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Jordan Fiscal Reform II Project

Aligning Team and Individual Performance with Organizational Performance Tool

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Aligning Team and Individual Performance with Organizational Performance Tool

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ALIGNING TEAM AND INDIVIDUAL PERFORMANCE WITH ORGANIZATIONAL PERFORMANCE TOOL

When employees have a “line of sight,” they can see the connection between their everyday work, and something larger- Russ Linden¹

1. OVERVIEW

Results are achieved not by organizations but by the employees and teams who actually perform the work. This tool is intended to help managers build results-oriented organizations where every person understands how he or she contributes to the organization’s desired results – has a “line of sight.”

This tool is designed to help managers whose organizations have a Balanced Scorecard take the next vital step to align teams and individuals. This tool builds upon concepts covered in the Service Delivery Improvement toolkit’s Balanced Scorecard Implementation Tool. Alignment or cascading of scorecards is essential in Balanced Scorecard implementation. Once an organizational balanced scorecard is completed, it should develop cascading scorecards at its various supporting organizational levels and finally at the team or individual level.

Using this tool, managers can follow seven recommended steps to develop aligned scorecards for teams and individuals in a manner that promotes learning and improvement. For each step, suggestions for success and ways to overcome common challenges are provided.

¹ (Linden, Management Insights, 2011)

2. LEARNING OBJECTIVES FOR THIS TOOL

- Guide and encourage managers to prepare aligned performance scorecards at the team and individual level
- Explore success factors and strategies used to overcome common challenges
- Define team and individual alignment practices step by step so managers can put these ideas into practice in their organizations

3. EXPECTED BENEFITS

This tool is intended to help managers develop a “line of sight” so individuals and teams can see their connection to achieving organizational results and so they can use feedback on performance to learn and improve. Developing performance cards has these benefits:

- Promotes readiness for government performance and transparency as defined in the King Abdullah II Award (KAA) Criteria sponsored by the King Abdullah II Centre for Excellence (KACE)
- Helps employees and teams know what needs to be done to be successful on the job by setting clear performance expectations
- Engages employees in making government work better
- Facilitates human resource development by making opportunities for individual and team learning and growth clear
- Makes performance review a more objective, aligned, ongoing process with increased opportunity for learning and improvement

4. THE CONTEXT FOR TEAM AND INDIVIDUAL ALIGNMENT IN JORDAN’S PUBLIC ORGANIZATIONS

No law or regulation requires managers in Jordan to align individual and team members work to the larger organization’s intended results. However, this management practice can improve the effectiveness and efficiency of a government organization. The practice of alignment contributes directly to excellence in performance management as advocated by the King Abdullah II Award for Excellence in Government Performance and Transparency.

This tool does not address the topic of employee performance review or appraisal.

5. SUGGESTIONS FOR USING THIS TOOL

This tool, like others in this Results Oriented Government series, is designed to help managers identify actions they can take to strengthen results management practices in their organizations.

This tool builds on concepts covered in the Service Delivery Improvement toolkit’s Balanced Scorecard Implementation Tool. **Development of a set of Balanced Scorecards for the organization at appropriate organizational levels is a prerequisite for effective use of this tool.** Organizations lacking such plans can learn

from the tool, but the tool's use will be hampered by lack of appropriate organizational objectives with which to align individuals and teams.

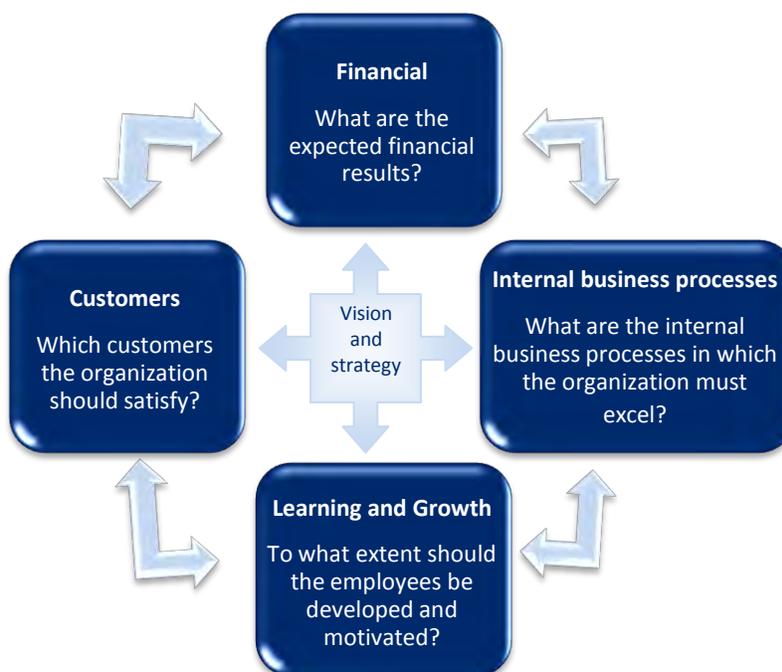
The tool can be used to advantage in a number of settings. For example:

