



Balanced Scorecard Professional (BSP) Certification Boot Camp

A 5-day course leading to professional **BSC certification** by the US Balanced Scorecard Institute and the **George Washington University, Center for Excellence in Public Leadership**

GOLD COAST 20 - 24 May 2024

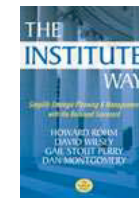
SYDNEY 21 - 25 October 2024



Attend In-Person

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Key Takeaway for
In-person Attendees



In Association With:

Center for Excellence
in Public Leadership

THE GEORGE WASHINGTON UNIVERSITY

Course Information

Education Partner



The Balanced Scorecard Institute provides training, certification, and consulting services to commercial, government, and non-profit organizations worldwide. The Institute applies best practices gained from hundreds of consulting assignments and 5,000 trainees in Balanced

Scorecard, strategic performance management, measurement, strategic planning, and change management to help executives, managers, and analysts transform their organizations into "performance excellence" organizations. The Institute also provides, through the balancedscorecard.org website, extensive resources, including case studies, white papers, articles, and other information based on lessons learned from extensive experience in building strategic management and performance measurement systems using our award-winning Nine Steps to Success™ Balanced Scorecard methodology.

(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.)

In Association With:

Center for Excellence in Public Leadership

THE GEORGE WASHINGTON UNIVERSITY

The Balanced Scorecard Professional certification (BSP), is offered through the Balanced Scorecard Institute and The George Washington University Center for Excellence in Public Leadership.



**THE GEORGE
WASHINGTON
UNIVERSITY**
WASHINGTON, DC

Co-certified with The George Washington University Center for Excellence in Public Leadership, part of the College of Professional Studies. The Center for Excellence in Public Leadership at The George Washington University is committed to developing leaders who make a positive difference in their organizations and the lives of the people they serve.

About Informa Connect Academy

Informa Connect Academy

Informa Connect Academy is a premier provider of global education and training solutions that caters to a diverse range of professionals, industries, and educational partners. We are dedicated to promoting lifelong learning and are committed to offering learners

expert guidance, training, and resources to help them stay competitive in a rapidly changing world.

Our comprehensive range of courses and programmes are tailored to meet the needs of all professionals, from aspiring specialists to seasoned experts. We partner with elite academic organisations and industry leaders with unmatched expertise in their respective fields to deliver an exceptional learning experience.

- The Balanced Scorecard Institute was the first organization in the world to create a certification program and certify practitioners, and has been doing so for 20 years.
- Over 5,000 Balanced Scorecard practitioners have been trained and certified and the Institute has consulted for hundreds of organizations from over 40 countries since 1997.
- The Institute created the first replicable framework for Balanced Scorecard systems.
- It was the first organization in the world to recognize that strategic planning, strategic alignment, and strategy execution made up an integrated system. It was the first to incorporate strategic thinking, change management, and communication planning into scorecard system design.
- The Institute was the first organization in the world to teach people how to build practical integrated scorecard systems themselves.
- It was also the first organization to recognize the difference between the private sector and mission-driven sectors and create separate frameworks for each sector. It was the first to incorporate just-in-time training into scorecard development.

Course Overview

Balanced Scorecard systems are becoming the standard performance management system in many organizations worldwide. The name “Balanced Scorecard” comes from the idea of looking at strategic measures in addition to traditional financial measures to get a more “balanced” view of performance.

