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ACCOUNTING AND FINANCE | AF-028

Balanced Scorecard Professional

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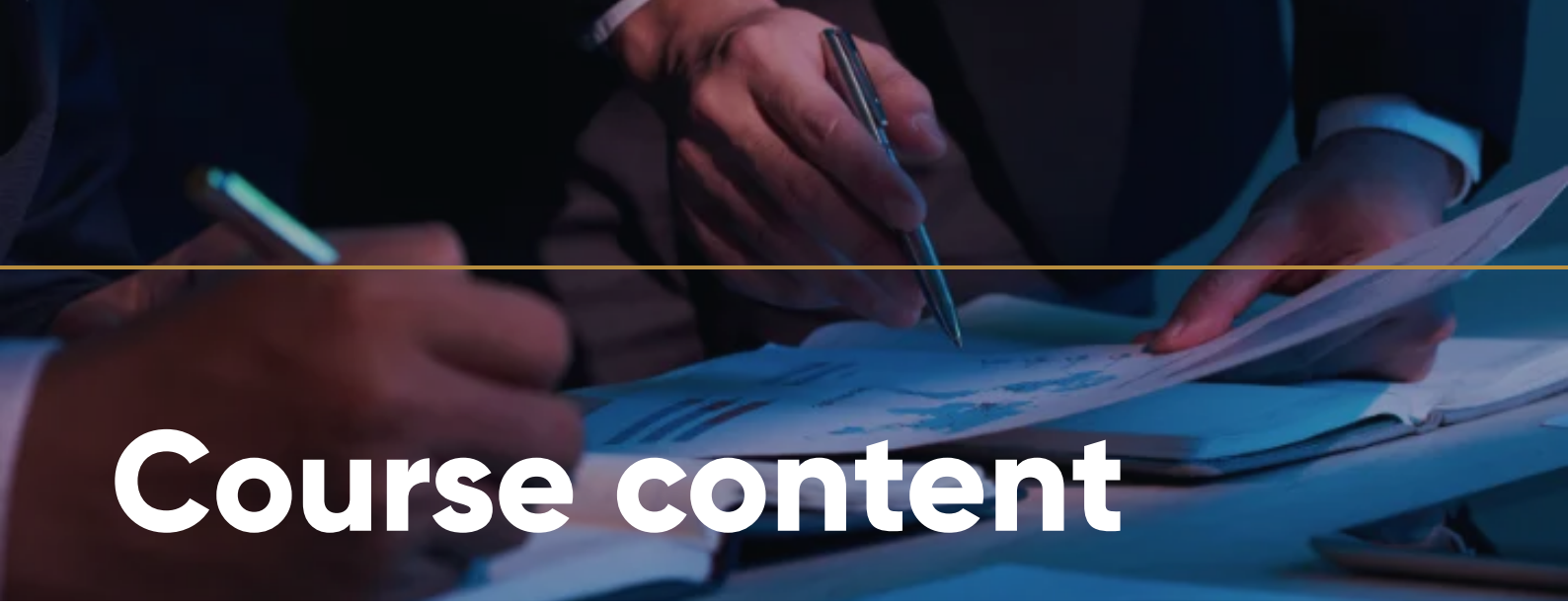


Course content

Why Attend

Organisations frequently develop ambitious strategic plans but struggle to translate them into measurable objectives, coordinated departmental activities, and meaningful performance improvements. Traditional performance management systems often focus heavily on financial results while overlooking customer expectations, operational processes, workforce capabilities, and the long-term drivers of organisational success.

The Balanced Scorecard provides a structured framework for converting organisational strategy into a coherent set of strategic objectives, performance indicators, targets, and improvement initiatives. By integrating financial and non-financial measures, it enables management teams to evaluate performance from multiple perspectives and understand how operational capabilities contribute to strategic outcomes.

Effective Balanced Scorecard implementation requires more than selecting key performance indicators (KPIs). Organisations must clarify strategic priorities, establish cause-and-effect relationships, develop strategy maps, align departmental objectives, define reliable performance measures, and create management review processes that support informed decisions and accountability.

The Balanced Scorecard Professional course equips participants with the practical knowledge and analytical skills needed to design, implement, manage, and continuously improve a strategy-focused performance management system.

