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MAKING STRONG SUCCESS

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STRATEGIC PLANNING TRAINING IN THE PHILIPPINES

STRATEGY TO SCORECARD

Practical Balanced Scorecard Strategic Planning for Translating Vision into Strategic Objectives, Strategy Maps, KPIs, Targets, Strategic Initiatives, and Execution

This program is strategically developed for organizations searching for **Strategic Planning Training in the Philippines**, **Training on Strategic Planning in the Philippines**, **Company Planning Training in the Philippines**, **Training on Company Planning in the Philippines**, **Enterprise Planning Training in the Philippines**, **Training on Enterprise Planning in the Philippines**, **Business Planning Training in the Philippines**, **Training on Business Planning in the Philippines**, **Planning Strategically Training in the Philippines**, and **Training on Planning Strategically in the Philippines.**

This particular MSS Corporation program deliberately uses the **Balanced Scorecard as its strategic planning framework, model, and process—and nothing else.** It does not mix the Balanced Scorecard with SWOT, PESTLE, OKRs, OGSM, Hoshin Kanri, Blue Ocean Strategy, or other strategic-planning frameworks.

TRAINING OVERVIEW

Many organizations say they have a strategic plan.

Yet when managers and employees are asked:
“What exactly is our strategy?”

they may give different answers.

When asked:
“How will we know whether the strategy is working?”

the answer may be even less clear.

Organizations may have:

- Mission and vision statements;
- annual goals;
- revenue targets;
- departmental plans;
- projects;
- budgets;
- individual KPIs; and
- lists of activities,

but these elements may not form one coherent strategy.

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Common strategic-planning problems include:

- Too many strategic priorities;
- broad statements such as “Grow the business” or “Improve customer service”;
- objectives that are not measurable;
- KPIs disconnected from strategy;
- departments pursuing unrelated priorities;
- targets based on aspiration rather than strategic intent;
- strategic initiatives selected without clear linkage to objectives;
- financial measures dominating the scorecard;
- measures being confused with objectives;
- activities being confused with accomplishments;
- initiatives being confused with strategy;
- managers focusing only on their own departments;
- employees not understanding how their roles contribute to company strategy;
- strategic planning ending once the planning workshop is over;
- scorecards being prepared but rarely reviewed; and
- annual plans becoming operational to-do lists rather than strategy-execution systems.

The **Balanced Scorecard** addresses this problem by translating strategy into a connected set of strategic objectives, measures, targets, and initiatives viewed through four perspectives:

1. **Financial**
2. **Customer**
3. **Internal Business Process**
4. **Learning and Growth**

For private-sector organizations, these four perspectives normally express an important strategic logic: **Develop the organizational capabilities required to improve critical internal processes, which enables stronger customer value and ultimately produces desired financial results.**

Strategy to Scorecard: Strategic Planning Training in the Philippines equips leaders, managers, planning teams, department heads, strategy personnel, and key organizational decision-makers with the practical capability to develop and execute strategy using the **Balanced Scorecard framework from beginning to end**.

Participants learn how to move systematically from:

Vision and Strategy
↓
Balanced Scorecard Perspectives
↓
Strategic Objectives
↓
Cause-and-Effect Relationships
↓

Strategy Map
↓
Measures / KPIs
↓
Targets
↓
Strategic Initiatives
↓
Department and Employee Alignment
↓
Strategy Review and Execution

The program emphasizes an important principle:
A strategic plan is not merely a document describing what the organization wants to do. It should become a management system that clarifies where the organization is going, what must change, what should be measured, what results are expected, and what initiatives must be executed.

Following MSS Corporation's **EnterTRAINment** methodology, this **Training on Strategic Planning in the Philippines** minimizes lecture-heavy discussion. Participants develop strategic objectives, challenge poorly written objectives, construct cause-and-effect relationships, build a Strategy Map, define KPIs and targets, prioritize strategic initiatives, develop Balanced Scorecards, and simulate a strategy-performance review.

TRAINING GOAL

To equip participants with the practical knowledge and skills required to develop, communicate, cascade, measure, execute, and review an organizational strategic plan using the **Balanced Scorecard framework and process exclusively**.

TRAINING OBJECTIVES

By the end of the program, participants should be able to:

1. **Explain** the purpose of strategic planning;
2. **Explain** how the Balanced Scorecard converts strategy into an actionable management system;
3. **Differentiate** mission, vision, strategy, strategic objectives, measures, targets, and initiatives;
4. **Explain** the four Balanced Scorecard perspectives;
5. **Translate** organizational strategy into appropriate strategic objectives;
6. **Differentiate** strategic objectives from activities, projects, measures, and targets;
7. **Develop** strategic objectives using clear action-oriented wording;
8. **Position** strategic objectives under the appropriate Balanced Scorecard perspectives;
9. **Identify** cause-and-effect relationships among strategic objectives;
10. **Construct** a coherent organizational Strategy Map;