- An individual manager may use the tool as a guide to learn how to develop performance cards at the individual and team level
- A department, agency, or institution may use the tool with a number of managers so they can learn and apply the practices together, with the opportunity to learn from one another at each implementation step

6. SOME KEY CONCEPTS AND DEFINITIONS

Balanced Scorecard (BSC): Balanced scorecards were proposed by Robert Kaplan and David Norton (Kaplan & Norton, 1996) and became widely used by results oriented organizations. They consist of four separate cards, each containing the objectives of one perspective. All four cards create a balance between short-term and long-term objectives, and also between financial goals and business development goals. **Figure 1** shows the four perspectives of balanced scorecards.

Figure 1: Balanced Scorecard Perspectives



Scorecards make the organization's strategies and objectives and their inter-connections visible. The four perspectives support and complement one another. Financial stability positively impacts learning and growth, which will in turn support targeted internal processes, and that will collectively lead to achieving desired results for customers.

Figure 2 illustrates the four perspectives or cards in a typical balanced scorecard implementation. Note there are usually objectives, indicators, targeted values and initiatives or projects associated with each level.

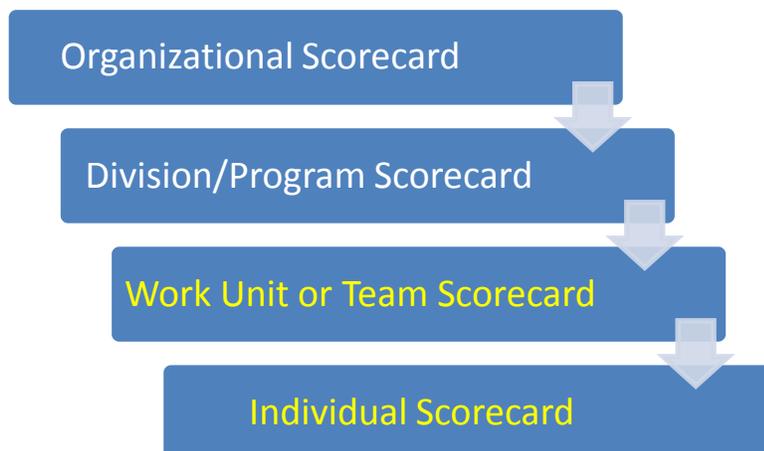
Figure 2: Illustration of Scorecard Elements for the Four Perspectives

Objective	Indicator	Targeted Value	Customer Card Initiatives
Objective	Indicator	Targeted Value	Internal Processes Card Initiatives
Objective	Indicator	Targeted Value	Learning and Growth Card Initiatives
Objective	Indicator	Targeted Value	Financial Card Initiatives

Cascading Scorecards: To be effective in implementing its organizational level strategy and achieving its objectives, an organization must develop aligned, “cascaded” scorecards at the supporting levels. The top level scorecard, with its strategies and objectives, must be put into action by responsible organizational units. Thus, organizational programs, teams, and even individuals could have cards that support and help achieve the broader organizational scorecard.

As highlighted in **Figure 3**, alignment of team and individual scorecards is the focus of this tool.

