

articles

This article explains how Robert Kaplan and David Norton's revolutionary approach to strategic planning works and how it can be adapted for the not-for-profit world.

Strategic Planning:

The BSC & Strategy Maps – an introduction

Organisations need to find a way to express their strategy simply and understandably – but that way also needs to reflect the complexity of their relationships and activities.

One increasingly popular framework to combine these qualities is the balanced scorecard (BSC), and specifically the more recent incarnation, the strategy map. At its simplest the strategy map describes how an organisation plans to deliver its strategic goals expressed as a one-page systems diagram.

The **strategy map** outlines the fundamental business logic of the plan, demonstrates the implications for internal and external stakeholders, codifies the organisational competencies needed, explores what kind of skills and knowledge staff need, and identifies what resources need to be invested.

The **strategy map** is generally complemented by a **balanced scorecard** to track how effectively the plan is being delivered, and an **implementation** plan to show how the activities to deliver the plan will be sequenced and rolled out.

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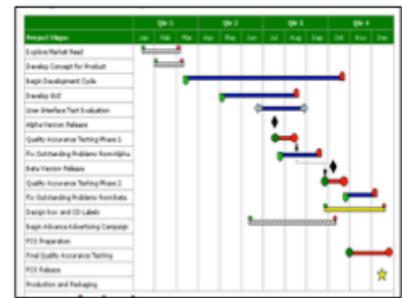
Strategy Map

describes the overall business logic and direction

Strategy 2013-15 Goals	Objectives	Indicators	Targets	Initiatives
Strategy				
Objectives				
Capabilities				
Learning				
Financial				

Scorecard

describes how success will be tracked and measured



Implementation Plan

describes how time, tasks and talent are organised

At =mc we're the leading European experts in developing strategy maps with charities and public bodies. This download explains what strategy maps and BSCs are, how to make them, and how you might use them.

Popular

Increasingly the classic 'narrative' approach to strategy – a written plan with hierarchical analysis, aims, objectives, action, and spread sheets – is not seen as flexible enough to deal with the emerging volatile situations that public bodies, charities and NGOs find themselves facing.

Part of the attraction for the non-profit sector of using BSC is that the approach has significant traction in the commercial sector. Many private agencies, including 70% of Fortune 500 companies, use them. And 60% of the FTSE 100 companies – including Tesco – use the BSC. So an advantage for any non-profit is that by adopting the model you can gain access to an enormous number of commercial examples with which to compare your own practice.

In the last 10 years public bodies including the BBC, the Army and the Health Service have begun to use strategy maps and scorecards. And =mc has worked with leading charities and non-profits such as the International Federation of the Red Cross and Red Crescent Societies (IFRC), UNICEF International, Amnesty International, ActionAid, WSPA, Compassion in World Farming, CRUK, Ramblers, National Trust for Scotland and Sightsavers are using this approach as an overall framework and for a range of operational activities including fundraising, communications, innovation and operations.



Why use this approach?

A well-developed BSC serves a number of purposes:

- **Communication:** to implement a strategy successfully, everyone – from the CEO to the receptionist handling calls from donors – needs to understand what the organisation is trying to achieve. Each individual also needs to know how they can contribute to achieving the strategy. The BSC sets out the strategy in a form that everyone can understand and see their role.
- **Measurement:** as strategy is essentially a hypothesis of what an organisation thinks it needs to focus on to be successful, it's important to continually ask, "Are we achieving the results we are aiming for and if not what should we do?" The BSC helps you track progress against the objectives you set and the actions you think will help.
- **Alignment:** for a strategy to be successful, all parts of the organisation need to work together to achieve it. The BSC enables you to 'cascade' objectives down and across different clusters and functions – so it will work at a whole organisation, region, and operational level. This alignment means that synergy is more likely to emerge.
- **Accountability:** the organisation strategy needs to achieve results for stakeholders – internal and external – especially beneficiaries and donors. The BSC helps to create a culture of accountability, learning and improvement – all essential to mission success. You can also publish this data to ensure stakeholders are satisfied.

What is the Balanced Scorecard (BSC)?

The BSC begins with the premise that most organisations are good at developing strategies, but not so successful at implementing them. So a key difference with the balanced scorecard is that it doesn't just help formulate an organisational strategy – it helps put it into practice and track its impact in a single framework.

Two US academics Robert Kaplan and David Norton, originally developed the methodology for commercial organisations during the 1990s. The methodology has since moved through a number of iterations and formats.

Originally the balanced scorecard simply asked you to measure the critical success factors in running a successful organisation. It focused, as the name suggests, on two simple dimensions:

- **Balancing** the key perspectives in an organisation: customers, internal processes, learning and growth, and finance. These are seen as interdependent.

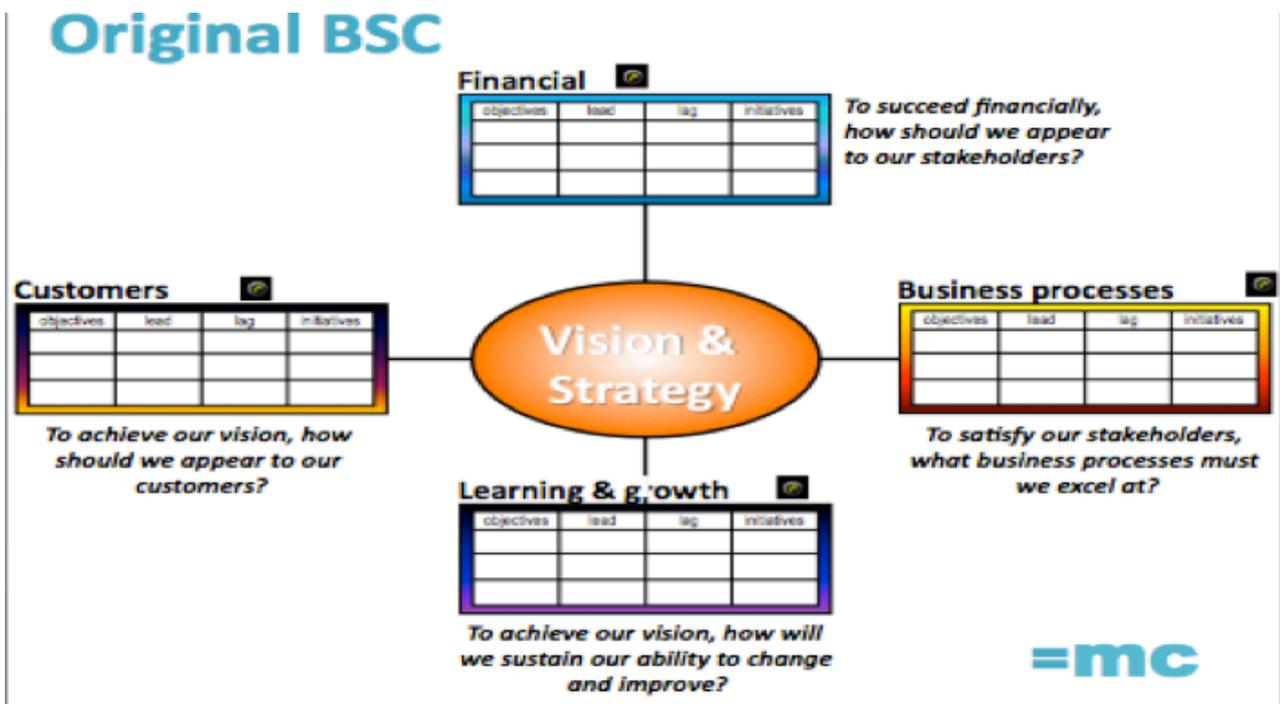
and

- **Scoring** and tracking a small number of metrics and measures – critical success factors that drive success in each of these perspectives.

The diagram below shows a balanced scorecard in the original format from circa 1990. This took four perspectives and tracked what was important in each one. The scorecard focused on measuring success in four key areas or perspectives:

- Finance: the financial results- profits- demanded
- Customers: who the business must serve
- Business processes: the ways you organise work
- Learning and growth: the people and their skills

These four perspectives aren't fixed and then names can change- so business processes are often called capacities, and customers can be called stakeholders.



