



CERTIFIED BALANCED SCORECARD MANAGEMENT SYSTEM PROFESSIONAL

LIVE ONLINE CERTIFICATION

2024 EDITIONS:

- > 05 - 09 FEBRUARY
- > 10 - 14 MARCH (ARABIC)
- > 22 - 26 APRIL
- > 02 - 06 JUNE (ARABIC)
- > 10 - 14 JUNE
- > 09 - 13 SEPTEMBER
- > 27 - 31 OCTOBER (ARABIC)
- > 18 - 22 NOVEMBER



Implement a Balanced Scorecard Management System to drive business performance

Key business benefits:

- > Improve the performance of your company.
- > Ensure excellence in achieving organizational strategic objectives through a rigorous cascading process.
- > Attain the company's desired state of evolution.
- > Eligible for Executive Program in Strategy & Performance Postgraduate Diploma.



Over the last years, the team at The KPI Institute:

- > Documented 21,000+ KPIs from 16 functional areas and 25 industries.
- > Reviewed 1,000+ performance reports from 125 countries.
- > Referenced 30,000+ resources as part of the documentation process.



Course overview



The training course provides you with relevant knowledge on how to develop and implement a Balanced Scorecard System. This course offers a comprehensive overview on the many benefits any organization can extract from the Balanced Scorecard System implementation. A highly interactive learning experience will enable you to grasp the functionality of the Balanced Scorecard, and leverage on its benefits to advance strategy execution. The course focuses on delivering all the information needed to fully comprehend the value of the Balanced Scorecard, as well as on developing the necessary skills for a successful implementation.

Participants' profile

> Professionals interested in measuring performance

Professionals interested in Balanced Scorecard Management System from the finance, human resources, production, logistics, information technology and other fields, will acquire the competency to apply all the above-mentioned concepts in their organizations, immediately after the course.

> Top/middle/lower management professionals

Executives or operational managers, regardless of their field of expertise, will gain the ability and knowledge to measure performance and maximize the value of using a sound Balanced Scorecard Management System. The tools and resources offered as part of the training course will enable managers to apply the acquired concepts within their organizations, immediately after the course.

> Performance measurement experts

For professionals like Strategy Manager, Performance Management Officer or Performance Architect, it is important to develop competencies in designing a Balanced Scorecard Architecture, especially in terms of translating the organizational strategy into outstanding results.

Benefits

- > Get access to a deeper understanding of the value added and functionality of the Balanced Scorecard Management System;
- > Develop and implement a Balanced Scorecard Management Architecture in a standardized manner;
- > Overcome challenges in strategy execution by implementing the Balanced Scorecard Management System;
- > Improve strategy communication by using the Balanced Scorecard Management System.
- > Obtain 40 CPD credits to include in your CPD records for your professional body, institute, regulator or employer.

Learning objectives

- > Comprehend fundamentals of a Performance Management System;
- > Transpose the organizational strategy into a Balanced Scorecard Management System;
- > Learn how to integrate the components of a Balanced Scorecard Architecture;
- > Differentiate between objectives, KPIs, and initiatives.

Agenda



Day 1 - 4h

Balanced Scorecard - Performance Management Framework

- › What is Balanced Scorecard?
- › Balanced Scorecard structure and elements
- › The role of the Balanced Scorecard
- › BSC terminology
- › BSC system architecture.

Balanced Scorecard Governance and Performance Leadership

- › Clarify mandate for improvement
- › Enlist leadership support
- › Balanced Scorecard governance framework
- › Build project competency.

Day 4 - 4h

Initiative management

- › Portfolio of Initiatives development
- › Initiatives documentation form functions
- › Initiatives documentation process.

Aligning the BSC across organizational levels

- › Alignment approaches
- › Objectives and KPI cascading: Functional area.

Day 2 - 4h

Organizational assessment

- › Assessment and evaluation
- › Internal Assessment
- › Performance Management Maturity Model
- › Environmental scanning techniques.

Strategy Formulation and Integration

- › Defining strategy
- › Vision, Mission Statement
- › Organizational values.

Day 5 - 4h

Managing the BSC system

- › Data governance
- › Performance reporting
- › Performance review meetings
- › BSC system recalibration.

Nurture a Performance Culture

- › Communication
- › Education
- › Engagement
- › Comprehensive Performance Management System
- › Compensation and Gamification.

Review and Q&A

- › Course review
- › Q&A.