Figure 3: Illustration of Cascading Scorecards



7. OVERVIEW OF TEAM AND INDIVIDUAL ALIGNMENT STEPS

A manager can follow these seven recommended steps to align individuals and teams with organizational performance and prepare scorecards:

1. Use the Balanced Scorecard for the organizational level that is closest as a starting point
2. Determine the extent to which the team or individual can influence each organizational objective
3. Select the objectives or related initiatives most appropriate for the team or individual
4. Identify how to measure success
5. Assign weights to the items if desired
6. Identify team or individual actions to support learning and improvement
7. Benefit from future opportunities for feedback and learning

These same steps can be followed to produce a card either for a work unit/team or an individual. The manager must determine whether it is most appropriate given the nature of the work to develop performance cards for work units or individuals or for both.

A blank template for completing a scorecard is provided in **Appendix 1: Scorecard Template**. This template can be used at selected steps to build the scorecard for an individual or team.

7.1 USE THE BALANCED SCORECARD FOR THE ORGANIZATIONAL LEVEL THAT IS CLOSEST AS A STARTING POINT

Begin the process to develop a team and/or individual scorecards by using the scorecard of the closest organizational level above. This scorecard will be used as the foundation for aligning team or individual efforts. Before starting the process to cascade scorecards to the team and individual level, the organization should ensure there has been thorough communication about the organizational scorecard's logic and intent. It is imperative to understand this "big picture" before attempting alignment.

A sample balanced scorecard for a hypothetical Printing Division of a General Services Department is illustrated in **Figure 4**. This is an internal service unit within the government that provides printing and document preparation for its customers. Note that each of the four perspectives contains objectives, indicators, targeted values and initiatives or projects. For example, the Printing Division has the objective in the Customer perspective of increasing customer satisfaction and targets a satisfaction level of 95% or greater. A major initiative is to initiate follow up calls to customers in which print employees hear directly from customers about their level of satisfaction and the reasons underlying the ratings. As you scan down the scorecard you can see in the Learning and Growth perspective the related objective "ensure every employee has direct contact with customers." This objective is measured by the percentage of employees who complete at least two hours of customer follow up calls monthly.

Figure 4: Balanced Scorecard for a Printing Division

Organizational Balanced Scorecard: Printing Division			
Customer			
Objective	Indicator	Targeted Value	Initiatives
Increase customer satisfaction	% of customers rating service as good or excellent	95%	Initiate follow up calls to determine customer satisfaction
Increase on-time delivery	% of orders completed on time	98%	Daily check for jobs behind schedule
Reduce returned jobs	% of orders accepted by customer	99%	Update quality assurance checklist
Internal Processes			
Objective	Indicator	Targeted Value	Initiatives
Ensure work orders are specified properly	% of orders with accurate specifications	99%	Customer outreach and assistance
Reduce waits and delays in print process	Process efficiency rate	85%	Review inventory and scheduling
Increase on-time delivery of outsourced jobs	% of outsourced jobs completed on time	98%	Performance based contracting
Learning and Growth			
Objective	Indicator	Targeted Value	Initiatives
Keep absenteeism low	Hours of non-vacation leave per employee per year	<= 25	Health and safety awareness
Ensure every employee has direct contact with customers about their satisfaction with services	% of employees completing at least 2 follow up hours per month	90%	Service follow up calls
Ensure employees are trained in current technologies	% of employees completing at least 8 hours per year in technology training	90%	Update technology training
Financial			
Objective	Indicator	Targeted Value	Initiatives
Meet revenue targets	Percent of expected revenue earned	>=100%	Monthly revenue review
Reduce cost per page printed	Cost per page printed	0.015	Review cost drivers

The manager must determine whether it is most appropriate given the nature of the work to develop performance cards for work units or individuals or for both situations. Where teams operate in an integral fashion to accomplish the work, a team or work unit card is recommended. This would be the case, for example, with the team of print operators who work together to produce most of the printed products. For supervisors,

managers, and higher level knowledge workers, an individual scorecard is recommended. So an individual scorecard could be developed for supervisors or managers in the Printing Division to describe their role and responsibilities for leading their respective areas and teams to achieve the division's objectives.