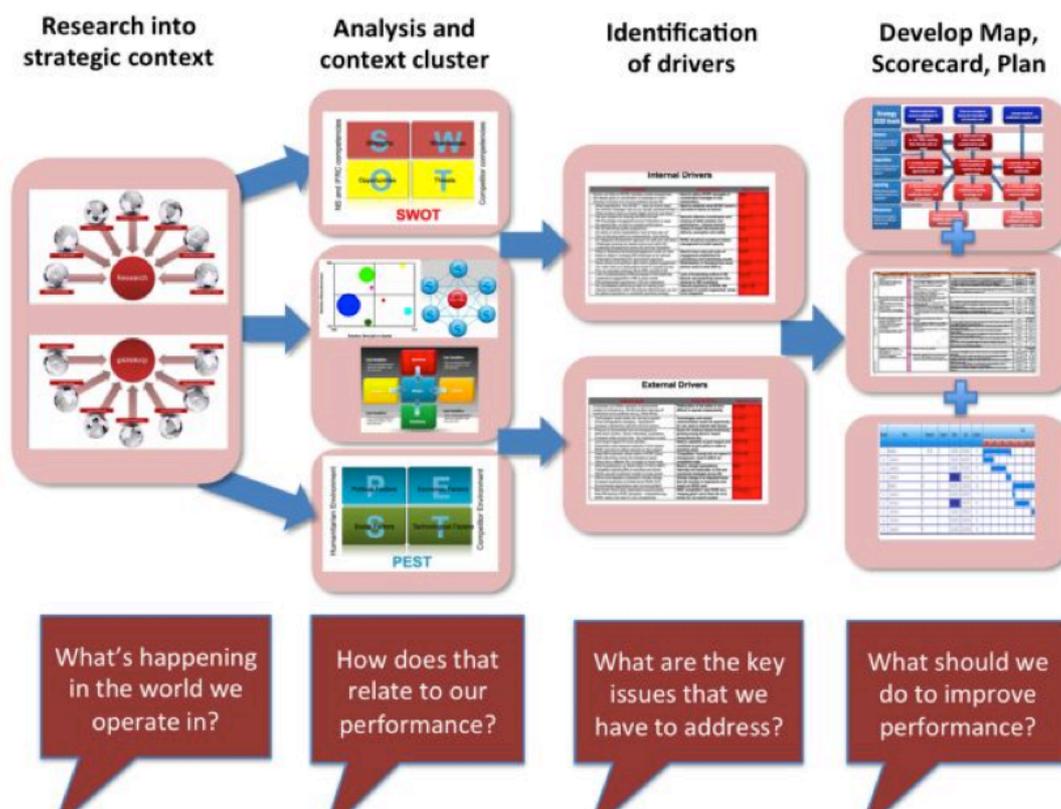
In each of the perspectives you were asked to answer a key question, illustrated above, and then to establish:

- the objective – outcome you’re aiming for– in each perspective
- the lead and lag indicators that will show progress
- any initiatives – or actions – to drive success
- a specific target for each metric

Since this first incarnation Kaplan and Norton’s thinking has moved on, and the perspectives are now organised in a sequence – hence the map idea.

Developing a Strategy Map

The process below illustrates the four stages in which a contemporary strategy map plus the scorecard and implementation plan are developed. Each stage is designed to answer a key question before moving to the next.



As you can see the strategy map begins with an exploration of the strategic context for an organisation— looking at what’s happening in the markets or settings you work in. This might involve scenario development, competitor analysis, benchmarking, or trends assessment.

You then need to use a range of strategic analysis tools to frame this information and make it meaningful. Typically these tools include PEST, SWOT, and Boston Matrix etc. (For more on these tools and how to use them see <http://www.managementcentre.co.uk/knowledge-base>)

Next you use the analysis to generate a set of drivers – these are key internal and external concerns that you need to address when you make your plan. Below are examples of external drivers for a Scottish housing association keen to work with older people and address their special needs.

Once you’ve developed the map, seen here on the far right, you move on to the **scorecard** and **implementation plan**.

These **drivers** need to be answered in the objectives placed on the map you create. (So notice in the final column below the mapping of **objectives** which address the drivers.)

External Drivers

External Driver Audit	Driver Implication	Objective Map
 <p>Various tools help shape and organise the analysis to create the drivers</p>	<p>Reduced public funding means we have to find new sources of support</p> <p>The competitive context – for market share, private and public funds, for tenders - means 'More for Less' and cost competition</p>	<p>Each of the drivers is a challenge that an objective must answer</p>
<ul style="list-style-type: none"> Government statistics and demographics plus <u>Bield</u> tenant and service data signal emerging needs Over 85s will increase 38% in 10 years and there is no real provision established 	<p>The growth in the in older population will change the ways we provide services and the kinds of services we provide</p>	<p>1, 2, 3, 7, 11</p>
<ul style="list-style-type: none"> Government statistics indicate changing demographics for older people Stakeholder and partner experience suggests different needs emerging 	<p>The significant growth in dementia – a function of a growing older population- will change the services people need and that we have to provide</p>	<p>1, 2, 5, 7, 11</p>
<ul style="list-style-type: none"> Feedback from customers/beneficiaries is that we do a good job Market trends and data says there are changing perception of quality and need 	<p>Our customers have changing aspirations in terms of what they want – from accommodation type to service levels. We need to assess and address these.</p>	<p>1, 2, 3, 7</p>
<ul style="list-style-type: none"> Government policy changing and there is uncertainty about personalisation agenda In Scotland and wider there may be an impending change in government 	<p>Government policies are changing- as the government may- and we need to stay abreast of these changes</p>	<p>4, 5, 6, 10</p>

Organising Perspectives

The BSC organises your strategy into a number of **perspectives**. In the established corporate model, the four classic perspectives are financial, customer, internal processes and learning & growth.

In a charity or public body the customer perspective is often replaced with a stakeholder perspective. In this you might want to consider the distinction between different kinds of stakeholders – beneficiaries, service users, regulators, members and donors.



While the number of perspectives is generally four, there is some flexibility in where you choose to focus them. See the Norwegian Refugee Council below where the employee perspective is included by combining it with learning.

The sequence in which you organise the perspectives is important. So what is the sequence for your organisation? Do good financial results come about as a result of meeting donor/customer needs? Or do you need to shape customer needs in the context of your financial needs?

Organising the perspectives properly ensures that the strategy focuses both on external 'outcomes' (financial success, customer/donor satisfaction) and internal 'inputs' (what needs to be done within the organisation to achieve the outcomes, what skills are needed

The how/why logic is important since for Kaplan & Norton, strategy is essentially a series of hypotheses:

“Strategy implies the movement of an organization from its present position to a desirable but uncertain future position. Because the organization has never been to this future position, its intended pathway involves a series of linked hypotheses.”

Kaplan and Norton

For this reason, the objectives in each perspective need to be connected to the others in a cause-and-effect logic – creating a linked narrative.

See the diagram below illustrating this process. The map encourages you to follow the logic of your 'theory of change.'



An example of a commercial strategy map: South West Airlines

The map below is based on one of the earliest developed – for South West Airlines (SWA) in the USA. SWA essentially invented the ‘low-cost’ business model now used worldwide by many airlines. (One indicator of the power of their map, and this approach generally, is that it has been borrowed so often by other airlines.)

South West began with some drivers about the need to use their expensive planes more effectively, the idea of offering lower fares to encourage passengers to fly with SWA rather than competitors, the requirement to persuade staff to work more flexibly together, etc.