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11. **Explain** the strategic logic connecting Learning and Growth, Internal Business Process, Customer, and Financial outcomes;
12. **Develop** appropriate measures or KPIs for strategic objectives;
13. **Differentiate** leading and lagging measures where applicable;
14. **Avoid** common KPI-design problems such as measuring activities instead of strategic results;
15. **Set** meaningful performance targets;
16. **Identify** strategic performance gaps;
17. **Develop** strategic initiatives specifically designed to close those gaps;
18. **Differentiate** strategic initiatives from routine operational activities;
19. **Prioritize** initiatives according to their contribution to strategic objectives;
20. **Assign** accountability for objectives, measures, targets, and initiatives;
21. **Develop** an organizational Balanced Scorecard;
22. **Cascade** strategic objectives and measures into relevant departmental scorecards;
23. **Connect** departmental contributions with enterprise strategy;
24. **Explain** how individual employee performance measures may support departmental and organizational strategic objectives;
25. **Conduct** a structured strategy-performance review using the Balanced Scorecard;
26. **Identify** strategic underperformance and required management responses;
27. **Distinguish** strategy-review discussions from ordinary operational meetings;
28. **Use** Balanced Scorecard results to support strategic learning and decision-making; and
29. **Prepare** a practical Balanced Scorecard Strategic Planning and Execution Roadmap.

LEARNING DOMAINS ADDRESSED

Cognitive Domain
Participants strengthen their understanding of strategy, Balanced Scorecard perspectives, strategic objectives, Strategy Maps, measures, targets, initiatives, cascading, performance review, and strategy execution.

Affective Domain
Participants strengthen strategic thinking, accountability, organizational alignment, results orientation, shared ownership, discipline, and commitment to strategy execution.

Psychomotor and Behavioral Domain
Participants practice writing strategic objectives, mapping cause-and-effect relationships, developing scorecards, selecting KPIs, establishing targets, designing strategic initiatives, cascading strategy, and conducting strategic performance reviews.

FROM POINT A TO POINT B

Point A: Before the Training

Organizations and participants may:

- Treat Strategic Planning as an annual event;
- maintain disconnected goals;
- confuse strategy with activities;
- create long lists of priorities;
- write vague objectives;
- focus heavily on financial targets;
- create departmental plans independently;
- select KPIs without strategic logic;
- measure what is easy rather than what matters;
- confuse KPIs with strategic objectives;
- choose initiatives before defining the strategic gap;
- create projects not linked to strategy;
- have no Strategy Map;
- lack cause-and-effect logic among objectives;
- have inconsistent departmental scorecards;
- fail to connect employee performance with strategy;
- focus on activities instead of outcomes;
- monitor results without understanding drivers;
- review scorecards only for compliance;
- conduct operational meetings but not strategic reviews; or
- develop plans that are never systematically executed.

Point B: After the Training

Participants should be better able to:

- Understand strategy as a connected system of choices and desired outcomes;
- translate strategy through the Balanced Scorecard;
- define strategic objectives clearly;
- organize objectives under the four perspectives;
- establish strategic cause-and-effect relationships;
- construct a Strategy Map;
- identify appropriate measures;
- establish meaningful targets;
- identify strategic performance gaps;
- develop initiatives linked to objectives;
- build an enterprise Balanced Scorecard;
- cascade strategy across departments;

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- connect departmental contributions to company strategy;
- assign strategic accountability;
- distinguish strategic measures from operational activity metrics;
- review strategy systematically;
- identify where execution is failing;
- adapt management actions based on scorecard evidence; and
- use the Balanced Scorecard as an ongoing strategy-management system.

ORGANIZATIONAL CHALLENGES ADDRESSED

This **Company Planning Training in the Philippines** may help organizations address:

- Lack of clearly articulated strategic priorities;
- employees not understanding organizational strategy;
- too many objectives;
- vague strategic objectives;
- financial targets without strategic drivers;
- disconnected departmental plans;
- departments working in silos;
- inconsistent company and departmental KPIs;
- measures unrelated to strategy;
- activity-based scorecards;
- unclear organizational priorities;
- projects disconnected from strategic objectives;
- weak accountability for strategy execution;
- no Strategy Map;
- conflicting departmental initiatives;
- poorly defined targets;
- scorecards containing too many measures;
- initiatives selected based on preference rather than strategic necessity;
- strategic plans that remain presentations or documents;
- management meetings focused exclusively on operations;
- poor tracking of strategic initiatives;
- employees unable to connect their roles with company strategy;
- weak alignment between company, department, and individual performance; or
- organizations seeking a disciplined Balanced Scorecard planning system.

WHAT STRATEGIC PLANNING MEANS IN THIS PROGRAM

Within this program, Strategic Planning means the systematic translation of organizational direction into:

- Strategic objectives;
- strategic cause-and-effect relationships;

- Balanced Scorecard perspectives;
- a Strategy Map;
- measures or KPIs;
- targets;
- strategic initiatives;
- accountability;
- cascading;
- strategy review.

This program intentionally uses the **Balanced Scorecard model exclusively**.

WHAT THE BALANCED SCORECARD IS

The Balanced Scorecard is a strategy-management framework that helps organizations translate strategy into an integrated set of objectives and measures viewed through four perspectives.

These perspectives prevent management from evaluating organizational performance solely through short-term financial results.

THE FOUR BALANCED SCORECARD PERSPECTIVES

1. FINANCIAL PERSPECTIVE

Strategic Question
What financial outcomes must the organization achieve to succeed?

Possible strategic concerns may include:

- Revenue growth;
- profitability;
- margin improvement;
- cash generation;
- asset productivity;
- cost efficiency;
- return on investment;
- financial sustainability.

Examples of strategic objectives:

- Increase profitable revenue;
- improve operating margin;
- strengthen cash generation;
- optimize operating costs;

- improve return on strategic investments.

Financial measures generally represent important **lagging outcomes** of strategy execution.