Tips and Advice Before Moving On:

- Be sure that you fully understand the scorecard's intent before moving forward. Ask for additional supporting information if any elements are not clear
- It is certainly possible and often desirable to prepare cards for both team and individual levels. If you are developing a card for an individual who is part of a team, develop the team card first and use it to further align the individual
- Work on scorecards for managers and supervisors in an iterative fashion. Do not finalize the managers scorecard until the scorecards for his or her teams or subordinates are complete

7.2 DETERMINE THE EXTENT TO WHICH THE TEAM OR INDIVIDUAL CAN INFLUENCE EACH ORGANIZATIONAL OBJECTIVE

Helping teams and individuals develop a “line of sight” about how they influence the larger organizational objectives is the essence of alignment. To develop aligned scorecards for individuals and teams, they must explore and then define their ability to influence the higher level scorecard's objectives. The measures and targets in the organizational scorecard help make the stated objectives in the higher level scorecard more specific. The planned initiatives make the organization's plans to pursue the strategy much more concrete. With this level of information, the team or individual can explore its ability to support and achieve the objectives. Following this process, the most relevant objectives can be selected as a basis for the individual or team card.

To select the most relevant objectives, consider each of the scorecard objectives and ask two main questions:

- How can we/I influence this objective? The team or individual should be asked to brainstorm ideas and possible actions that can be taken and select the one(s) that are most feasible and beneficial toward the objective
- To what extent can we/I influence this objective? Keeping the potential actions in mind, the individual or team should rate the ability to align on a scale of 1 to 5 with 5 being a very high ability to influence and 1 being the lowest

Managers can use the worksheet provided in **Appendix 2: Worksheet for Selecting Relevant Organizational Objectives** to review organizational objectives and explore the individual or team's ability to influence them. **Figure 5** illustrates a completed worksheet for the Print Operator Team of the Printing Division. In the completed example, you can see that some objectives are very relevant to this team of print operators while others are outside their ability to influence. The ability to influence the various objectives will guide the next step of selecting the relevant objectives.

Figure 5: Completed Sample Worksheet for the Print Operator Team of the Printing Division

Worksheet to Select Relevant Organizational Objectives - Print Operator Team					
Perspective	Organizational Objective	Related Initiative(s)	Ability to Influence (*)	What I/we can do to influence	Select? Y/N
Customer	Increase customer satisfaction	Initiate service follow up calls to determine customer satisfaction	5	Practice excellent customer service in all interactions with customers	Y
	Increase on-time delivery	Daily check for jobs behind schedule	4	Check due dates for work orders and complete work timely	Y
	Reduce returned jobs	Update quality assurance checklist	4	Double check specifications on order; call to resolve questions	Y
Internal Process	Ensure work orders are specified properly	Customer outreach and assistance	1	Not involved in taking work orders	N
	Reduce waits and delays in print process	Review inventory and scheduling	4	Complete jobs on time; coordinate with other team members to avoid waits and delays	Y
	Increase on-time delivery of outsourced jobs	Performance based contracting	1	Not involved in outsourced orders	N
Learning and Growth	Keep absenteeism low	Health and safety awareness	5	Practice workplace safety at all times; always use sick leave properly and responsibly	Y
	Ensure every employee has direct contact with customers about their satisfaction with services	Service follow up calls	5	Make assigned follow up calls to customers on a regular basis	Y
	Ensure employees are trained in current technologies	Update technology training	5	Attend scheduled training; be proactive to suggest training that would be beneficial; cross-train each other to share skills	Y
Financial	Meet revenue targets	Monthly revenue review	2	Limited ability	N
	Reduce cost per page printed	Review cost drivers	3	Do our part to be productive; suggest ways to increase efficiency and reduce cost	Y

Note (*): rate on a scale of 1 to 5 with 1 being very low ability to influence and 5 being a very high ability to influence

The act of linking personal actions to organizational objectives helps build and reinforce the understanding of a “line of sight” to the broader intent of the employee or team’s work. It helps everyone visualize why the work is important and why it is important to do the job well. See **Figure 6** for a great story that helps explain the concept and the benefit of developing the “line of sight”.

Tips and Advice Before Moving On:

- When completing the worksheet, some employees may need encouragement to think creatively about how they can help achieve an objective. Be sure to spend sufficient time on each objective and probe before accepting there is little way to influence

Figure 6: A Story Illustrating the Benefit of a "Line of Sight"

Bill Leighty had just been named deputy commissioner of the Virginia Department of Motor Vehicles, and had begun doing what had worked for him in previous jobs: MBWA, or manage by wandering around. He visited most of the units in the building, asking staff about their missions, roles and customers. Overall, the visits were uniformly helpful, every visit but one.