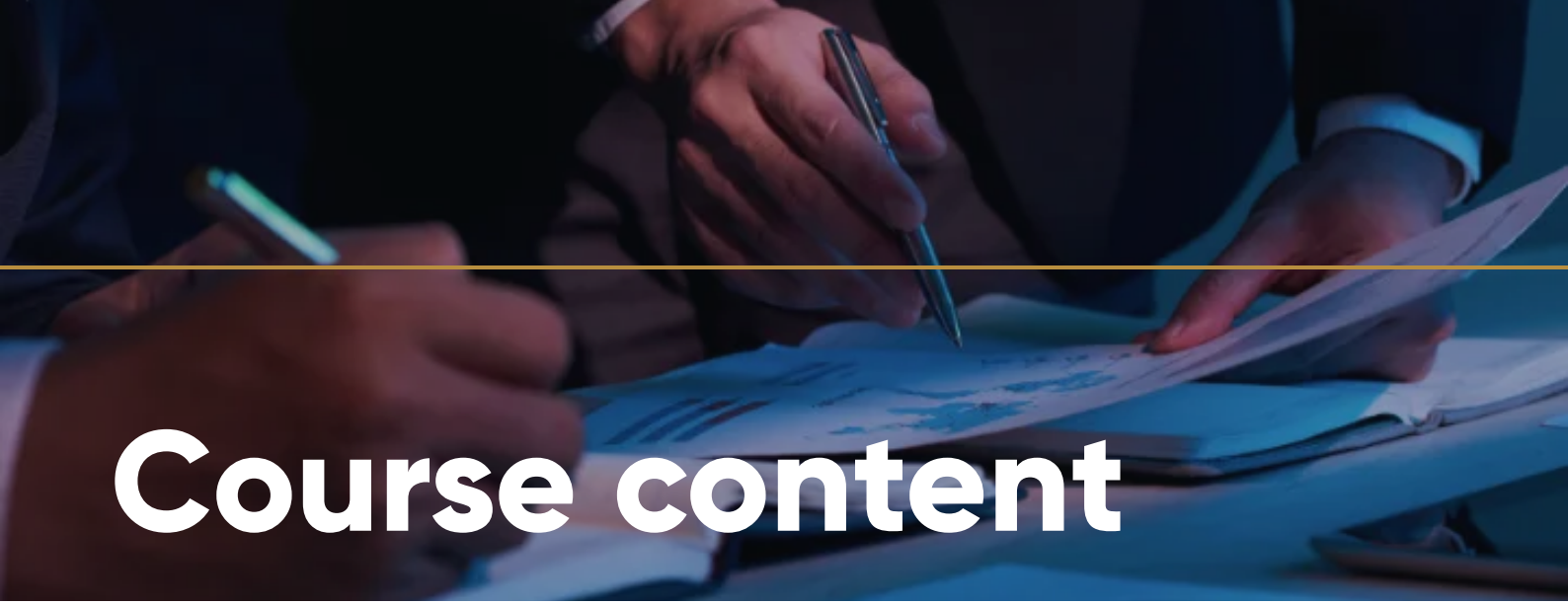
Participants explore the four Balanced Scorecard perspectives, strategy mapping, KPI development, target setting, strategic initiative management, performance dashboards, organisational alignment, and strategy execution governance.

Through practical workshops and organisational case studies, participants develop a comprehensive Balanced Scorecard framework that connects strategic direction with measurable organisational performance.

Professional Problems This Course Is Designed to Solve

• Poor execution of organisational strategy: Translating strategic plans into clear objectives, measurable outcomes, accountable initiatives, and structured performance reviews.

• Overreliance on financial performance indicators: Integrating financial, customer, internal process, and organisational capability measures to provide a balanced assessment of performance.



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Why Attend

• Unclear relationships between strategic objectives: Developing strategy maps that communicate how organisational capabilities and operational improvements contribute to strategic results.

• Ineffective KPI selection: Establishing relevant, measurable, actionable indicators with clear definitions, data sources, ownership, and reporting responsibilities.

• Misalignment between departments and corporate strategy: Cascading strategic objectives and performance measures across business units, departments, and teams.

• Weak performance monitoring and accountability: Establishing targets, reporting dashboards, management review cycles, and corrective action procedures.

• Difficulty sustaining performance improvement: Integrating Balanced Scorecard results into strategic decision-making, resource allocation, initiative management, and continuous improvement.

