



Inviso Consulting Group Scorecards and Dashboards



Effective strategy implementation requires performance management. Inviso’s Consulting Group has tremendous experience in creating scorecards, including selecting goals and KPIs; managing complex target setting processes; and, in collaboration with our Business Intelligence team, building and publishing scorecards and dashboards. Inviso enables clients to realize strategic objectives through scorecard processes.

Corporate Challenge

Corrected Scorecards

High complexity

Accountability cascade through organization

This global software company knew it had to integrate the performance management of its matrixed business groups more effectively to ensure that all parts of the organization contributed to achieving the company’s strategic objectives. It introduced a single “über” scorecard for the organization, supported by more than thirty business scorecards with interconnected metrics to drive achievement.

The sales group that sold the company’s solutions to the enterprise was responsible for one of the business scorecards, which contained metrics that fed into the “über” scorecard and were shared by the business groups that produced the companies products. The level of complexity faced by the enterprise sales group was particularly high because of its prominent role in the company, the interwoven structure of sales teams that sell to the enterprise, and its requirements for supporting data to illuminate drivers of metric outcomes for sales leaders. Further, once a metric was selected and a target negotiated, the target had to be broken down by for seasonality and cascaded through industry sectors and geographies.

Solution

Target governance

The enterprise sales group decided that accountability for each scorecard goal would sit with a “metric owner,” but had not established a system for coordinating metric owner efforts to yield a complete scorecard. Their sales operations team asked for Inviso’s assistance in establishing and managing a scorecard process. Inviso’s solution included:

Training metric owners

- Proposing, documenting and driving a governance framework for enterprise targets that delineates where in the organization target allocation decisions are made.
- Developing readiness and training metric owners on their responsibilities for negotiating targets.

Scorecard community management

- Interfacing with the company-wide scorecard team and the enterprise systems team to communicate business requirements, understand technical requirements and schedules, and resolve conflicts.
- Managing the “metric owner” community, field scorecard representatives, and segment counterparts to ensure that all targets are submitted on time and validated appropriately.

Business guidance

- Creating a summary business guidance document for sales leaders that define each metric, explain why the metric is important, describe how to achieve their targets, and contains links to further information.
- Created and managed a “Correction of Errors” process for responding when targets were missed.

Response for missed goals

Inviso has now managed the scorecard process for the enterprise group for four years, and has extended its efforts to support two additional teams. Inviso’s system for scorecard management has evolved as refinements and additional requirements are introduced each year by the central scorecard team and by field users. Each year, the enterprise scorecard is produced accurately and on-time, enabling company employees to focus on the strategic objectives that underpin each metric.

Accurate and on-time