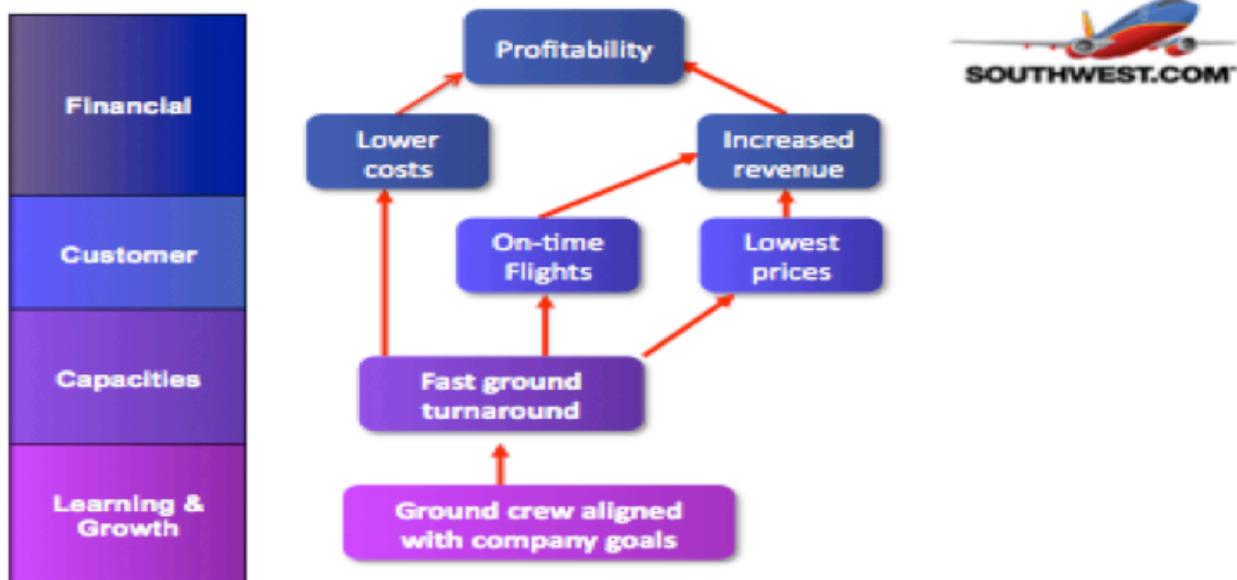
Notice down the left hand side the four perspectives in a BSC at work, showing a hierarchical logic. So to make money – **finance** – you need to satisfy **customer** needs. These needs are met by having strong **internal processes**. To achieve the processes requires a **learning and growth strategy** that engages and develops staff, and builds an appropriate culture.

The **objectives** – the ‘bubbles’ on the right hand side – show what activity must take place in each perspective to deliver the overall goal of running a profitable airline. The

objectives are a way of addressing the drivers indicated above. They also follow a vertical logic – with the down path answering ‘how?’ and the up path answering ‘why?’

This ‘simple’ model contains profound insights into how to run a successful low-cost airline. This simplicity is a key feature of an effective strategy map.

Southwest Airlines Strategy Map



Reading the map from the top perspective to the bottom should explain how the strategy works, so:

“How will we succeed in our strategy?”	By meeting our financial objectives.
“How will we meet the financial objectives?”	By delivering to our customers.
“How will we be sure to deliver to our customers?”	By excelling in key internal business processes.
“How can we be sure we are excellent in those processes?”	By learning and improving.

You normally begin with this ‘how’ logic when creating a map.

If you read the map from the bottom perspective to the top, it should explain why you have chosen the objectives in each perspective, as shown below:

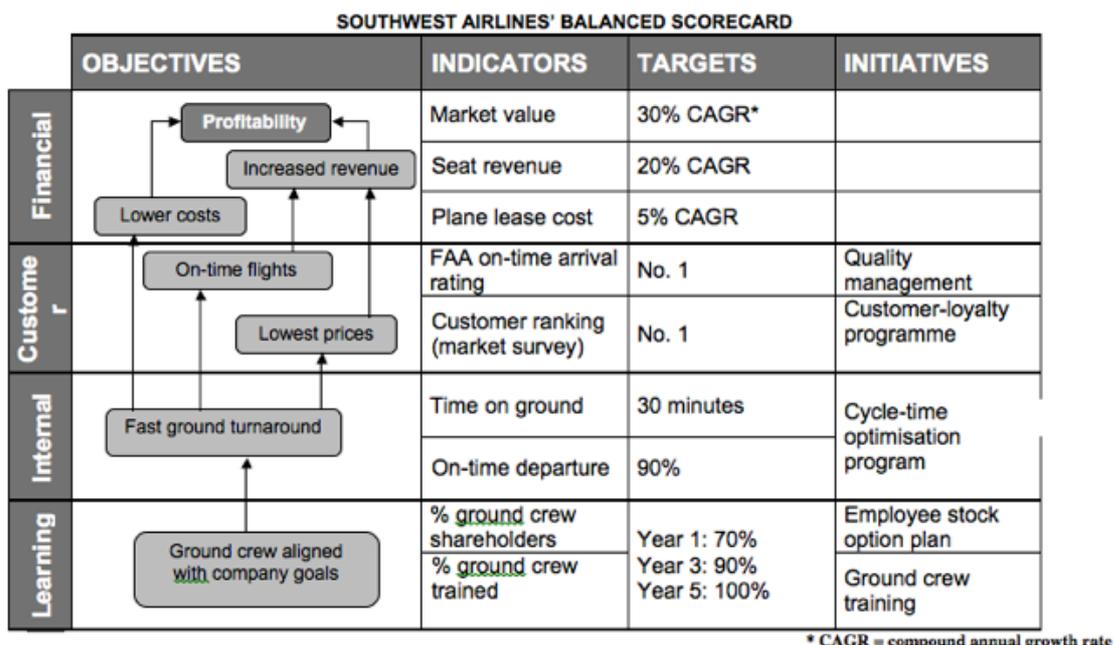
“Why are we learning and growing in this way?”	In order to excel in our internal processes.
Why are we focusing on those particular processes?	To deliver high-quality service to our customers.
“Why do we need to deliver this service to our customers?”	To ensure we achieve our financial objectives.
“Why do we need to achieve the financial objectives?”	To succeed in our strategy and move towards our vision.

As you can see the focus is on the core business logic. So the map is simple but not simplistic. The simplicity helps with using the map as a communication tool. It should clearly explain what your priorities are and how you intend to achieve them.

The objectives – in the ‘bubbles’ – link the map and the scorecard so appear in both. There are four main components in the scorecard which answer different questions:

Objectives	Indicators	Targets	Initiatives
What do we need to achieve?	How will we measure success?	How much do we need to improve?	What do we need to do to get there?

Below is the SWA scorecard to accompany their map. This shows how the map is implemented. Notice some key initiatives – action – here such as the importance of engaging employees through a stock option plan.



One of the attractive aspects of the BSC approach is that you can explain your strategy in just two/three pages and probably two/three minutes. Note, however, that those two/three pages can take just as long as a conventional strategy to develop – and just like a conventional strategy, the more complex the organisation, the longer it takes.

Businesses are, of course, ultimately judged on financial success. Most not-for-profit organisations, with the possible exception of fundraising departments, value success differently. For some, the service provided to ‘customers’ (or stakeholders, clients, beneficiaries, constituents, end users) is the ultimate measure of strategy. These organisations have re-ordered the perspectives to reflect this. Some have also renamed them.

For example internal processes are sometimes called capacities. Finance can be expressed as resources when it represents an investment rather than an outcome.

There are examples of reordered and renamed processes in the non-profit strategy maps at the end of this download.

Objectives

Objectives are statements of outcome you place on the map. They answer the drivers. They’re not actions. So “Improve our donor journey” is an objective. But “Buy a new database” isn’t. “Reduce HIV infection among men” is an objective but ‘Give condoms to sex workers isn’t.’ ‘Engage government in the importance of heritage’ is but ‘hire a PR firm to lobby for us’ isn’t.