Course Methodology

The programme combines instructor-led discussions, strategic planning case studies, strategy mapping exercises, KPI development workshops, performance measurement simulations, and practical Balanced Scorecard design activities.

Participants work with realistic organisational strategies, performance data, operational objectives, and management reporting scenarios to develop strategic objectives, strategy maps, KPI dictionaries, target-setting frameworks, and performance dashboards.

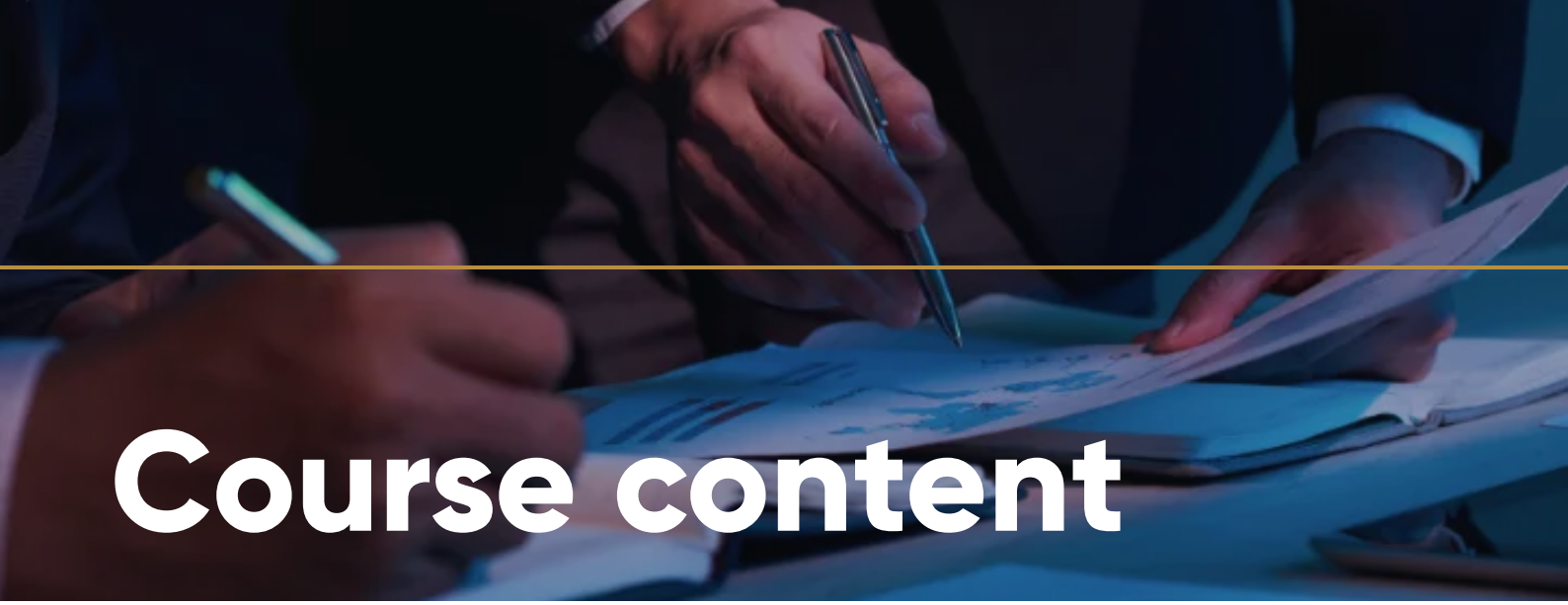
The programme emphasises practical implementation, cross-functional alignment, evidence-based performance evaluation, and the integration of Balanced Scorecard principles into existing management processes.

Course Objectives

By the end of this course, participants will be able to:

• Explain the principles and strategic value of the Balanced Scorecard framework

• Distinguish strategic performance management from operational performance monitoring



