

BALANCED SCORECARD

CHOOSE

1. Scoring Method >>>

M

Monthly scores (M) or Comparative scores (C)

2. Weighting Methods (see page below)

Last Year	Jan-06	This Year	Jan-07	Next Year	Jan-08
Weight		40%			

FINANCIAL 8.4

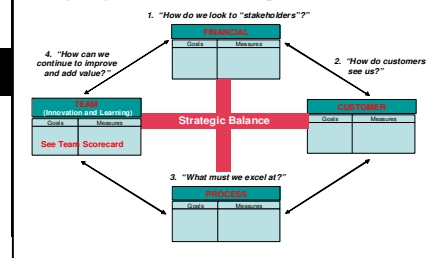
Sales 10.0
Payroll 7.1
Cash Flow 7.5

Weight 10%
TEAM 6.3

Results 7.5
Satisfaction 5.4
Inter-Personal 5.0
Capability 4.5

BALANCED SCORE : 6.7

A "Balanced Scorecard" Approach
 - 4 perspectives for looking at the business -



Weight 30%
CUSTOMER 5.7

Promos 5.7
Quotes 5.8
Delivery 8.1
Competitiveness 4.5
Customer Satisfaction 4.5

Weight 20%
PROCESS 5.1

<u>Planning</u> 4.7	<u>Proof of Concept</u> 4.5	<u>Service</u> 4.5
<u>Budgeting</u> 7.0	<u>Early Stage Commercialisation</u> 4.5	<u>Quality System</u> 5.5
<u>Organisation & Job Design</u> 4.5	<u>Production Planning</u> 4.5	<u>Purchasing</u> 4.5
<u>R&D Process</u> 4.5	<u>Costing</u> 6.1	

WEIGHTING

Change red letter cells & make 3 weighting choices

1. COMPARATIVE SCORING

SELECTED EQUAL CHOICE ≥ CSS or CSE = **CSE**

This Month		Actual	vs	Budget	40%
			vs	Last year	10%
YTD		Actual	vs	Budget	30%
			vs	Last year	10%
	Next Year Opinion		vs	Budget	10%

20%
20%
20%
20%
20%

100%

100%

2. 4 PERSPECTIVES

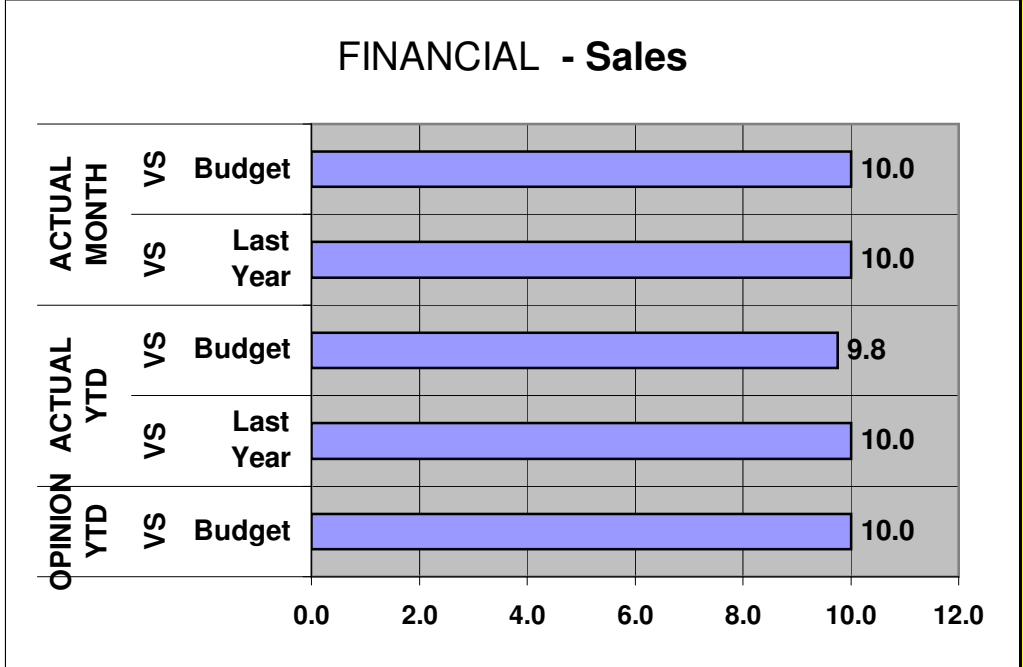
SELECTED EQUAL CHOICE PS or PE = **PS** CHOICE > S or E = **S** Proof

FINANCIAL	40%	25%				Sales	Payroll	Cash Flow	
						40%	30%	30%	100%
CUSTOMER	30%	25%	Promos	Quotes	Delivery	Competitiveness	Customer Satisfaction		
			25%	30%	15%	10%	20%	100%	
PROCESS	20%	25%	Planning	Budgeting	Organisation & Job Design		R&D Process		
			10%	15%	15%		15%		100%
			Quality System		Production Planning		Early Stage Commercialisation		
			10%		5%		5%		
			Costing	Service	Proof of Concept	Purchasing			
			5%	5%	5%	10%			
TEAM	10%	25%	Results	Satisfaction	Inter-Personal	Capability			
			50%	25%	15%	10%			100%
TOTAL	100%	100%							

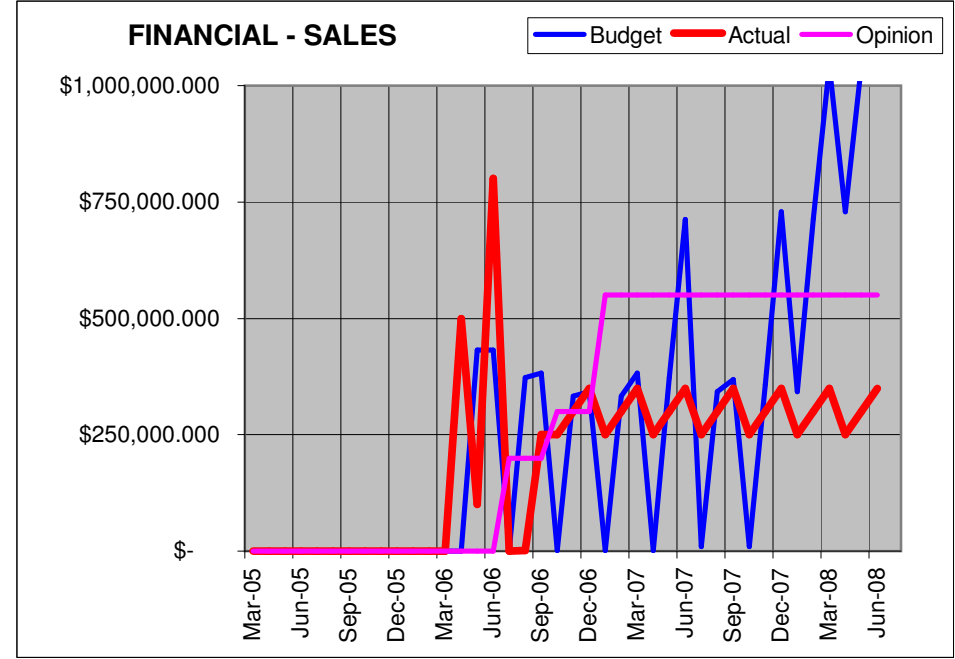
FINANCIAL	Sales	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES			
This Month	Jan-07	Actual	vs	Budget	10.0
			vs	Last year	10.0
YTD		Actual	vs	Budget	9.8
			vs	Last year	10.0
	Next Year Opinion		vs	Budget	10.0

Sales revenue

Comment:

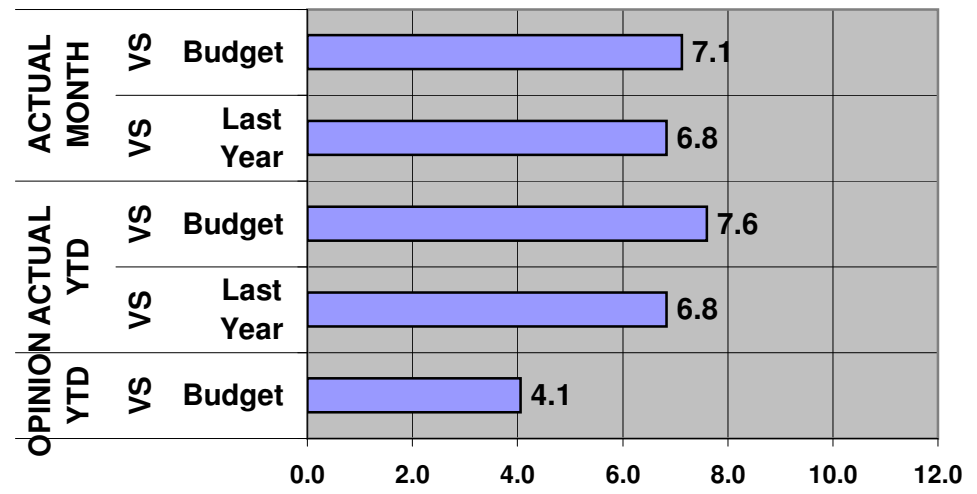


GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



FINANCIAL	Payroll	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES				Home
This Month	Jan-07	Actual	VS	Budget	7.1	
			VS	Last year	6.8	
YTD		Actual	VS	Budget	7.6	
			VS	Last year	6.8	
		Next Year Opinion	VS	Budget	4.1	

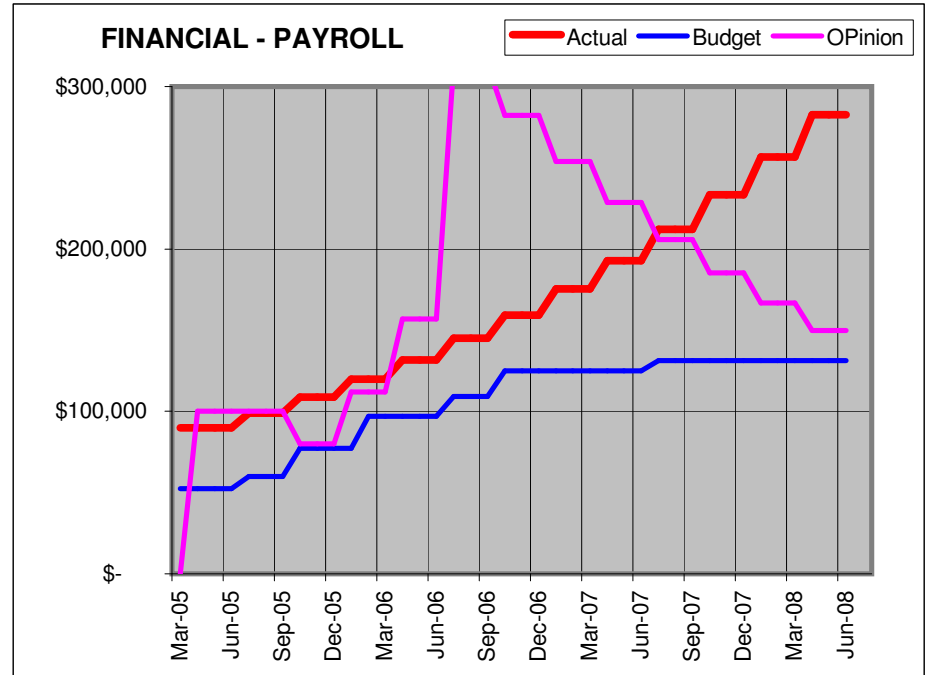
FINANCIAL - Payroll



Payroll costs

Comment:

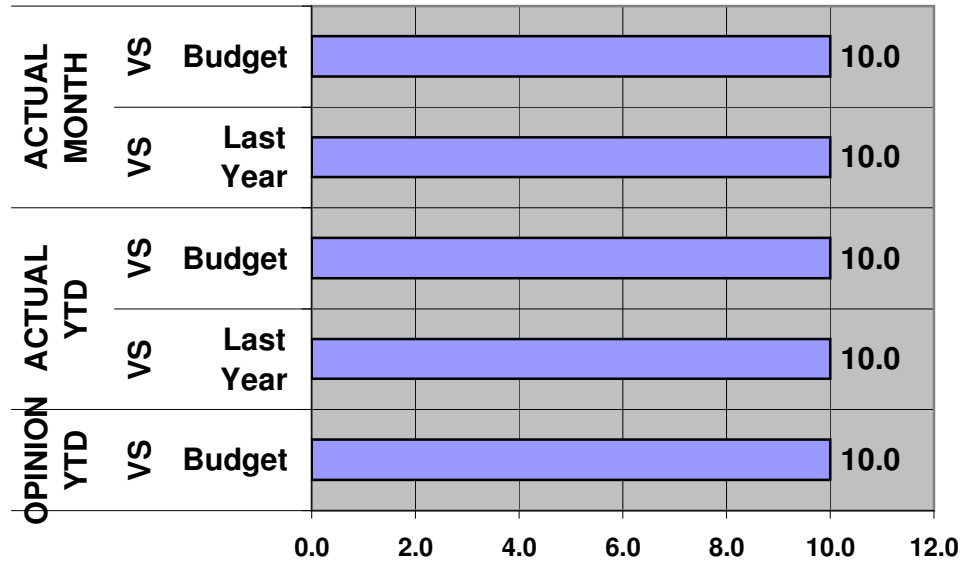
GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