In one office, he found two supervisors' desks facing a sea of workers sitting in neat rows. It reminded Leighty of a grade school class. There was little communication going on. People were working, but there wasn't any energy. The two supervisors' faces were down, as they went through a series of forms that the staff put on their desks. Leighty introduced himself and explained why he had come. He asked the staff what they did. Their reply: "We process Form 47."

He asked how this fit into the overall office mission. They didn't know. He asked about their customers. They weren't sure who their customers were. He asked them to explain Form 47. They couldn't. Leighty asked one more question: "How do you know when you're successful?" They told him no one bothered them if they kept the backlog of forms under six weeks. Leighty left.

Some time later Leighty was talking with a member of the state police, and told the man about this work group. The trooper got excited: "They don't know what Form 47 is all about? They don't realize how important this is? This form gets filled out when a driver is caught driving under the influence [of drugs or alcohol] for the third time. Three DUIs and that allows us to get dangerous people off the road! We can't do our work without that form, it's critical to law enforcement!" Leighty asked if the trooper would be willing to meet with the unit and explain how their work impacts the police and safety on the roads. The trooper quickly said yes, and soon met the staff (without Leighty).

Several weeks later Leighty met a woman who headed up the Virginia chapter of Mothers Against Drunk Driving. He told her the story about this unit and what it did. Her eyes got teary. She described numerous examples of habitual offenders who'd had more than three DUIs but were still on the road, and of the people she knew personally who'd been killed by them. She was astonished that the staff didn't know the importance of their work. Leighty asked her if she would meet with the unit. She agreed, and soon was talking with them about her own personal story (again, without Leighty).

A few months later Leighty came back to visit the unit. He reminded them of his initial visit, and asked them how they now viewed their job. The staff no longer said: "We process Form 47." Instead, one of them looked him right in the eye and said, "We're in the business of saving people's lives."

And that's not all. They had taken it upon themselves to do more than was asked. They developed charts and graphs on productivity; they created a "10 Worst Offenders" list for each state jurisdiction; and they started automating their processes to reduce cycle time, even though that was a threat to the job security of some employees. They had been transformed from mindlessly filling out forms to passionately pursuing a noble mission.

There are many ways to understand this story. To me, it's a great example of creating a "line of sight" for employees. When employees have a line of sight, they can see the connection between their everyday work, and something larger: a satisfied customer, a safer community and a cleaner environment.

This story is taken from (Linden, Management Insights, 2011) and reproduced according to its terms of use

7.3 SELECT THE OBJECTIVES OR RELATED INITIATIVES MOST APPROPRIATE FOR THE TEAM OR INDIVIDUAL

Now that the team or individual has explored the ability to influence objectives, it is time to select the most relevant ones to carry forward for alignment.

To select the most relevant objectives, the following question should be asked:

- Based on the ability to influence, should this objective be used to align the (team/individual) scorecard? A yes or no decision should be reached.

In the completed example shown previously in **Figure 5** the team agreed upon eight objectives to carry forward for alignment and omitted three objectives. The process to select relevant objectives should be one of "give and take" between the manager and subordinates. Employees must truly understand the selected objectives and strongly agree they have the ability to influence them.

Tips and Advice Before Moving On:

- While there is no hard and fast rule for how many objectives should be selected, it is best to limit objectives to those that are most important. Ten or fewer objectives are recommended
- It is not required, but you are encouraged to pick at least one objective from each of the four perspectives. If a perspective and its objectives seem like a "force fit" do not select those objectives for alignment. But, this situation may suggest either a problem with the scorecard objectives or an incomplete understanding of the objectives that should be reviewed with the scorecard's originator

7.4 IDENTIFY HOW TO MEASURE SUCCESS

For the selected objectives it is now time to agree upon how to measure their accomplishment appropriately at the team or individual level. A form to facilitate this process is included in **Appendix 3: Template to Develop Measures**. The template begins with the selected objectives, measures, and targets established in the

organizational scorecard. The relevant actions to support the objective identified with the team or individual in step 2 are inserted to help guide the measurement discussion.

