**Module 4 - Background**

**Strategy Mapping & the Learning and Growth Perspective**

**Required Reading**

Review:

MacKay, A. (2004). A practitioner’s guide to the balanced scorecard: A practitioners’ report based on: ‘Shareholder and stakeholder approaches to strategic performance measurement using the balanced scorecard’. *Chartered Institute of Management Accountants*. Retrieved from: [*http://www.cimaglobal.com/Documents/Thought\_leadership\_docs/tech\_resrep\_a\_practitioners\_guide\_to\_the\_balanced\_scorecard\_2005.pdf*](http://www.cimaglobal.com/Documents/Thought_leadership_docs/tech_resrep_a_practitioners_guide_to_the_balanced_scorecard_2005.pdf)

Review Chapters 1-6 and read section 7.2 of:

Murby, L., & Gould, S. (2005). Effective performance management with the balanced scorecard: Technical report. *Chartered Institute of Management Accountants*. Retrieved from: [*http://www.cimaglobal.com/Documents/ImportedDocuments/Tech\_rept\_Effective\_Performance\_Mgt\_with\_Balanced\_Scd\_July\_2005.pdf*](http://www.cimaglobal.com/Documents/ImportedDocuments/Tech_rept_Effective_Performance_Mgt_with_Balanced_Scd_July_2005.pdf)

Read the following:

Armitage, H., &Scholey, C. (2006).Using strategy maps to drive performance.*Society of Mgt. Accountants of Canada*. Retrieved from: [*http://www.cimaglobal.com/documents/importeddocuments/tech\_mag\_strategy\_mapping\_march07.pdf*](http://www.cimaglobal.com/documents/importeddocuments/tech_mag_strategy_mapping_march07.pdf)

Also take a look at the following web page and download the Strategy Map in a Word document. This is a real simple example that will assist you in your strategy mapping discussions.

Baldrige Program Strategy Map. (2012). *National Institute of Standards & Technology [NIST]*. Retrieved from: [*http://www.nist.gov/baldrige/about/strategy\_map.cfm*](http://www.nist.gov/baldrige/about/strategy_map.cfm)

This web article will be helpful for focusing your SLP.

Niven, P. (n.d.). Financial perspective.*EPM Review*. Retrieved from [*http://www.epmreview.com/resources/articles/item/84-financial-perspective.html*](http://www.epmreview.com/resources/articles/item/84-financial-perspective.html)

**Optional Reading**

Sharma, P. (n.d.). BSC – learning and growth. Retrieved from [*http://www.scribd.com/doc/5032774/Balanced-Scorecardlearning-and-growth*](http://www.scribd.com/doc/5032774/Balanced-Scorecardlearning-and-growth)

**Module 4 - Case**

**Strategy Mapping & the Learning and Growth Perspective**

**Assignment Overview**

Explain the process of strategy mapping and how it relates to performance management and establishing value propositions. You may discuss this theoretically or use the Glacier Inn case study presented in Armitage and Scholey (2009) to serve as an example for integrating these ideas. Alternatively, you can use the Hazard Action Zone case study presented in Murby and Gold (2005) if you’d prefer.

Armitage, H., &Scholey, C. (2006).Using strategy maps to drive performance.*Society of Mgt. Accountants of Canada*. Retrieved from [*http://www.cimaglobal.com/documents/importeddocuments/tech\_mag\_strategy\_mapping\_march07.pdf*](http://www.cimaglobal.com/documents/importeddocuments/tech_mag_strategy_mapping_march07.pdf)

Murby, L., & Gould, S. (2005). Effective performance management with the balanced scorecard: Technical report. *Chartered Institute of Management Accountants*. Retrieved from: [*http://www.cimaglobal.com/Documents/ImportedDocuments/Tech\_rept\_Effective\_Performance\_Mgt\_with\_Balanced\_Scd\_July\_2005.pdf*](http://www.cimaglobal.com/Documents/ImportedDocuments/Tech_rept_Effective_Performance_Mgt_with_Balanced_Scd_July_2005.pdf)

**Assignment Expectations**

Your **essay should be 3 to 4 pages** long and include the following:

**Introduction:** In this part of your essay you will need to introduce your topic and provide a very brief overview of the key points you plan to make in your paper.

**Analysis:** In this section you will present several arguments in favor of your thesis statement. Discuss how either Glacier Inn or Hazard Action Zone effectively used strategic mapping (or how they failed to do so).

**Conclusion:** Wrap up your argument with a clear and cogent synopsis of your findings. Do your best to convince your reader (aka, your professor) as to your position.

**Additional Instructions:** Your essay should be 3 to 4 pages in length (not counting your title page or references). You must include a list of references. APA formatting is preferred. Do not paste in sections of text into your essay. All of your work must be written in your own words. It’s OK to use a short quote now and again, but quotations must be in quotation marks and properly cited. In-text citations should be used anytime you are borrowing somebody else’s ideas, or information. That is to say, if you are borrowing a thought from a publication from J. Neutron’s article written in 2010, that section of text must be followed with (Neutron, 2010). Quotations, data, and general ideas (put into your own words) should all be cited.

**Module 4 - SLP**

**Strategy Mapping & the Learning and Growth Perspective**

For Module 4, consider your organization's mission and strategy from the perspective of its learning and growth (from your work on the case, your previous course work, and your background reading, you should be reasonably clear what such activities are). In this section of the assignment you’ll begin to identify objectives and measures relevant to that perspective. Refer back to this presentation on [*objectives*](https://tlc.trident.edu/content/enforced/85373-BUS499-JAN2017FT-1/Modules/Module1/111991ObjectivesMeasuresTargets%26ActionPlans.ppt?_&d2lSessionVal=spz5hGIGSuKYuSR0uFS2ftgcl&ou=85373) if you need to.

**SLP Assignment Expectations**

Once you’re reasonably clear on what’s involved, think about your organization and its learning and growth processes, and then:

* Identify at least three objectives for improving **the organization's learning and growth**, and show how they relate to the mission, vision and strategy of the organization.
* For each objective, develop at least one meaningful performance measure (metric).
* For each objective, identify at least one expected level of performance (target).
* For each objective, identify at least one new action or program that needs to be developed to ensure successful implementation of the organization's strategy (initiative).
* Comment briefly on the relationships of the learning and growth objectives that you've identified here to the financial objectives that you identified in the Module 1 SLP assignment, the customer service objectives you identified in Module 2, and/or the internal business process objectives you identified in Module 3. How do they help to fulfill those objectives? If they don't (and they don't have to), what makes them more important than objectives that would relate to customer service, business processes, or financial operations?
* Finally, do you wish to make any changes to your Module 1, 2, or 3 objective write-ups in light of your Module 4 experience?

Here’s a table that you may wish to copy and fill in (the boxes are expandable - take all the space you need to be complete in your descriptions. No **more than 2-3 pages** should be necessary.)

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| --- | --- | --- | --- |
| **Objective** | **Measure** | **Target** | **Action** |
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|  | | | |
| **Relationships to other objectives** |  | | |
|  | | | |
| **Revisions (if any) to Module 1, 2, and/or 3 Objectives** | | | |
| **Objective/Module** | **Measure** | **Target** | **Action** |
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