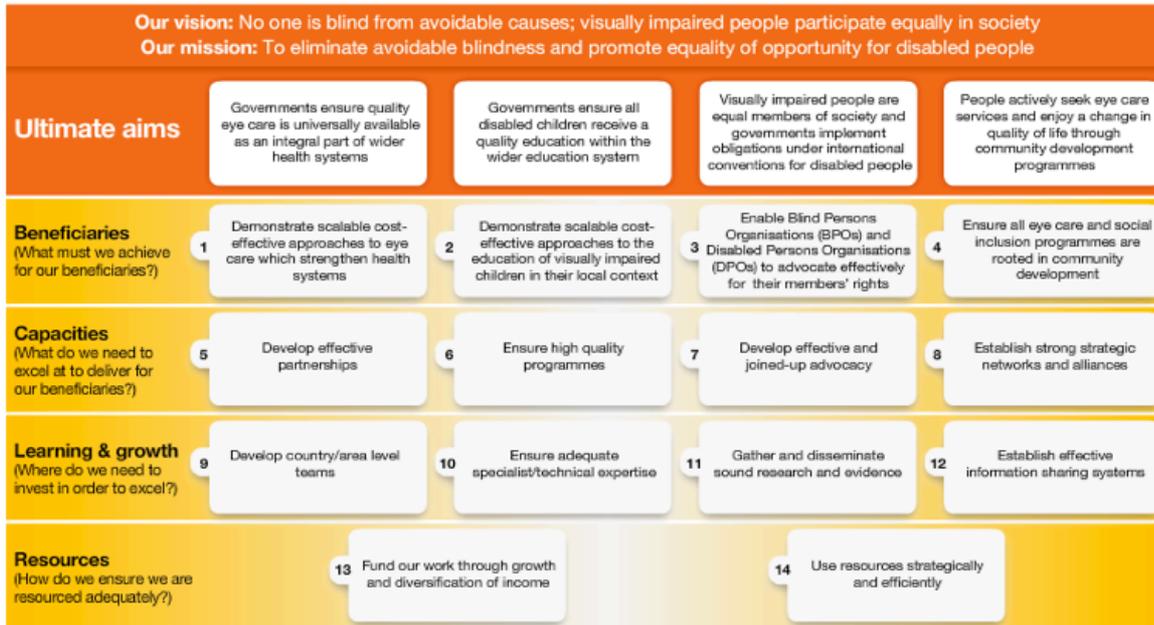
You want to end up with between two and five objectives per perspective. If you have too many it suggests you’re not focusing on the ‘vital few.’ And too few may mean the map is way too general.

Once you have agreed the objectives in the top perspective, move to the next level asking the key questions relevant to that perspective. Follow the how/why logic. The objectives in one perspective should explain how you plan to achieve the objectives in the perspective above.

Continue down the map until you have objectives populating each of the perspectives. If it seems, on reflection, that an objective would be better suited in another perspective don’t be afraid to move it. You can always move it back.

See below for some well-formed objectives on the SightSavers International map.

The Sightsavers SIM Card (Strategy Implementation and Monitoring Card) The Strategy Map



When identifying objectives it is important to consider. Do they:

- remain true to your vision, mission, values and competencies? The map is designed to translate your strategy, so it shouldn't contradict the fundamental way you want to work.
- capture the key things you need to achieve to be successful? Remember, the map doesn't describe everything you do. So what are the few things that are critical to your success?
- flow from your overarching strategic aims? The objectives describe how you will achieve what you need to do. The aims- at the top of the map- represent the major difference you want to make.

After your first draft to review the quality of the map, consider three questions:

- How many objectives are there? Focus is important. If you have more than 15 overall you risk an overload of data when measuring progress on the scorecard. Many BSC projects collapse because of the data burden. Capping the number of objectives ensures focus and simplicity.
- What is the 'granularity' of the objectives? Are they too general (e.g. "develop staff"), or too specific (e.g. "improve creativity skills among tier 3 middle managers") or balanced (e.g. "develop a more entrepreneurial culture among all staff")?

- Does the map identify and communicate the key internal and external priorities? Does it ‘tell the story’ of your strategy in an understandable way that individuals and stakeholder clusters can identify with?

To check the logic, many organisations add arrows between objectives, showing the key connections between objectives. Again avoid too many arrows.

Finally it’s normal to assign an ‘owner’ to each objective to ensure some part of the organisation, or some senior individual, is held accountable for its achievement.

Scorecard

The **Scorecard** captures the way in which you track the impact of initiatives – activities – on delivering the objectives in the map. It often is laid out like the example below.

Scorecard

Objectives – from the strategy map
“what do we need to achieve?”

Indicators – “how will we measure success?”
- normally divided into lead and lag

Targets – “how much do we plan improve and over what period?”

Initiatives – “what action will we take to deliver improvements?”

Strategy 2015-18 Goals	Objectives	Indicators	Targets	Initiatives
Stakeholders What groups are critical to our success? How do we engage with them?	1. Engage stakeholders, including staff, partners and our wider community, in our strategic planning and implementation 2. Monitor and evaluate stakeholder engagement 3. Deliver on our commitment to our stakeholders	Number of Stakeholders	2015/16 to 2017	Share of stakeholder feedback and positive feedback
Capacities What resources, skills and capabilities do we need to succeed?	1. Develop and maintain our organisational capabilities 2. Invest in our people and our technology 3. Monitor and evaluate our capabilities			
Learning How do we learn and improve our performance?	1. Monitor, measure and learn from our performance 2. Share and disseminate our learning 3. Apply our learning to our strategy and operations			
Financial What do we need to invest in to succeed?	1. Invest in... 2. Monitor and evaluate our financial performance			

Mapping – “which objectives will this initiative impact on?”

You place in the scorecard a number of initiatives or actions designed to deliver the objectives. Normally there’s at least one initiative for each objective in the map.

Some objectives may cut across different functions of an organisation and/or may require a new budget stream to fund them. If this is the case, a specific cross-functional initiative may need to be defined to ensure that the objective is achieved.

For example, if an international organisation decides to have an objective to “increase cross-regions working” it will, presumably, apply to all parts of the

organisation. The linked initiative will define who is responsible for the achievement of the objective, who is involved in implementing it, what resources are allocated, and how success will be measured.

Indicators

Indicators are an important part of the BSC performance management process. Indicators track the impact of initiative to deliver the objectives. Kaplan and Norton argue that only one or two indicators should be set for each objective to ensure you stay focused on the most important measures.

They point out you don't need to have information on all aspects of a car's functioning: just the few key things that let you know if it will get you where you want to go and how en route you are

There are two types of indicator: lead and lag.

- A **lead** indicator is what you measure to determine if you are heading in the right direction to achieve the objective.
- A **lag** indicator measures if you have achieved the objective. The implication is that it will take some time – the lag – until the objective is achieved.

Indicators and Targets

Indicators are really only useful when you set targets to show specific improvements. When organisations assign 'ownership' of objectives to senior team members they then have the responsibility for:

- writing a paragraph that explains the meaning and implications of each objective – and why they 'own' it
- organising a team of specialists or relevant stakeholders to set indicators, identify baseline data and propose targets
- bringing this information back to the senior team or BSC project group for approval, and to ensure the indicators and targets are in sync

Balanced Scorecard specialists suggest that most private sector organisations already collect 70% of the data needed by indicators. Our experience is that most

not-for-profit organisations are only collecting around 30% of the data they need. By implication, the choice of indicators should be pragmatic. Otherwise you may find yourself struggling to organise data collection. The key question is are you already collecting data on something that can be used as a BSC indicator?

An **indicator** defines **what will be measured** to assess achievement of an objective. A **target** defines **how much improvement** is required over time.

Only one or two indicators should be set for each objective. This keeps data collection manageable and the focus strategic. Every objective should have a lag indicator. Lag indicators look back over time and ask “have we achieved the objective?” For some objectives it may be difficult, or take time, to measure achievement directly. They will also need a lead indicator. Lead indicators ask “are we doing the things we think we need to do to achieve the objective?” In other words, lead indicators drive **performance**; lag indicators measure **outcome**.

