



In Association with:



BALANCED SCORECARD MASTER PROFESSIONAL (BSMP) CERTIFICATION APPLICATION COURSE

The *Balanced Scorecard Master Professional (BSMP)* certification, offered in association with the George Washington University College of Professional Studies, is a comprehensive program on leading a balanced scorecard planning and management system implementation. This Application course offers students of our public workshops a way to "upgrade" their work to full *BSMP* certification. The program is ideal for participants charged with building, implementing, managing, and sustaining balanced scorecard planning and management systems. It was developed for members of internal balanced scorecard teams who want to learn how to build, deploy, and sustain scorecard systems, and for anyone who wants to incorporate lessons learned and best practices into the development of a strategic management system. Completion of the Balanced Scorecard Professional (BSP) certification is **required** before registration for the Course will be approved.

Course Overview

This is a required course for balanced scorecard practitioners who want to achieve the highest level of certification – *Master Professional Certification* – from the Balanced Scorecard Institute. This course is designed for students who have completed the Balanced Scorecard Professional Certification. This course includes advanced balanced scorecard topics, mentoring from a senior Institute certifying trainer, and the development of a student practical application.

This five-day course uses the Institute's nine-step balanced scorecard framework: *Building and Implementing a Balanced Scorecard: Nine Steps to Success™*. The course is taught in an interactive manner, using lecture, lessons learned, and practical examples, mentoring with specific help on each student's application example, shared participant experiences, before and after scorecard examples from actual client engagements, certification exam preparation, and practice sessions. The culmination of the course is a student presentation to the class and instructors.

The goals of this course are to: learn advanced techniques for building and implementing a balanced scorecard performance management system, learn advanced change management aspects of the balanced scorecard journey, learn facilitation and coaching skills necessary to lead and participate in team workshops, learn how to do communications strategic planning, learn how to overcome the ten most common challenges to success, and practice building a scorecard application under the eye of an experienced certifying balanced scorecard trainer.

Successful implementation techniques will be taught, as will tips and tricks for dealing with implementation issues standing in the way of successful scorecard programs. Change management and facilitation skills will be taught and participants will have a chance to practice these skills. Participants will need to come prepared to develop a real scorecard based on their needs.

The Balanced Scorecard Institute Certification Process

The Institute's courses are based on participants successfully learning how to build and implement a scorecard system, and applying the learning in a practical way. Successfully passing a final exam completes the certification process. There are two levels of Certification: Advanced level is **Balanced Scorecard Master Professional (BSMP)** and the basic certification level is **Balanced Scorecard Professional (BSP)**. Both certifications are jointly awarded by the Institute and The George Washington University College of Professional Studies. The Certification Process is presented below:



Course Outline

Topics covered by the course include:

- Comprehensive approaches to strategic planning, strategic management, performance measurement and target setting, initiative prioritization, performance information systems, and program evaluation
- The Institute's Nine Step methodology for building and implementing balanced scorecard planning and management systems
- Modern approaches to Strategic thinking and Strategy mapping
- Communications strategy development and change management aspects of the balanced scorecard journey
- Facilitation and coaching skills necessary to lead team workshops in the development of a balanced scorecard system for your organization
- How to select appropriate BSC software to collect and report performance information throughout the organization
- How to cascade the enterprise scorecard throughout the organization

Detail outline is as follows:

Introduction

(Learning Objectives: Introduce participants; outline course modules; introduce the application example; discuss the course schedule.)

- Introductions, expectations, and participant knowledge
- Workshop objectives
- Agenda, schedule, and logistics
- Introduction to the workbook and course
- Definitions
- Application development and presentation description and requirements

Overview of Balanced Scorecard Principles

(Learning Objectives: Review the basic principles of balanced scorecard strategic planning and management systems; discuss building, implementation, and sustainment issues; discuss critical success factors of successful systems; discuss managing the scorecard project; contrast the differences and similarities in scorecard systems for different organizations; discuss a typical BSC cycle.)

- Review and contrast different approaches to performance management and measurement
- Benefits of scorecard systems
- Differences among business, government, and nonprofit scorecard systems
- Review of the basic components of scorecard systems, and how they fit together
- Summaries, challenges, and lessons learned for each scorecard system framework step
- Sample BSC strategies, strategy maps, and performance measures
- Challenges of scorecard systems and how to overcome them
- Class dialogue around student issues

The Balanced Scorecard Development Process

(Learning Objectives: Discuss principles and success factors of managing scorecard development programs; contrast the differences and similarities in scorecard systems for different organizations; discuss a typical BSC cycle; learn effective facilitation techniques.)