The Institute’s Nine Steps to Success™ framework is the basis of the course, where the emphasis is on shared participant experiences, lessons learned, and best practices. Smallgroup 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 for 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

Benefits of Attending

For The Organization



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



Improve focus on strategy & results



Improve communication of the organization’s Vision and Strategy

For The Learner



Enhanced professional credibility



Positive Career development



Professional networking opportunities



Extensive knowledge gained

Who Should Attend

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 Overview

Course Requirements and Certificates



Attendance – Delegates must attend all sessions of the course. Delegates who miss more than two hours of the course sessions will not be eligible to sit the exam



Certificate of Completion – Delegates will receive an Informa Certificate of Completion after successful completion of the course



Certificate from The Balanced Scorecard Institute – Delegates will receive a globally recognized certificate from The Balanced Scorecard Institute in association with The George Washington University upon successfully passing the certification



Laptops – Delegates are required to bring their laptop all throughout the session

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

What's Included



Course materials



Two exam attempts



Approved BSI subject matter experts



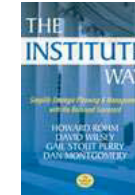
Refreshments and lunch at the course



Networking with other delegates



The Institute's Way book



Key Takeaway for In-person Attendees



Once you achieve the BSP certification level, you can continue your journey by registering for the highest level of certification: **Balanced Scorecard Master Professional (BSMP) Certification Application**

Other credentials offered by the Balanced Scorecard Institute:

- » Key Performance Indicator Professional Certification (KPI-P)
- » Objective & Key Result (OKR) Professional Certification



"Instructor was excellent, easy to understand, friendly, knowledgeable and professional. His wide experience and coaching style facilitated for perfect learning environment."

Head of Corporate Planning, Social Security Organisation

Meet Your Course Directors



Alan Fell

Director
Alan Fell Consultancy

Alan Fell is a UK-based independent consultant and management trainer, specialising in the Balanced Scorecard and the wider disciplines of Strategy Execution.

After a successful career with a major London-based bank, during which he led a pioneering Balanced Scorecard application in 1994-96, Alan has operated across the world for the last 20+ years, combining management training and implementation consultancy.

Alan has focused especially on the GCC markets in the last 20 years, spending well over half of his work time in the region, with involvement in innumerable training programmes and consulting assignments. In total Alan has led more than 300 training courses across the world during this period.

For many years, Alan has led his own Certificate in Strategy Execution training programme, in conjunction with Informa. In addition, Alan is also a Senior Associate of the Balanced Scorecard Institute and has been the course leader many times for the "BSP certified Bootcamp" scorecard training programme.

In total, Alan brings well over 30 years of hands-on strategy management experience, including 24 years of the Balanced Scorecard. He has been a frequent past chairman of many of Informa's Balanced Scorecard/strategy conferences. Informa's Balanced Scorecard/strategy conferences.



Dr Bob McDonald

Bob is a Balanced Scorecard Institute Senior Associate, a certified Balanced Scorecard Master Professional and Managing Director of a management consulting organization based in Australia. With a PhD in science and experience as a researcher, he brings a strong scientific and evidence-based approach to his work, ensuring that best practice approaches are adopted, while at the same time always looking for new and creative ways of improving processes and outcomes.

His main areas of expertise are strategy development and its effective implementation, evaluation of major programs and systems, and performance measurement and management.

Bob has worked in private, public and not-for-profit sectors in a diverse range of areas including manufacturing, tertiary education, health and overseas development. Prior to establishing his own consultancy business in 2009, Bob was Director of Performance with a large regional public health service in Australia where, among other things, he initiated and then oversaw the implementation and cascading of the Balanced Scorecard over an eight-year period. With 15,000 staff, over 40 hospitals and community centres, this was one of the largest implementations in the health sector internationally.

Bob has facilitated over 150 Balanced Scorecard and strategy workshops in a variety of settings in Australia, Asia and the Pacific and has led a number of independent reviews or evaluations of organizational programs and systems. He is trained in cross-cultural communication, can speak Indonesian and has lived and worked in South East Asia.

DESTINATION:

GOLD COAST, Australia

Don't miss the opportunity to complete the Balanced Scorecard Certification training whilst visiting one of Australia's iconic destinations – the vibrant Gold Coast. With international travel back in full swing, there's no better time to fit in work and pleasure than visiting the magnificent beaches, attractions, wildlife and gastronomy destinations this beautiful city has to offer!