Here is an example from some work we did with UNAIDS:

Objective	Lead Indicator	Lag Indicator
Reduce the prevalence of HIV	Number of participants attending peer AIDS awareness training	HIV prevalence rate reduced among the target group

The logic here is that running awareness training will lead to safer sexual practice and lower incidence of HIV. By collecting data, this assumption can be tested. It is possible of course that attendance in awareness training does not result in lower rates of HIV. (For example, if many the participants are drug users, then their addiction can negate the impact of the awareness.) If this is found to be the case, the lead indicator should be changed.

Some indicators are easy to measure – amount of money raised, number of people helped, number of actions etc. Others are difficult – staff motivation, empowerment, changes in attitude, etc. When you can’t measure the impact of your objective directly, you need to use an ‘analogue’ metric. This is a metric that suggests whether or not you are being successful. So you could argue that level of staff absences is a analogue indicator for motivation.

The cycle time – the length of time between the lead and lag indicator – is also important. In some cases, such as the HIV example below, the cycle time can be a number of years. In other cases – say whether your twitter campaign goes viral – the

cycle time can be as little as a day. So when making an investment or planning decision you need to be clear about when it's reasonable to decide that the objective is or is not being delivered.

In many non-profit organisations while there is a great deal of data collected it's often not clearly connected to measuring performance. It's important to be pragmatic about the choice of indicators and to measure what's relevant. A good starting point is to establish if there is information currently being collected that will give an indication of progress or success.

It's also important not to be derailed by the need to collect information on the indicators. Some organisations have found they spend so much time doing this in order to satisfy their Balanced Scorecard, that they've lost focus in actually achieving the strategy. To avoid this happening it can help to phase-in indicators – i.e. begin collecting information on the few key indicators and, over time, gradually begin developing the others. This way you build momentum.

HIV example

Below is an example of some work that =mc did for UNAIDS, the UN agency charged with dealing with HIV and AIDS.

A city authority decides to launch a peer education programme among sex industry workers. This involves initiatives such as organising sex worker peer training, condom distribution, and asking other city authorities for advice.

They might choose the following lead and lag indicators to track the impact of these initiatives.

Lead indicator	Estimated cycle time	Lag indicator
number of sex workers attending peer education training	12 months	levels of awareness among sex industry workers generally in the importance of condom use
number of condoms distributed	1 week	number of condoms used
number of other city governments who ask for advice on programme	2 years	number of other governments who adopt the programme
amount committed to peer education budget	12 months	amount spent as shown in accounts

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Resource Mobilisation/Fundraising example

Here’s another example based on a charity that decides to launch a fundraising programme across a number of income streams. They might choose the following simple lead and lag indicators.

Lead indicator	Estimated cycle time	Lag indicator
number of donors signed up to monthly giving through face-to-face	12 months	retention/attrition level at the end of 12 months
number of donors indicating they’ve left a bequest following adverts	5 years	time to a bequest programme maturing and delivering net results
number of proposals written to foundations	6 months	number of successful proposals
number of joint projects submitted to the EU	24 months	grants programmes agreed

Targets and Dashboards

A target sets the degree of improvement required to achieve the objective. Each indicator will have a target. In order to set the target, you need to know the current level of performance – or ‘baseline’ – against each indicator. The example below gives an objective in the ‘learning and growth’ perspective, and identifies a lag indicator and a set of targets.

Objective	Indicator	Target
Reward and motivate staff to keep them engaged	Staff turnover	Baseline: 50% Year 1: 40% Year 2: 30% Year 3: 20%

Many organisations develop a sophisticated system to track the impact of their work using a **dashboard**, which is essentially a ‘live’ version of the indicators.

The first example below is from SightSavers, the international disability charity. It accompanies the Scorecard and is a shortened version designed to guide senior managers on overall performance. SightSavers display their indicators on their website as part of their commitment to transparency and accountability.

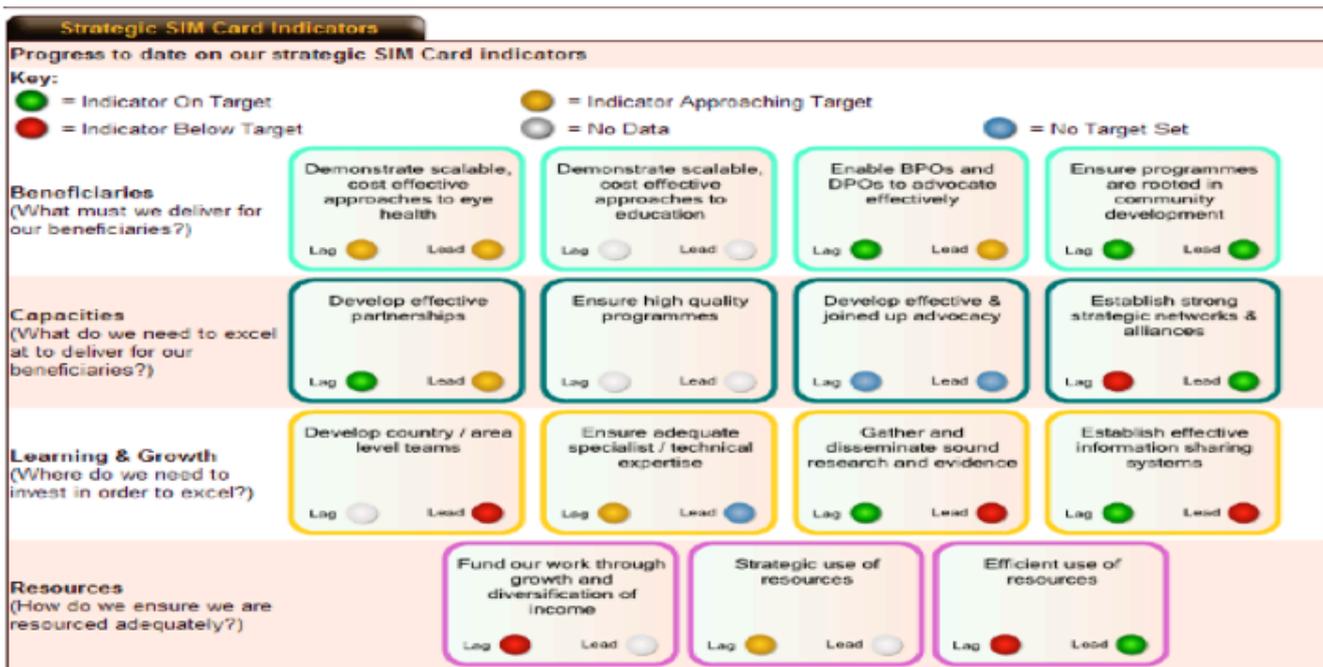
You can see here how they have used the traffic light approach to track impact:

Red: off target the indicator

Yellow: approaching target

Green: on target

The use of colours allows you to establish quickly where to pay attention.