The individual or team must now determine how to measure the objective at their level and set an appropriate target. In some cases the organizational measure and target can be accepted directly without modification, but in other cases they must be changed to fit the situation at the lower level. A completed example is illustrated in **Figure 7**. Notice in the example how the organizational level measures for customer satisfaction were cascaded to the team’s level so the team is holding itself accountable for achieving the same customer measure and target for customer measures but specifying that the relevant measures are for the team’s work products not the division as a whole. For the Financial measure, notice how the team modified the measure based on what it can do to influence cost. The team will hold itself accountable for implementing 12 efficiency improvement recommendations during the year in support of the broader organizational objective and measure to reduce printing costs.

Figure 7: Sample Completed Team Measures

Sample Team Development of Measures						
Team/Work Unit: Print Operator Team			Organizational Scorecard		This Scorecard	
Perspective	Objective and/or Initiative	What We Can Do	How Measured	Target	How Measured	Target
Customer	Increase customer satisfaction	Practice excellent customer service in all interactions with customers	% of customers rating service as good or excellent	95%	% of customers rating satisfaction with service of print team as good or excellent	95%
	Increase on-time delivery	Check due dates for work orders and complete work timely	% of orders completed on time	98%	% of orders completed on time by our team	98%
	Reduce returned jobs	Double check specifications on order; call to resolve questions	% of orders accepted by customer	99%	% of orders from our team accepted by customer	99%
Internal Process	Reduce waits and delays in print process	Complete jobs on time; coordinate with other team members to avoid waits and delays	Process efficiency rate	85%	Process efficiency rate	85%
Learning and Growth	Keep absenteeism low	Practice workplace safety at all times; always use sick leave properly and responsibly	Hours of non-vacation leave per employee per year	<= 25	Hours of non-vacation leave per employee per year for our team	<= 25
	Ensure every employee has direct contact with customers about their satisfaction with services	Make assigned follow up calls to customers on a regular basis	% of employees completing at least 2 follow up hours per month	90%	% of employees completing at least 2 follow up hours per month	90%
	Ensure employees are trained in current technologies	Attend scheduled training; be proactive to suggest training that would be beneficial; cross-train each other to share skills	% of employees completing at least 8 hours per year in technology training	90%	% of employees completing at least 8 hours per year in technology training	90%
Financial	Reduce cost per page printed	Review cost drivers	Cost per page printed	0.015	Number of efficiency recommendations implemented	12

Tips and Advice Before Moving On:

- Target setting is an “art”. The manager should work with the team to set a reasonable target for each selected measure. This process may require a lot of give

and take dialog about what the team can achieve. Be sure to set targets that are realistic but also sufficiently ambitious

- Examining performance data for prior periods, where available, will help inform target setting

7.5 ASSIGN WEIGHTS TO THE ITEMS IF DESIRED

Once the measures and targets have been determined it is possible to assign a weight for each objective. A completed sample for the Print Operator Team is illustrated in **Figure 8**. A percentage weight can be assigned to each objective as illustrated by the highlighted column in the example. In this example, the team decided the objective “increase customer satisfaction” was the most important and gave it a 20% weight. Other objectives were assigned weights of 15% or 10% as determined appropriate based on relative importance. Note the total of the percentage weights must equal 100%.

Figure 8: Sample Completed Team Weights

Team/Work Unit: Print Operator Team			Organization: General Services Dept.		
Perspective	Objective and/or Initiative	What We Can Do	How Measured	Target	Weight (*)
Customer	Increase customer satisfaction	Practice excellent customer service in all interactions with customers	% of customers rating satisfaction with service of print team as good or excellent	95%	20
	Increase on-time delivery	Check due dates for work orders and complete work timely	% of orders completed on time by our team	98%	15
	Reduce returned jobs	Double check specifications on order; call to resolve questions	% of orders from our team accepted by customer	99%	10
Internal Process	Reduce waits and delays in print process	Complete jobs on time; coordinate with other team members to avoid waits and delays	Process efficiency rate	85%	10
Learning and Growth	Keep absenteeism low	Practice workplace safety at all times; always use sick leave properly and responsibly	Hours of non-vacation leave per employee per year for our team	<= 25	10
	Ensure every employee has direct contact with customers about their satisfaction with services	Make assigned follow up calls to customers on a regular basis	% of employees completing at least 2 follow up hours per month	90%	10
	Ensure employees are trained in current technologies	Attend scheduled training; be proactive to suggest training that would be beneficial; cross-train each other to share skills	% of employees completing at least 8 hours per year in technology training	90%	10
Financial	Reduce cost per page printed	Review cost drivers	Number of efficiency recommendations implemented	12	15
Note (*): If weights are used for measures the total of all weights must equal 100%					100

