

## **Outcome Session 001**

Come and work with the CCHPO Network and find out what's new, different or emphasized differently within the HPO Diagnostic Change Model; hear about Project Management experiences, methods to enhance the HPO Seminar and various specialized applications and additional surveys being used to support the HPO Diagnostic Change Model.

## **Biographies for additional network members**

**Alan R. Olson** is a federal government employee working for the US Navy at SPAWAR SYSTEMS CENTER San Diego. He is the principal in-house facilitator and trainer and is certified in 7 Habits, HPO, Situational Leadership II, Coaching For High Performance, and Redirecting Children's Behavior - a parenting class. Alan is also one of the Performance Improvement Coaches (PICs) and is dedicated to organizational improvement. Alan has facilitated 25 7 Habits workshops resulting in 483 graduates scattered throughout the organization from Japan, Guam, Hawaii, Philadelphia, and San Diego. He's teaching his first 7 Habits Version 3.0 workshop on 29 November 2005.

**Carol Crawford** is an Associate with the Commonwealth Center for High-Performance Organizations, which provides management consulting services to federal, state and local governments, non-profit organizations and the private sector, and is the founder and head of Crawford Consulting, a private consulting practice. Ms. Crawford enters private organizational development consulting after a 30-year career with the Federal Government. During that career, she has specialized in adult learning, high-performance models, assessment tools, customer assessment and service, management effectiveness, workforce development planning and skills inventories, organizational change on both a large scale and at the unit level, executive coaching, career development, communications, emotional intelligence, applied management theory, as well as facilitation skills and classroom presentation training. Her focus throughout has been to make these issues real for individuals and organizations, and to help them craft realistic, applicable approaches to those issues.

Her career has spanned a variety of agencies: she was an Industrial Engineer with the US Postal Service, an Education Specialist and Manager of Career Development for the Comptroller of the Currency, Senior Education Specialist with the Department of Energy, and a Senior Internal Consultant with the Environmental Protection Agency. Prior to her federal career, Ms. Crawford taught English Literature and Analytical Writing, Logic, and Analysis at the University of Maryland, The American University, and Montgomery College.

Ms. Crawford is a certified practitioner of the Myers-Briggs Type Indicator Steps I and II, the Baron EQ-I emotional intelligence tool, the Zenger-Miller facilitation model (now Achieve Global), the Strength Deployment Inventory (SDI), and various quality-of-worklife instruments. She uses these instruments in a variety of settings and with a variety of groups and individuals, always with the view of applying the insights gained to both the organizational setting and personal life issues.

Ms. Crawford holds an AA degree from Montgomery College, a BA degree in English from the American University, and an MA degree in English Literature and Literary Analysis from the University of Maryland. She has also been a licensed career counselor by the State of Maryland, and for 12 years, concurrent with her Federal career, ran her own successful business involving career and employment matters. Ms. Crawford resides in the Washington, DC, and Gettysburg, PA, areas, and also travels internationally, primarily to the United Kingdom.

**Tom Ward** is an Associate with more than 35 years of applied management and consulting experience. He has designed and managed programs for Executive Coaching, Strategic Workforce Development, Organizational Change, Leadership Development, Management Improvement, Workforce Planning, Total Quality Management and Competency Development for a national workforce, and has worked with senior management teams and many line organizations including the Department of Agriculture, the Navy, and the Environmental Protection Agency. His most rewarding work is in helping work groups, management teams, and entire organizations "get unstuck."

Mr. Ward is certified to administer KEYS, measuring the climate for creativity, productivity, and innovation, and has assessed 106 organizations representing 6,500 people since 1998. He is also certified in the Bar-On EQ-i, measuring and coaching on individual emotional intelligence. He is the author of "Developing your Strengths," an appreciative inquiry-based guide to harnessing individual strengths to build more effective organizations, and is a teacher, speaker, guide, and coach on activity and strength-based development. He taught in the School of Management at George Mason University for four years.

During almost 20 years in program management, Mr. Ward was a budget officer; chief trouble shooter for USDA's Commodity Credit Corporation, a \$32 billion operation financing crop price supports; Management Team Leader for the USDA Working Capital Fund; Manager of USDA Commercial Industrial Activities; and Major Systems Acquisitions Program Manager. He ran trade shows for the National Automobile Dealers Association for two years, and served in the USMC infantry in Viet Nam before college.

Mr. Ward has an MBA in Organizational Development from George Washington University. His thesis correlated environmental stress and life crisis to employee motivation.

## Leadership Philosophy Questionnaire (LPQ)

The LPQ is a 360-degree feedback instrument designed to assess an organization relative to the standards of a *High Performance Organization* (HPO). Specifically, a Likert approach is used to evaluate the implicit leadership philosophies of individual team leaders/managers in four areas: Nature of People, Motivation, Distribution of Knowledge and Creativity, and Nature of Work. An HPO model incorporates performance efficiency as well as a positive work climate. Using both qualitative and quantitative questions, performance and team cohesiveness are simultaneously investigated. Descriptions of Rensis Likert's leadership styles (exploitive autocratic, benevolent autocratic, consultative, participative, and passive) are used to obtain quantitative ratings, teach the HPO values, and condition respondents toward textual commentary on the specifics of the performance of the manager being evaluated. As part of the teaching process, the LPQ uses language consistent with HPO values. The LPQ was designed specifically to meet the need for an instrument with updated language, i.e., language consistent with participative (system four) leadership values.

