

# PRODACAPO BALANCED SCORECARD WHITE PAPER

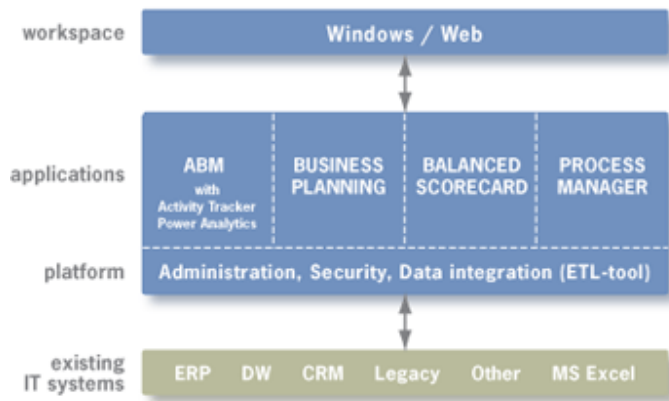


## CONTENTS

<b>CORPORATE PERFORMANCE MANAGEMENT</b>	<b>3</b>
<b>PRODACAPO BALANCED SCORECARD</b>	<b>4</b>
<b>Installation/Setup</b>	<b>4</b>
<b>Communicating via the web</b>	<b>4</b>
<b>Import/Export data</b>	<b>5</b>
<b>Security</b>	<b>5</b>
<b>Performance</b>	<b>5</b>
<b>Balanced Scorecard functionality</b>	<b>6</b>
Structure	6
Templates	6
Measures	7
Documents	7
Analysis and reporting	8
Balanced Scorecard initiatives	8
Excellent helpdesk	8
<b>Balanced Scorecard Measurement System</b>	<b>9</b>
<b>Balanced Scorecard Management System</b>	<b>9</b>
<b>Extend with other Prodacapo Solutions</b>	<b>10</b>
Combine Balanced Scorecard with Prodacapo ABC	10
Combine Balanced Scorecard with Prodacapo Process Manager	10

## CORPORATE PERFORMANCE MANAGEMENT

The Prodacapo software suite for Corporate Performance Management is a fully integrated and modular suite of world-class applications that helps your executives, business managers and staff get the insights and information they need to rapidly and continuously improve organizational performance and achieve results.



The suite includes applications for Activity-Based Costing/ Management, Business Planning, Balanced Scorecard and Process Management to help your organization overcome the major challenges it faces.

## PRODACAPO BALANCED SCORECARD

Prodacapo Balanced Scorecard helps you articulate strategy, goals and workable plans. The software is web-enabled and easy to use. With a clear view of goals, results, and plans, everyone can make better decisions and work together to continuously improve performance.

Prodacapo Balanced Scorecard is certified by Balanced Scorecard Collaborative.

## INSTALLATION/SETUP

- Scalable solution suites organizations of different size and complexity and supports both local and global installations.
- Based on modern client/server technology and market leading databases.
- Open database standard (SQL Server or Oracle), easy to retrieve and load data.
- Easy-to-maintain – minimal support required from IT department.
- Robust security. Access privileges can be set for different users and groups.
- Single sign on.
- Easy to integrate with existing IT systems, allowing automatic updates of data.
- Only model builders need to have the software installed.

## COMMUNICATING VIA THE WEB

- Easy access to Prodacapo Balanced Scorecard from the standard web browsers.
- Prodacapo Balanced Scorecard is fully web-enabled, with intuitive dashboards, graphs, and reports. This means that users at all levels can easily access and understand Balanced Scorecard information and take action based on it.
- Possibility to translate Vision/Mission, Perspective, Objectives, Measures, Comments into several different languages. Make it possible to display a scorecard in different languages just by switching the setting of languages in Web Solution.
- The Web Solution offers different analysis views, for example “Values to date”, which makes it easier to benchmark measure values and viewing 2 charts side by side.
- Different display alternatives for the dashboard and grid views.
- Ability to export/print to PDF-files from the scorecard grid views (and to print it in different paper sizes, A4, A3, etc)

- Shortcuts to own views can be created for easy access to scorecards, measures and initiatives. (My Scorecard).
- Possibility to hide/show views according to customer requirements in Web Solution.
- Users can update measures, action plans and add comments via the web, which allows for rapid communication and feedback.
- The scorecard can be calculated via the web.
- Balanced Scorecard can be integrated into portals as an add-on and can be customized to fit into these applications graphically.
- Because Prodacapo Balanced Scorecard is web enabled, no program has to be installed on end-users' computers. The result is low cost of ownership and rapid implementation.

