

# Scorecards: Tools for monitoring performance.

Hands-on course of 2 days - 14h

Ref.: TAB - Price 2024: CHF1 590 (excl. taxes)

## EDUCATIONAL OBJECTIVES

At the end of the training, the trainee will be able to:

Design relevant scorecards for your business

Identify significant indicators based on your objectives

Manage the strategy using scorecards

Measure performance and manage your team with scorecards

Use scorecards to monitor the company

Manage your team with scorecards

Create scorecards. Put them in practice with role-playing games. Feedback.

## THE PROGRAMME

last updated: 01/2018

### 1) Designing your scorecards and indicators

- Identifying the role and purposes of scorecards for the company and for management.
- Definition: What a scorecard is and is not.
- Understanding the scorecard approach: Knowing how to identify the company, clarify the mission, etc.
- Placing an activity's performance under scorecard control.
- Identifying three aspects of control and monitoring: Strategic, managerial, operating.
- Defining the objectives of the organization, and of each department or office.
- Identifying action variables or key factors of success.
- Building the indicators. Setting up standards.
- Choosing indicators based on the objectives. Different levels of indicators and their use.
- Ranking result, progress, monitoring, reporting, and managerial indicators.
- Identifying relevant indicators based on needs.
- Selecting performance, activity, and timeframe indicators by function or by process.

*Hands-on work* : Brainstorming in subgroups: What are the different types of scorecards?

*Discussions.*

### 2) Selecting the most significant indicators.

- Defining the progress goals attached to indicators.
- Identifying each user's needs; management, team, staff.
- Determining what levels of information are required and giving them meaning.

*Hands-on work* : Brainstorming in pairs: Determining the key factors of success and the most meaningful indicators for your business. *Discussions.*

### 3) Manage the strategy using scorecards

- Identifying the major steps of the project.
- Instituting project management. Adopting a gradual approach.
- Creating reports and implementing a reporting process.
- Getting users and recipients involved.
- Listing users' needs and useful levels of information.
- Analyzing different requests.

#### TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

#### ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more. Participants also complete a placement test before and after the course to measure the skills they've developed.

#### TEACHING AIDS AND TECHNICAL RESOURCES

- The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
- At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
- A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

#### TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

#### ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at [psh-accueil@ORSYS.fr](mailto:psh-accueil@ORSYS.fr) to review your request and its feasibility.

- Finding existing information.
- Identifying sources of information: Build, collect, and check the information.
- Knowing the cost of the information. Consolidating the information.
- Formalizing the communication of the information. Making reading easier. Degree of accuracy. Frequency. Attractiveness.
- Using tools to create the scorecard.

*Hands-on work : Creating reports and designing a reporting system. Workshop: Create the matrix of a scorecard for your unit, department, or office.*

#### 4) Manage your team with scorecards

- Manage the change by getting everyone involved. Sharing the project's issues, getting people involved and assigning them responsibilities.
- Making your team members responsible for tracking indicators.
- Getting your teams on board with scorecards; designing and updating.
- Uniting your team around scorecards.
- Analyzing the results: Interpreting and correcting deviations between actual and forecasts.
- The scorecard: A decision support tool.
- Holding meetings: Frequency, preparation, purposes.
- The scorecard: A communication tool.
- Using it as a cross-cutting information tool. Posting the scorecard. An internal or external benchmarking tool.
- Using the scorecard based on your own managerial style. A tool for improving skills.

*Hands-on work : Scenarios: During a team meeting, present the selected indicators. Analyze the sessions in groups.*

#### 5) Optimize your scorecards

- Organizing the presentation of scorecards with your teams.
- Setting up an information circuit to encourage changes to the indicators.
- Updating the scorecard. Adapting it to the company's strategy.
- Risk mapping. Identifying which of the company's processes should be included.
- Defining global performance indicators.
- Verifying the efficiency of the processes based on set performance indicators.
- Developing strategic scorecards.
- Dividing the strategy into four perspectives: Financial, customer, process, learning.

*Hands-on work : Case study: Creating and improving scorecards. Brainstorming perspectives of the strategic scorecard.*

## DATES

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### REMOTE CLASS

2025 : 03 Feb, 05 May, 11 Aug,  
23 Oct