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COURSE BROCHURE

Advanced Balanced Scorecard Design and Cascading Training Course

25 January – 5 February 2027
Rome

Advanced Balanced Scorecard Design and Cascading Training Course

Ref: 483_17678 **Date:** 25 January – 5 February 2027 **Location:** Rome **Fees:** 11100 GBP

Balanced Scorecard Design and Cascading is an advanced 2-week training course for strategy office managers, performance analysts and scorecard owners who build an enterprise scorecard, cascade it to units and teams and produce a Cascaded Scorecard and Strategy Map. Organisations that report dozens of disconnected indicators now need one line of sight from strategic intent to departmental measures. Jupiter Prime Training runs this course for practitioners who already maintain a scorecard and now redesign it.

Why Balanced Scorecard Design and Cascading Matters Now

Three pressures drive scorecard redesign today: leadership teams that want fewer, sharper measures instead of crowded reports, support functions such as finance, human resources and technology that must show how they contribute to strategy, and performance software that exposes weak measure definitions the moment data is automated. A well-designed and well-cascaded scorecard aligns every unit behind shared objectives; a poorly built one multiplies indicators and hides accountability. The course follows the Balanced Scorecard BSC of Kaplan and Norton with its four perspectives, the Nine Steps to Success framework of the Balanced Scorecard Institute and the maturity self-assessment in ISO 9004:2018.

Who Gains Most from Balanced Scorecard Design and Cascading

- Strategy office managers who own the enterprise scorecard and its annual refresh
- Performance analysts who define measures, collect results and prepare scorecard reports
- Objective and measure owners who answer for results in strategy reviews
- Support unit planners who translate enterprise objectives into finance, people or technology scorecards
- Divisional performance coordinators who align business unit scorecards with the corporate strategy map

A strategy office attending with two or three divisional coordinators gains most, because the group can agree cascade rules, a shared measure dictionary and one reporting rhythm.

Balanced Scorecard Design and Cascading Capabilities

Participants move from maintaining a list of indicators to engineering a linked set of scorecards that explains how each unit moves strategy.

- Design an enterprise strategy map with themes and cause-and-effect links across four perspectives — executive teams approving strategic logic
- Specify measures with data definitions, polarity, frequency and owners — analysts producing trusted results
- Calibrate targets and thresholds using baselines and benchmarks — leaders accepting stretch commitments
- Align business unit and support unit scorecards with enterprise objectives — divisional heads sharing accountability
- Test scorecard integrity through linkage, coverage and redundancy checks — strategy offices pruning measures
- Build a review routine that uses scorecard results for decisions — strategy review meetings

Key Balanced Scorecard Design and Cascading Terms

- Four perspectives — the financial, customer, internal process, and learning and growth views that balance a Balanced Scorecard.
- Strategic objective — a concise statement of what the organisation must achieve within one perspective to execute its strategy.
- Cascading — the structured translation of enterprise objectives and measures into aligned scorecards for business units, support units and teams.
- Measure polarity — whether a higher or lower result is better, recorded so that scoring and colour coding behave correctly.
- Strategic initiative — a time-bound project funded to close the gap between current performance and a scorecard target.
- Measure dictionary — the reference document holding each measure's definition, formula, data source, frequency, owner and target logic.

Balanced Scorecard Design and Cascading Day by Day

Day 1: Scorecard Foundations and Maturity

- Balanced Scorecard Evolution — Distinguishing Measurement Tool From Strategy Management System
- Scorecard Maturity Assessment — Locating Gaps in Current Scorecard Practice
- ISO 9004 Self-Assessment Elements — Relating Scorecard Maturity to Sustained Success
- Indicator Inventory Audit — Separating Strategic Measures From Operational Noise
- Scorecard Charter — Agreeing Scope, Sponsor and Design Team Roles

Day 2: Strategic Foundations for the Scorecard

- Mission, Vision and Value Proposition Review — Anchoring the Scorecard in Strategic Intent
- Customer Value Proposition Types — Choosing Which Customer Objectives Matter
- Strategic Theme Selection — Grouping Objectives Into Value Creation Streams
- Nine Steps to Success Framework — Sequencing Scorecard Design Activities
- Stakeholder Perspective Adaptation — Adjusting Perspectives for Public and Non-Profit Bodies

Day 3: Designing the Enterprise Strategy Map

- Objective Statement Writing — Expressing Outcomes in Verb and Noun Form
- Cause-and-Effect Linkage — Testing the Logic Between Perspectives
- Strategy Map Layout Conventions — Keeping One Page Readable for Executives
- Objective Commentary Sheets — Explaining Intent Behind Each Objective
- Strategy Map Validation Session — Securing Executive Agreement on Objectives