### Structure of the LPQ

The LPQ consists of four sections:

- A. *Assumptions About the Nature of People and Their Attitudes Toward Work*
- B. *Assumptions About How People Choose to be Motivated*
- C. *Assumptions About the Distribution of Knowledge and Creativity and the Resulting Way Decisions are Made*
- D. *Assumptions About the Nature of Work*

Each of these four sections contains five performance questions, each dealing with a specific sub area of the overall topic for that section. For example, in the section on *Motivation*, question B4 asks "How well does this team leader/manager motivate co-workers to higher levels of efficiency and productivity?" The question is followed by five descriptions, each of which fits one of Likert's five management systems, from System 1, Autocratic ("Motivates in a manipulative fashion using threats, punishment, and intimidation.") to System 4, Democratic ("Has great skill in... {helping to} create a motivating environment."), plus System 0 ("Abdicates the responsibility..."). As the respondent completes the ratings for each of these five specific questions two performance questions call for textual response with the question "How could this team leader/manager improve in the area of motivating co-workers?" and the question "How does this team leader/manager excel in the area of motivating co-workers?"

Following the performance ratings and textual commentary in each section, there are three questions on which inferred beliefs are rated. In the *Motivation* section, for example, the first of these three questions (question B6) asks "On the basis of this team leader's behaviors that you have just rated, which of the following beliefs about motivation would you infer to be closest to hers/his?" The second asks, "Which of the following beliefs do you think this team leader would endorse as his/her own?" The third asks, "Which of the following beliefs would you choose as ideal?" Following these three

belief inference questions, the final question is textual: *“Please comment on this manager’s apparent beliefs in the Motivation area.”*

This pattern is repeated for all four sections of the LPQ. At the end of the four sections two additional textual response questions are given:

- (1) *“Describe the three most important specific ways this person could improve her (his) leadership effectiveness--things this person should stop doing, do differently, or start doing.”*
- (2) *“If you were to identify the two or three most important ways this person demonstrates effective leadership, what would they be?”*

### **Features and Benefits of the LPQ**

Textual feedback is particularly valuable. It is usually much more targeted, unique, and specific than the quantitative rating scale feedback. However, the combination of quantitative and textual is more valuable than either alone. The strength of quantitative ratings is that they provide a basis for comparison. They also condition the rater to give more carefully thought-out textual feedback. That is, after reading five alternative kinds of behavior on each of the five questions, the rater has a basis for comparison in giving detailed textual feedback to the manager.

Quantitative data provides a different kind of precision. It provides a context of comparison both of the manager with himself/herself and also to other managers. The "within manager" comparisons are important. When areas of either strength or weakness are identified on which raters seem to have consensus, it helps the manager to focus in order to amplify strengths and remedy weaknesses. Also, quantitative comparisons in successive years are helpful in demonstrating progress. "Between manager" comparisons can also be helpful. Of course specific results of individual managers are confidential, but each manager can see his or her own standing relative to all other managers, with their identities hidden, giving at least some idea of relative standing in specific areas.

The LPQ has many uses within an organization. It can be used to provide orientation, to help answer the question "Where are we as an organization." It provides senior management with a global assessment of leadership philosophy of those who help to lead the organization. It also provides the individual team leader/manager with targeted feedback and individual insight for creating an action plan to become a better leader. It can be used as a method of performance evaluation, and to monitor continuous improvement. One of the most important functions of LPQ profiling is to teach the HPO values. In this sense, the wording of the individual items of the LPQ sections is very important. As managers continue to be profiled with the instrument they become very familiar with descriptions of the five Likert systems in each specific area of rating, with the clear implication of what is valued by the organization and where they need to improve.

*The LPQ is available from Profile Plus; contact them at [www.profileplus.com](http://www.profileplus.com).*

## Section D. Assumptions About the Nature of Work

	System 0	System 1	System 2	System 3	System 4
D1. What kind of organizational structure does this team leader/manager promote?	Doesn't exert a strong or consistent effect upon the organization.	Creates a rigid vertical organization with tight controls.	Creates an appearance of cooperation and mutual respect, but exerts tight control over "management" decisions (as opposed to lower level task decisions).	Creates an atmosphere of openness and communication so that employees can help the team leader/manager make good decisions.	Creates an effective team. Clearly understands and is committed to teamwork.
D2. How does this person deal with team goals?	Not particularly concerned about goals.	Decides what the team goals should be and then tells people what they must do to attain them.	Formulates the goals and then tries to persuade others to adopt them and strive to attain them.	Confers with everyone in the team and then formulates goals based upon their input.	Involves others in a process of joint discussion and dialogue to formulate and foster adoption of goals that represent shared purposes and values.
D3. To what extent does this team leader/manager take on the responsibility of matching an individual's unique strengths with particular tasks or projects to ensure productivity?	This team leader/manager is not well attuned to the unique strengths of employees.	This team leader/manager is not attuned to the unique strengths or skills of others; is concerned only that the work gets done as designed by management.	This team leader/manager tends to allocate responsibility to those on his "same page." Is mainly concerned with how productivity reflects on him.	This team leader/manager is aware of individual employee strengths and tries to match tasks to individual capabilities.	This team leader/manager is highly aware of the unique skills, insights, and strengths of employees and helps the team to effectively match team members to specific tasks.
D4. In terms of giving team members praise and recognition for their contribution, this person:	Doesn't see telling others how well they have done as part of his job.	Almost never does this. Believes that threats motivate others better.	Gives recognition when team members do things the way he wants them.	Does this when their performance merits special recognition.	Pays special attention to letting others know how much their contributions are appreciated; goes out of his way to give such recognition.
D5. How does this person usually work with others in creating a vision for the unit and in setting goals and objectives that will lead to vision attainment?	Doesn't say much; just goes along with whatever comes down from above or whatever others want to do.	Completely controls the group. Establishes vision, goals, and objectives by unilateral fiat	Generally wants his own way and will try to persuade others to his own point of view in subtle ways.	Discusses the vision, goals, and objectives openly with others, but usually makes the major decisions.	Works easily and collaboratively with others in defining the vision, as well as the goals and objectives of the group.