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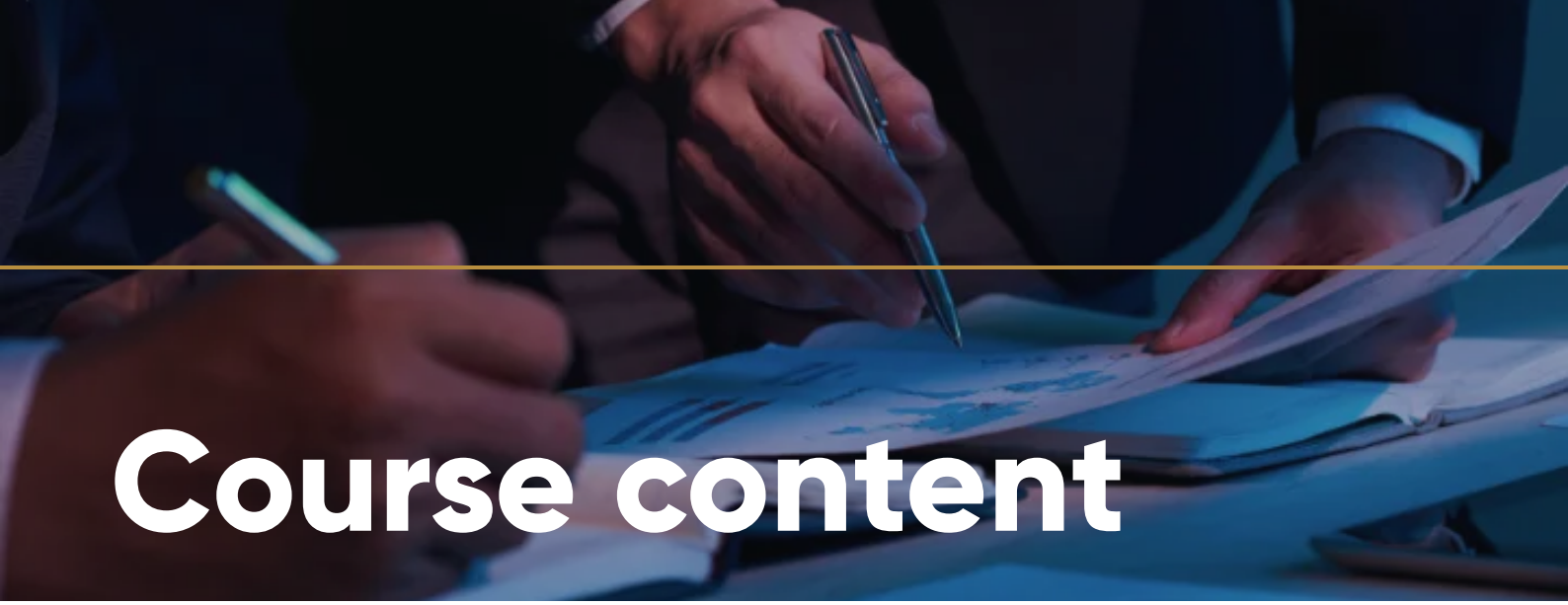
Course Objectives

- Translate organisational vision and strategy into measurable strategic objectives
- Apply the four Balanced Scorecard perspectives to organisational strategy
- Develop strategy maps showing relationships between strategic objectives
- Design meaningful KPIs with clear definitions and measurement methodologies
- Establish performance baselines, targets, thresholds, and accountability arrangements
- Cascade Balanced Scorecard objectives across organisational levels
- Connect strategic initiatives, budgets, and resources with performance objectives
- Develop Balanced Scorecard dashboards and management reporting structures
- Conduct strategic performance reviews and identify corrective actions
- Design a practical Balanced Scorecard implementation and continuous improvement roadmap

Target Audience

This course is suitable for:

- Strategic planning managers and specialists
- Corporate performance management professionals
- Business strategy and transformation managers
- Senior executives and department heads
- Performance measurement and KPI specialists
- Finance managers and management accountants
- Organisational development professionals
- Quality and operational excellence managers
- Project management office and strategy execution professionals
- Public sector performance and institutional planning specialists



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Target Competencies

Participants will develop competencies in:

• Strategic performance management

• Balanced Scorecard framework design

• Strategy mapping and strategic alignment

• Strategic objective development

• KPI design and measurement

• Performance target setting

• Organisational scorecard cascading

• Strategic initiative and resource alignment

• Performance dashboard development

• Strategy execution monitoring and improvement

Course outline

Day 1: Balanced Scorecard Fundamentals and Strategic Performance Management

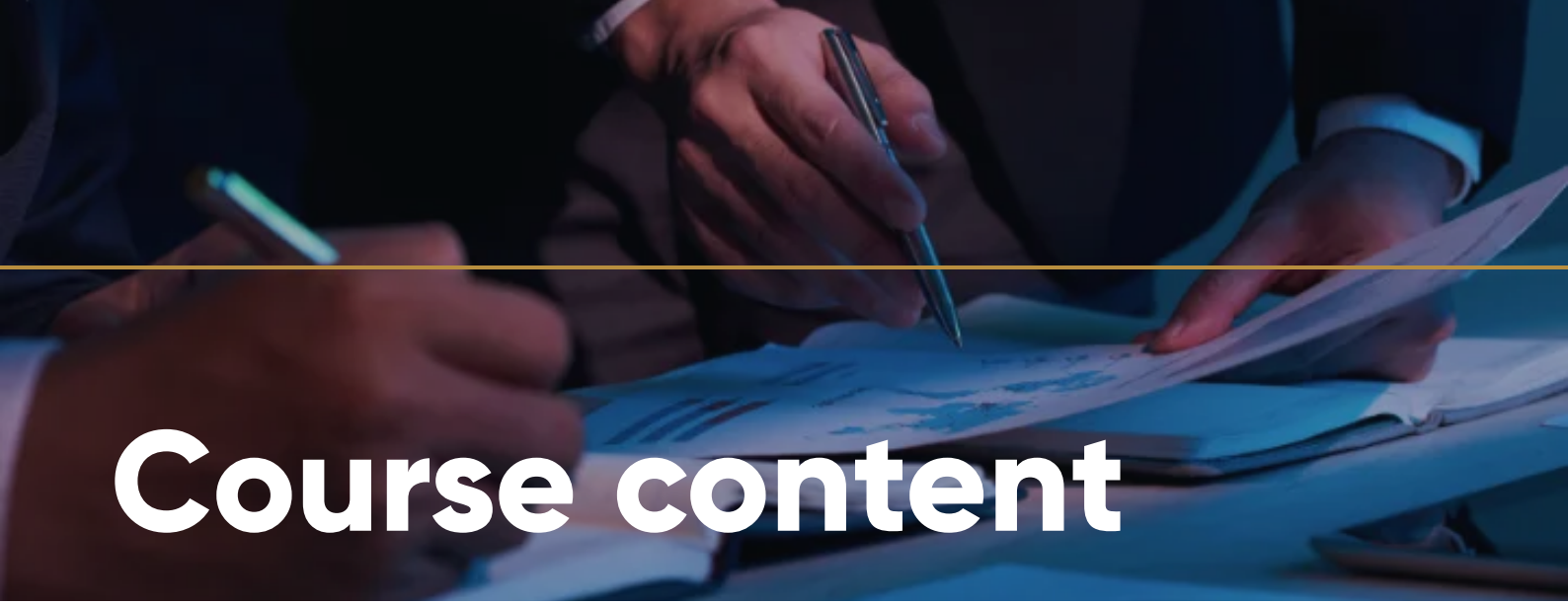
• Understanding the evolution, principles, and purpose of the Balanced Scorecard as a strategic management and performance measurement framework

• Examining the limitations of traditional financial performance measurement and the need for integrated financial and non-financial indicators

• Exploring the four Balanced Scorecard perspectives: Financial, Customer, Internal Business Processes, and Learning and Growth

• Translating organisational mission, vision, strategic priorities, and stakeholder expectations into measurable strategic objectives

• Establishing Balanced Scorecard governance, executive sponsorship, strategic accountability, and cross-functional implementation responsibilities



Course content

Course outline

• Practical workshop: Analysing an organisational strategy and developing an initial set of strategic objectives across the four Balanced Scorecard perspectives

Day 2: Strategy Mapping and Strategic Objective Alignment

• Understanding strategy maps and their role in communicating strategic priorities, value creation, and organisational performance relationships

• Developing strategic objectives that describe desired organisational outcomes rather than routine operational activities

• Identifying cause-and-effect hypotheses linking workforce capabilities, internal processes, customer outcomes, and financial performance

• Applying strategic themes to organise objectives around priorities such as operational excellence, customer value, innovation, and sustainable growth

• Evaluating strategic alignment between corporate objectives, business unit priorities, departmental responsibilities, and stakeholder requirements

• Practical exercise: Designing a complete organisational strategy map with strategic themes, objectives, and logical performance relationships

