Strategic Performance with Balanced Scorecard and KPIs Training Course



26 - 30 Oct 2026

Lisbon

4500 € (Per Person)

Ref: #PLA7893_127651

Course Introduction / Overview:

This intensive training course provides a comprehensive framework for translating organizational strategy into measurable action and tangible results. It delves deep into the principles and practical application of the Balanced Scorecard (BSC) and Key Performance Indicators (KPIs), two of the most powerful tools in modern strategic management. Moving beyond mere theory, this program focuses on the practical implementation challenges and success factors that determine the effectiveness of a performance management system. Participants will explore the seminal work of Robert S. Kaplan and David P. Norton, particularly the concepts outlined in their groundbreaking book, "The Balanced Scorecard: Translating Strategy into Action.". This course is designed to equip professionals with the skills to build a robust performance framework that aligns daily operations with long-term strategic goals. At BIG BEN Training Center, we ensure that participants learn not just the 'what' and 'why' but the critical 'how' of developing a customized BSC, selecting meaningful KPIs, and fostering a culture of continuous improvement and data-driven decision-making. The curriculum is structured to empower attendees to drive strategic alignment, enhance accountability, and ultimately achieve sustainable organizational excellence.

Target Audience / This training course is suitable for:

- Chief Executive Officers and Senior Executives.
- Strategy and Planning Directors and Managers.
- Performance Management Specialists and Analysts.
- Department Heads and Line Managers.
- Finance Managers and Controllers.
- Human Resources Managers responsible for performance appraisal systems.
- Project and Program Managers.
- Business Analysts and Consultants.
- Quality and Continuous Improvement Managers.

Target Sectors and Industries:

- Banking and Financial Services.
- Healthcare and Pharmaceuticals.
- Manufacturing and Engineering.
- Information Technology and Telecommunications.
- Retail and Consumer Goods.
- Oil and Gas and Energy.
- Government Agencies and Public Sector Organizations.
- Logistics and Supply Chain Management.
- Consulting and Professional Services.

Target Organizations Departments:

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

Course Offerings:

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

- Develop a comprehensive strategy map that visually links strategic objectives.
- Design and build a Balanced Scorecard tailored to their organization's unique context.
- Identify, define, and select meaningful Key Performance Indicators (KPIs) for each strategic objective.
- Master the art of cascading the Balanced Scorecard from the corporate level to departments and teams.
- Align individual employee objectives and performance with overall corporate strategy.
- Establish realistic performance targets and benchmarks for continuous monitoring.
- Implement a robust data collection and reporting system for performance measurement.
- Facilitate effective strategy review meetings using the Balanced Scorecard framework.
- Integrate the BSC and KPI system with other management processes like budgeting and compensation.
- Lead the change management process required for successful BSC 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 in the workplace. We believe in an experiential learning approach that goes beyond traditional lectures. The course incorporates a dynamic blend of expert-led presentations, real-world case study analyses, and interactive group discussions that encourage collaborative problem-solving. A significant portion of the training is dedicated to hands-on workshops and practical exercises where participants will work on developing elements of a strategy map and a Balanced Scorecard. This allows for the direct application of concepts and tools in a controlled, supportive environment. Facilitators will provide continuous guidance and personalized feedback to help attendees overcome challenges and refine their understanding. The methodology emphasizes peer-to-peer learning, allowing participants to share experiences and insights from diverse industries. Our goal is to create a stimulating learning environment that bridges the gap between strategic theory and operational reality, empowering participants with the confidence and competence to drive performance management initiatives within their organizations.

Course Agenda (Course Units):

Unit One: Foundations of Strategic Performance Management

- Introduction to strategy and its execution challenges.
- The evolution of performance measurement systems.
- Core concepts of the Balanced Scorecard (BSC).
- The four perspectives: Financial, Customer, Internal Business Process, and Learning & Growth.
- Understanding the cause-and-effect linkages in a strategy map.
- The role of Key Performance Indicators (KPIs) in strategy execution.
- Distinguishing between leading and lagging indicators.

Unit Two: Designing and Building the Balanced Scorecard

- Clarifying organizational vision, mission, and strategic themes.
- The process of building a corporate strategy map.
- Defining strategic objectives for each of the four perspectives.
- Techniques for brainstorming and prioritizing strategic objectives.
- Ensuring vertical and horizontal alignment of objectives.
- Developing the strategic narrative to communicate the strategy.
- Workshop: Creating a preliminary strategy map for a case study organization.

Unit Three: Developing Meaningful Key Performance Indicators (KPIs)

- The characteristics of a powerful KPI.
- A step-by-step process for developing relevant KPIs.
- Linking KPIs directly to strategic objectives.
- Avoiding common pitfalls in KPI selection.
- Setting ambitious yet realistic targets and benchmarks.
- Defining data sources and establishing data collection processes.
- Workshop: Selecting and defining KPIs for the case study strategy map.

Unit Four: Cascading Strategy and Ensuring Alignment

- The importance of cascading the Balanced Scorecard.
- Methods for cascading the BSC to business units and support departments.
- Translating departmental scorecards into team and individual objectives.
- Aligning personal goals with the strategic objectives of the organization.
- Developing a communication plan for the BSC rollout.
- Engaging employees and securing buy-in across the organization.
- Linking performance management and reward systems to the BSC.

Unit Five: Implementation, Automation, and Sustaining Success

- Managing the BSC implementation as a strategic project.
- The role of the "Office of Strategy Management".
- Evaluating software solutions for automating the Balanced Scorecard.
- Designing effective performance dashboards and reports.
- Conducting productive strategy review meetings.
- Using the BSC to drive strategic learning and adaptation.
- Evolving the Balanced Scorecard over time to maintain relevance.

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:

How can an organization effectively balance the four perspectives of the Balanced Scorecard without creating conflicting priorities or resource allocation challenges?

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

This training course distinguishes itself by moving beyond theoretical recitation to focus intensely on the practical architecture and sustainable implementation of a performance management system. While many courses explain what a Balanced Scorecard is, our curriculum is meticulously designed to guide participants through the intricate process of building one from the ground up, addressing the real-world challenges of objective selection, KPI definition, and strategic alignment. We emphasize the "how-to" aspects, providing structured workshops and exercises that simulate the actual development process. The course places a strong emphasis on the art of cascading strategy, a critical step where many initiatives falter, ensuring that participants learn how to translate high-level corporate goals into meaningful actions for every department and individual. Furthermore, the program delves into the crucial, often-overlooked, aspects of change management and communication required to embed the BSC into the organizational culture. It is not merely a course on measurement; it is a comprehensive training on strategy execution, strategic learning, and fostering a performance-driven culture that adapts and thrives.