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STRATEGY EXECUTION HEROES

Advanced Balanced Scorecard tips

Workshop format

This document is part of a set of supporting material available for download upon purchase of *Strategy Execution Heroes* by Jeroen De Flander (isbn 978-908148731-3) .

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Pre-workshop assignment

- Explain why you want to improve the Balanced Scorecard approach in your company, why you chose them to participate in a workshop and what you expect of them
- Ask attendents to read pages 208 to 217 of *Strategy Execution Heroes*
- All attendents should have a solid understanding of the Balanced Scorecard

Typical workshop agenda

Agendapoint

- Explain background & objectives
- Inform attends on groundrules
- Brainstorm on the BSC
- Discuss on priority items
- Define an action plan

Time

- 15'
- 5'
- 60'
- 30'
- 15'

Example ground rules

- Help the facilitator
- Listen to understand
 - | Let go of your assumptions
 - | Consider possibilities
 - | Don't take anything for granted
- Be concise
 - | Say it once and with precision
 - | Beware of war stories
 - | Do not take more air time than required
- Take a stand when you believe deeply in something
 - | Silence is agreement and commitment
 - | Ask questions if you don't understand
- Reach out to people you don't know
- View differences as helpful
 - Respect others' opinions
 - Provide only constructive feedback
 - Think out of the box
- All discussions should contribute to moving agreed objectives
 - Speak one at a time
 - No justification, remain focussed
 - Use parking lot
- Be here (mentally) when you are here (physically)
 - Limit external distractions (be on time, phone policy, ...)
- Have fun
- Anybody can ask for a time out when meeting focus and ground rules are not adhered to

Brainstorm on the BSC

- Start with the list of tips from download #30
- With the group, brainstorm on
 - | The importance of each tip for your organisation, and on
 - | How well you score your current performance
- Use the group to identify possible other improvement areas and judge importance and current performance for each of them

Discuss on priority items

- For all items that were ranked
 - | Discuss their relative priority
 - | Create consensus on what should be top priorities
- Estimate with the group for each identified top priority
 - | What estimated workload would be
 - | To what degree it is in our influence to improve it
 - | Who should be involved as well
 - | Whether it depends on other actions to be take first
 - | ...

Define an action plan

- Based on the input of the previous step, start detailing the task at hand in a concrete action plan that identifies
 - | The objective of all actions
 - | When to start and when we estimate to finish it
 - | Who will take what role in the execution of the improvement action
 - | How we will measure the success of the action on the longer term and who will take ownership for it

Annex 2: tips and tricks for a brainstorm session

- Productivity checklist:
 - | Be prepared: set a goal, provide background information
 - | Location: pleasant environment, no interruptions
 - | Invite all key people
 - | Choose moderator/facilitator: keeps group on track, watches over ground rules
- Ground rules:
 - | Criticism is ruled out, be polite, be positive, judge later
 - | Quantity wanted over quality, look for lots of right answers
- The wilder, the better
 - | Improvement sought, build upon brainstorming lists
 - | Have fun
- Overcoming writer's block:
 - | Look at the problem from a different viewpoint
 - | Use analogies, metaphors, what ifs, past parallels, copy from...
- Idea evaluation:
 - | Avoid the rhetoric of no
 - | Funnel, weigh ideas in positive/negative, interesting etc., then sort
 - | Simplify, reformulate
- Idea acceptance:
 - | Communicate
 - | Be action driven