Day 3: KPI Development, Performance Targets and Measurement Systems

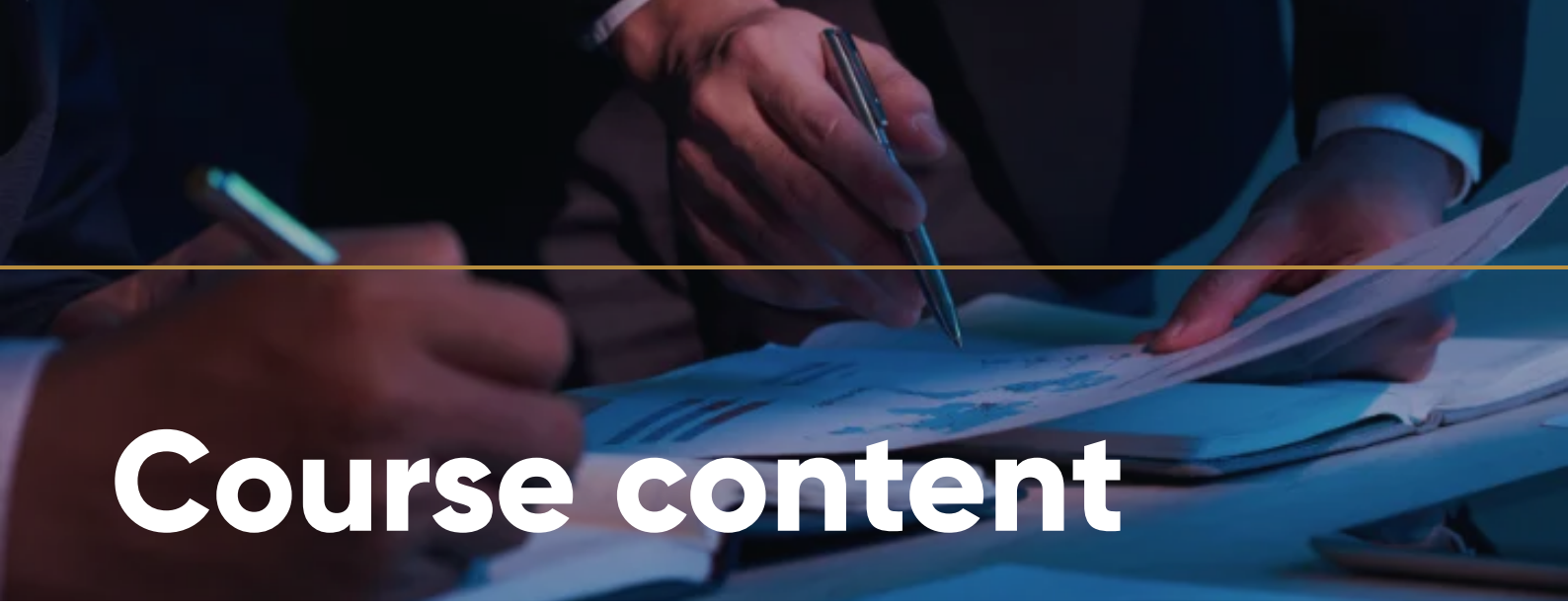
• Distinguishing strategic KPIs from operational metrics and identifying leading and lagging performance indicators

• Developing KPI definitions covering measurement purpose, calculation methodology, data sources, reporting frequency, and ownership

• Establishing performance baselines, realistic targets, tolerance thresholds, and performance rating methodologies

• Selecting financial indicators involving profitability, cost efficiency, revenue growth, and return on investment

• Designing customer, internal process, and learning and growth indicators covering service quality, productivity, innovation, workforce capabilities, and organisational development



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• KPI development workshop: Preparing a Balanced Scorecard KPI dictionary with measures, formulas, targets, data sources, and accountability assignments

Day 4: Balanced Scorecard Cascading, Strategic Initiatives and Performance Reporting

• Cascading corporate Balanced Scorecard objectives into business unit, departmental, and team-level performance measures

• Aligning strategic initiatives, improvement projects, departmental action plans, and resource allocation with Balanced Scorecard objectives

• Establishing accountability through objective ownership, KPI responsibility matrices, reporting arrangements, and management review structures

• Designing Balanced Scorecard dashboards using performance indicators, targets, trends, status classifications, and management commentary

• Integrating Balanced Scorecard information with budgeting, strategic planning, project management, and organisational performance systems

• Practical workshop: Developing a departmental Balanced Scorecard and management dashboard aligned with an organisation-wide strategy map

