



EXECUTING STRATEGY WITH THE BALANCED SCORECARD TRAINING COURSE

07 - 11 DEC 2026

CAPE TOWN

4600 € (PER PERSON)

REF: #PLA3575_257184



Course Introduction / Overview:

Successfully executing strategy is one of the most significant challenges facing organizations today. Many well-crafted strategic plans fail not because they are flawed, but because they are poorly implemented. The Balanced Scorecard (BSC) is a revolutionary strategic planning and management system that addresses this gap by translating an organization's vision and strategy into a comprehensive set of performance measures. Developed by Robert S. Kaplan and David P. Norton, and detailed in their seminal work "The Balanced Scorecard: Translating Strategy into Action", this framework provides a holistic view of organizational performance. It moves beyond traditional financial metrics to include critical non-financial drivers of success across four key perspectives: financial, customer, internal business processes, and learning and growth. This intensive training course from BIG BEN Training Center is designed to provide a comprehensive, A-to-Z guide on designing, implementing, and managing a robust Balanced Scorecard system. Participants will learn not just the theory but the practical application of creating strategy maps, developing meaningful Key Performance Indicators (KPIs), and cascading strategic objectives throughout the entire organization to ensure complete alignment and drive sustainable results.

Target Audience / This training course is suitable for:

- Chief Executive Officers (CEOs) and Senior Executives.
- Strategy and Planning Managers.
- Performance Management Specialists.
- Department Heads and Line Managers.
- Financial Controllers and Analysts.
- Human Resources Managers.
- Project and Program Managers.
- Business Consultants and Advisors.
- Quality and Process Improvement Professionals.



Target Sectors and Industries:

- Banking and Financial Services.
- Healthcare and Pharmaceuticals.
- Manufacturing and Engineering.
- Telecommunications and Information Technology.
- Retail and Consumer Goods.
- Energy and Utilities.
- Government Agencies and Public Sector Organizations.
- Non-Profit and Educational Institutions.

Target Organizations Departments:

- Strategic Planning and Corporate Development.
- Finance and Accounting.
- Operations Management.
- Human Resources and Organizational Development.
- Marketing and Sales.
- Information Technology.
- Quality Assurance and Control.
- Project Management Office (PMO).



Course Offerings:

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

- Master the core concepts and principles of the Balanced Scorecard framework.
- Translate organizational vision and strategy into actionable strategic objectives.
- Develop a comprehensive and coherent strategy map linking objectives in a cause-and-effect chain.
- Design and select meaningful Key Performance Indicators (KPIs) for each of the four perspectives.
- Set realistic and challenging targets for each performance measure.
- Cascade the corporate-level scorecard to business units and support departments.
- Align individual employee objectives and performance with overall strategic goals.
- Utilize the Balanced Scorecard as a dynamic strategic management tool.
- Lead and facilitate strategy review meetings effectively.
- Overcome common challenges associated with Balanced Scorecard implementation.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be highly interactive, practical, and engaging, ensuring that participants can immediately apply their learning to their organizational context. This course moves beyond theoretical lectures to immerse participants in a hands-on learning experience. The program is built around a blend of expert-led instruction, real-world case studies of successful and failed Balanced Scorecard implementations, and collaborative group exercises. Participants will work in teams to build a complete strategy map, develop a set of KPIs, and simulate the process of cascading objectives. Interactive workshops and facilitated discussions will encourage the sharing of experiences and challenges, fostering a rich learning environment. Ample time is dedicated to practical application, where participants can work on templates and frameworks relevant to their own industries. Continuous feedback from the instructor and peers is a core component, ensuring a deep understanding of strategic performance management principles and their effective execution.



Course Agenda (Course Units):

Unit One: Fundamentals of Strategic Performance Management

- Introduction to Strategy Execution Challenges.
- The Evolution of Performance Measurement Systems.
- The Genesis of the Balanced Scorecard by Kaplan and Norton.
- Understanding the Four Perspectives: Financial, Customer, Internal Process, and Learning & Growth.
- Distinguishing Between Lagging and Leading Indicators.
- The Balanced Scorecard as a Strategic Management System, Not Just a Measurement Tool.
- Common Misconceptions and Pitfalls to Avoid.

Unit Two: Building the Strategy Map

- Translating Mission, Vision, and Values into Strategy.
- The Importance of a Clear Strategic Focus.
- Identifying Strategic Themes and Goals.
- Developing Strategic Objectives for Each Perspective.
- Establishing Cause-and-Effect Linkages Between Objectives.
- The Art and Science of Crafting a Compelling Strategy Map.
- Workshop: Developing a Draft Strategy Map for a Case Study Organization.

Unit Three: Developing Performance Measures and Targets

- The Difference Between Metrics, Measures, and KPIs.
- Characteristics of Effective Key Performance Indicators (KPIs).
- Brainstorming and Selecting the Right Measures for Each Strategic Objective.
- Defining and Documenting Each KPI Clearly.
- The Process of Setting Ambitious yet Realistic Targets.
- Using Benchmarking to Inform Target Setting.
- Workshop: Linking KPIs to the Strategy Map and Setting Targets.



Unit Four: Cascading the Scorecard and Ensuring Alignment

- The Importance of Organizational Alignment for Strategy Execution.
- Approaches to Cascading: Translating Corporate Strategy to Business Units.
- Aligning Support Departments (HR, IT, Finance) with Strategic Objectives.
- Developing Team and Individual Scorecards.
- Linking Performance Management and Rewards to the Balanced Scorecard.
- Communication Strategies for a Successful Rollout.
- Gaining Buy-in and Managing Change Across the Organization.

Unit Five: Executing and Sustaining the Strategy

- Using the Balanced Scorecard for Strategic Review Meetings.
- Analyzing Performance Data and Generating Strategic Insights.
- The Role of Strategic Initiatives and Project Prioritization.
- Linking the Balanced Scorecard to the Budgeting and Planning Process.
- Automating the Balanced Scorecard: Software and Tools Overview.
- Sustaining Momentum and Evolving the Scorecard Over Time.
- Case Study Analysis: Lessons from Long-Term Balanced Scorecard Users.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

Beyond measurement, how can the learning and growth perspective of the Balanced Scorecard become a primary driver of innovation within an organization?



What unique qualities does this course offer compared to other courses?

This course distinguishes itself by focusing intensely on the practical execution of strategy, moving far beyond the theoretical underpinnings of the Balanced Scorecard framework. While many programs explain what the four perspectives are, this training emphasizes how to build them from the ground up within your unique organizational context. It provides a structured, repeatable process for translating high-level vision into a tangible strategy map with clear cause-and-effect logic. A key differentiator is the deep dive into the art of cascading, a critical step where most implementations falter. We provide actionable techniques for aligning every department and individual with corporate objectives, ensuring that strategy becomes everyone's everyday job. The curriculum is enriched with carefully selected case studies that illustrate not only successes but also common failures, providing invaluable lessons in what to avoid. Rather than just presenting a set of tools, this course cultivates a strategic mindset, empowering participants to use the Balanced Scorecard as a dynamic system for learning, adapting, and driving continuous improvement and sustainable performance.