With easy accessibility via Gold Coast International Airport or a one-hour drive from Brisbane, the Gold Coast is one of Australia's best-connected cities. Year-round weather delivers basking sunshine over 300 days a year, perfectly suiting Balanced Scorecard Certification dates to fit in a timetable of work and play. To learn more, visit www.informaconnect.com/academy for more details.

Course Outline

BSP Certification Part 1: Introduction To The Balanced Score

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
- » 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



Figure 1. Nine Steps to Success Framework

Course Outline

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

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

Course Outline

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

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



Attendees are required to bring their laptops (not iPads) as they will need to log into the online platform.

FAQs

What is a Balanced Scorecard?

The balanced scorecard (BSC) is a strategic planning and management system. The BSC suggests that we examine an organization from four different perspectives (Financial, Customer, Internal Process, Organizational Capacity) to help develop objectives, measures (KPIs), targets, and initiatives relative to those views.

What type of organizations can implement the Balanced Scorecard?

BSCs are used extensively in business and industry, government, and nonprofit organizations worldwide. More than half of major companies in the US, Europe, and Asia are using the BSC, with use growing in the Middle East and Africa. BSC has also been selected by Harvard Business Review as one of the most influential business ideas of the past 75 years.

Who is the certification most useful for?

Job titles who attended this course are CEOs, Strategy Directors, Managers & Analysts, Change Management Managers, Performance Directors, HR Directors, and Heads of Departments amongst others

What are the next steps after completing this course?

Delegates can continue their journey by getting the highest level of certification – Balanced Scorecard Master Professional Certification. Delegates also do attend KPI Professional Certification to master this topic.

Tell me more about the exam

The exam, administered online, has 40 questions (multiple choice or true/false pulled randomly from a larger pool of questions). There is a 75-minute time limit to complete the exam and results are posted immediately. A score of 75% is needed to pass.

How long is the certification valid and how can I recertify?

BSP Certifications expire on December 31, three years from the year a person was originally certified. BSMP Certifications expire on December 31, five years from the year a person was originally certified. Annual recertification notices are sent, as a courtesy, in the first quarter of the year in which the individual is due for renewal. Accompanying the reminder notice will be a link to information regarding the recertification process and instructions to access the recertification application form and guidelines.

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Easy Ways to Register



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Course Code	Location/ Format	Course Dates	Early Bird price valid until		Standard price valid after		Great Savings: When you book 4 or more participants! Call us today on +61 (2) 9080 4399 or email training@informa.com.au to take advantage of the discount offer.
			GC - 26 Apr 24 SY - 4 Oct 24		GC - 26 Apr 24 SY - 4 Oct 24		
P24GL27GC	Gold Coast	20 - 24 May 2024	\$5,095 + \$509.50 GST	\$5,604.50	\$5,395 + \$539.50 GST	\$5,934.50	
P24GL27SY	Sydney	21 - 25 October 2024	\$5,095 + \$509.50 GST	\$5,604.50	\$5,395 + \$539.50 GST	\$5,934.50	

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Academy**

Informa Connect Academy is a premier provider of global education and training solutions that caters to a diverse range of professionals, industries, and educational partners. We are dedicated to promoting lifelong learning and are committed to offering learners expert guidance, training, and resources to help them stay competitive in a rapidly changing world.

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Informa Connect Academy has a long-standing track record of delivering very successful customised learning solutions achieving real and measurable value for our clients through our senior training consultants. If you have 8+ interested people, an on-site course can be the ideal solution – giving you the opportunity to customise our course content to your specific training needs, as well as attracting significant savings compared to public course costs.

WHY CHOOSE ON-SITE WITH INFORMA CONNECT ACADEMY?

- 1. Custom design** – Together, we will identify the best blended learning solution for your culture, your people and your training objectives.
- 2. Quality assured** – We design market-leading training programs, concepts and methodologies, with a 400+ course portfolio. Our rigorously selected 900+ instructor faculty are recognised experts in their field. Quality of their content and delivery methods is assured through continuous monitoring and evolution.
- 3. On-site training** is a cost effective way to train your people and achieve your defined outcomes.

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