FINANCIAL	Cash Flow	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES			
This Month	Jan-07	Actual	vs	Budget	10.0
			vs	Last year	10.0
YTD		Actual	vs	Budget	10.0
			vs	Last year	10.0
	Next Year Opinion		vs	Budget	10.0

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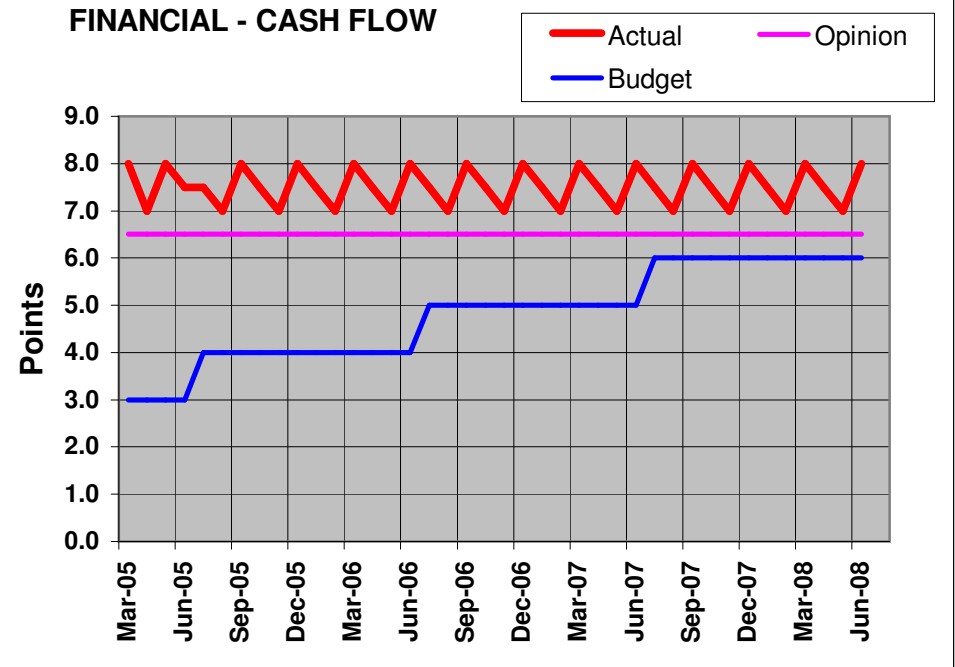
FINANCIAL - Cash Flow



Measures scored include Future funding, Cash Inflow planned, Cash Outflow planned, Adequacy of cash balance, , , , ,

Comment:

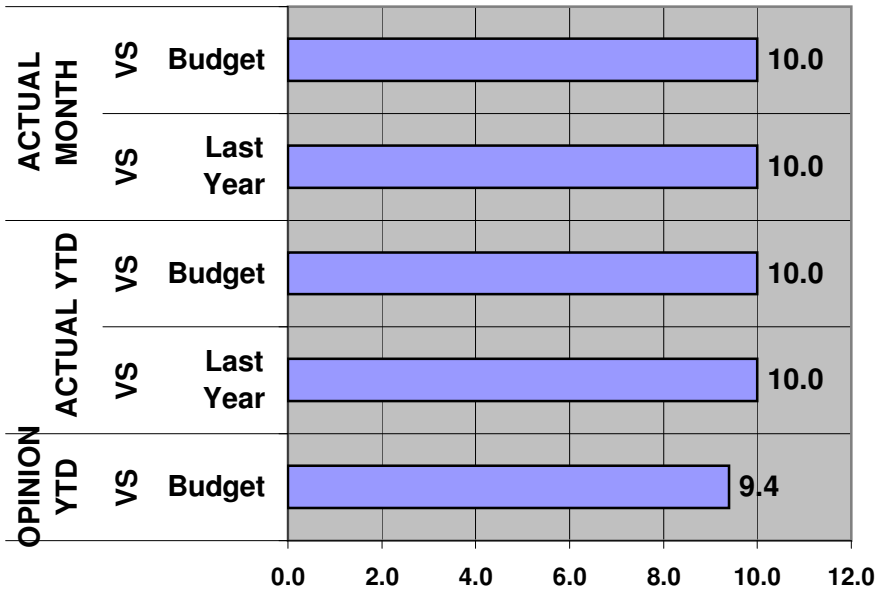
GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



CUSTOMER	Promos	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES			
This Month	Jan-07	Actual	VS	Budget	10.0
			VS	Last year	10.0
YTD		Actual	VS	Budget	10.0
			VS	Last year	10.0
	Next Year Opinion		VS	Budget	9.4

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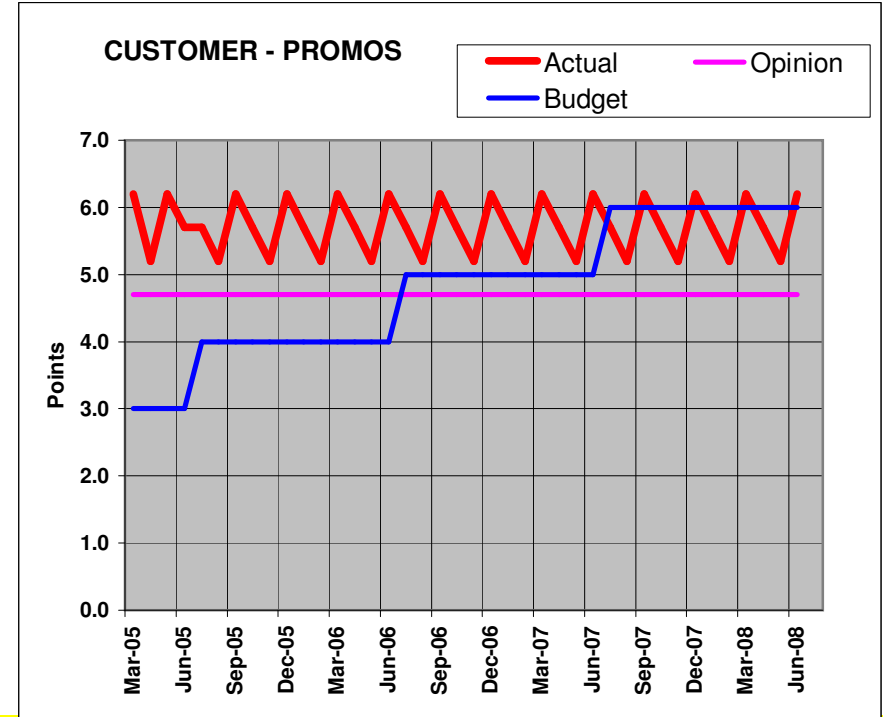
CUSTOMER - Promos



Measures scored include Target markets clarified, Target lists prepared, Target mail-outs prepared, Target mail-outs sent, Follow up, Enquiries, Response, , ,

Comment:

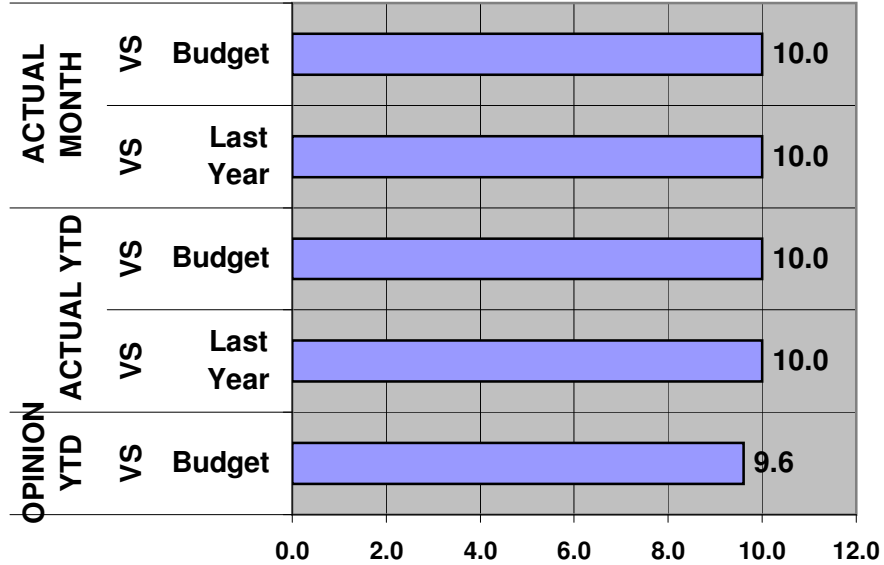
GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



CUSTOMER	Quotes	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES			
This Month	Jan-07	Actual	vs	Budget	10.0
			vs	Last year	10.0
YTD		Actual	vs	Budget	10.0
			vs	Last year	10.0
	Next Year Opinion		vs	Budget	9.6

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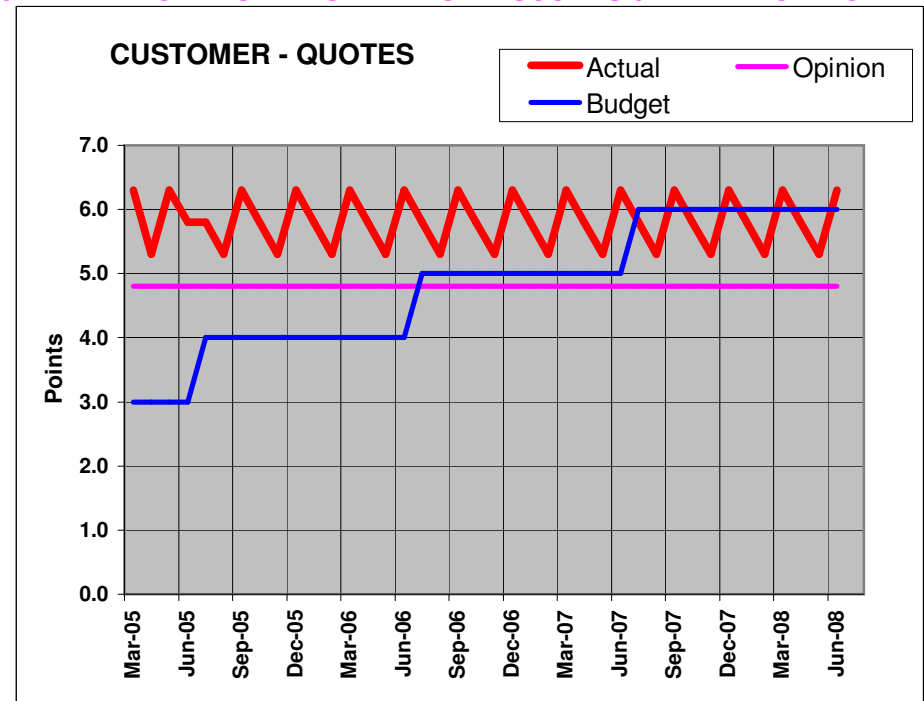
CUSTOMER - Quotes



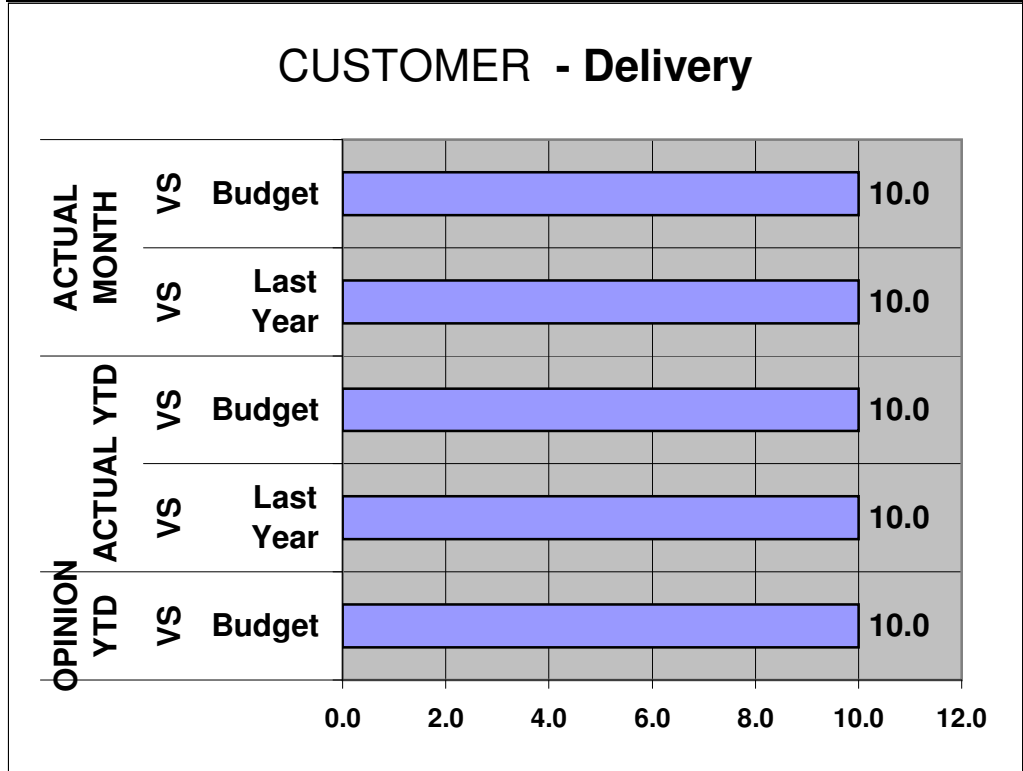
Measures scored include Level of interest, Quote requests received, Quotes prepared, Quotes followed up, Quotes accepted, Orders received, , , ,