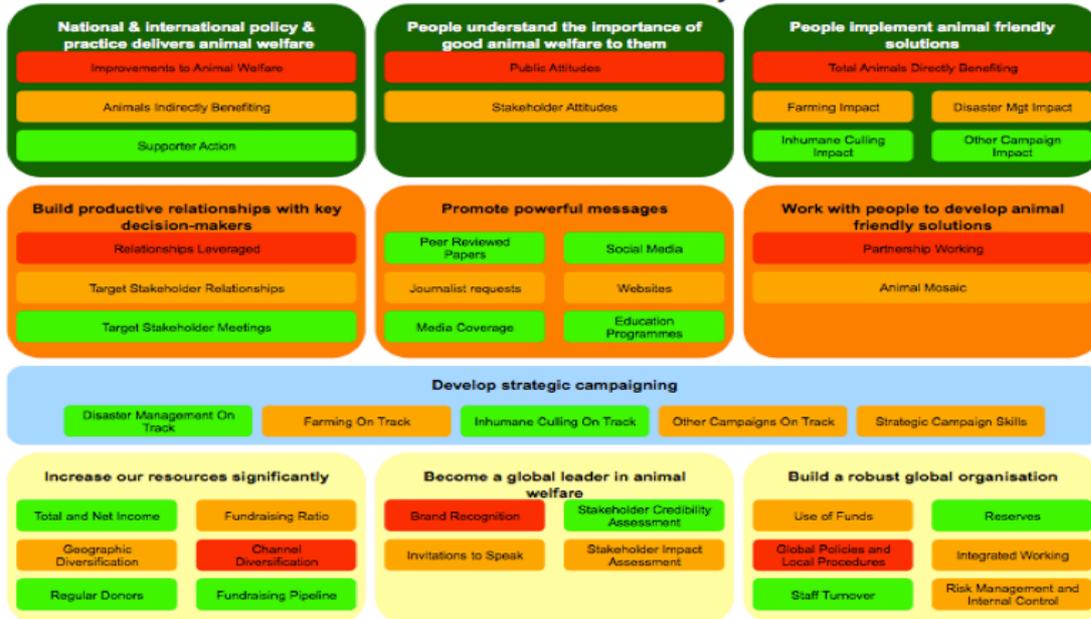


Here’s another example of a dashboard from Word Society for Protection of Animals. (WSPA) You click on the item to drill down and discover the key issues underlying the performance.



WSPA Annual Scorecard

A world where AW matters and animal cruelty has ended

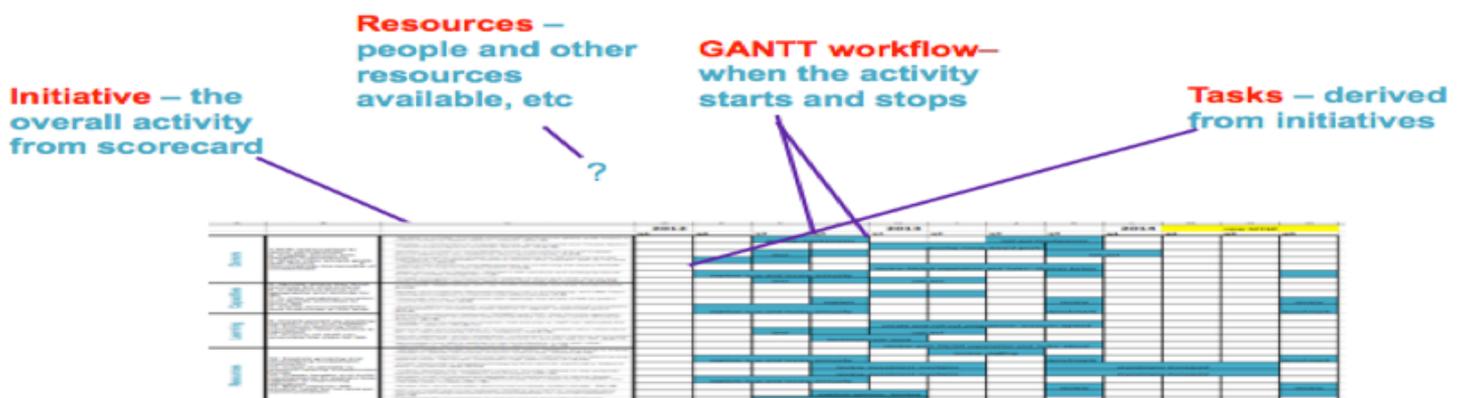


Implementation Plan

The final part of the process is an implementation plan which sequence the Initiative. This often takes the form of a GANTT chart combining:

- **Team:** who will deliver the initiative
- **Task:** the Initiative itself
- **Time:** how long the initiative will take to deliver

Below is a simple example of one of these.



Not-For-Profit Strategy Map examples

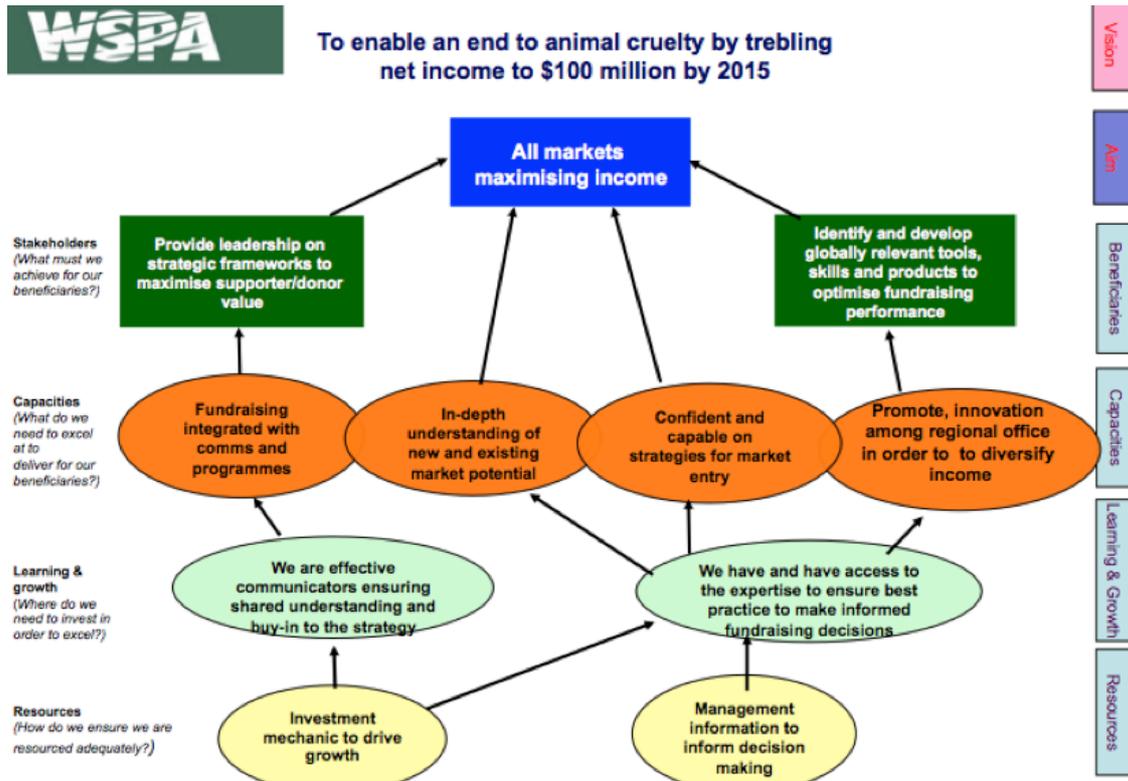
This section has examples of Strategy Maps from different non-profit organisations to show different approaches. Note we are unable to offer many example maps since organisations regard them as confidential. Thanks to those who did agree.

WSPA

WSPA (World Society for the Protection of Animals) is an international NGO that works through a federation of animal charities worldwide to promote animal protection and welfare. A key to WSPA's approach is the development of innovative models for animal protection that can be developed, tested, and replicated by their member organisations.

WSPA has used strategy maps widely and the – edited – fundraising map below is a specific one to deliver a challenging strategic goal: growing income to \$100M. WSPA put the financial/resources perspective on the bottom of the map, seeing this as driving the strategy. The customer perspective was renamed 'stakeholders' – to include the member organisations who were the customers for the strategy. At the top of the map are a fundraising vision and an overarching aim.