#### IMPORT/EXPORT DATA

- Includes an ETL tool (Extract-Transform-Load), Prodacapo Connect, which makes it easy to integrate the solution with existing IT systems.
- Easy to import/export data to and from MS Excel.
- Possibility to import data from other data sources into Prodacapo.
- Possible to create a complete scorecard model only by using import sequences. Prodacapo Connect covers all steps.

#### SECURITY

- Robust security. Access privileges can be set for different users and groups.
- Only the users who build and administer the Scorecards need to have the software installed.
- Security settings in User Manager enable you to give different groups access to different Scorecard information.
- A home Scorecard can be set for each user.

#### PERFORMANCE

- The calculation of the Scorecard is optimized and redesigned to handle large volumes of information extremely quickly.
- Extremely high-speed calculations minimize the time required for calculations, even for customers with vast quantities of data.
- No restrictions concerning the number of scorecards in your model.
- All information is stored in a single database and several users can model simultaneously.
- Ability to schedule the calculation.

## BALANCED SCORECARD FUNCTIONALITY

---

### STRUCTURE

- An overall scorecard can be broken down into an unlimited number of underlying scorecards at different levels in the organization.
- Possibility to define unique scorecard statements for single scorecards
- Possibility to add different dimensions to the scorecard, giving the scorecard different views.
- Ability to use dimensions for selections to display different sets of measures and objectives.
- Different viewing options for vision/mission and statement can be defined in the dashboard.
- Possibility to use pre-defined perspectives; Learning & Growth, Internal, Customer and Financial.
- Add and delete an unlimited number of perspectives to customize the scorecard.
- The sort order of the perspectives on the dashboard can be changed.
- Functionality to copy scorecard models.
- Drill down functionality to perform more detailed analysis and view comments.
- The strategy maps can be explored to understand cause and effect.
- The grid dashboard displays the standard dashboard data in a grid format. Including perspectives, objectives, measures, measure unit and the measure data from left to right.
- Measures and initiatives grid showing an overview of measures and attached initiatives per scorecard.
- Dictionary grid view enables analysis of similar measures across scorecards (benchmarking) according to the scorecard structure or according to own defined scorecard groups.
- Cockpit and black panel views are available to focus on specific measures.
- Use watch lists to focus particular attention on certain areas.
- Scorecards can be printed to HTML or Acrobat PDF format.
- Certified by the Balanced Scorecard Collaborative.

### TEMPLATES- EASY TO CUSTOMIZE

- Possibility to create scorecard templates that can be pushed out to the entire organization.
- Create different templates for different regions, branches etc. to simplify creation of many similar scorecards.
- Connect an unlimited number of scorecards to a template.
- For easy administration, changes made to the template are pushed out on all connected scorecards.
- The templates make it easy to build, administer and maintain scorecard solutions at all levels of an organization.

---

## MEASURES

- A measure/objective dictionary gives the ability to reuse definitions in different scorecards and to be able to easily update many measures with same settings.
- A formula dictionary has been added to simplify the update of both measures and the scorecard structure. The dictionary makes the scorecard setup more flexible.
- Measures are analyzed via charts and graphs to understand performance and trends. Use the default Actual Values or Index Values chart or create own charts.
- Charts can include different series (in addition to actual, plan, index) including values from last year, from another measure, from underlying measures and accumulated values (year to date).
- A time frame setting in charts makes it possible to define charts where the time frame is dynamic and will follow the selected year or period.
- Measure data can be aggregated in the scorecard structure using aggregated measures.
- Use formula measures to combine data from different measures, the formula can refer to one or several measures and include a number of different operators. The formula measures give extended possibility to use complex calculations
- Measures with different update types (year, half year, tertial, quarter, month, week, day or undefined) can still be compared based on dates.
- Ability to define different directions (bigger is better, smaller is better, plan is best) for the measures.
- Use smoothed periods if the data is very fluctuating.
- The data settings allows for different measure units, target, target time, use of min/max values (when data is close to 0).
- Tolerance color settings can be defined for each measure based on percentages or absolute values.
- Set an update responsible for the measures.
- Set owners to a whole scorecard, an objective or a measure.
- Create own objective and measure categories
- Measure data can be entered manually in Web Solution, via an Excel upload or via an automatic connection to another system. It is also possible to link a measure to another Prodacapo object such as a process an activity.
- E-mail notifications can be used to inform about underperformance and missing data.
- Grids views with scorecard data can be exported to Excel.