Day 3 - 4h

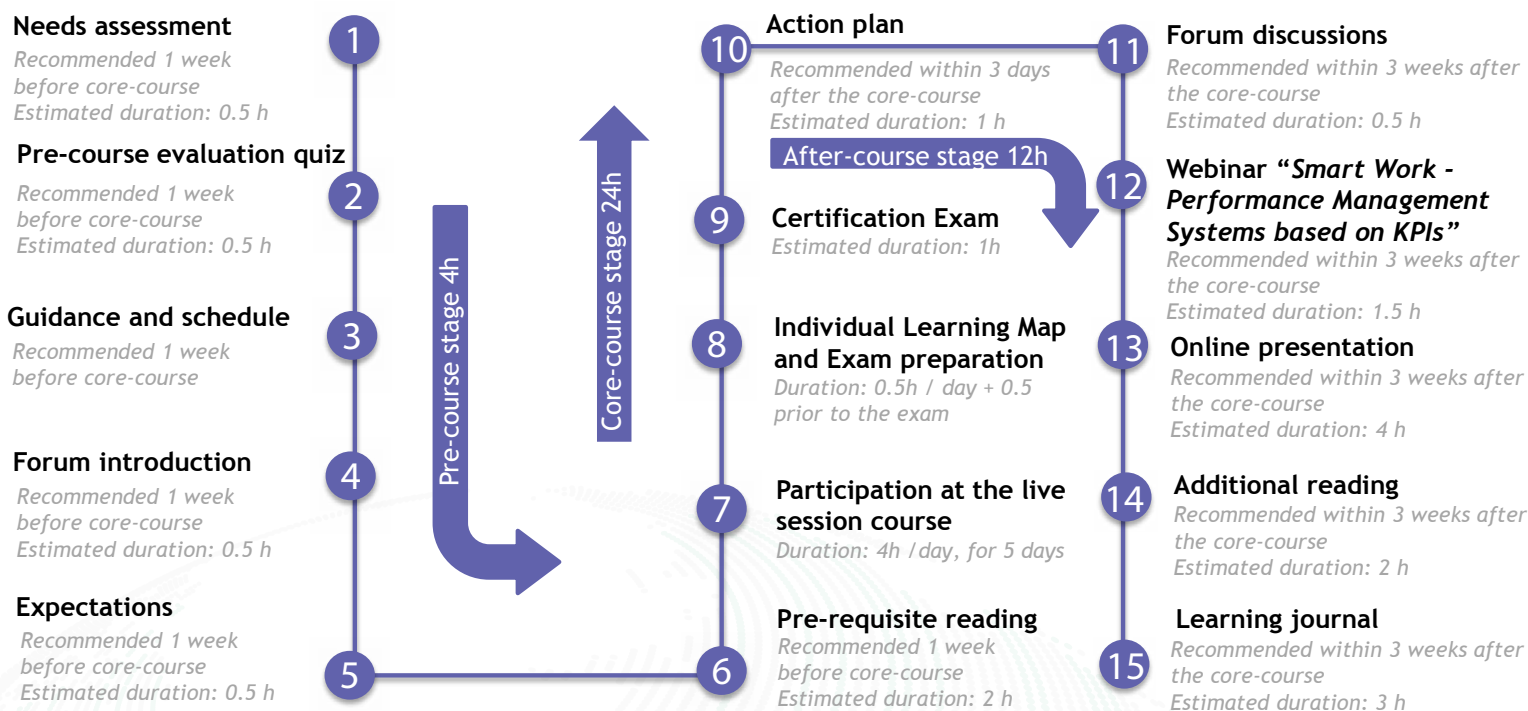
Setting organizational objectives

- › Value drivers
- › Goals and Objectives
- › SMART Objectives
- › Building the Strategy Map.

Working with KPIs

- › KPI Balancing
- › KPI selection for organizational scorecard
- › Importance of KPI Documentation
- › Target setting recommendations.