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2. CUSTOMER PERSPECTIVE

Strategic Question
What customer outcomes must we create to achieve our financial objectives?

Possible strategic concerns include:

- Customer acquisition;
- customer retention;
- customer satisfaction;
- customer loyalty;
- customer experience;
- market share;
- customer value;
- brand preference;
- service reliability.

Examples of strategic objectives:

- Increase customer retention;
- strengthen customer satisfaction;
- improve customer experience;
- grow priority customer segments;
- strengthen customer value proposition.

The Customer Perspective connects organizational strategy with the value the organization must deliver to the market.

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3. INTERNAL BUSINESS PROCESS PERSPECTIVE

Strategic Question
Which internal processes must we excel at to deliver the required customer and financial outcomes?

Possible areas include:

- Sales processes;
- service delivery;
- production;
- quality;
- innovation;

- fulfillment;
- customer management;
- operations;
- supply chain;
- compliance;
- productivity;
- process improvement.

Examples:

- Improve lead conversion;
- shorten service-delivery cycle time;
- strengthen quality consistency;
- improve operational productivity;
- accelerate product development;
- improve customer-issue resolution.

This perspective identifies the organizational processes that must perform differently or better for strategy to succeed.

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4. LEARNING AND GROWTH PERSPECTIVE

Strategic Question
What people, capabilities, technology, information, culture, and organizational capacity must we strengthen to improve our processes?

Possible strategic concerns include:

- Employee competencies;
- leadership capability;
- workforce productivity;
- employee engagement;
- technology;
- information;
- culture;
- knowledge;
- organizational alignment.

Examples:

- Strengthen leadership capability;
- build critical workforce competencies;
- improve employee engagement;
- strengthen digital capability;
- improve access to management information;

- strengthen performance culture.

Learning and Growth provides much of the **organizational capacity that enables the other perspectives to succeed.**

BALANCED SCORECARD CAUSE-AND-EFFECT LOGIC

The four perspectives should not become four unrelated lists.

They should express the organization's strategic hypothesis.

A simplified example:
Learning and Growth
Strengthen sales-team capability
↓
Internal Business Process
Improve consultative-selling effectiveness
↓
Customer
Increase customer conversion and retention
↓
Financial
Grow profitable revenue

This relationship answers:
“Why should achieving this objective contribute to achieving the next objective?”

That strategic logic forms the foundation of the Strategy Map.

STRATEGIC OBJECTIVES

Strategic objectives describe what the organization must accomplish strategically.

Good objectives are:
- Results-oriented;
- strategically significant;
- understandable;
- actionable;
- sufficiently specific;
- measurable through appropriate indicators.

OBJECTIVE VERSUS MEASURE

These are not the same.

Strategic Objective
Increase customer retention

Measure
Customer Retention Rate

Target
≥ 90%

Initiative
Strategic Account Retention Program

This distinction is fundamental to Balanced Scorecard development.

OBJECTIVE VERSUS ACTIVITY

Weak strategic objective:
“Conduct employee training.”

That is an activity.

Potential strategic objective:
Strengthen critical workforce capability.

Possible initiative:
Leadership and Technical Capability Development Program.

The objective describes the strategic result.

The initiative describes one intervention intended to achieve it.

STRATEGY MAP

A Strategy Map visually communicates the organization's strategic objectives and their cause-and-effect relationships across the Balanced Scorecard perspectives.

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A simplified private-sector structure may resemble:

FINANCIAL
Increase Profitable Revenue
↑
Improve Operating Margin

CUSTOMER
Increase Customer Retention
↑
Strengthen Customer Value

INTERNAL BUSINESS PROCESS
Improve Service Quality
↑
Increase Process Efficiency

LEARNING AND GROWTH
Strengthen Employee Capability
↑
Improve Leadership Effectiveness

The actual map should reflect the organization's specific strategy rather than generic objectives.

WHY STRATEGY MAPS MATTER

A Strategy Map helps answer:

- What are our most important objectives?
- How do they relate?
- What drives what?
- What organizational capabilities enable performance?
- What processes create customer value?
- What customer outcomes generate financial results?
- Where should management focus?

It therefore communicates the **logic of strategy**, not merely its components.

DEVELOPING BALANCED SCORECARD MEASURES

Once strategic objectives are defined, appropriate measures or KPIs are developed.

A useful measure should:

- Represent the objective meaningfully;
- provide decision-useful information;
- be sufficiently measurable;
- have available or obtainable data;
- have clear calculation methodology;
- have an owner;
- support management action.

EXAMPLE

Strategic Objective
Improve customer satisfaction.

Possible Measure
Customer Satisfaction Score.

Target
≥ 90%.

Reporting Frequency
Monthly.

Owner
Customer Experience Head.

The scorecard converts strategic intent into measurable accountability.

LEADING AND LAGGING MEASURES

Where appropriate, organizations may use both.

Lagging Measure
Shows an outcome that has already occurred.

Examples:

- Revenue;
- profit;
- customer retention;
- employee turnover.

Leading Measure
Provides information about a driver that may influence future outcomes.

Example:
If the strategic objective is:
Strengthen Sales Capability

a relevant capability or behavioral indicator may help management understand whether the conditions for improved sales outcomes are developing.

A Balanced Scorecard should help management understand both:

What results are occurring?

And

What strategic drivers are producing those results?

SETTING STRATEGIC TARGETS

A measure without a target does not clearly establish expected performance.