Day 4: Measure Design

- Measure Selection Criteria — Judging Relevance, Influence and Data Availability
- Leading and Lagging Measure Pairs — Balancing Outcome and Driver Indicators
- Measure Dictionary Construction — Fixing Formula, Source, Frequency and Owner
- Measure Polarity and Scoring Rules — Making Results Comparable Across Units
- Proxy and Composite Indexes — Measuring Objectives Without Direct Data

Day 5: Targets, Thresholds and Initiatives

- Baseline Establishment — Reading Historic Performance Before Committing Targets
- Benchmark-Based Targeting — Calibrating Ambition Against Peer Performance
- Threshold and Colour Band Design — Deciding When Results Turn Amber or Red
- Initiative Gap Mapping — Linking Projects to Specific Measure Gaps
- Initiative Rationalisation — Stopping Projects That Serve No Objective

Day 6: Cascading to Business Units

- Cascade Architecture — Choosing Identical, Contributory or Unique Objectives
- Business Unit Strategy Maps — Translating Enterprise Themes Into Unit Logic
- Measure Roll-Up Rules — Aggregating Unit Results Into Enterprise Scores
- Shared Objective Agreements — Managing Results That Need Several Units
- Cascade Alignment Matrix — Showing Each Unit's Contribution to Enterprise Objectives

Day 7: Cascading to Support Units and Teams

- Support Unit Service Agreements — Linking Shared Services to Business Unit Needs
- Finance, People and Technology Scorecards — Aligning Enabling Functions With Strategy
- Team-Level Scorecards — Connecting Daily Work to Unit Objectives
- Personal Objective Linkage — Relating Individual Goals to Scorecard Measures
- Cascade Integrity Checks — Detecting Gaps, Overlaps and Orphan Measures

Day 8: Scorecard Reporting and Automation

- Scorecard Report Design — Presenting Results, Trends and Commentary Together
- Performance Software Configuration — Structuring Hierarchies, Weights and Calculations
- Data Quality Controls — Validating Measure Results Before Publication
- Analyst Commentary Writing — Explaining Variance and Corrective Action
- Reporting Calendar — Synchronising Unit and Enterprise Scorecard Cycles

Day 9: Embedding Scorecards in Strategy Reviews

- Strategy Review Meeting Design — Using Scorecard Evidence to Drive Decisions
- Objective Owner Briefings — Preparing Owners to Explain Performance
- Strategy Map Refresh Rules — Deciding When Objectives or Measures Change
- Scorecard Communication Campaign — Building Staff Understanding of Objectives
- Scorecard Sustainability Plan — Keeping the System Alive Beyond Launch

Day 10: Practising the Cascaded Scorecard and Strategy Map

- Enterprise Strategy Map Finalisation — Confirming Themes, Objectives and Linkages
- Measure Dictionary Peer Review — Testing Definitions With Fellow Analysts
- Cascade Alignment Matrix Completion — Mapping Unit Contributions to Enterprise Objectives
- Mock Scorecard Review — Rehearsing Owner Explanations and Executive Decisions
- Cascaded Scorecard and Strategy Map Assembly — Completing Enterprise and Unit Scorecards

Applying Balanced Scorecard Design and Cascading After the Course

- Run an indicator inventory audit on the current scorecard and propose which measures to retire, merge or redefine.
- Facilitate a cascade session with one business unit and one support unit to draft their aligned strategy maps and measure dictionaries.

Balanced Scorecard Design and Cascading Questions FAQ

What is Balanced Scorecard design and cascading and why does it matter now?

Balanced Scorecard design and cascading is the work of building an enterprise scorecard and translating it into aligned unit and team scorecards. It matters now because leaders want fewer, connected measures that show how every unit contributes to strategy.

Which roles gain most from Balanced Scorecard design and cascading training?

Strategy office managers, performance analysts, objective owners and divisional performance coordinators gain most. You benefit most if you maintain a scorecard, define measures or must align your unit's objectives with an enterprise strategy map.

How does Balanced Scorecard design and cascading differ from a KPI design course?

Balanced Scorecard design and cascading works at the level of strategy maps, perspectives and alignment between units. A KPI design course concentrates on individual indicators and their optimisation, while this course builds the whole linked architecture of objectives, measures, targets and initiatives.

What do you bring back from Balanced Scorecard design and cascading training?

You bring back an enterprise strategy map, a measure dictionary, a cascade alignment matrix and draft unit scorecards. You also bring rules for targets, thresholds and scorecard reviews that you can apply immediately.

Balanced Scorecard Design and Cascading: The Way Forward

The Cascaded Scorecard and Strategy Map first informs which measures the executive team keeps, retires or redefines at the next strategy review. Strategy offices, analysts and unit heads use it to report and align performance. After the first reporting cycle, revisit the cause-and-effect links and ask whether movement in leading measures really preceded movement in outcomes.