**D\_Text1. How could this team leader/manager improve in the area of helping teams to get work done more efficiently and effectively?**

**D\_Text2. How does this team leader/manager excel in the area of helping teams to get work done more efficiently and effectively?**

D6. On the basis of this team leader's consistent beliefs about the nature of work, which of the following beliefs about the nature of work would you infer to be closest to his?	Doesn't seem to have strong or consistent beliefs about the nature of work.	"Workers are incapable. Complex work needs to be broken down into "dumber and dumber" pieces and closely supervised."	"Efficiency requires much maneuvering and strict supervision. Rewards should be given to those who align themselves with the manager."	"Work is most efficient when the leader provides a clear sense of vision and works cooperatively with the team to achieve the vision."	"Work is most effective when all share a vision through open communication, and all share in decision making and work together as a cooperative team."
D7. Which of the following beliefs do you think this team leader would endorse as his own?	"No strong or consistent beliefs about the nature of work"	"Workers are incapable. Complex work needs to be broken down into "dumber and dumber" pieces and closely supervised."	"Efficiency requires much maneuvering and strict supervision. Rewards should be given to those who align themselves with the manager."	"Work is most efficient when the leader provides a clear sense of vision and works cooperatively with the team to achieve the vision."	"Work is most effective when all share a vision through open communication, and all share in decision making and work together as a cooperative team."
D8. Which of the following beliefs would you choose as ideal?	"No strong or consistent beliefs about the nature of work"	"Workers are incapable. Complex work needs to be broken down into "dumber and dumber" pieces and closely supervised."	"Efficiency requires much maneuvering and strict supervision. Rewards should be given to those who align themselves with the manager."	"Work is most efficient when the leader provides a clear sense of vision and works cooperatively with the team to achieve the vision."	"Work is most effective when all share a vision through open communication, and all share in decision making and work together as a cooperative team."

**D\_Text3. Please comment on this manager's apparent beliefs in the "Nature of Work" area.**

**Total\_Text1. Describe the three most important ways this person could improve his leadership/managerial effectiveness— things this person should stop doing, do differently or start doing.**

**Total\_Text2. If you were to identify the two or three most important ways this person demonstrates effective leadership, what would they be?**

**Total\_Text3. Please list any other comments that you that would be useful to the person being rated so that he can continue to improve performance and behavior.**

**Performance Diagnostic Questionnaire (PDQ)**

<b>PDQ Section C. Conditions for Change: Capabilities</b>				
	1	2	3	4
c1. What is the likelihood that the positive change efforts of this organization will be successful?	They will almost certainly not be successful	They have a small chance of being successful.	They have a high likelihood of being successful.	They are almost certain to be successful.
To what extent do managers in this organization adequately understand the value of each of these ingredients for success?				
	1	2	3	4
c2. Team building skills.	Very weakly	Somewhat weakly	Somewhat strongly	Very strongly
c3. Problem solving skills.	Very weakly	Somewhat weakly	Somewhat strongly	Very strongly
c4. Skill in fostering creativity.	Very weakly	Somewhat weakly	Somewhat strongly	Very strongly
To what extent do managers in this organization successfully foster these ingredients for success?				
	1	2	3	4
c5. Team building skills.	Very poorly	Somewhat poorly	Somewhat well	Very well
c6. Problem solving skills.	Very poorly	Somewhat poorly	Somewhat well	Very well
c7. Creativity.	Very poorly	Somewhat poorly	Somewhat well	Very well
	1	2	3	4
c8. To what extent does your work group value customer focus?	Our work group does not value it.	Our work group values customer focus somewhat.	Our work group moderately values customer focus.	Our work group places strong value on customer focus.
	1	2	3	4
c9. How effective is your work group in implementing a strong customer focus?	Very ineffective	Somewhat ineffective	Somewhat effective	Very effective
Please rate your organization on each of these four ingredients needed to effect positive change:				
	1	2	3	4
c10. The requisite skills.	Very weak	Somewhat weak	Somewhat strong	Very strong
c11. The requisite knowledge.	Very weak	Somewhat weak	Somewhat strong	Very strong
c12. The requisite commitment and	Very weak	Somewhat weak	Somewhat strong	Very strong
c13. The requisite effort.	Very weak	Somewhat weak	Somewhat strong	Very strong
c14. Please summarize the major strengths of this organization in the "capabilities" area of conditions for change.				
c15. Please identify the gaps or weak points of this organization in the "capabilities" area of conditions for change.				
c16. Please give any other thoughts or recommendations you may have in the "capabilities" area of conditions for change.				