Targets answer:
“How much performance is required?”

Examples:

- Revenue: ₱50 million
- Gross Margin: ≥ 35%
- Customer Retention: ≥ 90%
- On-Time Delivery: ≥ 95%
- Employee Engagement: ≥ 85%

Targets should represent intended strategic performance rather than arbitrary numbers.

BASELINE, TARGET, AND GAP

A useful strategy discussion compares:

Current Performance
Where are we now?

Target
Where must we be?

Gap
What must change?

Example:
Current Customer Retention: 78%

Target: 90%

Strategic Gap: 12 percentage points

The next question becomes:
What strategic initiative is required to close this gap?

STRATEGIC INITIATIVES

Strategic initiatives are significant projects or programs designed to improve performance against strategic objectives.

Examples:

- Digital Transformation Program;
- Leadership Development Program;
- Customer Experience Redesign;
- Sales Force Effectiveness Program;
- Process Automation Project;
- Service Quality Improvement Program.

Initiatives consume organizational:

- Money;
- people;
- time;

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- management attention.

They should therefore be directly linked to strategic priorities.

STRATEGIC INITIATIVE VERSUS ROUTINE ACTIVITY

Routine activity:
Process payroll monthly.

Strategic initiative:
Implement a new HRIS to automate and improve employee lifecycle processes.

Routine activity:
Respond to customer inquiries.

Strategic initiative:
Implement an omnichannel Customer Experience Improvement Program.

Balanced Scorecard strategy should not become a collection of everything the organization normally does.

STRATEGIC INITIATIVE PRIORITIZATION

Organizations frequently generate more initiatives than they can execute.

A BSC-based prioritization discussion asks:

- Which strategic objective does this initiative support?
- What performance gap does it address?
- How significant is its strategic contribution?
- What resources does it require?
- Who owns it?
- What result should it produce?
- Can the organization realistically execute it?

If an initiative cannot be connected to a strategic objective, its strategic necessity should be questioned.

BALANCED SCORECARD ARCHITECTURE

A practical company scorecard may contain:

Element	Purpose
Perspective	Strategic viewpoint
Strategic Objective	What must be accomplished
Measure / KPI	How performance is assessed
Baseline	Current performance
Target	Required performance
Strategic Initiative	Major intervention to close the strategic gap
Accountable Owner	Person accountable for performance
Frequency	When performance is reviewed

This becomes one of the organization's primary strategy-management tools.

CASCADING THE BALANCED SCORECARD

Enterprise strategy should influence departmental priorities.

The logic is:
Company Balanced Scorecard
↓
Department Balanced Scorecards
↓
Employee Performance Scorecards

Cascading does not mean copying the same KPIs down to every level.

It means identifying:
How does this department or role contribute to achieving the enterprise strategy?

COMPANY-LEVEL SCORECARD

Answers:
What must the entire organization accomplish?

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Example:
Objective: Increase customer retention.

DEPARTMENT-LEVEL SCORECARD

Answers:
How does this department contribute?

Customer Service
Improve First Contact Resolution.

Operations
Improve service delivery reliability.

Sales
Strengthen strategic account management.

IT
Improve customer system availability.

Different departments contribute differently to the same strategic outcome.

EMPLOYEE-LEVEL SCORECARD

Answers:
What results should this employee deliver to support the department and ultimately the company strategy?

This creates strategic line of sight.

Employees can then understand:

My KPI
↓
supports
Department KPI
↓
supports
Company Strategic Objective
↓

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supports
Organizational Strategy

STRATEGY EXECUTION THROUGH THE BALANCED SCORECARD

Strategic Planning is not finished when the scorecard is approved.

The organization must:

1. Communicate the strategy;
2. assign objective owners;
3. define measures;
4. establish targets;
5. execute initiatives;
6. collect performance data;
7. review strategic results;
8. identify gaps;
9. make management decisions;
10. learn and adjust execution.

STRATEGY REVIEW VERSUS OPERATIONAL REVIEW

Operational Review
Focuses on:

- Today's problems;
- transactions;
- workloads;
- immediate issues;
- operational exceptions.

Strategy Review
Focuses on:

- Strategic objectives;
- strategic KPIs;
- targets;
- performance gaps;
- strategic initiatives;
- assumptions;
- strategic decisions.

Both are necessary.

But if every management meeting is operational, strategy may gradually disappear from management attention.

BALANCED SCORECARD STRATEGY REVIEW QUESTIONS

For each strategic objective:

1. What Was the Target?
What performance did we intend to achieve?

2. What Is the Actual Result?
What does the evidence show?

3. What Is the Gap?
Are we ahead, on target, or behind?

4. Why?
What is driving the result?

5. Is the Strategy Working?
Do the cause-and-effect relationships appear to be producing the intended outcomes?

6. Are Initiatives Working?
Are strategic projects producing expected improvements?

7. What Decision Is Required?

- Continue?
- accelerate?
- revise?
- stop?
- add resources?
- change execution?

The purpose of the scorecard is not merely to report numbers.

It is to improve strategic management decisions.

COMMON BALANCED SCORECARD MISTAKES

Too Many Objectives
If everything is strategic, nothing is prioritized.

Too Many Measures
A scorecard should focus management attention, not overwhelm it.
Measures Without Objectives
KPIs should measure strategy—not exist independently.

Objectives Written as Activities
"Conduct marketing" is not a strategic objective.