---

## DOCUMENTS

- Documents and links can be attached to a measure, an objective or to an entire scorecard. All types of documents and links can be attached.
- Attributes can be attached to the scorecard.

---

## ANALYSIS AND REPORTING

- Predefined analyses
- Predefined reports
- Includes flexible functionality for creating user-defined reports
- Publish reports to user groups.
- Users can gain access to the analyses and reports using their standard web browsers.

---

## BALANCED SCORECARD INITIATIVES

- Use initiatives to turn plans into action. Manage, communicate, and follow up on steps taken to reach goals.
- An unlimited number of initiatives can be created.
- An initiative can be connected to a scorecard or to an objective/measure.
- Own categories can be created to organize initiatives.
- Initiatives can be grouped by responsible person, category, status, progress etc. or viewed in a structure.
- There are pre-defined status codes with icons for easy follow up on each initiative.
- Possibility to continually add and update status and progress of initiative.
- Notes and documents can be attached to initiatives. All types of documents and links can be attached.
- Possibility to estimate cost, currency, potential and potential/benefit unit, progress/plan unit for each initiative.
- Information about all action plans and initiatives can easily be presented in different dimensions.
- Use Prodacapo Connect to import initiatives and/or progress of initiatives.

---

## EXCELLENT HELPDESK

- Experienced team focused on implementation, design as well as development of our ABC-model.
- World class support according to our customers.

---

## LEARN MORE

For more information please see [www.prodacapo.com](http://www.prodacapo.com) or contact us at [prodacapo@prodacapo.com](mailto:prodacapo@prodacapo.com)

#### BALANCED SCORECARD MEASUREMENT SYSTEM

- Use measure dictionary in order to standardize definitions for objectives and measures and to create analysis for benchmarking.
- An unlimited number of measures can be created.
- Input constraints for validation of web data input.
- Measures can be aggregated and used in formulas.
- Possibility to drag and drop measures of your choice for fast and easy access to your measures (My measures).
- Ability to add comments on measures.
- Ability to add comments on aggregated measures.
- Different categories can be created in order to organize and gain a structure of the measures.
- Measures can be grouped by owner, category, description, index etc. to create different views.
- All information on action plans, progress according to plan, people responsible, and finalizing data can be handled in the system.
- A list of measures can be exported to MS Excel, Text, Html or XML.

#### BALANCED SCORECARD MANAGEMENT SYSTEM

- Easy-to-understand. Highly visual dashboard displays both current performance levels and trends in the same screen – with drill-down options for more details.
- Reports on actions can be run in all dimensions.
- Intuitive graphs, tables and reports with customization options.
- Designed to be easy and intuitive to work with for all users, regardless of position in the organisation
- Powerful built-in reporting and analysis options.
- Powerful support for communication, management and follow up actions
- Easy to visualize and communicate strategy, goals, key performance indicators and action plans to everyone, with easy-to-understand dashboards.
- Possibility to drill-down to analyze underlying measures and find the root-cause of performance issues.
- A Measure window shows a complete list of all measures; the ones with a connection to the Scorecard as well as others used in formula or aggregated measures.
- Provides users with early alerts, notifying users of both excellence and challenges.

## EXTEND WITH OTHER PRODACAPO SOLUTIONS

---

### COMBINE BALANCED SCORECARD WITH PRODACAPO ABC

- Combine Balances Scorecard with Prodacapo ABC allows you to automatically follow the cost for a chosen process in your scorecard.
- Use the data from an ABC/M model to follow important key performance indicators in your Scorecard.
- Visualize driver volumes, unit costs, profitability and more from the ABC/M model.

---

### COMBINE BALANCED SCORECARD WITH PRODACAPO PROCESS MANAGER

- Combine Balanced Scorecard with Process Manager gives your organization a tool to model and manage processes and activities.
- Managing the processes gives you an understanding of where the action can be taken to improve the measures of your scorecards.

---

### LEARN MORE

For more information please see [www.prodacapo.com](http://www.prodacapo.com) or contact us at [prodacapo@prodacapo.com](mailto:prodacapo@prodacapo.com)