

A BALANCED SCORECARD TIED TO CORE VALUES

This is an example of a balanced scorecard tied to an organization's core values. As the matrix illustrates, each core value has at least one performance measure.

CORE VALUE	GOAL STATEMENT	PERFORMANCE MEASURES	RELATED STRATEGIES
RELIABILITY	Provide timely, accurate, and cost effective products and services the first time, every time.	<ul style="list-style-type: none"> ▪ Percentage of individuals who receive products, benefits and services without adjustment ▪ Percentage of individuals who receive products, benefits and services without manual intervention 	<ul style="list-style-type: none"> ▪ Improve the quality of the data coming into the system ▪ Improve the quality of the data residing in the system
CUSTOMER SATISFACTION	Provide our customers what they need, when they need it.	<ul style="list-style-type: none"> ▪ Percentage of customers who report they are satisfied or completely satisfied 	<ul style="list-style-type: none"> ▪ Establish service level agreements (internal and external)
FINANCIAL SUSTAINABILITY	Develop and support our people, ensure the integrity of our systems, and strengthen the funding programs.	<ul style="list-style-type: none"> ▪ Percentage of program funding ▪ Vacancy rate ▪ Percentage of clean audit findings (internal and external) 	<ul style="list-style-type: none"> ▪ Establish and execute strategy for improving endowment performance
QUALITY WORKPLACE	Deliver knowledgeable, compassionate and consistent education and consultation to help employees make smart decisions.	<ul style="list-style-type: none"> ▪ Percentage of employees who report they are satisfied or highly satisfied ▪ Percentage of members with retirement plans in place ▪ Replacement ratio ▪ Percentage of customers confident in company's decisions 	<ul style="list-style-type: none"> ▪ Establish and implement a comprehensive HR plan ▪ Establish baseline data on confident decision making ▪ Implement comprehensive communication strategy ▪ Provide coordinated, consistent training