Comment:

GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



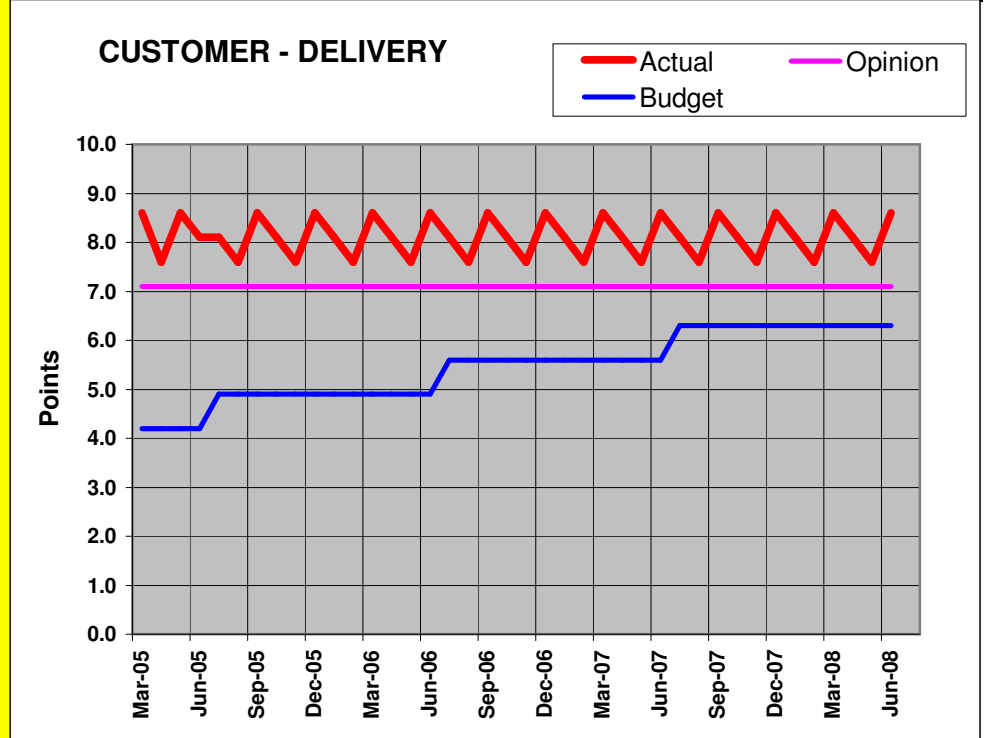
CUSTOMER	Delivery	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES			
This Month	Jan-07	Actual	VS	Budget	10.0
			VS	Last year	10.0
YTD		Actual	VS	Budget	10.0
			VS	Last year	10.0
	Next Year Opinion		VS	Budget	10.0



Measures scored include Turnaround promised, Delivery on time, Delivery quality, , , , , ,

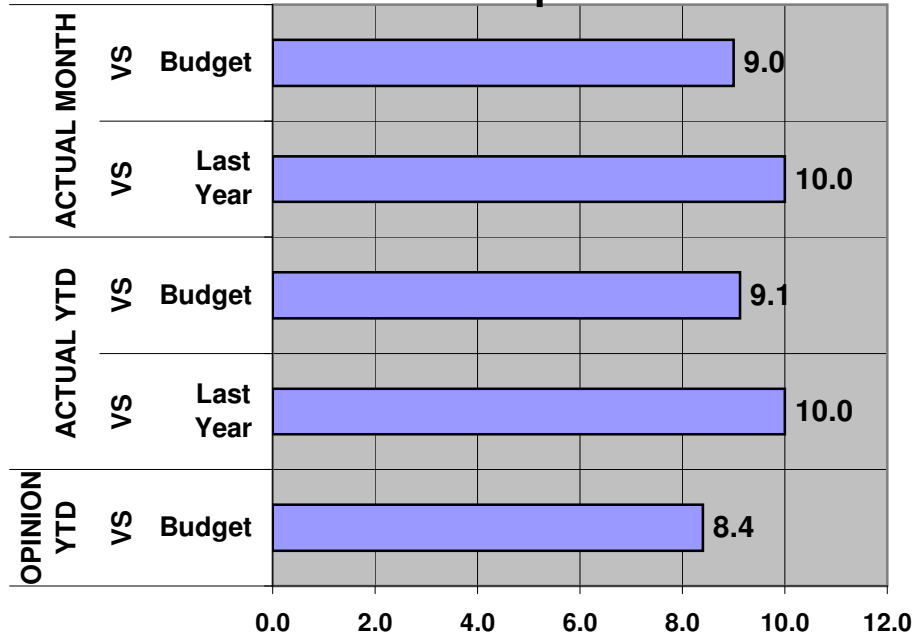
Comment:

GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



CUSTOMER	Competitiveness	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES				Home
This Month	Jan-07	Actual	vs	Budget	9.0	
			vs	Last year	10.0	
YTD		Actual	vs	Budget	9.1	
			vs	Last year	10.0	
	Next Year Opinion		vs	Budget	8.4	

CUSTOMER - Competitiveness

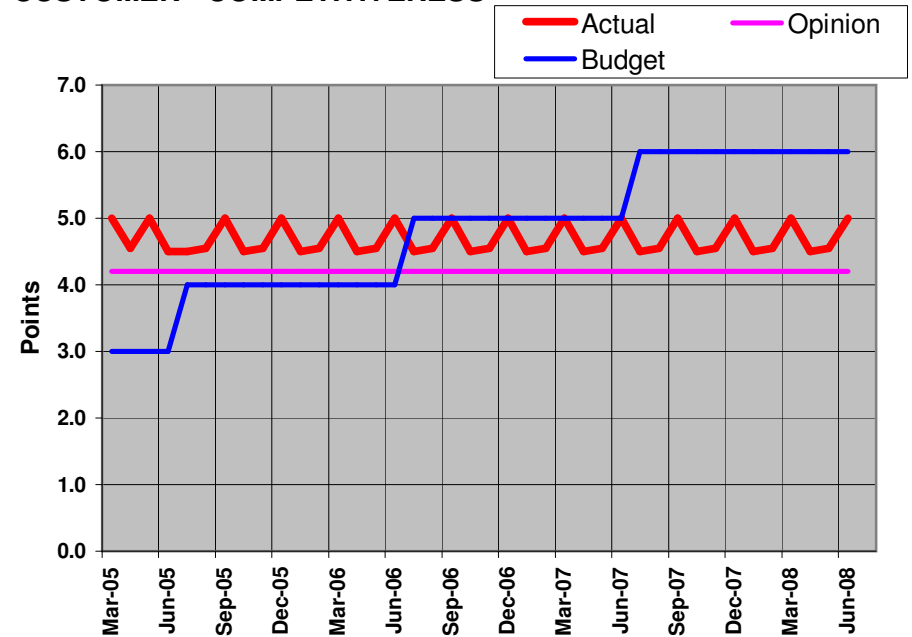


Measures scored include Product, Price, Value proposition, Promotion - Website, Customer Visits, Customer Relationships, Distribution, Sales collateral, Service, Warranty

Comment:

GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH

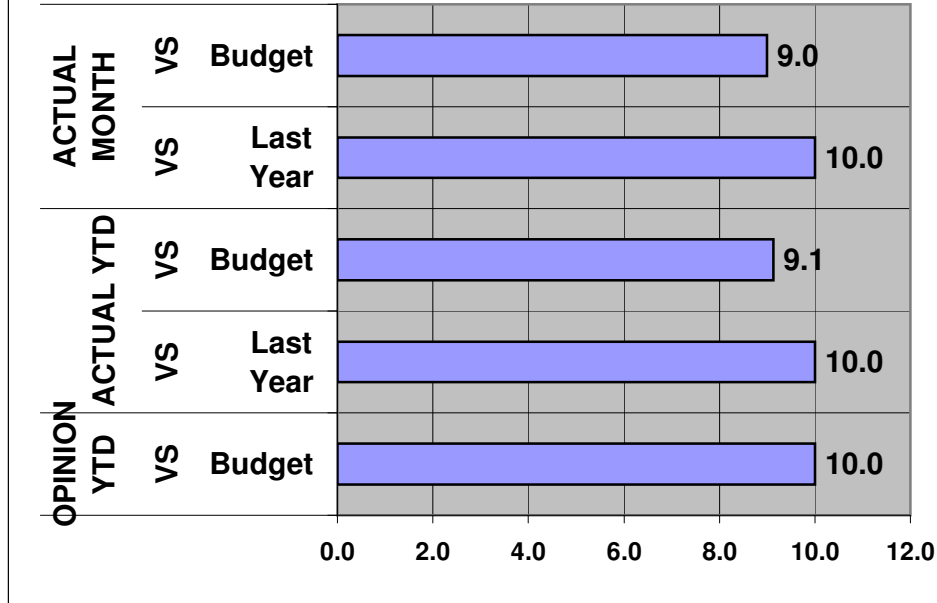
CUSTOMER - COMPETITIVENESS



CUSTOMER	Customer Satisfaction	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES			
This Month	Jan-07	Actual	vs	Budget	9.0
			vs	Last year	10.0
YTD		Actual	vs	Budget	9.1
			vs	Last year	10.0
	Next Year Opinion		vs	Budget	10.0

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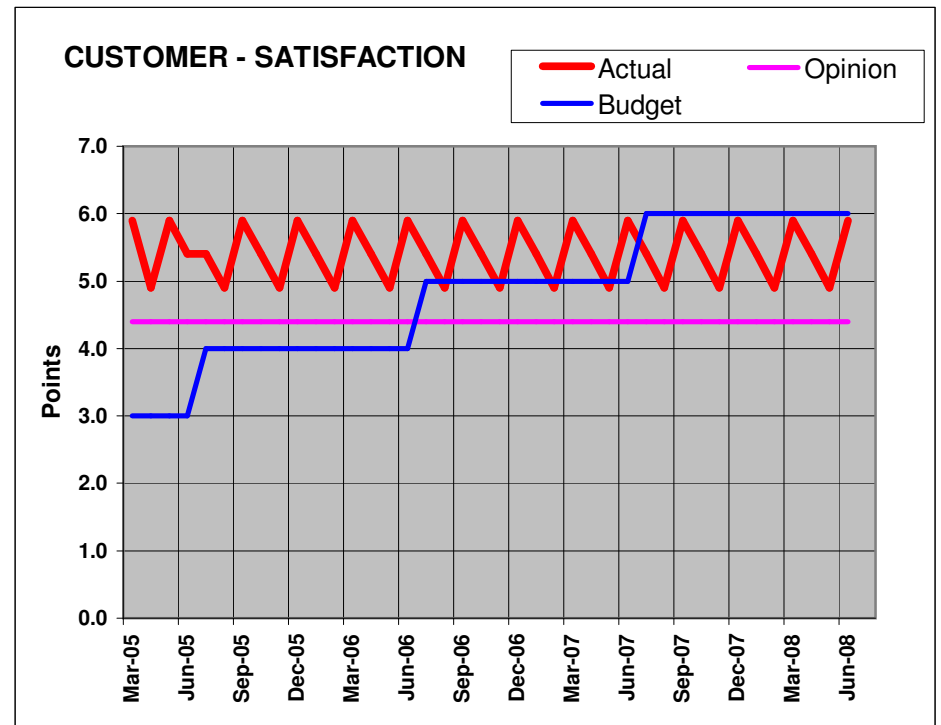
CUSTOMER - Satisfaction



Measures scored include General awareness, Value proposition, Promotion - Website, Customer Visits, Customer Relationships, Distribution, Sales collateral, Service, Warranty, Training