Initiatives Before Strategy
Organizations sometimes choose projects before knowing what strategic problem those projects are intended to solve.

Departmental Silos
Each department develops independent priorities without an enterprise Strategy Map.

Financial-Only Thinking
Financial outcomes are essential but often reflect what already happened.

The BSC requires attention to the drivers of future performance.

No Cause-and-Effect Logic
Objectives become disconnected lists rather than one strategy.

No Ownership
Everyone supports the objective, but nobody is accountable.

No Strategy Review
The Balanced Scorecard becomes an annual reporting template rather than a strategy-management system.

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ONE-DAY STRATEGIC PLANNING TRAINING OUTLINE USING THE BALANCED SCORECARD

Time	Modules and Essential Topics	Major Activity and Participant Output
8:00 AM–10:00 AM	**MODULE 1: TRANSLATE STRATEGY—FROM VISION TO BALANCED SCORECARD STRATEGIC OBJECTIVES** **1. Strategic Planning Through the Balanced Scorecard** • Strategy versus operations • Balanced Scorecard as a strategy management system **2. Understanding the Four BSC Perspectives** • Financial • Customer • Internal Business Process • Learning and Growth **3. Translating Strategy into Strategic Objectives** • Results versus activities • Writing clear strategic objectives **4. Establishing Strategic Priorities** • Avoiding too many objectives • Distinguishing strategic importance from routine operational responsibility **5. Building Cause-and-Effect Logic** • How organizational capabilities drive processes, customer outcomes, and financial performance	**Major Activity: Balanced Scorecard Strategic Objective Challenge** — Participants translate an organizational strategy into a focused set of strategic objectives, categorize them correctly across the four perspectives, and challenge objectives that are vague, operational, duplicated, or activity-based. **Major Output:** Draft Four-Perspective Strategic Objective Architecture
10:00 AM–10:15 AM	**MORNING BREAK**	
10:15 AM–12:00 NN	**MODULE 2: MAP THE STRATEGY—BUILDING THE BALANCED SCORECARD STRATEGY MAP** **1. Understanding Strategy Maps**	**Major Activity: Build-the-Strategy-Map Workshop** — Participants connect strategic objectives using cause-and-effect relationships, challenge weak strategic logic, refine the sequence of objectives, and

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Time	Modules and Essential Topics	Major Activity and Participant Output
	• Translating strategic objectives into one visual strategy • Communicating organizational priorities clearly **2. Cause-and-Effect Relationships** • Learning and Growth → Internal Business Process → Customer → Financial • Testing whether strategic logic makes sense **3. Connecting Strategic Objectives** • Drivers and outcomes • Avoiding isolated objectives **4. Identifying Strategic Dependencies** • Which capabilities and processes enable downstream results? **5. Validating the Strategic Story** • Can leaders explain how the organization expects strategy to create results?	present the strategic story represented by the map. **Major Output:** Organizational Balanced Scorecard Strategy Map
12:00 NN–1:00 PM	**LUNCH BREAK**	
1:00 PM–3:00 PM	**MODULE 3: MEASURE THE STRATEGY—KPIs, BASELINES, TARGETS, AND STRATEGIC INITIATIVES** **1. From Strategic Objective to Measure** • What should be measured? • Objective versus KPI **2. Selecting Strategic KPIs** • Relevant and decision-useful measures • Leading and lagging measures where appropriate	**Major Activity: Scorecard Design and Strategic Gap Workshop** — Participants develop measures and targets for Strategy Map objectives, identify performance gaps, and select strategic initiatives specifically designed to improve strategic performance. **Major Output:** Enterprise Balanced Scorecard with Objectives, KPIs, Baselines, Targets, Strategic Initiatives, and Accountable Owners

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Time	Modules and Essential Topics	Major Activity and Participant Output
	• Avoiding activity-based KPIs **3. Establishing Baselines and Targets** • Current performance → required performance → strategic gap **4. Developing Strategic Initiatives** • Initiatives as responses to strategic gaps • Initiative versus operational activity **5. Prioritizing Strategic Initiatives** • Strategic contribution, required resources, ownership, and execution capacity	
3:00 PM–3:15 PM	**AFTERNOON BREAK**	
3:15 PM–5:00 PM	**MODULE 4: EXECUTE THE STRATEGY—CASCADING, ACCOUNTABILITY, AND BALANCED SCORECARD STRATEGY REVIEWS** **1. Cascading Enterprise Strategy** • Company scorecard → department scorecards → employee contribution • Alignment rather than simple KPI duplication **2. Establishing Strategic Accountability** • Objective owners, KPI owners, initiative owners, reporting responsibilities **3. Conducting Balanced Scorecard Reviews** • Target versus actual • Variance • cause • strategic implications • required action	**Major Activity: Balanced Scorecard Strategy Review Simulation** — Participants receive a sample company scorecard with on-target and underperforming objectives, analyze performance gaps, identify likely causes, evaluate strategic initiatives, and conduct a simulated management strategy review. **Major Output:** Cascaded Strategy Alignment Map and 30-, 60-, or 90-Day Balanced Scorecard Strategy Execution Roadmap

Time	Modules and Essential Topics	Major Activity and Participant Output
	4. Strategy Review Versus Operational Review • Keeping strategic conversations strategic • Using evidence to drive decisions **5. Closing the Strategy-Execution Loop** • Monitoring objectives and initiatives • Strategic learning • Management action • Continuous execution discipline	
5:00 PM	**PROGRAM CLOSING**	Strategic learning synthesis, management commitments, evaluation, and next steps