BSC-1

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# BALANCED SCORECARD FUNDAMENTALS

## Understanding Strategic Measurement



## Building a Balanced Scorecard

BSC-2

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**How would we know if we were high-performing?**

**BSC Fundamentals**

**Building a BSC**

**Operationalizing a BSC**



## Balanced Scorecard

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### INTRODUCTION TO BALANCED SCORECARD

- ❑ ***Background of the balanced scorecard***
- ❑ ***What is a balanced scorecard?***
- ❑ ***Why use a balanced scorecard?***
- ❑ ***Building a balanced scorecard***



## Background

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**Nolan Norton Institute sponsors a one-year study, “Measuring Performance in the Organization of the Future” to demonstrate the over-reliance on summary financial-performance measures were hindering organizations’ abilities to create future economic value. The study resulted to a shift in focus to a multidimensional scorecard and expanded to “Balanced Scorecard” concepts in 1992.**



## Background

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### Robert S. Kaplan

Robert S. Kaplan is the Marvin Bower Professor of Leadership Development at Harvard Business School.



### David P. Norton

Dr. David Norton serves as a President with the Balanced Scorecard Collaborative - a global network to support organizations implementing the Balanced Scorecard. Formerly, Dr. Norton was CEO of the Nolan Norton Institute, a consulting firm he co-founded, which became the research arm of KPMG.



## What is a Balanced Scorecard?

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**A philosophy and technique to facilitate the translation of an organization's definition of "what is higher performance" (pick 3+) into "how we would know" – that we are moving toward it.**

**A tool that captures the organization's mission, vision and strategies into a comprehensive set of performance measures that provide the framework for a strategic measurement, management and improvement system.**



## How Would We Know...?

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**Customer and Stakeholder Perspective** – How must we appear to our customers? Are we delivering what customers and stakeholders want, need and expect – will we, both now and in the future?

**Financial Perspective** – To succeed, how will we look financially? Are we making the best possible use of our budget? Are we good stewards of the public funds? (Private Sector: shareholders)

**Internal Processes** – To satisfy our customers (and achieve our mission) at what processes must we excel?

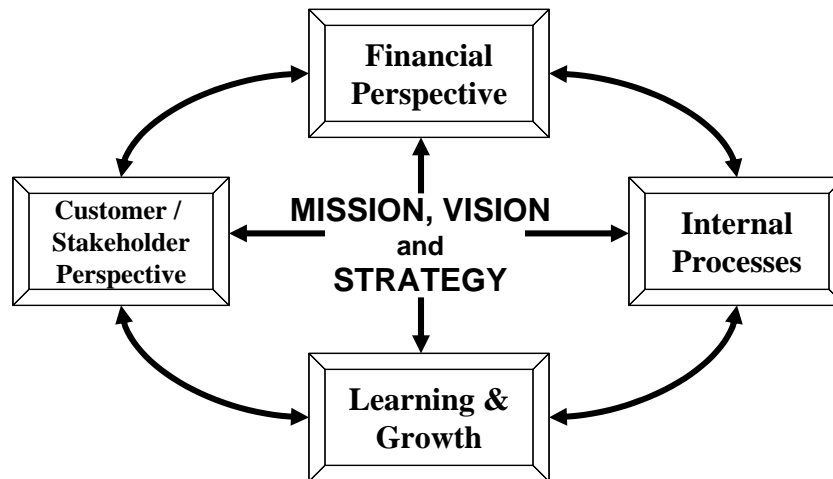
**Learning & Growth** – In order to achieve our vision / strategy, how must our organization learn, change and improve?  
...both the individual and the Organization? ...future value creation.



## What is a Balanced Scorecard?

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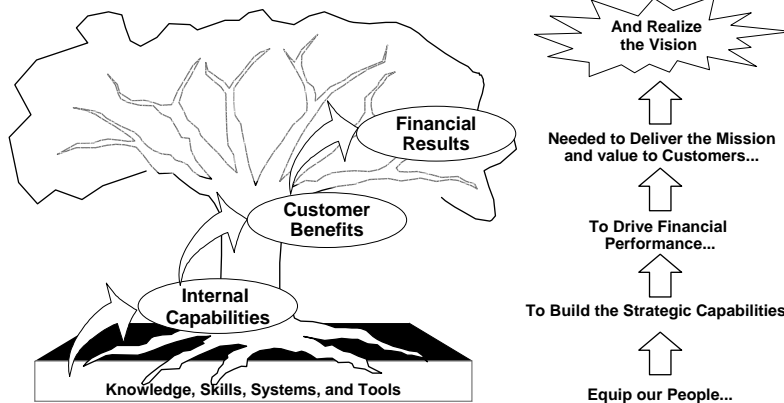


## What is a Balanced Scorecard?

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### Articulates Strategic Hypotheses in Cause and Effect Terms



## Why use a Balanced Scorecard?

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### THEREFORE:

The balanced scorecard can provide a comprehensive framework for ensuring that strategic plans are effective and are implemented; by translating an organization's strategy into a set of key performance indicators.