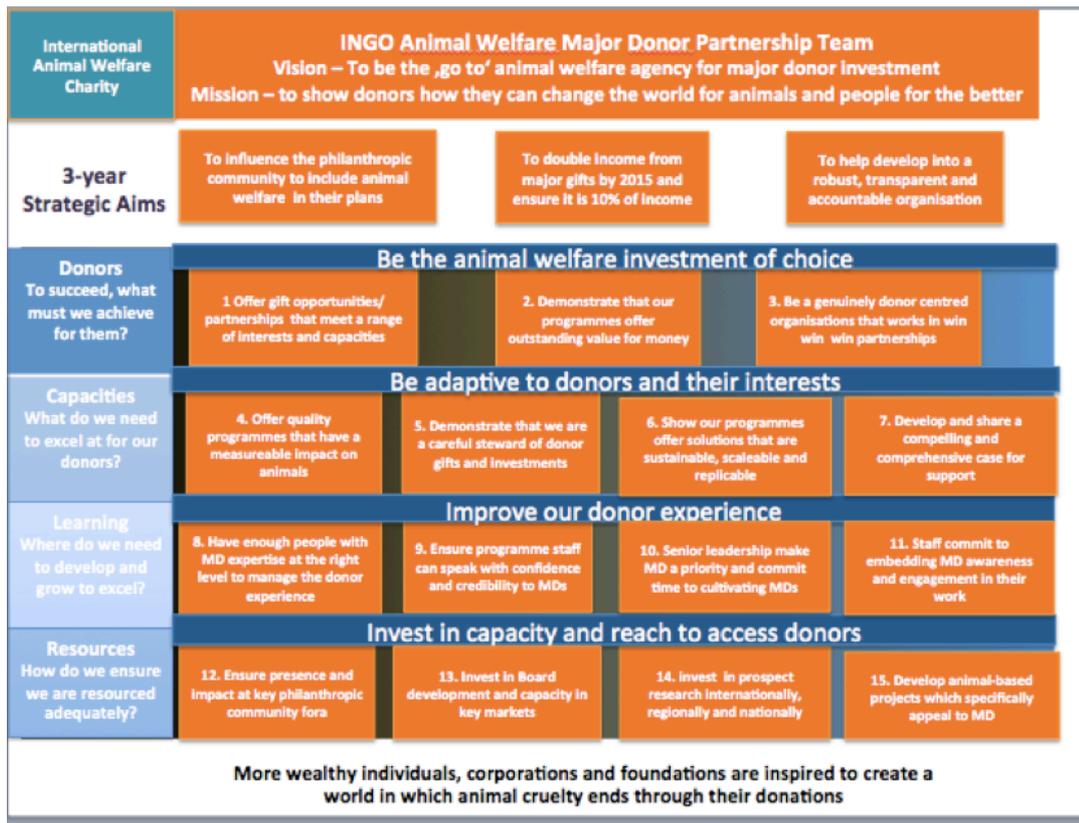
WSPA has developed matching scorecard to help the senior team measure the extent to which its objectives are delivering WSPA's strategic outcomes, vision and mission.



A Fundraising Map: Animal Welfare INGO

The map below is an anonymised example of a functional map-developed for the major donor team of an animal welfare INGO. I should how the major donor team seeks to move from an overarching vision, though a mission, some key strategic aims and then a set of 15 linked objectives organised along four key perspectives.

Each perspective is summarised with a tagline, and at the bottom is an overall outcome.



Norwegian Refugee Council

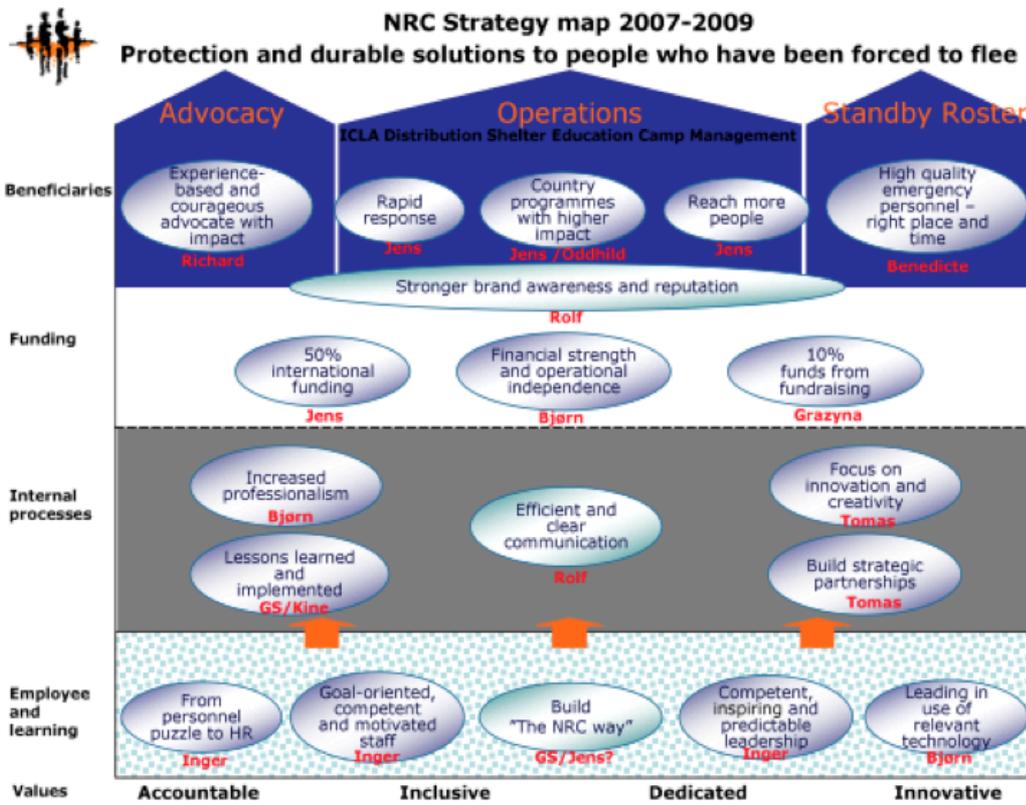
The Norwegian Refugee Council (NRC) is an independent humanitarian NGO, which provides assistance and protection to refugees and internally displaced persons worldwide. NRC developed a strategy map to implement its strategy from 2007-09.

NRC took the traditional BSC model as a starting point but reversed the order of the customer (‘beneficiaries’) and financial (‘funding’) perspectives. Protecting beneficiaries is the end point, or result, of the strategy. The logic is that NRC is able to provide protection by generating funds for its work.

NRC has incorporated three broad strategic themes into its strategy map – a technique also used by Amnesty International in their map. Operations are the cornerstone of NRC’s work. The organisation is additionally engaged in Advocacy for refugees and internally displaced people. The third theme is operating a Standby Roster, to ensure that quality emergency workers are deployed to areas of need quickly.

On the map you can see that key individuals from the senior team are assigned one or more objective to ensure each one is owned.