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MAJOR PARTICIPANT OUTPUTS

Participants are expected to complete:

1. **Draft Four-Perspective Strategic Objective Architecture**
2. **Organizational Balanced Scorecard Strategy Map**
3. **Enterprise Balanced Scorecard with Objectives, KPIs, Baselines, Targets, Strategic Initiatives, and Accountable Owners**
4. **Cascaded Strategy Alignment Map and 30-, 60-, or 90-Day Balanced Scorecard Strategy Execution Roadmap**

Together, these outputs form a practical **Balanced Scorecard Strategic Planning package.**

SAMPLE BALANCED SCORECARD STRATEGY

A simplified company example may look like this:
FINANCIAL PERSPECTIVE
Increase Profitable Revenue
Improve Operating Margin
↑
CUSTOMER PERSPECTIVE
Increase Customer Retention
Strengthen Customer Value
↑
INTERNAL BUSINESS PROCESS PERSPECTIVE

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Improve Sales Effectiveness
Strengthen Service Delivery
Increase Operating Efficiency
↑
LEARNING AND GROWTH PERSPECTIVE
Strengthen Leadership Capability
Build Critical Employee Competencies
Improve Performance Accountability

The actual objectives should be developed according to the organization's specific strategy rather than copied from generic examples.

SAMPLE BALANCED SCORECARD

Perspective	Strategic Objective	Sample Measure	Sample Target	Sample Strategic Initiative
Financial	Increase Profitable Revenue	Revenue Growth Rate	≥ 20%	Strategic Market Growth Program
Financial	Improve Operating Margin	Operating Margin	≥ 15%	Cost and Productivity Improvement Program
Customer	Increase Customer Retention	Customer Retention Rate	≥ 90%	Strategic Customer Retention Program
Customer	Improve Customer Satisfaction	CSAT	≥ 90%	Customer Experience Improvement Program
Internal Process	Improve Service Delivery	On-Time Delivery Rate	≥ 95%	Service Process Optimization
Internal Process	Increase Sales Effectiveness	Lead-to-Customer Conversion	≥ 25%	Sales Force Effectiveness Program
Learning & Growth	Strengthen Leadership Capability	Leadership Competency Score	≥ Target	Management Development Program
Learning & Growth	Improve Employee Engagement	Engagement Score	≥ 85%	Employee Engagement Improvement Program

These are training examples only. Actual organizational measures and targets must be determined through the strategic planning process.

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TRAINING METHODS

This **Training on Planning Strategically in the Philippines** follows MSS Corporation's **EnterTRAINment** methodology:

- Approximately **30% concise trainer explanation, demonstrations, facilitated discussion, and synthesis**
- Approximately **70% Balanced Scorecard workshops, strategic-objective development, Strategy Mapping, KPI design, target setting, initiative selection, scorecard development, cascading exercises, and strategy-review simulations**

Methods may include:

- BSC readiness discussion;
- strategy-versus-operations exercise;
- strategic-objective writing;
- perspective-classification challenge;
- cause-and-effect mapping;
- Strategy Map workshop;
- KPI-design laboratory;
- target-setting exercise;
- strategic-gap analysis;
- initiative-prioritization workshop;
- Balanced Scorecard development;
- scorecard cascading;
- strategy-review simulation; and
- execution planning.

TARGET PARTICIPANTS

This **Strategic Planning Training in the Philippines** is recommended for:

- Presidents;
- CEOs;
- Business Owners;
- General Managers;
- Executives;
- Directors;
- Vice Presidents;
- Department Heads;
- Senior Managers;
- Middle Managers;
- Business Unit Heads;
- Strategy and Planning personnel;
- Corporate Planning teams;

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- Performance Management personnel;
- Finance leaders;
- HR leaders;
- Operations leaders;
- Sales and Marketing leaders;
- process owners;
- Balanced Scorecard teams;
- organizational-development professionals;
- high-potential leaders participating in strategy execution; and
- employees responsible for organizational planning and performance management.

RECOMMENDED NUMBER OF PARTICIPANTS

Approximately **10 to 20 participants** is recommended for highly interactive Strategy Mapping, scorecard development, strategic discussion, and cross-functional alignment.

For actual company Strategic Planning sessions, participation should ideally include leaders representing the major organizational functions because the Balanced Scorecard requires enterprise-level cause-and-effect thinking.

DELIVERY OPTIONS

The program may be delivered through:

- Face-to-face in-house training;
- live virtual instructor-led training;
- hybrid training;
- executive workshop;
- management development;
- strategy academy;
- Balanced Scorecard orientation;
- Strategic Planning capability building;
- pre-strategic-planning preparation; or
- customized Strategic Planning training and consultancy.

AVAILABLE PROGRAM FORMATS

Half-Day Balanced Scorecard Strategic Planning Fundamentals
Recommended for:

- Understanding the Balanced Scorecard;
- four perspectives;

- strategic objectives;
- basic Strategy Mapping;
- basic KPI and target concepts.

The half-day format contains exactly two modules.

One-Day Strategic Planning Training Using the Balanced Scorecard
Recommended for the complete foundation:
Strategy → Perspectives → Objectives → Strategy Map → Measures → Targets → Initiatives → Cascading → Review

Two-Day Balanced Scorecard Strategic Planning Workshop
Recommended when organizations require deeper application involving:

- Strategic-objective development;
- Strategy Map development;
- KPI design;
- measure definitions;
- target setting;
- strategic initiative development;
- ownership;
- departmental cascading;
- scorecard review processes.