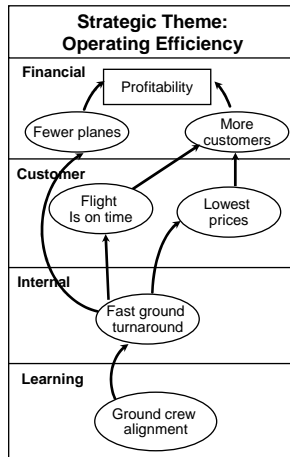


# Why use a Balanced Scorecard? BSC-11

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## BSC Terminology

Strategy Map: Diagram of the cause-and-effect relationships between strategic objectives



Statement of what strategy must achieve and what's critical to its success

How success in achieving the strategy will be measured and tracked

The level of performance or rate of improvement needed

Key action programs required to achieve objectives

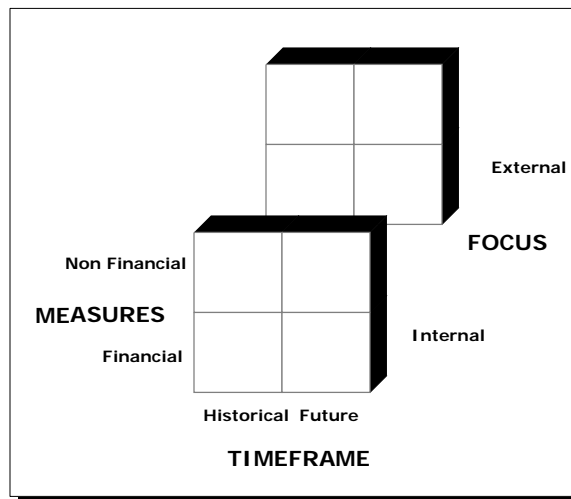
Objectives	Measurement	Target	Initiative
▪ Fast ground turnaround	▪ On Ground Time ▪ On-Time Departure	▪ 30 Minutes ▪ 90%	Cycle time optimization



# Why use a Balanced Scorecard? BSC-12

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Traditional measures of performance focused primarily on financial statistics based on the accounting model, and customer feedback

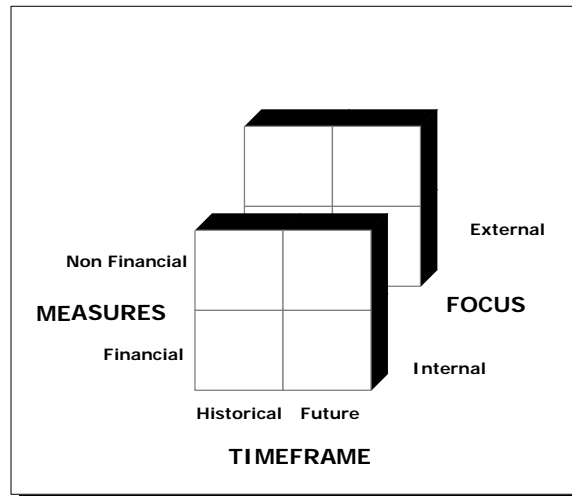




## Why use a Balanced Scorecard? BSC-13

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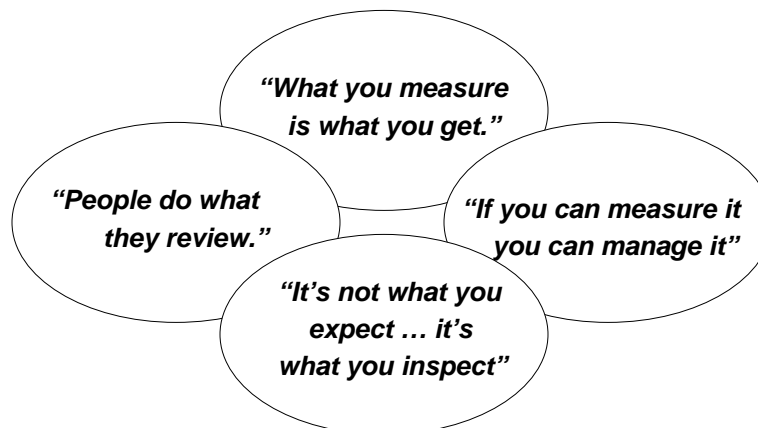
**A balanced scorecard focuses on an integrated system of key performance indicators for critical strategic success factors**



## Why use a Balanced Scorecard? BSC-14

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### Measurement Motivates



### Measurement Communicates



## Why use a Balanced Scorecard? BSC-15

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- ***BSC includes financial measures and customer satisfaction, that tell the results of actions already taken***
- ***BSC complements these measures with operational measures ... that are the drivers of future performance***



## Why use a Balanced Scorecard? BSC-16

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**The Premise Behind the Balanced Scorecard Is that Measurement Motivates Behavior**

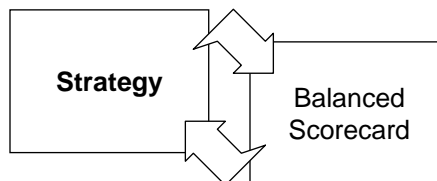
*The Premise*

**Measurement Communicates Values,  
Priorities And Direction**



*The Conclusion*

**Measurement Must Be Linked To Strategy**





## Why use a Balanced Scorecard? BSC-17

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*The name reflects the balance between:*

- ❑ *Short-term and long-term objectives*
- ❑ *Financial and non-financial measures*
- ❑ *Lagging and leading indicators*
- ❑ *External and internal performance perspectives*