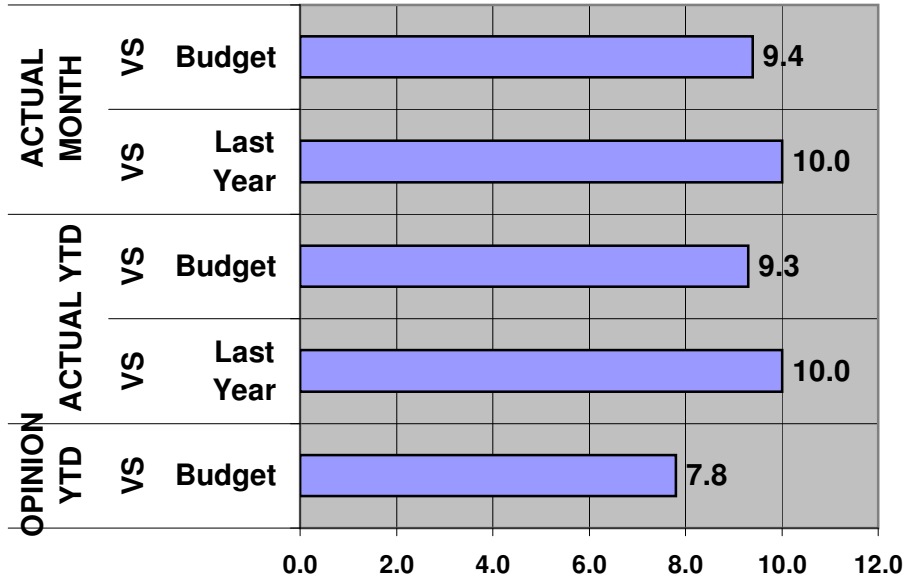
Comment:

GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



PROCESS	Planning	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES				Home
This Month	Jan-07	Actual	vs	Budget	9.4	
			vs	Last year	10.0	
YTD		Actual	vs	Budget	9.3	
			vs	Last year	10.0	
		Next Year Opinion	vs	Budget	7.8	

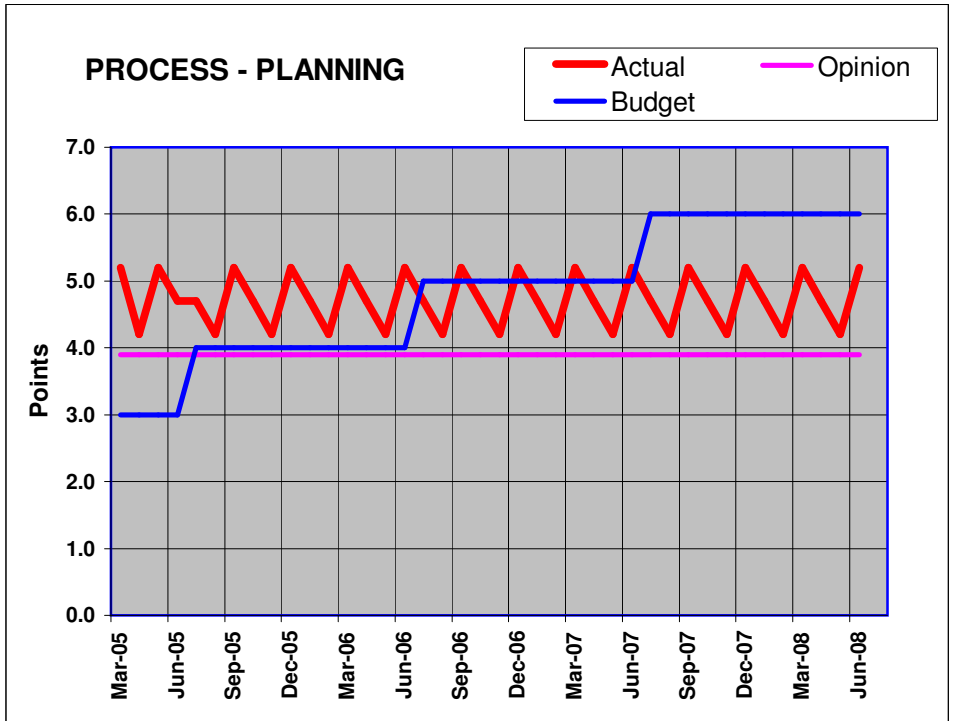
PROCESS - Planning



Measures scored include Business Plans, Competitors, Customers, Technology trends, Management reports, Strategy, Performance review, Commercialisation, Competitive advantage,

Comment:

GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH

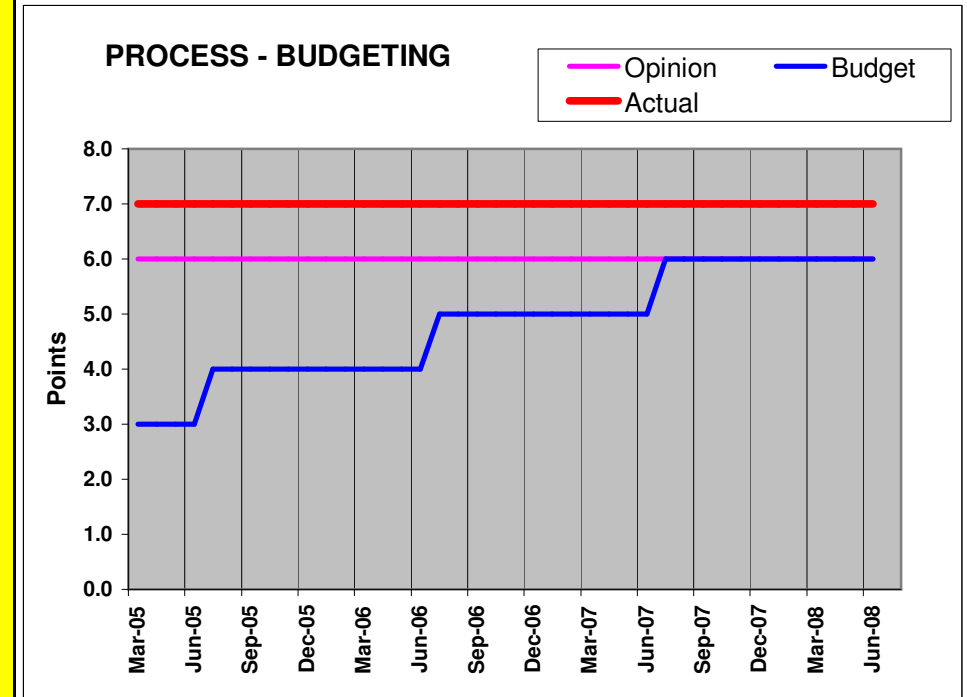
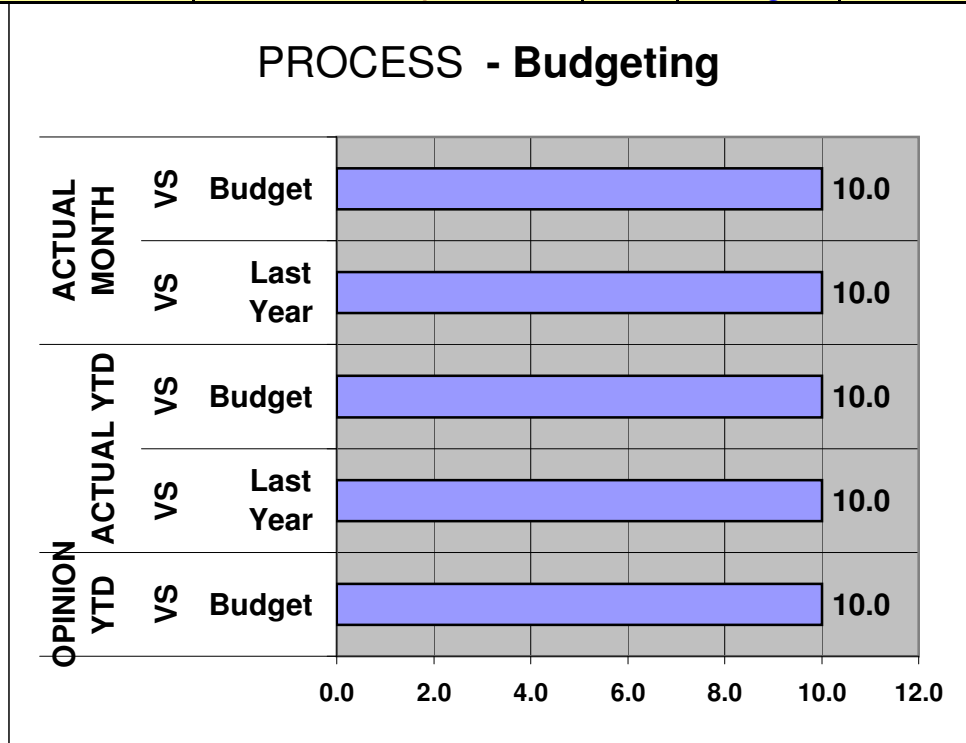


PROCESS	Budgeting	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES				Home
This Month	Jan-07	Actual	VS	Budget	10.0	
			VS	Last year	10.0	
YTD		Actual	VS	Budget	10.0	
			VS	Last year	10.0	
	Next Year Opinion		VS	Budget	10.0	

Measures include - Yearly budgets done on time (before 28 Feb), communicated, delegated, understood by Board, Senior Management, responsible staff and others. Quarterly opinions by month on time (in preceding quarter before Mar 31, Jun 30, Sep 30, Dec 31)

Comment:

GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



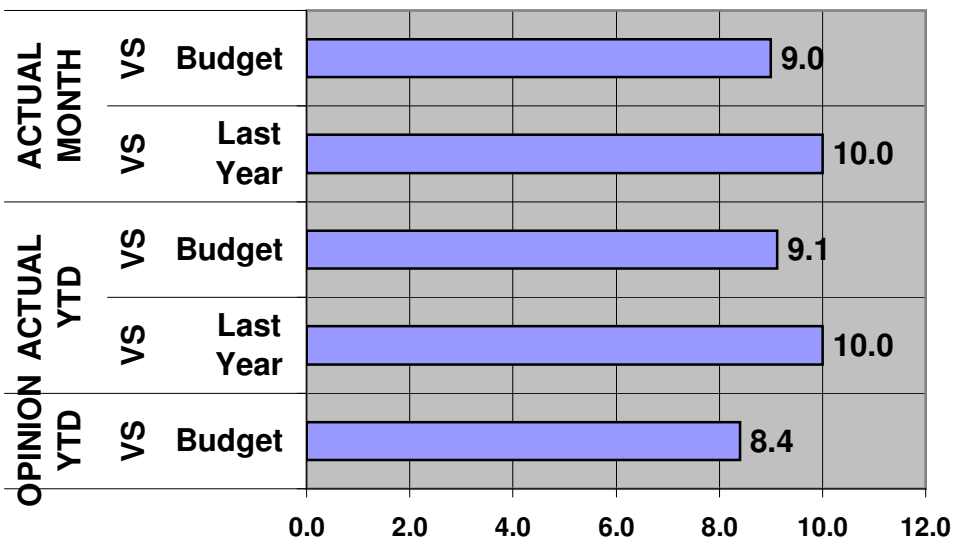
PROCESS	Org/Job Design	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES			
This Month	Jan-07	Actual	vs	Budget	9.0
			vs	Last year	10.0
YTD		Actual	vs	Budget	9.1
			vs	Last year	10.0
	Next Year Opinion		vs	Budget	8.4

Measures scored include Structure aligned with strategy, Design brief , Participation in design process, Functional clarity, Centralisation/decentralisation balance, Job design, KPI's identified, KPI's assigned, Project flexibility, Culture

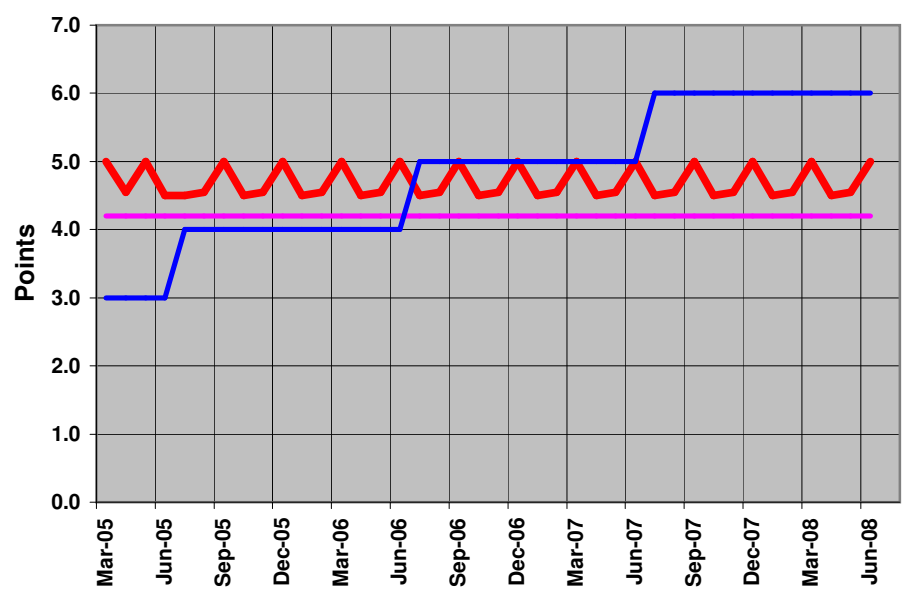
Comment:

GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH

PROCESS - Organisation & Job Design



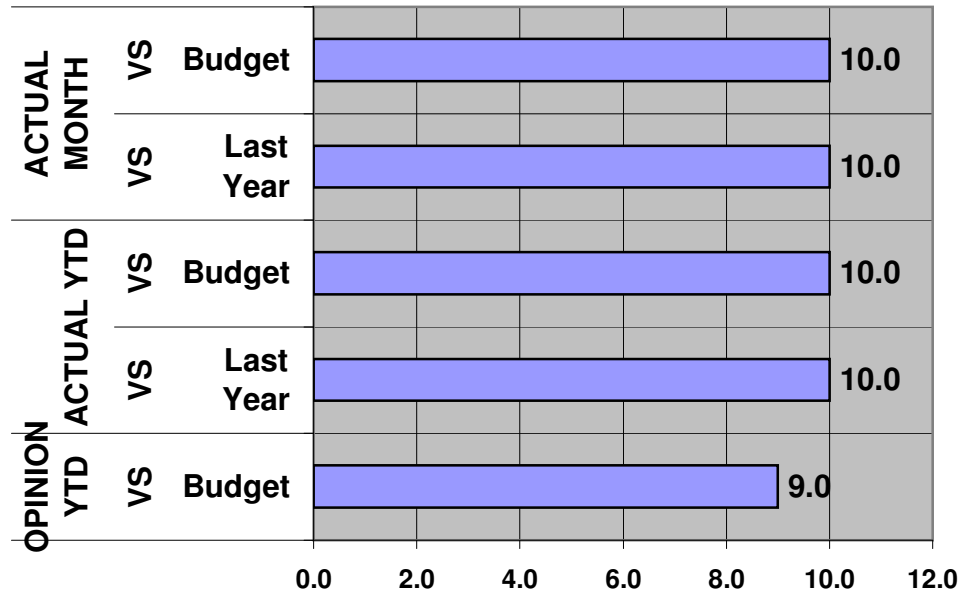
PROCESS - ORGANISATION & JOB DESIGN



PROCESS	Quality System	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES			
This Month	Jan-07	Actual	VS	Budget	10.0
			VS	Last year	10.0
YTD		Actual	VS	Budget	10.0
			VS	Last year	10.0
	Next Year Opinion		VS	Budget	9.0

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PROCESS - Quality System

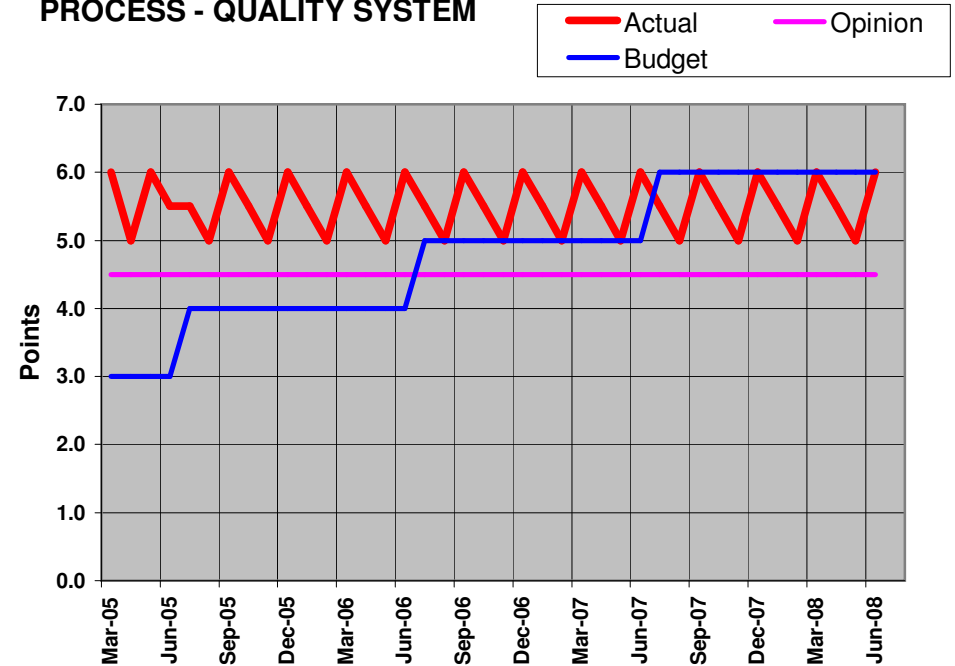


Measures scored include Business Plan fit, Standards, Quality commitment, Quality organisation, Quality meetings, Quality follow-up, Quality attitudes, Quality progress, ,

Comment:

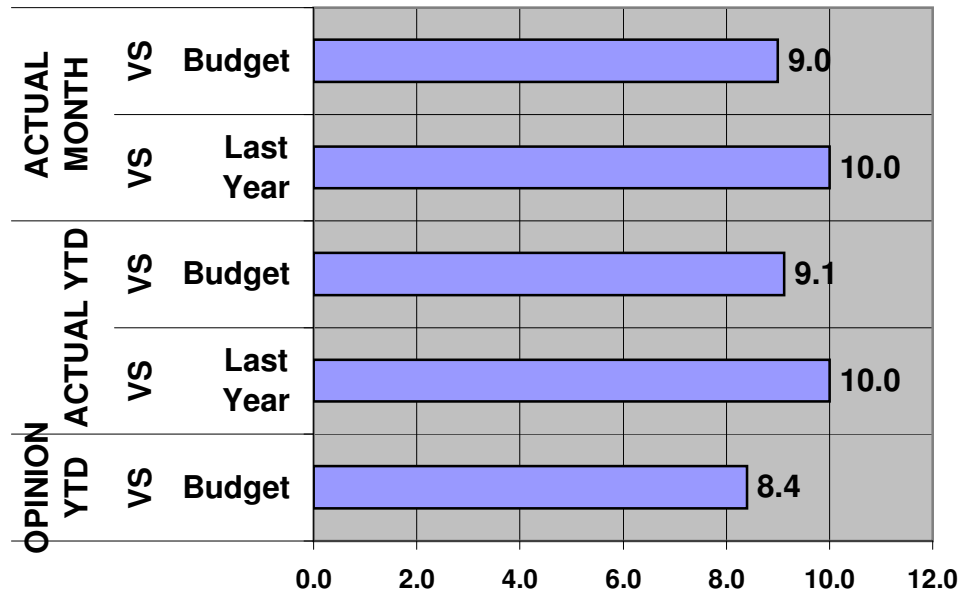
GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH

PROCESS - QUALITY SYSTEM



PROCESS	R&D Process	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES				Home
This Month	Jan-07	Actual	vs	Budget	9.0	
			vs	Last year	10.0	
YTD		Actual	vs	Budget	9.1	
			vs	Last year	10.0	
	Next Year Opinion		vs	Budget	8.4	

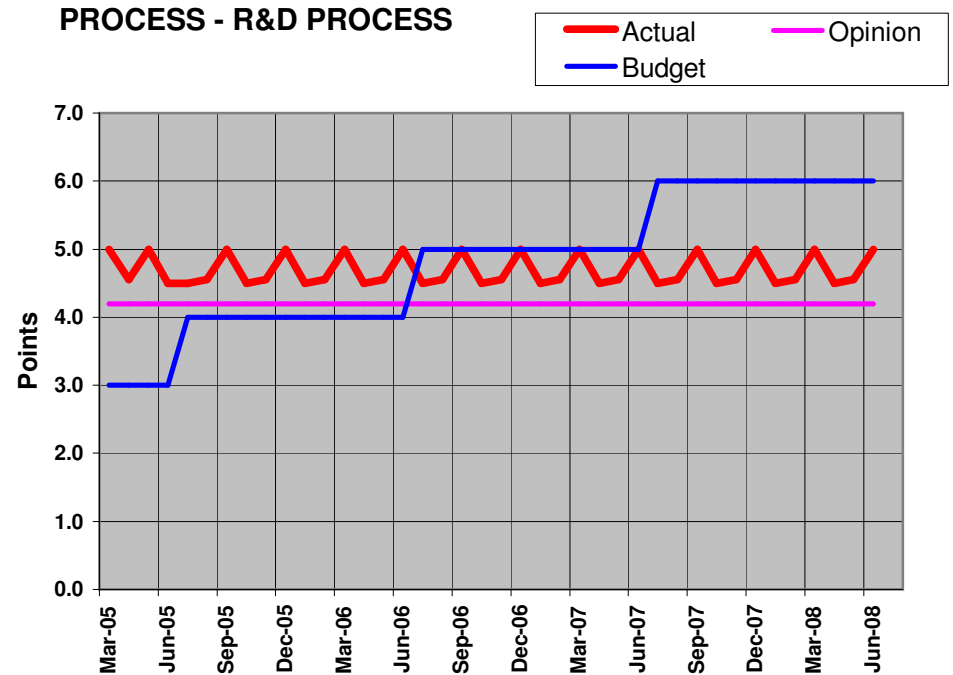
PROCESS - R&D Process



Measures scored include Physical resources, Technical understanding, Technical staff, Project plan, Innovation, IP generation, Technical risk, Business Plan fit, Documentation, Project performance

Comment:

GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH

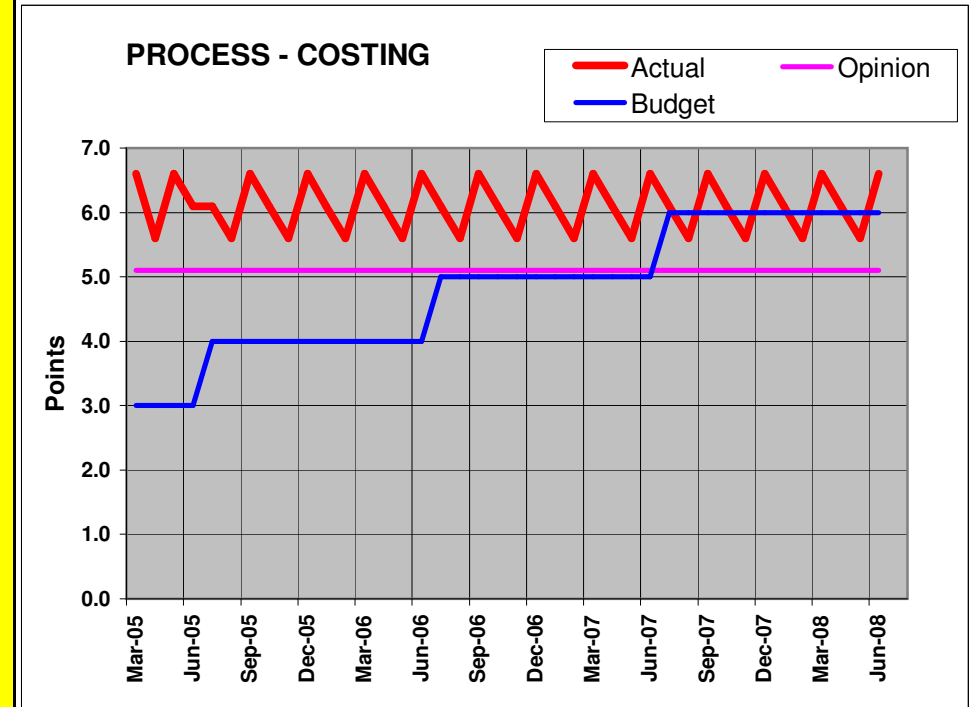


PROCESS	Costing	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES				Home
This Month	Jan-07	Actual	VS	Budget	10.0	
			VS	Last year	10.0	
YTD		Actual	VS	Budget	10.0	
			VS	Last year	10.0	
	Next Year Opinion		VS	Budget	10.0	

Measures scored include Standard costing, Cost recording, Cost reporting, Cost analysis, Corrective action, CAPEX proposal costing, Cost commitments, , ,