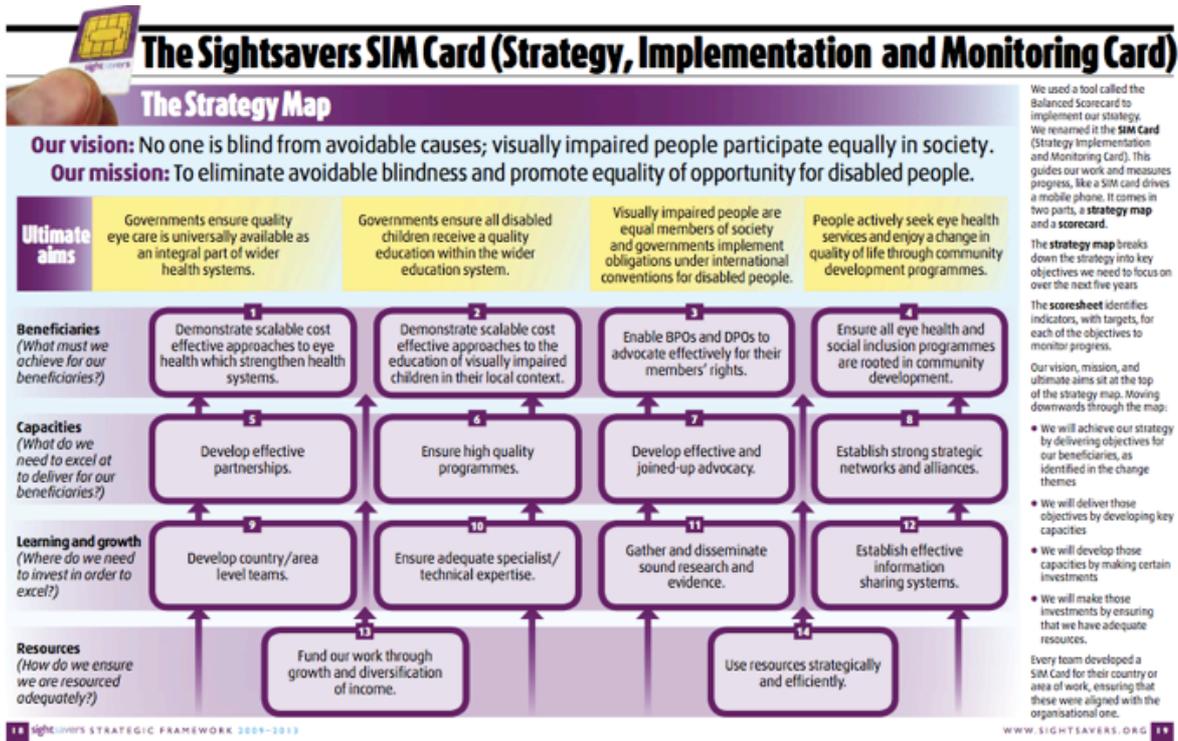




Sightsavers

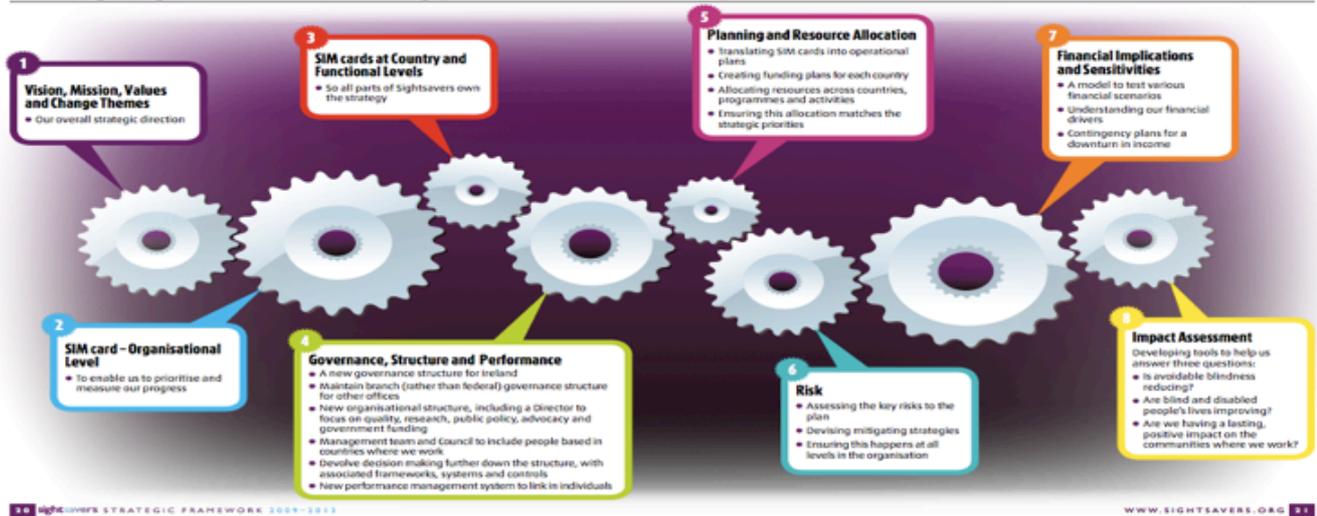
Sightsavers is a leading disability INGO which works with sight impairment. In 2008 they undertook a major review of their mission, working with =mc to undertake a significant stakeholder consultation, and develop a new integrated strategy using the Map and Scorecard. The result was a radical change in focus and changes to the way they organised and worked. (See the diagram below showing how changes in one part of their work changed another.)

This process took place over 18 months involving a small cross-functional team from within Sightsavers staff aided by a team of =mc consultants. They decided to re-brand the Scorecard as the Sightsavers SIM card, using a mobile phone metaphor.



Sightsavers are keen on accountability so put their approach and results online. You can visit an interactive version at www.sightsavers.org/in_depth/13905.html.

Fitting together our strategy and operational plans

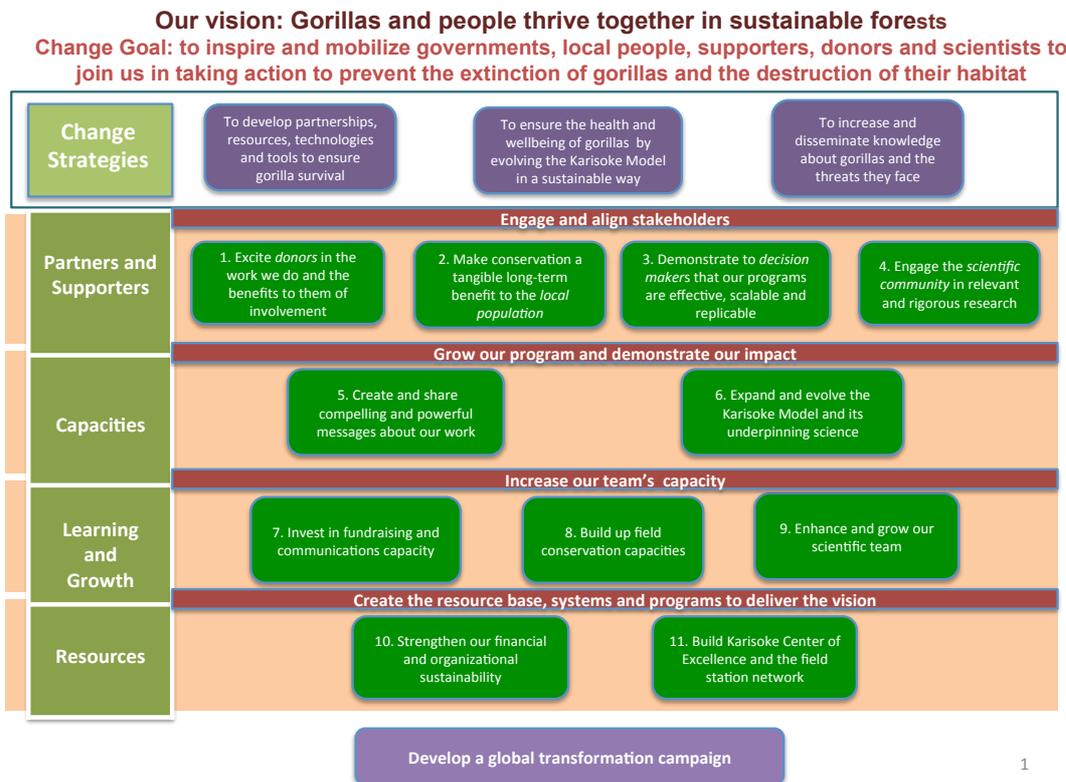


Dian Fossey Gorilla Fund

The Dian Fossey Gorilla Fund works to help humans understand and protect the interests of one of the most precious and threatened species in the world- gorillas.

The map is used as part of an overall approach to engage a number of key stakeholders in the ‘Partners and Supporters perspective:

- Donors
- Local people in Congo and Rwanda
- Decision makers- specifically politicians
- Scientists



This map was used in a successful ‘pitch’ to US billionaire Ted Turner to provide significant support.

Want help or to know more?

=mc has, in the last five years, helped significant number of international and UK charities develop powerful integrated strategies using the BSC and other approaches. These plans have helped to transform work and income.



If you'd like to know more about developing an overall strategy map for your team or organisation contact Bernard Ross, director at =mc on (+44) 207 978 1516 or b.ross@managementcentre.co.uk



And if you'd like to know more about developing a strategy map to drive your fundraising contact Angela Cluff, director at =mc on (+44) 207 978 1516 or a.cluff@managementcentre.co.uk