## Why use a Balanced Scorecard? BSC-18

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## Why use a Balanced Scorecard? BSC-19

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### Government must be:

- ✓ **Competitive**
- ✓ **Accountable**
- ✓ **Customer Friendly**
- ✓ **Fiscally Responsible**
- ✓ **IT Responsible**
- ✓ **Secure**

**Reality is:**  
 Highly unstable, so  
 planning systems  
 must deal with  
 uncertainty

### Strategy is:

- **a hypothesis**
- **a dynamic process**
- **everyone's job**

### Organizations are:

- **systems**

Adapted from "Planning is Dead, Long Live Planning", Joseph Fuller,  
[Across the Board](#), March 1998



## Why use a Balanced Scorecard? BSC-20

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### ***Four Barriers to Strategy Implementation***

#### The Vision Barrier

Only 5% of the workforce understand the strategy

#### The People Barrier

Only 25% of managers have personal objectives and incentives linked to strategy

**9 out of 10  
 organizations don't  
 execute their  
 strategies**

#### The Management Barrier

85% of executive teams spend less than one hour/month discussing strategy

#### The Resource Barrier

60% of organizations don't link budgets to strategy

**Management Systems were designed to meet the needs of  
 stable organizations that were changing incrementally**

You can't manage strategically with a system designed for tactics



## Building a Balanced Scorecard

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### Steps to Building a Balanced Scorecard

- 1. Clarify the Mission and Vision***
- 2. Specify Objectives in the Four Perspectives***
- 3. Define Performance Measures for each Objective***
- 4. Establish Goal(s) for each Measure***
- 5. Define (or validate) Strategy (or initiative)***  
***Use a strategy map***



## Building a Balanced Scorecard

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### ***1. Clarify Mission and Vision***

#### **The Mission of Southwest Airlines**

The mission of Southwest Airlines is dedication to the highest quality of Customer Service delivered with a sense of warmth, friendliness, individual pride, and Company Spirit.

#### **To Our Employees**

We are committed to provide our Employees a stable work environment with equal opportunity for learning and personal growth. Creativity and innovation are encouraged for improving the effectiveness of Southwest Airlines. Above all, Employees will be provided the same concern, respect, and caring attitude within the organization that they are expected to share externally with every Southwest Customer.

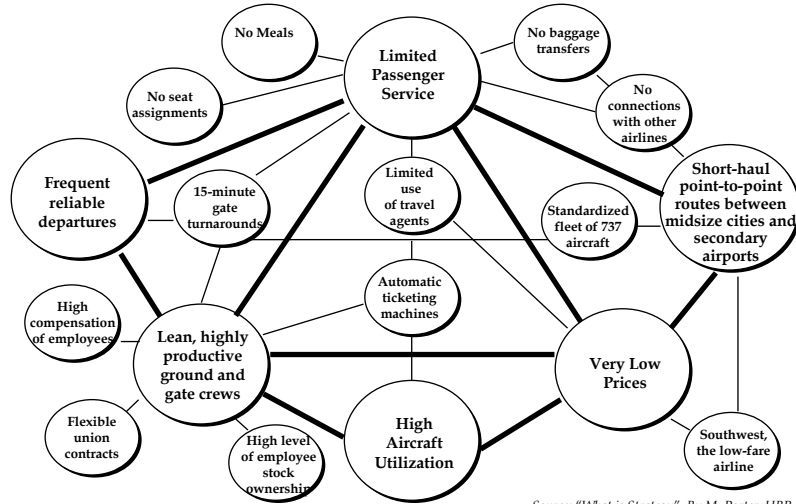


# Balanced Scorecard

BSC-23

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**Southwest Airlines' activity map creates a web of activities that creates and sustains its competitive advantage.**



Source: "What is Strategy", By M. Porter, HBR, Nov/Dec, '96.

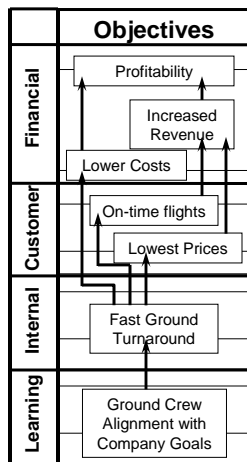


# Building a Balanced Scorecard

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## 2. Specify Objectives in the Four Perspectives



Ensure logic and causal relationships

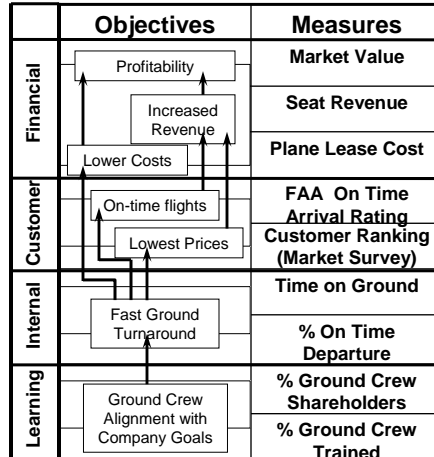


# Building a Balanced Scorecard

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## 3. Define Performance Measures for each Objective



### PRINCIPLES OF PERFORMANCE MEASUREMENT

**Simple:**

- Easy to understand – by everyone
- Easy to collect – accessible today
- Timely – hourly / daily / weekly
- Visible – posted on the “wall”
- Informative – no interpretation required