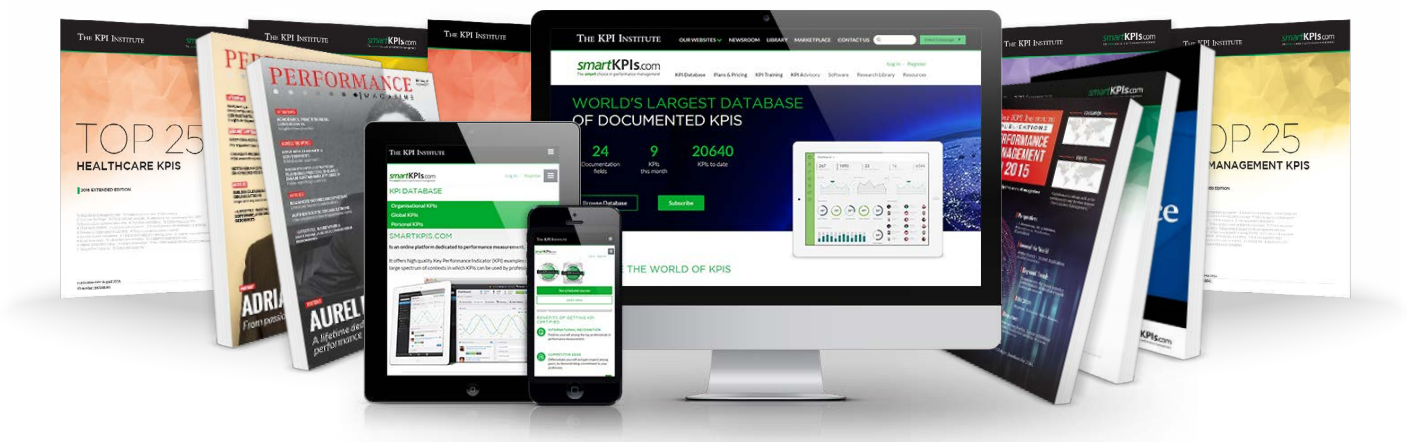
Certification Process



The certification process is finalized only when you complete all of the 3 stages of the learning experience. You will receive:

- > Certificate of Completion (soft copy): after completing pre-course activities and passing the Certification Exam;
- > Certificate of Attendance (soft copy): after participating at the 5 days of live session course;
- > Certified Professional diploma (soft copy): after you have successfully completed all of the 3 stages of the learning experience and the full payment was received by contractor
- > CPD Certificate of Attendance (soft copy): once successfully obtained the Professional status.

Educational resources



Course materials

- › Course Slides
- › Course notes
- › Course quiz
- › The KPI Infographic.

The qualitative reports

- › Performance Management in 2012 – 2018

Catalogues

- › Documentation forms
- › Negative behaviours
- › Targets in practice
- › Scorecards
- › Dashboards
- › Graphs in practice

Videos

- › 11 Videos dedicated to Performance Management.

Fact sheets

- › KPI Definitions
- › KPI Selection Criteria
- › Performance Management related theories

Webinars

- › Free access to all Performance Management webinars series to date.

Performance Management Toolkit

- › **Templates:** Desired State of Evolution, Strategy Map, Performance Scorecard, Performance Dashboard, Performance Healthogram, Performance Maturity Model, Initiatives Portfolio, Performance, Management System Architecture, Monthly Performance Management Process, Employee Scorecard, KPI documentation form
- › **Manuals:** Performance Scorecard guide for administrator, Performance Dashboard guide for administrator
- › **Publications:** KPIs for Human Resources Dashboard, KPIs for Human Resources Scorecard

Premium subscription on smartKPIs.com

Available for 6 months, providing access to 500 fully-documented KPIs, over 20,000 listed KPIs, and one research report from the Top 25 KPIs series.

Educational resources



This micro-certification course is an additional benefit provided to all participants to upskill professionals in assessing Strategy Planning Frameworks in organizations. The maturity assessment methodology presented during the course is the proprietary knowledge of The KPI Institute and Global Performance Audit Unit, built on 10+ years of research and practical experience in strategy formulation. Moreover, upon course completion participants can request access to one-time, free of charge, the entire evaluation methodology on the GPA Unit online platform.

Professionals will gain practical experience in identifying the strengths and weaknesses of organizational practices and formulating improvement recommendations in 6 key areas:

- › Organizational Identity
- › Strategy Formulation
- › Strategy Articulation
- › Strategy Alignment
- › Strategy Review
- › Governance & Strategic Communications

OTHER RELATED MICRO-CERTIFICATES



**Micro-certificate
in Performance Measurement
Maturity Assessment**



**Micro-certificate
in Performance Improvement
Maturity Assessment**



**Micro-certificate
in Employee Performance
Maturity Assessment**

NOTE: These three micro-certificates are not offered as part of the Certified Balanced Scorecard Management System Professional Program, they can be purchased separately.

For more information, [CLICK HERE](#)

Faculty



The KPI Institute retains the authority to designate facilitators for each training course based on business requirements. The TKI Faculty continually expands by incorporating subject matter experts and experienced professionals to guarantee an exceptional experience for our trainees. Consequently, the facilitator assigned to the course may undergo changes prior to the actual delivery date. For information about the appointed facilitator for each session, kindly contact your sales representative or reach out to office@kpiinstitute.org.



