WORKSHEET + WORKED EXAMPLE

# Measure What the Strategy Needs

A small strategy-linked scorecard with measures, owners, and counterchecks.

40 minutes | Balanced Scorecard · Four connected perspectives

## Use it in three moves

1. Start with the strategic choice. Describe what should improve for the people receiving the work.

2. Choose a small set of connected measures across resources, customers, processes, and learning. Give each a baseline, owner, and review date.

3. Ask how each measure could mislead you or create an unwanted incentive. Use the review to revise the measures as well as the work.

### State the strategic choice

What result should improve, for whom, and through what change?

### Financial · Can we sustain the work?

Choose an objective, measure, baseline, target, owner, and review date. For public services, use stewardship and resource sustainability.

### Customer · What gets better for recipients?

Use their experience and outcome, not only an internal activity count.

# Measure What the Strategy Needs

YOUR WORKING NOTES / CONTINUED

### Internal process · What must work well?

Select a process measure plausibly connected to the outcome. Treat the link as a hypothesis.

### Learning and growth · What capability enables it?

Include skills, information, time, and support. Training attendance alone is weak evidence of capability.

### Connect and challenge the measures

Explain the proposed chain, then check unintended incentives and missing voices.

### Agree the review rhythm

Name owners, decisions the evidence informs, and what would retire a measure.

# A question for me

Which success measure could improve while the underlying experience worsens?

# See one way through

FICTIONAL WORKED EXAMPLE / NOT THE ANSWER TO YOUR SITUATION

### State the strategic choice

Make first-time service resolution more reliable by improving preparation and access to expertise.

### Financial · Can we sustain the work?

Objective: reduce avoidable repeat visits. Measure repeat-visit cost, with quality and workload checks. Finance lead establishes the baseline before setting a target.

### Customer · What gets better for recipients?

Track cases resolved without the customer reopening the issue within 14 days; include a short explanation from sampled customers.

### Internal process · What must work well?

Measure the proportion of visits with required information available beforehand. Service coordinator owns the preparation check.

### Learning and growth · What capability enables it?

Protected practice and access to a specialist. Check whether technicians can use the guidance in a real case.

### Connect and challenge the measures

Better preparation and supported practice should reduce repeat visits. Check that teams are not avoiding difficult cases to improve the metric.

### Agree the review rhythm

Monthly review with technicians and the service owner. Remove measures that no longer inform a decision; investigate conflicting signals.

## The thinking behind it

Measures direct attention and can reshape behavior. Ask what a person would have to do to make the number look good, and whether that helps the people the work serves.

Robert Kaplan and David Norton's Balanced Scorecard links strategy to financial, customer, internal-process, and learning-and-growth perspectives. This original starter guide uses those four perspectives and explicit causal assumptions; it is not a full implementation program.

Balanced Scorecard Institute · Basics

Read You Have a Culture Problem by Nic Payne