**Relevant:**

- Linked to organization and unit strategy
- Linked to customer expectations

**Outputs:**

- Predictive of outcomes

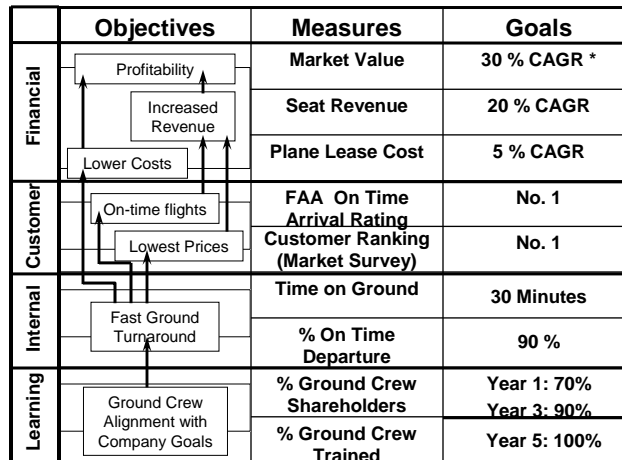


# Building a Balanced Scorecard

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## 4. Establish Goal(s) for Each Measure



\* Combined Annual Growth Rate



# Building a Balanced Scorecard

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## 5. Define (or validate) Strategy (or initiative) – Map

	Objectives	Measures	Goals	Strategies
Financial	Profitability	Market Value	30 % CAGR *	
	Increased Revenue	Seat Revenue	20 % CAGR	
	Lower Costs	Plane Lease Cost	5 % CAGR	
Customer	On-time flights	FAA On Time Arrival Rating	No. 1	Quality Management
	Lowest Prices	Customer Ranking (Market Survey)	No. 1	Customer Loyalty Program
Internal	Fast Ground Turnaround	Time on Ground	30 Minutes	Cycle Time Optimization
		% On Time Departure	90 %	Program
Learning	Ground Crew Alignment with Company Goals	% Ground Crew Shareholders	Year 1: 70% Year 3: 90%	Employee Stock Option Plan
		% Ground Crew Trained	Year 5: 100%	Ground Crew Training

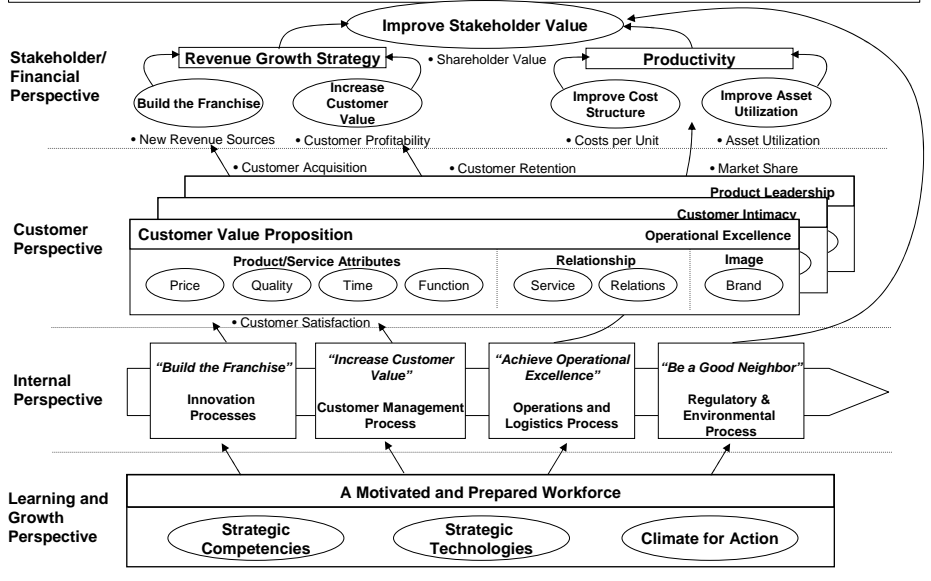
\* Combined Annual Growth Rate



# Balanced Scorecard

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# Balanced Scorecard

BSC-29

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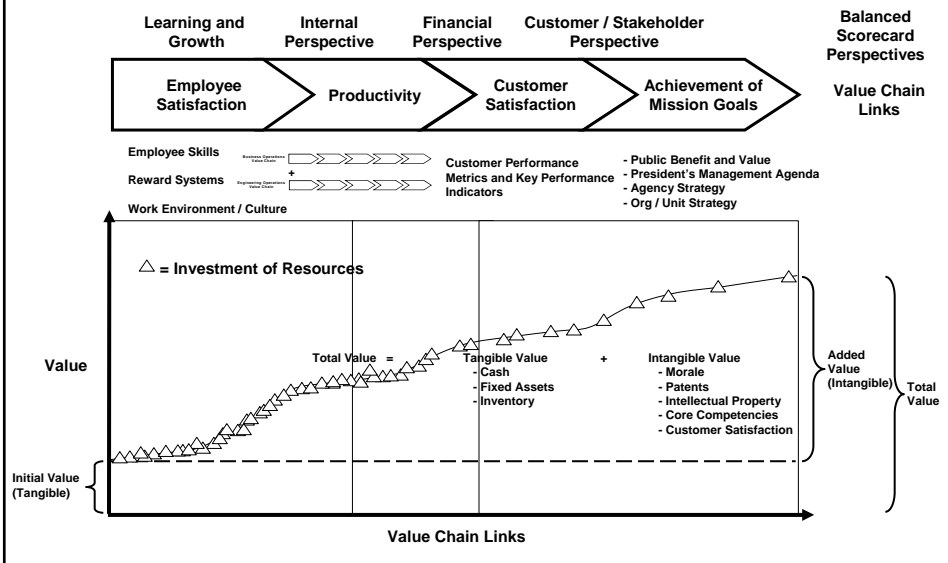
"...and because the years are much longer on Jupiter, moving our headquarters there would really boost our annual results."



