

Project Plan

- Not started
- On Plan
- ✓ Complete
- ◆ Issues

Date of Report	May 26, 2017		
Name	Client Performance Management System		Sponsor Bill Praxton, CFO
Start Date	5/17/17	End Date	7/26/17

Balanced Scorecard Design and Development Plan

Item No	Task	Actual Start Date	Tentative Start Date	Impact on Completion (Actual vs. Target)	Target Completion date & Status	Comments	Deliverables	Lead
1. Refresh the Strategic Plan		6/1/17			4/30/05			
1.1	Review current strategic planning documents and determine if the current plan is appropriate for the Balanced Scorecard	5/19/17			3/31/05	n		
1.2	Prepare for Strategic Planning Off-site				4/15/05	ü		
1.3	Strategic Planning working group to develop draft revised Strategic Plan - See Planning Workshop Coordinator for more details					m	1) Kick off meeting of technical group	
1.4	Senior Leadership approves revised Strategic Plan					m		
1.5	Communicate Strategic Plan and Balanced Scorecard in printed and electronic format					m	1) Strategic Plan booklet 2) Strategy Map Draft	
2. Strategy Map / Strategic Plan								
2.1	Preliminary Draft Map with no extras for Gap Analysis only						3) Very Basic Strategy Map	
2.2	Isolate holes / gaps between draft strategic plan vs. Draft Strategy Map						4) Gap Analysis Results and recommendations to fill out S-Plan	
2.3	Make revisions to lower level objectives in Draft Strategic Plan and fill-out Strategy Map for all components - themes, narrative add-on's and complete cause-effect flows.						5) Revised Strategic Plan 6) Revised Strategy Map	
2.4	Approval of Revised Strategic Plan and Final and Complete Strategy Map					May have to schedule at joint leadership off-site	7) Briefing Session	
2.5	Develop Communication Plan for Strategic Plan						8) Communication Plan	
2.6	Launch Action Plan Steps for Strategic Plan with Strategy Map					May require meetings and other events per the Communication Plan	9) Action Plan for Communication Plan	

2.7	Centralize feedback and comments for next planning cycle. Collect and recommend for next planning session cycle.						Output from this step does not get acted upon until next annual planning cycle.	10) Feedback Collection System and Reports	
3. Measurements and Targets									
3.1	Create measurement and target development workplan complete with templates and methodology							11) Performance measurement training, tools, methodology	
3.2	Quality control review to refine and improve complete measurement approach for client							Final set of tools to development enterprise wide performance measurements	
3.3	Extend each objective on the Strategy Map into one to three performance measurements						Follow the methodology and training		
3.4	Solicit input and feedback from functional leads and line and staff personnel							Revised set of performance measurements	
3.5	Establish a set of targets in accordance with operational goals that are linked to the Strategic Plan							Targets for each measurement	
3.6	Identify initiatives and projects related to execution of each objective. Extend the Map							Scorecard Model	
3.7	Prototype test Scorecard Model for data points that use existing measurement data						Make sure model is tight / fits across all components		
3.8	Complete a comprehensive measurement template for database development							Performance measurement development template	
4. Initiative Mapping and Budgeting									
4.1	Extend Initiative and Projects that are part of Scorecard Model into Action Plans or document with existing plans						Extended Scorecard Model ensures execution of the Strategic Plan	Extended Scorecard Model	
4.2	Link the Initiative / Projects within the Scorecard Model to the Budgeting Process								
4.3	Identify gaps and short coming with linking and make recommendations to improve							Recommended Changes to Link Processes Together	
4.4	Cross walk all major initiatives against the Strategic Objectives - Pareto Chart the initiatives / projects							Graph of what should get resourced vs. what should not	
4.5	Work back upstream from initiatives / projects not linked and document any missing lower level objectives in strategic plan and / or strategy map							Operating Plan / Sub Objective Additions	
5. Reporting Framework (Database)									

5.1	Map and build a framework structure from the highest organizational level down to the managerial level						See other similar models from other performance management projects	Visual prototype framework for review		
5.2	Align and link lower level components by through objective setting - upper to lower by organizational level / reporting units									
5.3	Assign performance measurements for lower level objectives. Index across common reporting units for the same objective.									
5.4	Complete a comprehensive measurement template for database development for this reporting level (lower objectives)									
5.5	Prototype test and revise database design of Balanced Scorecard System - (ESMS)						NOTE: The IT Design and Development Plan covers automation of the Enterprise Strategic Management System	Various automated tools, such as data collection forms, reporting tools, etc.		
5.6	Roll out test modules at pilot sites - flush out lessons learned and update IT Plans									
5.7	Cascade and development plan for Enterprise Strategic Management System (ESMS)							ESMS Design and Development Plan		
							Baseline End Date	7/15/17		

Major Issues				
Item No.	Description	Comments	Status	
1				
2				
3				
4				