Balanced Scorecard Strategic Planning Facilitation
Recommended when the objective is not merely to teach strategic planning but to **develop the organization's actual strategic plan**.

The engagement may produce:

- Corporate Strategy Map;
- Company Balanced Scorecard;
- Strategic Objectives;
- KPIs;
- Targets;
- Strategic Initiatives;
- accountable owners;
- departmental cascading framework;
- strategy-review mechanism.

Balanced Scorecard Strategy Execution Engagement
May include:

- Strategy Map finalization;
- scorecard development;
- KPI definitions;

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- target validation;
- strategic initiative charters;
- departmental cascading;
- individual scorecard alignment;
- strategy-review templates;
- quarterly strategy-review facilitation;
- scorecard implementation support.

CUSTOMIZATION OPTIONS

This **Enterprise Planning Training in the Philippines** may be customized using the client's:

- Existing mission and vision;
- existing strategic direction;
- existing Strategy Map;
- Balanced Scorecard;
- organizational objectives;
- KPIs;
- performance scorecards;
- strategic initiatives;
- departmental scorecards;
- individual scorecards;
- organizational structure;
- historical performance;
- strategy-review practices;
- planning horizon; and
- management priorities.

The customization should remain **strictly within the Balanced Scorecard methodology** for this specific program.

WHAT THIS PROGRAM DELIBERATELY DOES NOT USE

Because this particular program has been designed to follow the **Balanced Scorecard framework/model/process and nothing else**, the core training does **not** introduce or combine BSC with:

- SWOT Analysis;
- PESTLE Analysis;
- Porter's Five Forces;
- Value Chain Analysis;
- OKRs;
- OGSM;
- Hoshin Kanri;

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- Blue Ocean Strategy;
- McKinsey 7S;
- Ansoff Matrix;
- BCG Matrix;
- other competing strategic-planning models.

This protects methodological clarity.
Participants learn **one integrated strategy-management framework deeply rather than several frameworks superficially**.

POSSIBLE STRATEGIC PLANNING PERFORMANCE MEASURES

Organizations implementing the Balanced Scorecard may monitor:

- Percentage of strategic objectives with defined measures;
- percentage of KPIs with validated definitions;
- percentage of strategic measures with targets;
- strategic initiative completion;
- number of initiatives linked to strategic objectives;
- scorecard reporting timeliness;
- strategy-review completion;
- departmental scorecard alignment;
- individual scorecard alignment;
- percentage of strategic objectives on target;
- strategic KPI improvement;
- action closure from strategy reviews;
- initiative-benefit realization;
- employee understanding of strategy.

The ultimate measure of success is not:
“Did we complete the strategic planning workshop?”

It is:
“Is the organization executing strategy and producing the intended strategic results?”

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FREQUENTLY ASKED QUESTIONS

What is Strategic Planning Training in the Philippines?
Strategic Planning Training in the Philippines develops leaders' capability to translate organizational vision and strategy into strategic objectives, Strategy Maps, KPIs, targets, initiatives, accountability, and execution using the Balanced Scorecard.

What is Training on Strategic Planning in the Philippines?
Training on Strategic Planning in the Philippines equips leaders and planning teams with the skills required to build and execute an organizational strategic plan using a structured strategy-management methodology.

For this MSS Corporation program, that methodology is exclusively the **Balanced Scorecard**.

What is Company Planning Training in the Philippines?
Company Planning Training in the Philippines helps leadership teams develop enterprise-level strategic objectives, measures, targets, initiatives, and accountability mechanisms.

What is Training on Company Planning in the Philippines?
Training on Company Planning in the Philippines develops leaders' ability to align company priorities through a Strategy Map and Balanced Scorecard.

What is Enterprise Planning Training in the Philippines?
Enterprise Planning Training in the Philippines focuses on developing organizational strategy at the enterprise level rather than allowing departments to independently pursue unrelated goals.

What is Training on Enterprise Planning in the Philippines?
Training on Enterprise Planning in the Philippines teaches organizational leaders how to translate enterprise strategy into a connected Balanced Scorecard and cascade it across departments.

What is Business Planning Training in the Philippines?
Within this program, **Business Planning Training in the Philippines** refers to company-level strategy development and execution using the Balanced Scorecard.

It should not be confused with preparing a startup business plan or financing document.

What is Training on Business Planning in the Philippines?
Training on Business Planning in the Philippines helps participants translate business direction into strategic objectives, measures, targets, strategic initiatives, and execution mechanisms through the Balanced Scorecard.

What is Planning Strategically Training in the Philippines?
Planning Strategically Training in the Philippines develops the capability to think beyond daily operations and establish long-term strategic priorities, cause-and-effect relationships, measures, targets, and initiatives.

What is Training on Planning Strategically in the Philippines?
Training on Planning Strategically in the Philippines helps leaders convert strategy from broad aspirations into a measurable and executable Balanced Scorecard.

What is the Balanced Scorecard?
The Balanced Scorecard is a strategy-management framework that translates organizational strategy into objectives and measures across four perspectives:

1. Financial
2. Customer
3. Internal Business Process
4. Learning and Growth

Does the training include Strategy Mapping?
Yes.