Tips and Advice Before Moving On:

- Establishing weights, like target setting, can be an “art”. The process requires considerable dialog about what is most important
- Sometimes the ability to influence the objective may affect the weigh assigned. Objectives with a strong ability to influence may be counted more than those with less ability to influence
- You can try an exercise in which the manager and each individual assign weights independently and then compare and contrast their results. This method allows every individual to be candid without being influenced initially by the opinions of others
- Establishing weights is optional. If desired, all objectives can be counted equally

7.6 IDENTIFY TEAM OR INDIVIDUAL ACTIONS TO SUPPORT LEARNING AND IMPROVEMENT

The learning and growth perspective of the scorecard provides rich opportunities for individuals and teams to better prepare themselves to succeed. Once the scorecard’s objectives, measures and weights have been assigned, the next step is to determine what the individual or team can do to enhance learning and improvement toward achieving the target.

The important questions to ask for each objective are:

- What can our team do to ensure we learn from measuring performance?
- When and how will we measure, monitor, and learn?

A completed example of this step is illustrated in Figure 9. Notice the team has agreed to hold monthly and quarterly meetings to address performance on most of the objectives. In other instances they have identified individual actions that will be taken such as attending required training for health and safety or completing individual skill inventories.

Figure 9: Sample Completed Team Learning Plan Actions

How Measured	Target	Weight (*)	Team/Personal Learning Plan Action
% of customers rating satisfaction with service of print team as good or excellent	95%	20	Hold team meetings to review ratings and identify follow up actions quarterly
% of orders completed on time by our team	98%	15	Hold team meetings to review performance and identify follow up actions monthly
% of orders from our team accepted by customer	99%	10	Hold team meetings to review performance and identify follow up actions monthly
Process efficiency rate	85%	10	Hold team meetings to review waits and delays and identify follow up actions weekly
Hours of non-vacation leave per employee per year for our team	<= 25	10	Attend all required health and safety awareness training
% of employees completing at least 2 follow up hours per month	90%	10	Maintain log of follow up calls completed; ensure every member is trained on proper procedures for calls
% of employees completing at least 8 hours per year in technology training	90%	10	Complete skills inventory for each person
Number of efficiency recommendations implemented	12	15	Devote time at each monthly team meeting to identify and plan efficiency improvements

Tips and Advice Before Moving On:

- It is very important to schedule the follow up actions to ensure they are completed. Maintaining commitment to monitoring and learning reinforces that the scorecard is “real” and important
- Some organizations maintain an individual development plan for every employee. If your organization uses individual development plans, this step of the scorecard development will aid greatly in their preparation

7.7 BENEFIT FROM THE FUTURE OPPORTUNITIES FOR FEEDBACK AND LEARNING

The previous step established a number of opportunities for learning and improvement. In implementing the scorecard, managers can increase the benefit the organization receives from these feedback and learning opportunities – and how much is learned.

Managers and supervisors play a key role in sustaining a constructive learning environment. Figure 10 provides helpful advice for managers by Shelley Metzenbaum drawn from her research on effective performance accountability practices in the US Federal government.

Figure 10: Recommendations on Effective Feedback (Metzenbaum, 2006)

Specific functions managers should encourage as part of constructive group feedback are:

- Help members set challenging but realistic goals, adjusting them as needed
- Make sure each member understands what his or her contribution is to the final product
- Ensure group participants understand how their membership in the group is helpful
- Emphasize the unity of the group
- Change goals that are too difficult
- Encourage talk in meetings about how performance can be improved
- Avoid fear of failure
- Help members feel responsible for the group's fate
- Give members assignments that suit their abilities
- Clearly define boundaries of unacceptable practice

...The discussions should break the goal into manageable pieces, examine concrete illustrations of specific behaviors and strategies that might help advance progress and reinforce confidence that the job can be done. The forum for the feedback is not as important as the way feedback is delivered.

