

Automating your Strategic Performance System

Automation

Performance System automation occurs when performance measurement software is applied to get the right performance information to the right people at the right time. Automation adds structure and discipline to implementing performance systems, helps transform disparate corporate data into information and knowledge, and helps communicate performance information. In short, automation helps people make better decisions because it offers quick access to actual performance data.

Automation software

There are now over one hundred scorecard and/or performance management automation development companies. Some of the software options are specifically dedicated to performance management and/or the balanced scorecard. Others include tools which are primarily designed for Enterprise Resource Planning, Business Intelligence, Analytics or Data Warehousing, but have modules dedicated to Performance Management. Balanced Scorecard Australia uses BSI's proven, disciplined framework, *Nine Steps to Success™*, to systematically develop, implement, and sustain strategic scorecard systems (see Figure 1-1 below).

Figure 1-1: BSI *Nine Steps to Success™* Framework



BSI has its own software solution that is fully aligned with the *Nine Steps to Success™* framework, but there are several good software options that are compatible with the framework as well, ranging from inexpensive cloud-based solutions to full enterprise data warehouse solutions.

Selecting an Automation Partner

Our team can help you to evaluate, select, and implement the appropriate software solution for your organisation.

We will advise you on your options and act as an honest broker between you and software vendors. We leverage our years of experience in this field to make sure that our clients are getting a software product that specifically meets their needs in the most economical fashion possible.

We use a systematic approach for automation selection. Our process is detailed below.

Automation Selection Process

1. Determination of user and technical requirements. We will establish this through a series of interviews with the prospective users and administrators of the automation solution. A few examples of user requirements are:
 - a. Data input requirements.
 - b. Information/data viewing- What kind of reports/ presentations are required?
 - c. Security requirements.
 - d. Do you need real time vs. scheduled data representation?A few examples of Information Technology/CIO requirements are:
 - e. Where does current data management reside? How mature is the data management?
 - f. What is the client's technology plan?
 - g. How is data currently reported?
2. We will assist with the evaluation of any existing performance management software owned by the client.
3. If the current software is deemed insufficient, we will develop evaluation criteria that will incorporate the client's requirements as well as industry standards for selection of the automation provider. Working with the client, we will develop a decision matrix in which the criteria are weighted and can be scored for objective vendor-to-vendor comparisons
4. We will use the selection criteria to assist the client to narrow the list of potential solutions to a "short list."
5. In a collaborative effort with the client, we will create the technology solution procurement RFP and Statement of Work
6. We will assist the client with the review of submitted proposals to determine which vendors will be selected for demonstrations.
7. We will assist with the continuing evaluation of the vendors during the presentations and reference checks. This includes using a standardized set of criteria/questions based on the SOW and review of the written proposals.
8. We will submit recommendations based on the developed criteria and presentations
9. We can assist in development of implementation and change management plans for the new solution.

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