Strategy Mapping is a central part of the program.

Participants develop strategic objectives and establish cause-and-effect relationships across the four Balanced Scorecard perspectives.

Does the program include KPIs?
Yes.

Participants learn how to translate strategic objectives into appropriate measures or Key Performance Indicators.

Does the training include targets?
Yes.

Participants establish expected strategic performance levels and identify gaps between current and desired performance.

Does the training cover strategic initiatives?
Yes.

Participants learn to identify projects and programs that directly support strategic objectives and close strategic performance gaps.

Does this training cover SWOT?
No.

This program intentionally follows the **Balanced Scorecard framework/model/process only**.

Does it include PESTLE?
No.

Does it include OKRs?
No.

The program uses Balanced Scorecard strategic objectives, measures, targets, and initiatives rather than mixing BSC with OKRs.

Does it include Porter's Five Forces?
No.

Why doesn't the program combine several strategic planning models?
Because combining many frameworks can dilute the learning objective.

This program is specifically designed for organizations wanting participants to **understand and apply the Balanced Scorecard deeply and consistently**.

Does the program cover cascading?
Yes.

Participants learn how the Company Balanced Scorecard can be translated into departmental contributions and eventually into relevant employee performance measures.

Is a company scorecard enough?
No.

A complete Balanced Scorecard strategy-management system should include:

- Strategic objectives;
- Strategy Map;
- measures;
- targets;
- initiatives;
- owners;
- cascading;
- performance review.

Can we use our actual company strategy during training?
Yes.

This is strongly recommended where appropriate.

Participants may develop or improve actual strategic objectives, Strategy Maps, scorecards, measures, targets, and initiatives subject to organizational confidentiality.

Is this the same as Strategic Planning Facilitation?
No.

Training primarily develops participants' **capability to understand and apply the methodology**.

Strategic Planning Facilitation goes further by having MSS Corporation facilitate the leadership team in producing the organization's **actual Strategic Plan, Strategy Map, Balanced Scorecard, targets, and strategic initiatives**.

Is one day enough?
One day is appropriate for developing practical foundational capability in the complete Balanced Scorecard process.

It is generally **not sufficient for a leadership team to completely formulate, validate, negotiate, and finalize an enterprise strategic plan for a complex organization**.

Organizations seeking actual Strategic Planning may require:

- Pre-work;
- leadership sessions;
- facilitated planning;
- scorecard development;
- validation;
- cascading; and
- implementation support.

RELATED MSS CORPORATION TRAINING PROGRAMS

Organizations considering this program may also explore:

- Balanced Scorecard Training;
- Strategic Management Training;
- Strategy Execution Training;
- KPI Development Training;
- Performance Management Training;
- Management Development Program;
- Business Acumen Training;
- Strategic Thinking Training;
- Leadership and Management Training; and
- Balanced Scorecard Strategic Planning Facilitation and Consultancy.

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WHY CHOOSE MSS CORPORATION FOR STRATEGIC PLANNING TRAINING IN THE PHILIPPINES?

Balanced Scorecard From Beginning to End
The program does not create a confusing mixture of unrelated planning frameworks.

Participants learn one coherent process:
Strategy → Strategic Objectives → Strategy Map → Measures → Targets → Strategic Initiatives → Cascading → Strategy Review

Four-Perspective Strategic Thinking
Participants learn to balance:

- Financial results;
- customer outcomes;
- internal-process capabilities; and
- Learning and Growth drivers.

Strategy Maps
Participants do not merely develop lists of goals.

They build the cause-and-effect logic of strategy.

KPI Development
Measures are designed from strategic objectives rather than selected because data happens to be available.

Target Setting
Participants connect current performance, strategic expectations, and performance gaps.

Strategic Initiatives
Projects and programs are selected specifically to improve strategic performance.

Organizational Alignment
Participants learn how company strategy cascades into departmental and employee contribution.

Execution, Not Merely Planning
The Balanced Scorecard becomes a management system for monitoring and reviewing strategy throughout the year.

Practical Participant Outputs
Every module produces a concrete component of the strategic plan.

EnterTRAINment Methodology
Participants write, challenge, map, measure, prioritize, develop, cascade, analyze, review, and decide rather than merely listen.

Highly Customizable
MSS Corporation may incorporate the client's actual:

- strategy;
- scorecards;
- objectives;
- KPIs;
- targets;
- initiatives;
- management issues; and
- execution challenges.

CALL TO ACTION

Don't End Strategic Planning With a Beautiful Presentation. Turn Strategy Into a Scorecard That Management Can Actually Execute.

Equip your executives, managers, department heads, planning teams, and organizational leaders to translate company strategy into clear objectives, cause-and-effect relationships, a Strategy Map, strategic KPIs, measurable targets, prioritized initiatives, accountable owners, and a disciplined strategy-review process.

Partner with MSS Corporation for a customized:

- **Strategic Planning Training in the Philippines**
- **Training on Strategic Planning in the Philippines**
- **Company Planning Training in the Philippines**
- **Training on Company Planning in the Philippines**
- **Enterprise Planning Training in the Philippines**
- **Training on Enterprise Planning in the Philippines**
- **Business Planning Training in the Philippines**
- **Training on Business Planning in the Philippines**
- **Planning Strategically Training in the Philippines**
- **Training on Planning Strategically in the Philippines**

built entirely around the **Balanced Scorecard framework, model, and process**.

With MSS, We Make Strong Success.