Tips and Advice Before Moving On:

- For additional ideas and helpful advice to promote learning see the tool **Monitoring, Evaluating, and Learning from Performance**

8. FINAL TIPS FOR MANAGERS

Using this tool, a manager can develop scorecards for individuals and teams that align with the organization's scorecard. Throughout development and implementation of scorecards, remember that managers must reinforce the organizational vision and strategy through regular communication with employees.

What makes the communication effective? Researchers Boswell and Bourdeau (Boswell & Bourdeau, 2001) offer this advice about helping employees maintain a "line of sight" to organizational strategic objectives:

First, it appears that how well an employee understands the *actions* important to the organization's strategic objectives is more important (in terms of enhanced attitudes

and retention) than simply being able to articulate the organization's strategic *goals*. Organizations may need to look beyond simply communicating their strategic direction to employees and instead focus on whether employees accurately understand *how* to effectively contribute. Our research suggests that organizations may accomplish this best by involving employees in organizational decision processes and through direct and personal communication rather than "company-wide" information sessions.

So managers are well advised to make communication concerning the scorecards as direct and personal as possible in settings that are conducive to real interaction with employees. Remember to celebrate successes – to recognize and reinforce the accomplishments of individuals and teams toward achieving the organization's objectives.

Aligned scorecards help everyone in the organization learn, improve, and contribute to the organization's success

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APPENDIX 1: SCORECARD TEMPLATE

Scorecard Template						
Name/Title:		Organization:				Date:
Perspective	Objective and/or Initiative	What We Can Do	How Measured	Target	Weight (*)	Team/Personal Learning Plan Action
Customer						
Internal Process						
Learning and Growth						
Financial						

Note (*): If weights are used for measures the total of all weights must equal 100%

APPENDIX 2: WORKSHEET FOR SELECTING RELEVANT ORGANIZATIONAL OBJECTIVES

Worksheet for Selecting Relevant Organizational Objectives					
Perspective	Organizational Objective	Related Initiative(s)	Ability to Influence (*)	What I/we can do to influence	Select? Y/N
Customer					
Internal Process					
Learning and Growth					
Financial					

Worksheet to Select Relevant Organizational Objectives - Print Operator Team

Perspective	Organizational Objective	Related Initiative(s)	Ability to Influence (*)	What I/we can do to influence	Select? Y/N
Customer	Increase customer satisfaction	Initiate service follow up calls to determine customer satisfaction	5	Practice excellent customer service in all interactions with customers	Y
	Increase on-time delivery	Daily check for jobs behind schedule	4	Check due dates for work orders and complete work timely	Y
	Reduce returned jobs	Update quality assurance checklist	4	Double check specifications on order; call to resolve questions	Y
Internal Process	Ensure work orders are specified properly	Customer outreach and assistance	1	Not involved in taking work orders	N
	Reduce waits and delays in print process	Review inventory and scheduling	4	Complete jobs on time; coordinate with other team members to avoid waits and delays	Y
	Increase on-time delivery of outsourced jobs	Performance based contracting	1	Not involved in outsourced orders	N
Learning and Growth	Keep absenteeism low	Health and safety awareness	5	Practice workplace safety at all times; always use sick leave properly and responsibly	Y
	Ensure every employee has direct contact with customers about their satisfaction with services	Service follow up calls	5	Make assigned follow up calls to customers on a regular basis	Y
	Ensure employees are trained in current technologies	Update technology training	5	Attend scheduled training; be proactive to suggest training that would be beneficial; cross-train each other to share skills	Y
Financial	Meet revenue targets	Monthly revenue review	2	Limited ability	N
	Reduce cost per page printed	Review cost drivers	3	Do our part to be productive; suggest ways to increase efficiency and reduce cost	Y

Note (*): rate on a scale of 1 to 5 with 1 being very low ability to influence and 5 being a very high ability to influence

APPENDIX 3: TEMPLATE TO DEVELOP MEASURES

Template to Develop Measures						
			Organizational Scorecard		This Scorecard	
Perspective	Objective and/or Initiative	What We Can Do	How Measured	Target	How Measured	Target
Customer						
Internal Process						
Learning and Growth						
Financial						