- Managing the process
- Creating a realistic scorecard development schedule
- Securing resources and getting people on-board
- Dealing with objections
- Facilitating scorecard development workshops
- Class dialogue around student issues

Change Management Aspects of Balanced Scorecard Systems

(Learning Objectives: Understand the people side of implementing a change initiative; obstacles and how to overcome them)

- Use a Readiness Assessment to define the organization's readiness for change
- Theories of change
- Review models for change from experts in the field of Change Management
- Developing a change management plan
- Class dialogue

Advanced Scorecard Development Techniques

(Learning Objectives: Advanced techniques for surveying customers and employees, strategy mapping, performance measurement and target setting, initiative management, and scorecard cascading; rewards and recognition.)

- Changing hearts and minds through interactive communications
- Employee motivation
- Rewards and incentives
- Tips on building and sustaining employee buy-in
- Advanced performance measures' considerations
- Cascading the scorecard throughout the organization – aligning vision, strategy, and work
- Project management
- Best practices
- Class dialogue around student issues

Managing With the Balanced Scorecard

(Learning Objectives: Organization considerations for managing scorecard systems; using scorecard information to improve performance; strategic budgeting)

- Implementation issues
- Review of software options for collecting, verify and validating performance data and information
- Strategic budgeting using the balanced scorecard
- Using performance information to improve organization performance
- Sustaining the scorecard system
- Class dialogue around student issues

Application Development

(Learning Objectives: Develop a practical balanced scorecard example for your organization; work through issues facing scorecard implementation in your organization.)

- Review student application material
- Build the student application and prepare student presentations

Prerequisites

This course is designed for participants that have already completed one of two programs of study plus passed the BSP Certification Exam:

Option 1

Balanced Scorecard Professional Certification Boot Camp

OR Option 2 (both required)

BSP Pt. 1: Introduction to the Balanced Scorecard

BSP Pt. 2: Advanced Balanced Scorecard

Completion of one of these two options is required for registration for Course 520 to be approved. You will need the approximate dates and city in which you completed these pre-required courses when you register. **Participants are highly discouraged from taking the Application Course immediately after taking the BSP program**, as the Application program experience is improved dramatically when the participants have real world problems to discuss and address. Allowing for at least three months of practical experience using the framework after completing the BSP program is recommended before taking the Application Course.

Who Should Attend

This course is recommended for executives, managers, planners and analysts who are seeking the best practical ideas in improving organizational performance, and who want to achieve the highest level of certification – **Master Professional Certification** – from the Balanced Scorecard Institute.

Intellectual Property Note

Certification and training related to the *Nine Steps to Success™* methodology is for internal facilitation and personal use only. Any use of the *Nine Steps to Success™* or other Institute intellectual property beyond internal facilitation use without a formal affiliate or associate agreement with the Institute is prohibited.

Course Benefits

This is a hands-on workshop taught by the most senior Institute facilitating consultants and is designed to enable anyone involved with developing a balanced scorecard system to act as a coordinating change agent/internal consultant to lead and develop a scorecard system. Instructors will work closely with each participant. Participants will learn how to develop balanced scorecards and apply them in their own organizations. Software for planning and performance measurement will be demonstrated to show how information technology can be used to help develop the scorecard system, collect, report, and visualize performance information, and cascade an enterprise scorecard to business and support units, and to teams and individuals. Past participants also have raved about the value they received from working side-by-side with other participants, who come from all over the world and various organization types. This

sharing of practical experience occurs through classroom discussions, through meet-and-greet receptions scheduled during the week, and in some cases through electronic correspondence long after the course has ended. Tuition covers all course materials, as well as continental breakfasts, lunches and refreshments during residency session.

Hands-On Training

For each step of the course, we will use case studies and exercises in small groups to allow each participant to practice facilitation techniques and receive feedback from the instructor. You will work with your colleagues from a wide variety of organizations with different perspectives. You come to the program with an application example from your organization or from a personal interest area, and you build your scorecard during the class, with expert instructor feedback at each step of the process.

Course Materials:

- A 400-page workbook and a collection of current lessons learned and best practices on the many aspects of scorecard systems
- Performance Toolkit® with worksheets for each step of the methodology
- Reference material, including a Change Management book
- Readiness Assessment and Lessons Learned tips
- Sample organization assessment survey with questions
- Sample Strategy Maps on large-format charts
- Packet of Case Studies and Exercises
- Advanced consultant toolkit material, including templates, detailed guidelines for consulting and facilitation, sample schedules for building a scorecard system, definitions, and a summary of each step in the process

Instructors

The course will be taught by Senior Associates of the Balanced Scorecard Institute. All program instructors have specialized expertise in balanced scorecard training, facilitation and consulting in public, nonprofit, and private-sector organizations.

Discounted Course Fee

\$4,925 (Naira 1,773,000) per participant including GWU Certification fee

Fee covers course materials listed above plus lunch and refreshments.

Early Bird and Group Discount: Contact us for discount for early and group registration.

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