Mihai Toma

Managing Director of Consulting Services
 Expertise: Balanced Scorecard, Strategy Planning & Execution, Performance Measurement & Management



Alina Miertoiu

Senior Management Consultant
 Expertise: OKRs, Performance Measurement & Management, Benchmarking



Andrea Minelli

Management Consultant
 Expertise: Strategy Planning & Execution, Performance Measurement & Management, Balanced Scorecard



Fadi Al-Jafari

Management Consultant
 Expertise: Data Analysis & Visualization, Strategy Planning & Execution, Performance Measurement Management



Malek Ghazo

Lead Management Consultant
 Expertise: Performance Measurement Management, Strategy Management, Data Visualization, Customer Service, Organizational Excellence, Innovation, Sustainability



Linh Do

Head of Professional Services TKI Vietnam - Management Consultant
 Expertise: Performance Measurement, Performance Management, Strategy Planning



Sasqia R. Ramadhani

Performance Management Consultant
 Expertise: Performance Measurement & Management

About Executive Education in Strategy and Performance



The Executive Program in Strategy and Performance is the most complex educational program in The KPI Institute's portfolio. It is designed for business leaders who are interested in strengthening their skills in strategic planning, performance measurement, data analysis and reporting, and strategy execution in dynamic markets.

Professionals interested in this program, can enroll to obtain one of the following diplomas:

Postgraduate Diploma in Strategy and Performance

Recommended for Executives and consultants interested in developing an in-depth understanding and experience in Strategy and Performance Management.

- > 3 semesters (18 months)
- > 6 mandatory courses
- > 2 elective courses
- > 1 final practitioner portfolio (36 assignments)
- > 1 Postgraduate Diploma in Strategy and Performance

Graduate Certificate in Strategy and Performance

Recommended for professionals interested to explore the basic disciplines related to Strategy and Performance Management.

- > 2 semesters (12 months)
- > 4 courses
- > 1 final practitioner portfolio (20 assignments)
- > 1 Graduate Certificate in Strategy and Performance



"NOTE: Certified Balanced Scorecard Management System Professional is part of the Postgraduate Executive Education program."

Course Fees



Language	Date	Time zone 1	Time zone 2	Standard Fee	Special Fee
English	> 05 - 09 February	09:00-13:00 GST	13:00-17:00 GMT +8	USD \$ 1,500	USD \$ 1,350
	> 22 - 26 April	18:00-22:00 GST	09:00-13:00 CST (US)	USD \$ 1,500	USD \$ 1,350
	> 10 - 14 June	09:00-13:00 GST	13:00-17:00 GMT +8	USD \$ 1,500	USD \$ 1,350
	> 09 - 13 September	18:00-22:00 GST	09:00-13:00 CST (US)	USD \$ 1,500	USD \$ 1,350
	> 18 - 22 November	09:00-13:00 GST	13:00-17:00 GMT +8	USD \$ 1,500	USD \$ 1,350
Arabic	> 10 - 14 March	22:30-02:30 GST	13:30-17:30 CST (US)	USD \$ 1,500	USD \$ 1,350
	> 02 - 06 June	09:00-13:00 GST	13:00-17:00 GMT +8	USD \$ 1,500	USD \$ 1,350
	> 27 - 31 October	18:00-22:00 GST	09:00-13:00 CST (US)	USD \$ 1,500	USD \$ 1,350

Join as a Group

Customized Live Online Group Training Programs

The KPI Institute is offering Customized Live Online Group Training Programs that provide a perfect blend of research, best-practice and best-in-class instructional design.

Leveraging on our extensive research work, our highly skilled faculty, our expertise in providing customized learning solutions, together with next-generation online technology, our Group learning programs are unique, accessible anytime, anywhere learning experiences that deliver results for employees and the organization.

This fully customized training solution supports organizations of all sizes to provide their employees with development opportunities in an efficient, impactful and cost-effective way.

Benefits of customized live online sessions



▶ Flexibility and convenience

Participants can learn from anywhere and it can be scheduled in consecutive days throughout one week or selected days over 2 or more weeks. Participants can access learning materials from anywhere, anytime convenient for the group.

▶ Customized course content

Course content, case studies and exercises will be customized based on the group's industry or selected functional areas, as well as by assessing current needs and competency development requirements.

