

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

LRI's expert consultants can help you develop an effective scorecard for your organization's core values. Please call us for a free consultation at 800-598-7662 or email [info@leadingresources.com](mailto:info@leadingresources.com)