# Balanced Scorecard

BSC-30

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Baltimore II - Project Management Manual August 2005 Table of Contents

<b>Day 1</b>	<b>Manual</b>	<b>Text</b>
<b>Table of Contents</b>	<b>3</b>	
<b>Introductions and Ground Rules</b>	<b>4</b>	
<b>Project Management Basics</b>	<b>11</b>	<b>pp. 3-17</b>
<b>Best Worst Team Exercise and Simplify the Problem Exercise</b>		
<b>Project Planning Situation</b>	<b>16</b>	
<b>Project Planning Situation Process Discussion</b>	<b>18</b>	
<b>Project Manager Competencies Sorting Exercise</b>	<b>20</b>	<b>111-115</b>
<b>Homework- Day 1 for Day 2</b>		
Project Manager Competencies Sorting Exercise Handout		
Pre-Assign Teachback Chapters (1 per table)		
Skim Chapters 4 and 5 in <i>PM for 21st Century</i>		
<b>Day 2</b>		
<b>Project Management Overview - PMBOK Connections</b>	<b>22</b>	<b>49-71</b>
<b>Project Meeting Basics and Skills and Farmers</b>	<b>26, 27</b>	
<b>OIG Meeting Problems +Meetings, Bloody Meetings</b>	<b>30</b>	
<b>Project Definition</b>	<b>32</b>	<b>49-71</b>
<b>Work Breakdown Structure (WBS)</b>	<b>45</b>	<b>66, 73-77</b>
<b>Homework - Day 2 for Day 3</b>		
Teach Back Assignments Review (ensure criteria understood)		<b>Text Chapters</b>
Handout Situational Type Exam Questions - Part I		
<b>Day 3</b>		
<b>Teach Back Assignments</b>	<b>53</b>	
<b>Tower Bidding and Building Simulation</b>	<b>51</b>	
<b>Project Sequencing (Network Diagram)</b>	<b>54</b>	<b>76-103</b>
<b>Project Scheduling</b>	<b>62</b>	<b>76-103</b>
<b>Preliminary Research Phase &amp; Field Work Phase (PM Handbook)</b>	<b>36, 70</b>	
<b>MS Project Overview</b>		
<b>Homework - Day 3 for Day 4</b>		
Read Earned Value Project Management Article	<b>85-94</b>	
SDI Pre-work (green portion p. 4 and p.5)		
Handout Practice Exam Questions - Part II		
<b>Day 4</b>		
<b>Estimating</b>	<b>77</b>	
<b>Earned Value Project Management - An Introduction</b>	<b>85</b>	<b>185-187</b>
<b>Earned Value Project Management</b>	<b>95</b>	<b>185-187</b>
<b>Visual Awareness Examples</b>		
<b>Risk Management</b>	<b>109</b>	<b>88-89, 242-244</b>
<b>Interpersonal Skills: Relationship Awareness (SDI)</b>	<b>129</b>	<b>111-115</b>
<b>Homework- Day 4 for Day 5-- Prepare for Exam</b>		
Handout Practice Exam Questions- Part III		
Prepare for Exam		
<b>Day 5</b>		
<b>Final Exam</b>		
<b>Evaluation Questions (WBS, Sequence, Schedule, Estimate)</b>		
<b>Reporting Phase (PM Handbook)</b>	<b>149</b>	
<b>Reference Materials</b>		
<b>Team Basics</b>	<b>157</b>	
<b>Meeting Design</b>	<b>161</b>	
<b>Decision Making</b>	<b>166</b>	
<b>Conflict Resolution and Problem Solving</b>	<b>169</b>	
<b>Communicating from Meetings</b>	<b>172</b>	
<b>Thomas-Kilmann Conflict Modes Instrument (TKI)</b>	<b>174</b>	
<b>Appendices and EPA Materials</b>		
<b>Appendix A – Glossary of Project Management Terms</b>	<b>189</b>	
<b>Appendix B – Bibliography</b>	<b>201</b>	
<b>Appendix C – Example PMBOK Exam</b>	<b>210</b>	
<b>Project Management Handbook (EPA OIG)</b>	<b>227</b>	
<b>Assessing Organizational Systems (EPA OIG)</b>	<b>273</b>	

77 21 37 38 74 42  
13 45 73 5 10 26 70  
29 53 33 1 57 14 78 18  
49 9 81 69 34 82 2 58  
61 25 17 6 50 66 30  
19 83 59 11 24 28 48  
47 35 27 43 36 68 56 20 64  
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7 47 23 12 52 84 32  
75 55 39 16 72 44 76

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61 25 17 6 50 66 30  
19 83 59 11 24 28 48  
47 35 27 43 36 68 56 20 64  
31 3 71 15 67 60 40 4 80  
7 47 23 12 52 84 32  
75 55 39 16 72 44 76