

# **Ask the Expert**

Q: Can you please provide some guidance on how to create a compelling method to communicate our business units' achievements against our goals?

I've been approached by our senior management to create a way for our senior management team to efficiently present our achievements to our president, make it interesting and ensure he's up-to-date on all of our activities. If you have any samples of what has worked in the past that would be extremely helpful.



A: To convey each business unit's achievements against goals, I would emphasize overall results to date, upcoming milestones and issues needing attention, as I'm guessing your president will be less interested in past successes and focused more on pending activities and executional risks.

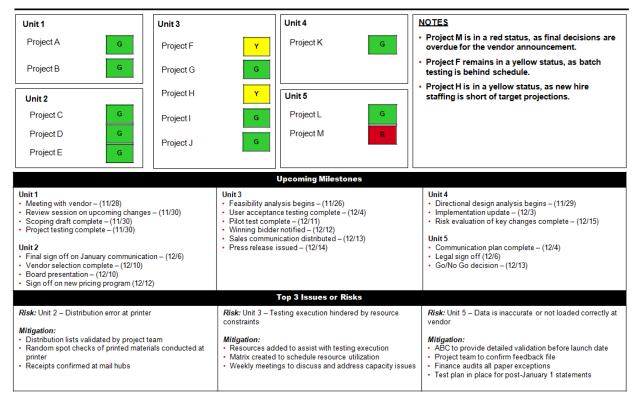
### Provide clear, easy-to-digest data

To present this information, you might create a one-page scorecard that consolidates pertinent facts in an easy-to-understand format. Here's how I'd go about it:

- 1. Determine each business unit's key operating goals and the frequency with which to measure them.
- 2. Map out a process for obtaining status updates and other relevant data.
- 3. Assign point people from each unit who will be responsible for compiling and supplying information.
- 4. Decide on the structure and categories for your scorecard.
- 5. Create a scorecard prototype that displays each unit's progress and pressing issues.
- 6. Test the prototype with the scorecard's target audience and revise it based on feedback.

See Figure 1 (below) for an example of a scorecard used at a leading company (uploaded to the Hub with the company's permission).

#### **Business Unit Scorecard**



This scorecard is designed not only to communicate project or goal status, but more importantly to pinpoint issues and risks needing attention. Accordingly, the scorecard is future-focused.

In your scorecard if you wish to list recent accomplishments, tasks completed or other topics, you could add or substitute those categories as desired.

# Code your goals

The key to making any scorecard useful is to keep it concise and graphical. A good way to do that is to code the status of each goal red, yellow or green based on the likelihood of completing the goal by its due date.

How you define the goal's status might be based on time remaining and percent of goal complete, degree of challenge compared to allocated resources or any other variable that could affect a successful outcome.

However you define status, you will want to ensure your definitions are clear and consistent, so there is no ambiguity about the implications of being red, yellow or green.

# Try to economize

Next, document key upcoming milestones or other urgent priorities with due dates. The intent here is to convey what's happening when, and to demonstrate that the project team is focused on the right activities.

Be sure to summarize each pending milestone succinctly in a common grammatical format. Economy of words is key, as you probably will be pressed for space and the reader will be expected to digest a lot of information.

End the scorecard with a section outlining top issues or risks. You don't necessarily need to include items for each business unit. Instead, you might focus on the most serious items overall. Even more important than identifying issues and risks is showing that mitigation plans are in place to address them.

#### Easy way to prioritize

Scorecards like these can be immensely helpful in executive briefings, enabling you to efficiently convey important information.

The right scorecard also can help you create accountability, allocate resources and improve execution of strategic priorities. It's worth exploring how scorecards might work in your organization.

Andy Szpekman is president of <u>AHS Communications, LLC</u>, which provides human resource management and communication research, strategies and tools to improve business performance. His clients include Alpharma, Bank of America, BC Hydro, Cardinal Health, McKinsey & Co., Microsoft, News Corporation, Russell Investment Group, Scholastic and Wachovia. Earlier in his career, Andy held positions at Bank of America, Warner-Lambert and Brecker & Merryman, Inc. (an HR and communications consulting firm).