six-Stage Management System
- Public Sector and Non-Profit Scorecard Adaptation: Mission and Stakeholder Perspectives

Day 3: Building the Corporate Scorecard

- Strategic Objective Statement Drafting in Verb-Noun Format
- Measure Selection and Measure Definition Sheets: Formula, Source, Frequency and Owner
- Baseline, Target and Performance Threshold Setting
- Strategic Initiative Prioritisation Matrix
- Scorecard Accountability Map: Objective Owners, Measure Owners and Data Stewards

Day 4: Cascading, Alignment and Scorecard Risk

- Cascading Approaches: Shared, Contributory and Unit-Specific Objectives
- Support Unit Scorecards and Internal Service Agreements
- Hoshin Kanri Catchball for Vertical and Horizontal Alignment
- Strategic Risk Integration into the Scorecard Using ISO 31000
- Scorecard Health Check: Measure Overload, Gaming and Weak Causal Links

Day 5: Case Work and the Cascaded Scorecard

- Utility Company Case Study: Rebuilding a Corporate Strategy Map
- Hospital Network Case Study: Cascading to Clinical and Support Units
- Strategy Review Meeting Agenda and Reporting Cadence Design
- Cascaded Balanced Scorecard Drafting for an Own Organisation
- Peer Challenge Panel and Scorecard Defence

Skills You Will Gain

- Strategy Translation
- Strategy Mapping
- Performance Measure Definition
- Target Setting
- Organisational Alignment
- Strategic Initiative Prioritisation
- Scorecard Quality Review

Why Attend This Course

- Return to work with a Cascaded Balanced Scorecard for your own organisation, already tested against peer challenge
- Show leaders and unit heads, on one page, how their work connects to the strategy
- Replace long indicator lists with a focused set of measures that explain performance
- Compare scorecard practice with managers from other sectors and countries who face similar alignment problems

Conclusion

A strategy is only as effective as the organisation's ability to measure it and align every unit behind it. This course moves from diagnosing why strategies stall, through the Balanced Scorecard, strategy maps and the leading implementation frameworks, to building measures, targets and initiatives and cascading them to business and support units. The final day turns that material into a Cascaded Balanced Scorecard that participants take back to their strategy owner, giving them a structured and defensible basis for the next strategy cycle.