

## Assessing the Need for the Balanced Scorecard

Directions: Please read each statement & consider how much you agree with what is stated:

1- Strongly Disagree, 2-Disagree, 3- Neutral, 4-Agree, 5-Strongly Agree

### SCORE

- |           |  |
|-----------|--|
| 1 2 3 4 5 | Our organization has invested in CQI (Continuous Quality Improvement) and other improvement initiatives but we have not seen a corresponding increase in customer results. |
| 1 2 3 4 5 | If we did not produce our current Performance (CQI) Reports for a month nobody would notice.   |
| 1 2 3 4 5 | We create significant value from intangible assets such as employee knowledge & innovation, customer relationships, & a strong culture.                                    |
| 1 2 3 4 5 | We have a strategy (or have had strategies in the past) but have a hard time successfully implementing it.   |
| 1 2 3 4 5 | We rarely review our performance measures and make suggestions for new and innovative indicators.  |
| 1 2 3 4 5 | Our senior management team spends the majority of their time discussing variances from plan & other operational issues.  |
| 1 2 3 4 5 | Budgeting at our organization is very political and based largely on historical trends.  |
| 1 2 3 4 5 | Our employees do not have a solid understanding of our mission, vision, and strategy.  |
| 1 2 3 4 5 | Our employees do not know how their day-to-day actions contribute to the organization's success.   |
| 1 2 3 4 5 | Nobody owns the performance measurement process at our organization.   |
| 1 2 3 4 5 | We have numerous initiatives taking place at our organization and it's possible that not all are truly strategic in nature.  |
| 1 2 3 4 5 | There is little accountability in our organization for the things we agree to do as a group.   |
| 1 2 3 4 5 | People tend to stay within their "silos", and as a result we have little collaboration among departments.  |
| 1 2 3 4 5 | Our employees have difficulty accessing the critical information they need to serve customers.   |
| 1 2 3 4 5 | Priorities at our organization are often dictated by current necessity or "firefighting".  |
| 1 2 3 4 5 | The environment in which we operate is changing, and in order to succeed we too must change.   |
| 1 2 3 4 5 | We face increase pressure from funders & other stakeholders to demonstrate results.  |
| 1 2 3 4 5 | We do not have clearly defined performance targets for both fiscal and non-fiscal indicators   |

## Assessing the Need for the Balanced Scorecard

1 2 3 4 5 We cannot clearly articulate our performance management strategy in a one page document or map"

1 2 3 4 5 We sometimes make decisions that are beneficial in the short term but may harm long term-value creation

### TOTAL SCORE:

#### Scoring Key

- 20-30** If your score fell within this range you most likely have a strong performance management system in place. The program is cascaded throughout your organization to ensure that all employees are contributing to your success, and is linked to key management processes.
- 31-60** You may have a performance measurement system in place but are not experiencing the benefits you anticipated to succeed. Using the balanced scorecard as a performance management system would be of benefit to you.
- 61-100** Scores in this range suggest difficulty in successfully executing your performance strategy and meeting the needs of your stakeholders. A balanced scorecard as a performance management system is strongly recommended to help you focus on the implementation of strategy and align your organization with overall goals.