▶ Business continuity

Continuity of work with daily sessions scheduled for a maximum 4 hours to ensure both information assimilation efficiency and work-related task completion.

▶ Virtual collaborative learning

Facilitated inter-company learning is enabled, leading to Virtual Teams Cooperation and Communication, with the help of specialized E-Learning technology.

▶ Cost effectiveness

An estimated of up to 40% savings compared with traditional face-to-face in-house solutions, due to logistical burdens being waved from both customer and contractor.

Customized Live Online Group Courses	Online Live Format	Content details
Certification	5 Days - 4h/Day	Fully customized certification course
Masterclass	3 Days - 4h/Day	75% of the certification course content, selected based on group requirements
Essentials	2 Days - 4h/Day	50% of the certification course content, selected based on group requirements
Awareness Session	4 h	Selected 1 or 2 sessions from a certification content, depending on the length

Group sizes range from a minimum of 10, to a maximum of 25 participants.

Should you be interested in scheduling a live online Group training course, email us at office@kpiinstitute.org or contact one of the region representatives.

Online Coaching (up to 4h)

- ▶ One of our consultants and facilitators will be dedicated to help customers individually achieve their business objectives, evaluate current systems or tools and provide feedback on how to improve current strategy, performance measurement and management practices.
- ▶ Our dedicated coaches are industry, capability and functional area experts who guide the participants in addressing their business needs and requirements.
- ▶ They will work closely with attendees and help them address their individual areas of improvement.
- ▶ We can assist in providing coaching on all the topics that we cover through our certification programs detailed in this brochure.

*Live coaching will be provided via conference call. The session scheduling will be established either via email/conference call for all delegates or individually between each participant and the facilitator.

**Hours to be accessed when required by scheduling as per customer preference and facilitator availability.

Get in touch with us for a customized quotation

Registration

3 ways to register

Online

marketplace.kpiinstitute.org

Direct contact

Call us and we will assist you through the registration process.

Contact Asia Pacific

Sasikala Annamalai

Senior Business

Development Manager

E: sasikala.annamalai@kpiinstitute.com

M: +60 12 591 1366

Contact Rest of the World

Alexandru Muntean

Head of Customer Engagement

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Registration form

Email us with your registration details

Payment

Credit card

Pay by credit card using the online facility.

Bank transfer

1. Send an email containing your contact details and registration request;
2. An email confirmation containing the tax invoice and bank account details will be sent to you;
3. Proceed with the attendance fee payment by bank transfer;
4. Send through email the proof of the payment transaction completion;
5. A tax receipt together with the registration confirmation will be sent to you via email (after the attendance fee payment is confirmed).

Kindly ensure that your payments reflect the Total Amount of the invoice that will be presented to you. It is your responsibility to cover all bank fees due to Telegraphic / Wire transfer.

Registration form

By filling your contact data, you agree to receive further information about our events. Your privacy is very important to us. We will not sell, rent or share your personal information under any circumstances.

Participant details:

Mr. Mrs.

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First name

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Last name

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Job title

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Email

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Phone

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Organization

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Department

.....
Date of training course

.....
Training course

.....
City

.....
Country

Registration cancellation procedure

Any withdrawals have to be announced at least two weeks before the beginning of the course, through fax or e-mail. In this situation, the attendance fee will be refunded, less \$400 retained for administrative expenditure. The attendance fee will not be refunded if the withdrawal from the course takes place less than 2 weeks before its start date. If you find yourself in the impossibility to attend the course after the registration process is already completed you may delegate another person to attend the course in your place without any further fees charged. If you have confirmed and made the attendance fee payment but you didn't attend the course, the course attendance fee will not be refunded. If you attend the course only partially (one day or a limited number of sessions), you will not benefit from any attendance fee reduction or refund.

Term of Agreement

If there are no other standing agreements, this form represents a valid contract between the parties.

I agree to the above terms and conditions.

.....
Signed

.....
Date

.....
Company stamp

The Customer acknowledges and agrees that all materials provided by the KPI Institute, including but not limited to the live presentations, any audio-visual presentations, and the handout materials distributed pre, during and after the training course, shall at all times remain the sole and exclusive property of the KPI Institute. They cannot be made public, and can only be used for the purpose of the individual course participant's benefit. In no event shall the Customer use the live presentations, any audio-visual presentations, and/or the handout materials for any other purpose, including but not limited to the offering of any course, training or seminar that in any manner competes with the course or any portion thereof. This provision shall survive the termination or expiration of this Agreement.



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HEADQUARTERS

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