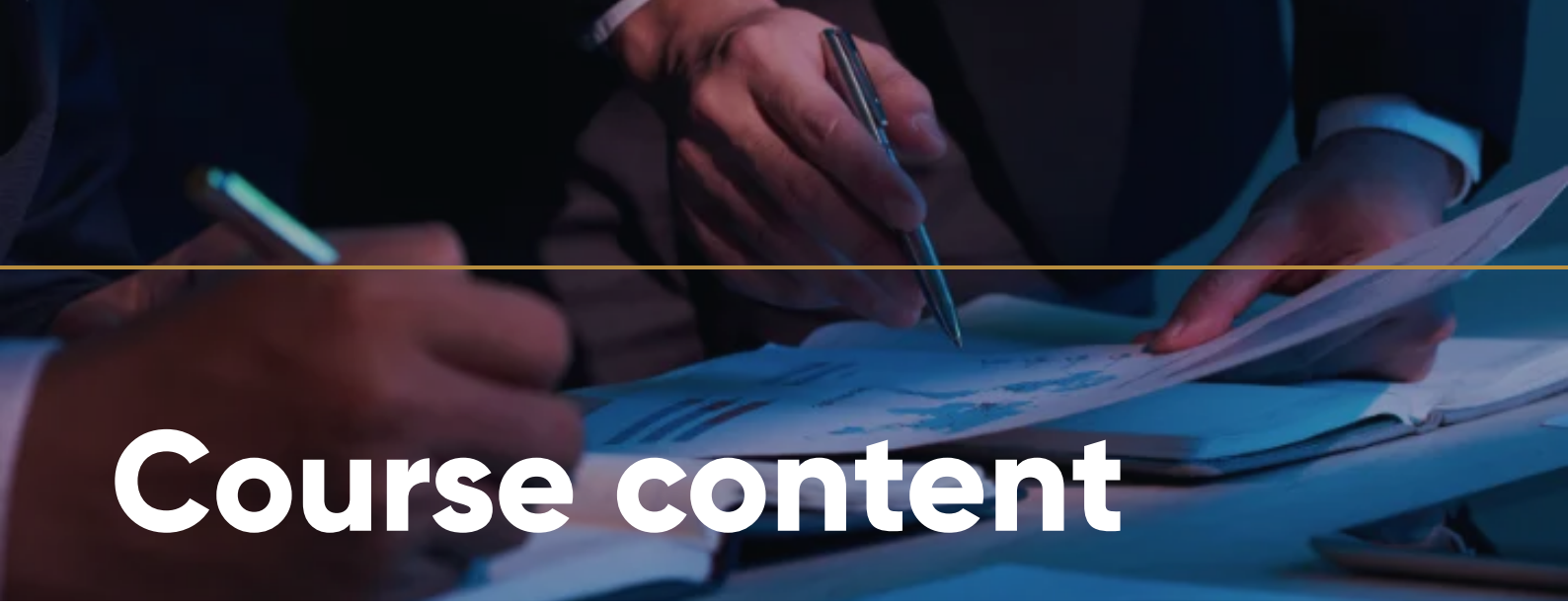
Day 5: Balanced Scorecard Implementation, Strategic Reviews and Continuous Improvement

• Developing a phased Balanced Scorecard implementation roadmap covering readiness assessment, governance, design, piloting, deployment, and organisational adoption

• Conducting strategic performance review meetings to assess results, investigate performance gaps, and evaluate strategic assumptions

• Applying root cause analysis and corrective action planning to address underperforming objectives and strategic initiatives

• Evaluating Balanced Scorecard effectiveness through data reliability, management engagement, strategic alignment, reporting quality, and decision-making outcomes



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Course outline

• Strengthening long-term adoption through leadership commitment, employee communication, performance culture, digital reporting tools, and continuous strategy review

• Capstone exercise: Developing and presenting a Comprehensive Balanced Scorecard Implementation Framework incorporating strategic objectives, a strategy map, KPIs, performance targets, departmental alignment, strategic initiatives, dashboards, and an implementation roadmap

Seminar dates

Available seminar dates

Live dates and pricing for Balanced Scorecard Professional generated from the course details page.

Date	Location	Format	Fee
Dates on request	Venue on request	Classroom	**Contact us**

Live online option	Online delivery is available at €1,850.-.