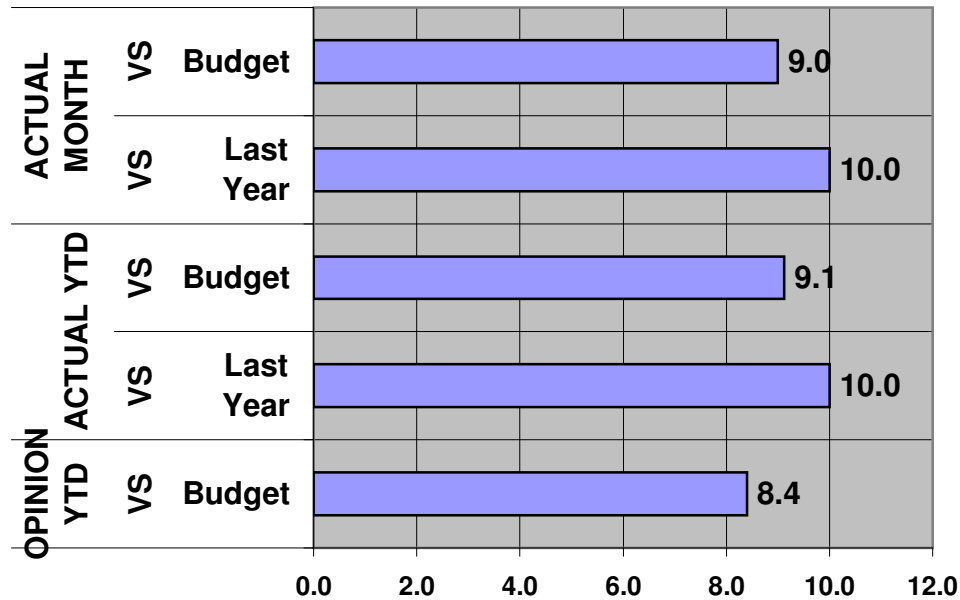
Comment:

GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



PROCESS	Prod Planning	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES				Home
This Month	Jan-07	Actual	VS	Budget	9.0	
			VS	Last year	10.0	
YTD		Actual	VS	Budget	9.1	
			VS	Last year	10.0	
	Next Year Opinion		VS	Budget	8.4	

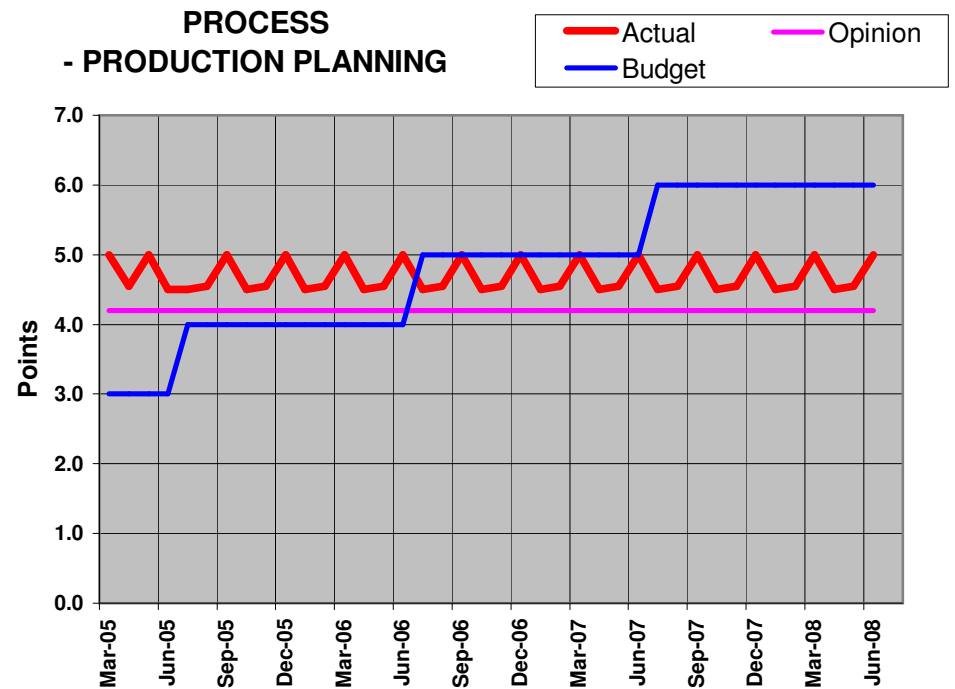
PROCESS - Production Planning



Measures scored include Order system, Job orders, Production orders, Production meetings, Delegation, Production review, Corrective action response, Costing system, Time management, Quality

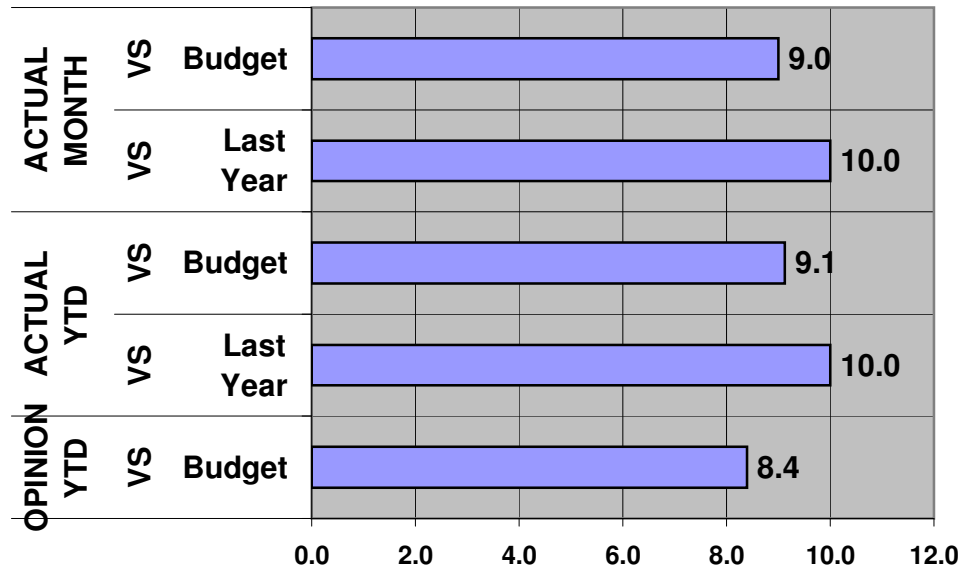
Comment:

GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



PROCESS	Purchasing	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES				Home
This Month	Jan-07	Actual	VS	Budget	9.0	
			VS	Last year	10.0	
YTD		Actual	VS	Budget	9.1	
			VS	Last year	10.0	
		Next Year Opinion	VS	Budget	8.4	

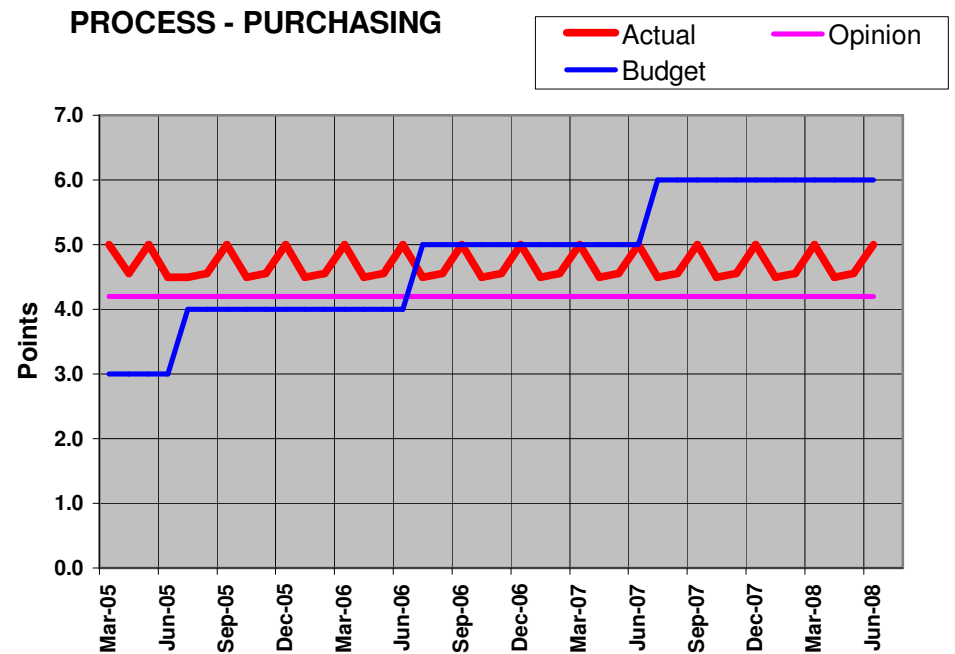
PROCESS - Purchasing



Measures scored include Inventory system - physical, Inventory system - information system, Minimum order quantities, Supplier choice, Negotiating capability, Negotiating success, On-time delivery, Quality delivered, Purchasing organisation, Purchasing documentation

Comment:

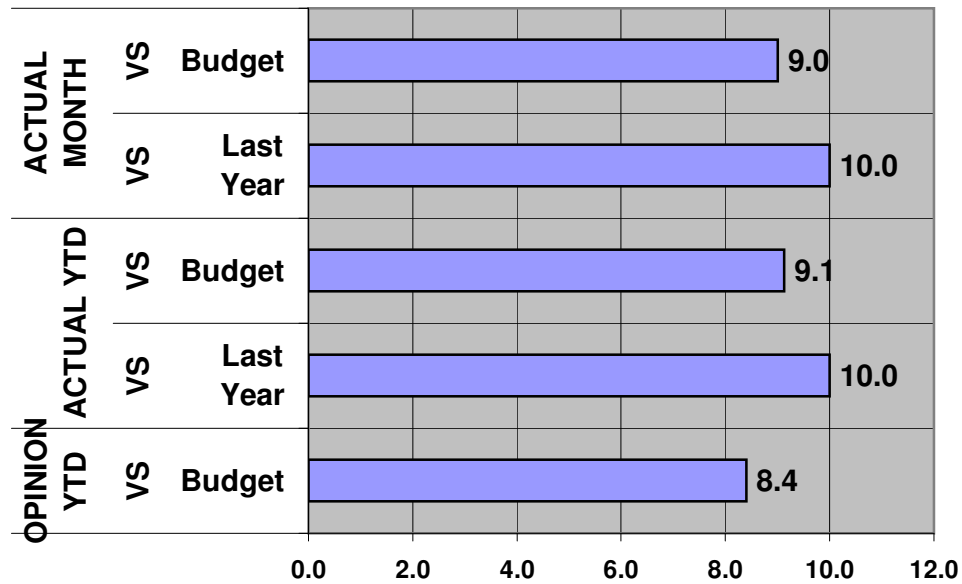
GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



PROCESS	Proof of Concept	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES			
This Month	Jan-07	Actual	VS	Budget	9.0
			VS	Last year	10.0
YTD		Actual	VS	Budget	9.1
			VS	Last year	10.0
	Next Year Opinion		VS	Budget	8.4

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PROCESS - Proof of Concept

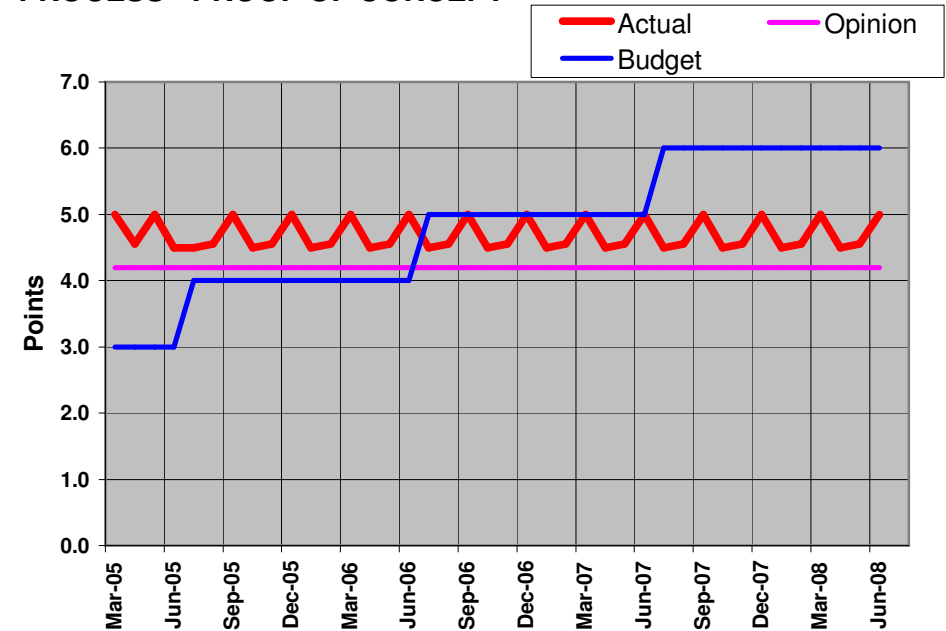


Measures scored include Physical resources, Technical understanding, Technical staff, Project plan, Innovation, IP generation, Technical risk, Business Plan fit, Documentation, Project performance

Comment:

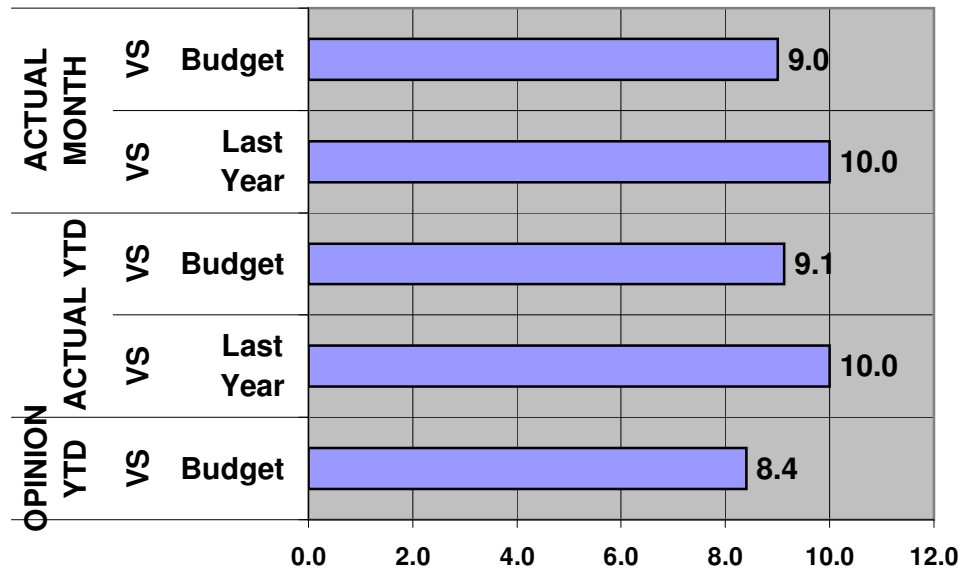
GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH

PROCESS - PROOF OF CONCEPT



PROCESS	Service	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES				Home
This Month	Jan-07	Actual	vs	Budget	9.0	
			vs	Last year	10.0	
YTD		Actual	vs	Budget	9.1	
			vs	Last year	10.0	
	Next Year Opinion		vs	Budget	8.4	

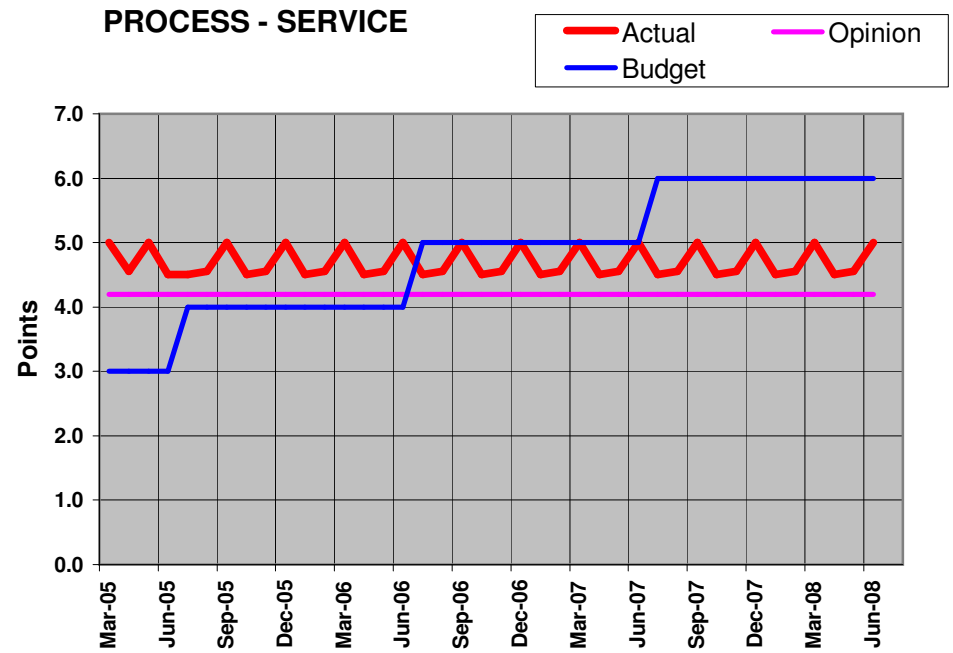
PROCESS - Service



Measures scored include Service quality, Service rework, Service response time, Service margins, Service capability, Service process, Service manuals, Online service, Service courtesy follow-up, Service jobs analysis

Comment:

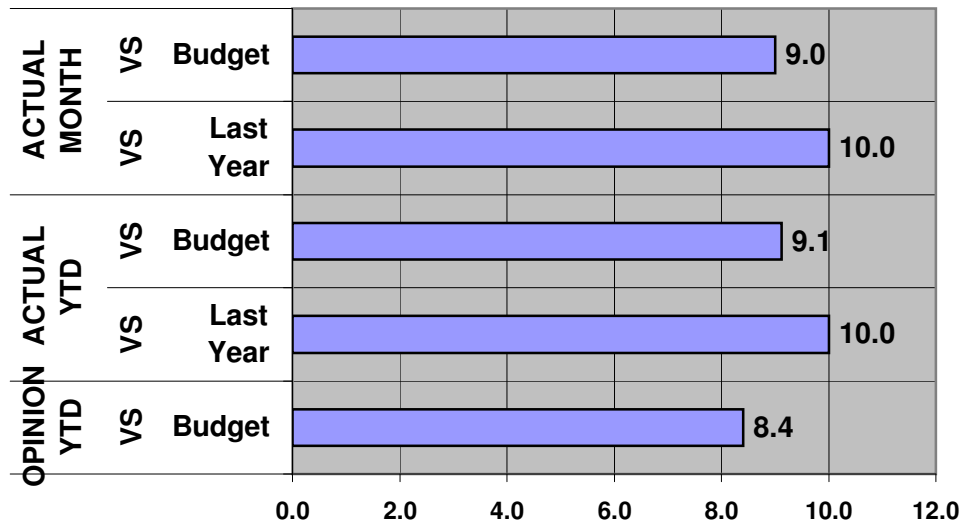
GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



PROCESS	Early Stage Commercialisation	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES			
This Month	Jan-07	Actual	VS	Budget	9.0
			VS	Last year	10.0
YTD		Actual	VS	Budget	9.1
			VS	Last year	10.0
	Next Year Opinion		VS	Budget	8.4

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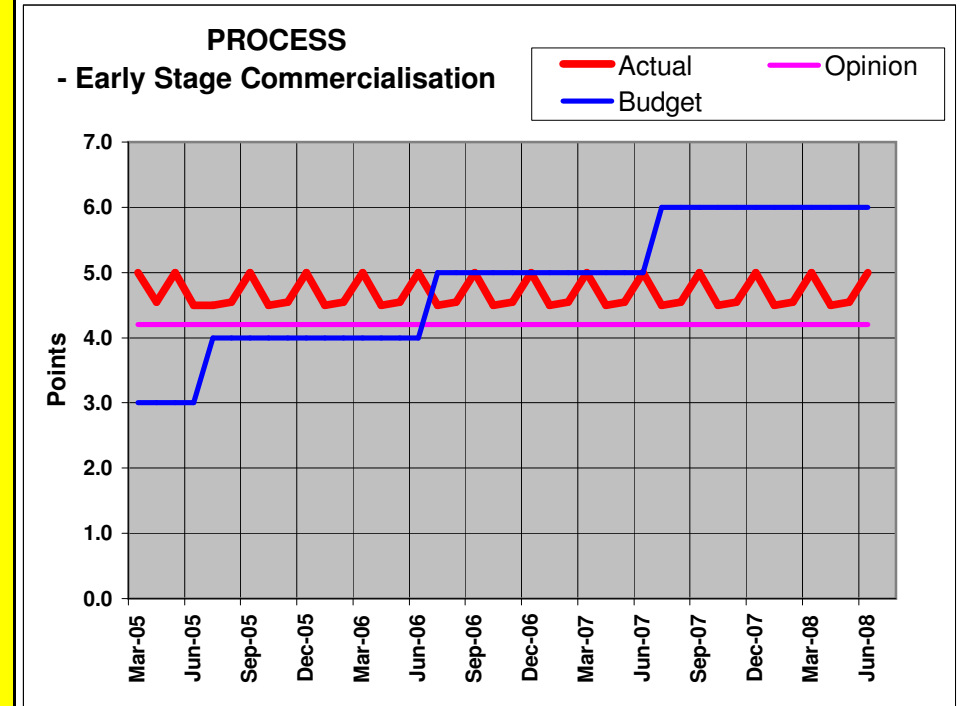
PROCESS - Early Stage Commercialisation



Measures scored include Physical resources, Technical understanding, Technical staff, Project plan, Innovation, IP generation, Technical risk, Business Plan fit, Documentation, Project performance

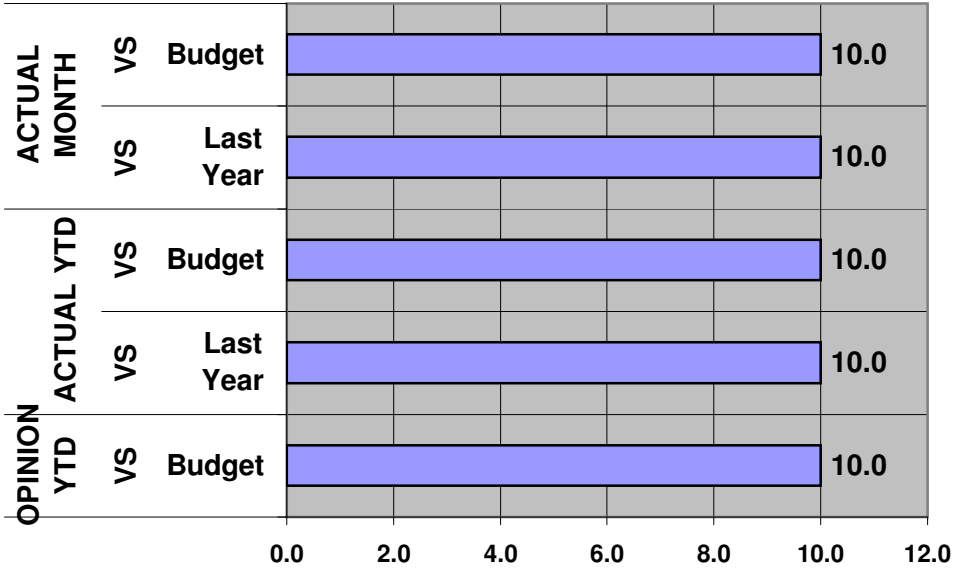
Comment:

GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



TEAM	Results	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES				Home
This Month	Jan-07	Actual	VS	Budget	10.0	
			VS	Last year	10.0	
YTD		Actual	VS	Budget	10.0	
			VS	Last year	10.0	
	Next Year Opinion		VS	Budget	10.0	

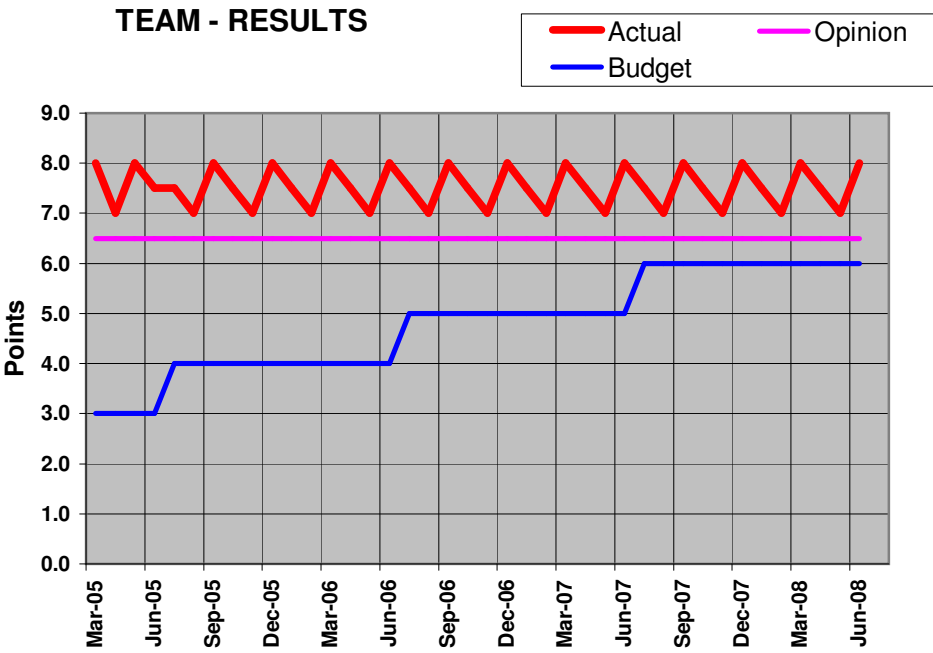
TEAM - Results



Measures scored include Stake in the outcome , Achievement , Performance focus , Advancement , , , , ,

Comment:

GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH

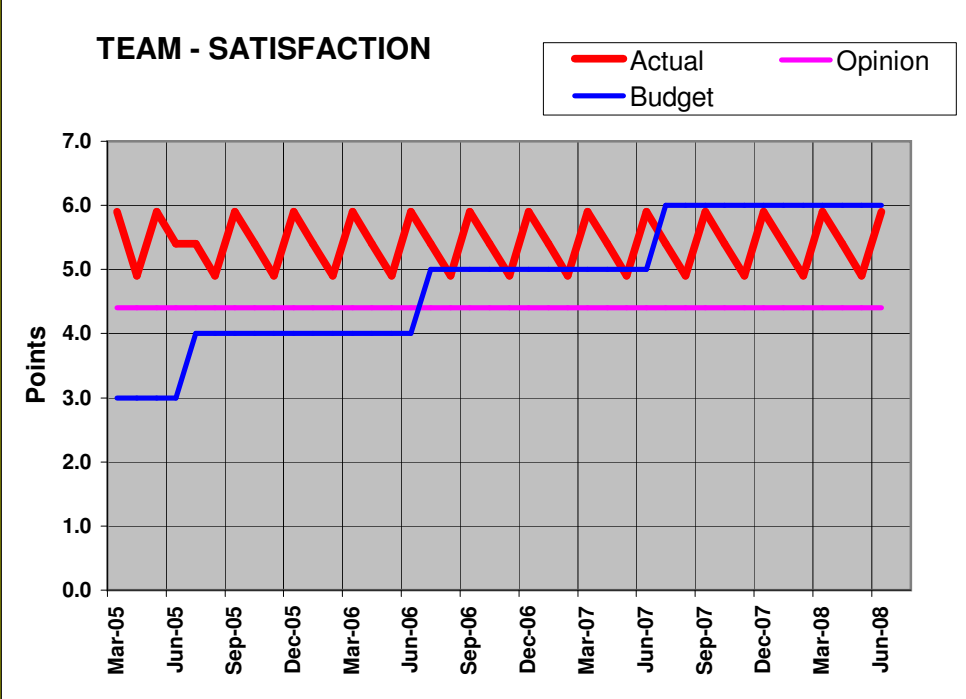
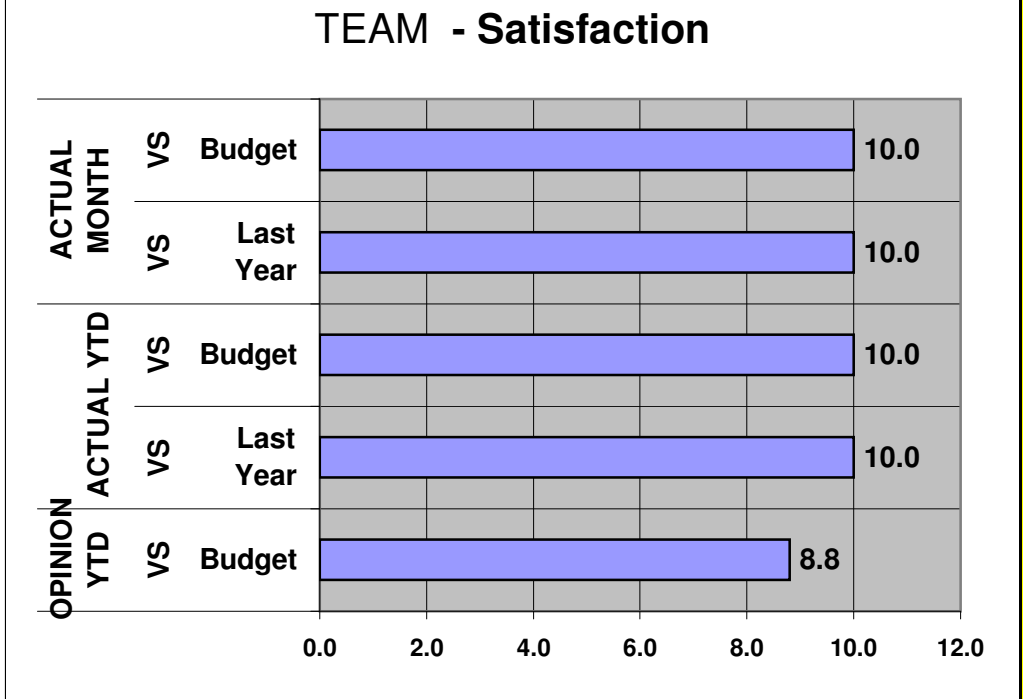


TEAM	Satisfaction	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES				Home
This Month	Jan-07	Actual	VS	Budget	10.0	
			VS	Last year	10.0	
YTD		Actual	VS	Budget	10.0	
			VS	Last year	10.0	
	Next Year Opinion		VS	Budget	8.8	

Measures scored include Optimistic , Enjoyable , Peaceful , Feel responsible , Free to take risks , Integrity , Trust , Passion , ,

Comment:

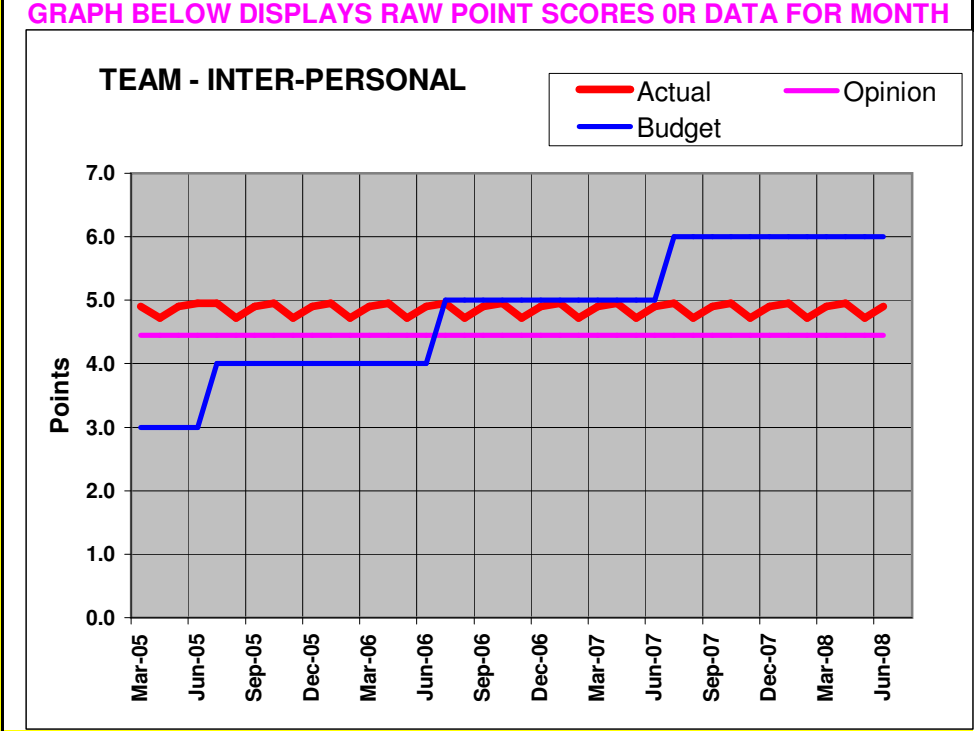
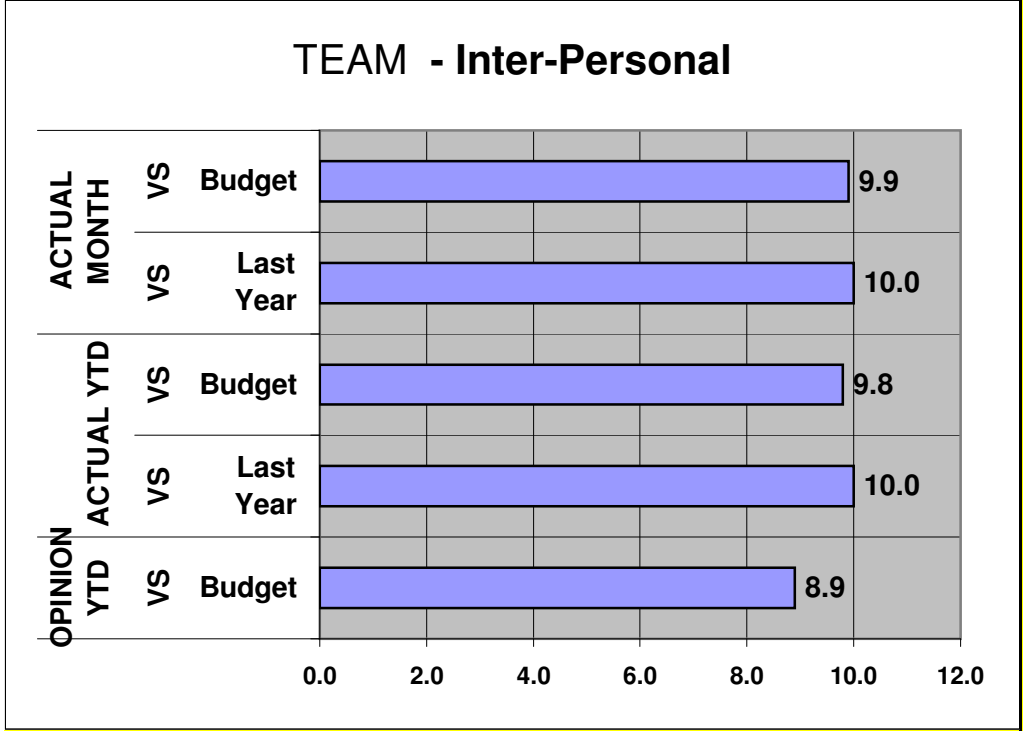
GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH



TEAM	Inter-Personal	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES				Home
This Month	Jan-07	Actual	vs	Budget	9.9	
			vs	Last year	10.0	
YTD		Actual	vs	Budget	9.8	
			vs	Last year	10.0	
	Next Year Opinion		vs	Budget	8.9	

Measures scored include Objectivity , Problem-solving , Planning, Consultation , Respect , Quality relationships , Cooperation , , ,

Comment:



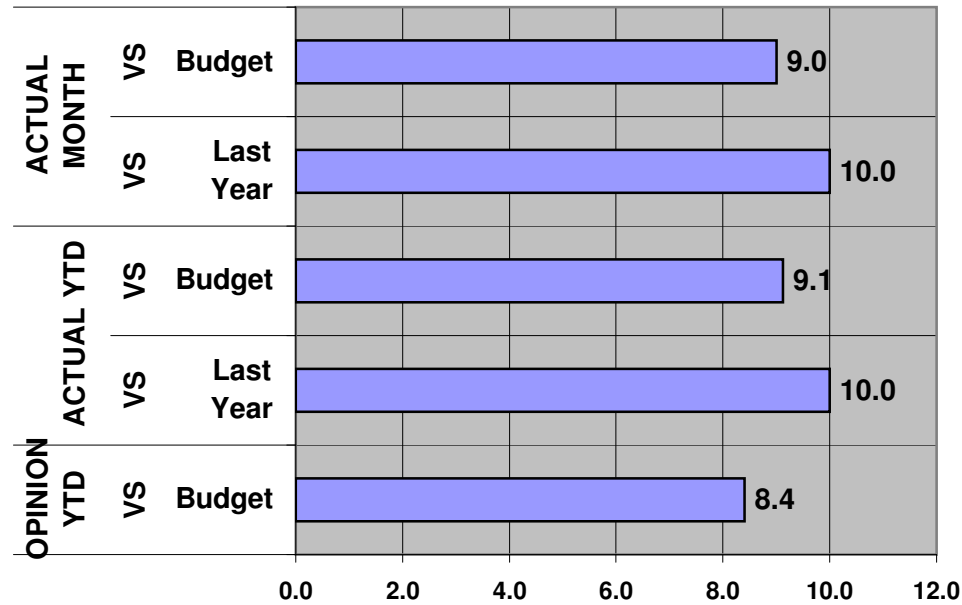
TEAM	Capability	TABLE & BAR CHART BELOW DISPLAYS COMPARATIVE SCORES			
This Month	Jan-07	Actual	VS	Budget	9.0
			VS	Last year	10.0
YTD		Actual	VS	Budget	9.1
			VS	Last year	10.0
	Next Year Opinion		VS	Budget	8.4

Measures scored include Encourages creativity , Allows visioning , Potential tapped , Leadership-sharing , Challenging , Understanding, Training, Commercialisation management, Project management, Business management

Comment:

GRAPH BELOW DISPLAYS RAW POINT SCORES OR DATA FOR MONTH

TEAM - Capability



TEAM - CAPABILITY

