



**ActiveStrategy 2007 Fall Seminar  
Agenda & Topics  
How to Accelerate Results through Strategy Execution  
October 2-3, 2007 The Fairmont Hotel, San Francisco**

**Seminar attendees will remain in one of three customized tracks for the duration of the two-day event. Select the track that best meets your needs.**

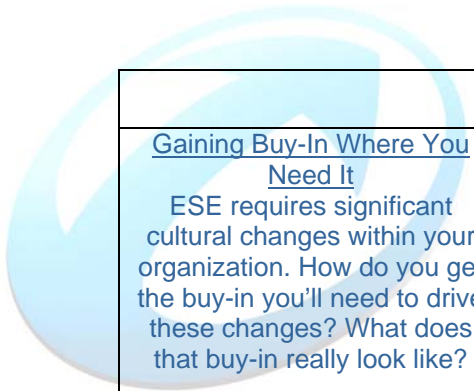
*Please note that though topics in each track are similar, the subject matter will be covered differently to suit the experience level of the track. Track 1/Building will begin at a more fundamental level. Track 2/Deployment will assume a basic understanding and will get into more advanced and broader ranging discussions. Track 3/Software-Enabled Deployment will cover advanced topics, as well as software demonstrations.*

If you have questions about which track is best, please contact us at [info@activestrategy.com](mailto:info@activestrategy.com).

**SCHEDULE**

Both days begin with buffet breakfast at 8:00am. Day one sessions go from 8:30am - 5:00pm, followed by a cocktail and hors d'oeuvres reception. Day two sessions start at 8:30am and will conclude at 3:45pm, at which time Optional Private Meetings will begin.

TRACK 1 - BUILDING	TRACK 2 - DEPLOYMENT	TRACK 3 – SOFTWARE-ENABLED DEPLOYMENT
<b>OVERVIEW OF TRACKS</b>		
How to build a successful Balanced Scorecard framework, starting from the ground up	How to expand a top-level Balanced Scorecard into a deployed ESE performance framework that drives ongoing improvement	How to ensure alignment & ongoing results from a cascaded Balanced Scorecard & ESE performance framework, leveraging software
<b>WHO SHOULD ATTEND WHICH TRACK?</b>		
<p>Executives and managers who:</p> <ul style="list-style-type: none"> <li>• do not yet have a Balanced Scorecard</li> <li>• are in the early stages of creating one</li> <li>• are just becoming exposed to their organization's existing Balanced Scorecard framework</li> </ul> <p><b>Pre-work:</b> attendees should prepare an initial SWOT analysis for their area of responsibility (listing Strengths, Weaknesses, Opportunities, and Threats)</p>	<p>Executives and managers of organizations who:</p> <ul style="list-style-type: none"> <li>• have at least one Balanced Scorecard</li> <li>• need to learn cascading &amp; deployment techniques</li> <li>• want to learn how to apply advanced ESE techniques</li> </ul> <p><b>Pre-requisite:</b> attendees must have personal knowledge of fundamental Balanced Scorecard topics. If possible, attendees should bring copy of existing Balanced Scorecard for their area.</p>	<p>Executives and managers of organizations who:</p> <ul style="list-style-type: none"> <li>• are ready for advanced cascading &amp; deployment techniques</li> <li>• want to learn how to apply advanced ESE techniques</li> <li>• are already deploying ASE software or are ready to do so</li> </ul> <p><b>Pre-requisite:</b> attendees must have personal knowledge of fundamental Balanced Scorecard topics &amp; be interested in ASE software.</p>



<b>SESSION TOPICS</b>		
<p><u>Gaining Buy-In Where You Need It</u> ESE requires significant cultural changes within your organization. How do you get the buy-in you'll need to drive these changes? What does that buy-in really look like?</p>	<p><u>Ensuring Alignment between Strategy and Balanced Scorecards</u> A refresher on how to ensure your existing top-level Balanced Scorecard is well aligned to your Strategic Plan and Vision.</p>	<p><u>Ensuring Alignment between Strategy and Balanced Scorecards</u> A refresher on how to ensure your existing top-level Balanced Scorecard is well aligned to your Strategic Plan and Vision.</p>
<p><u>Introduction to the Balanced Scorecard &amp; ESE</u> Fundamentals that will help you understand the BSC tool and how to apply it most effectively within a broader ESE framework.</p>	<p><u>Effectively Cascading Balanced Scorecards</u> Techniques for cascading objectives and measures, best practices, and hands-on exercises.</p>	<p><u>Effectively Cascading Balanced Scorecards</u> Techniques for cascading objectives and measures, best practices, and hands-on exercises.</p>
<p><u>Building a Top-Level Balanced Scorecard Aligned to Strategy</u> How to pull the critical outputs from your Strategic Planning process to first build a representative Strategy Map and then a top-level Balanced Scorecard</p>	<p><u>Cascading YOUR Scorecard Workshop</u> Using the attendees' own Balanced Scorecards, we will work through the process of cascading objectives and measures for lower-level scorecards.</p>	<p><u>Cascading in Software</u> Best practices for building linked scorecard objectives, measures, and ownership within ASE software.</p>
<p><u>Effectively Cascading Balanced Scorecards</u> Creating linked lower-level Scorecards to drive strategy deeper into your organization. Covers techniques for cascading Objectives, best practices, and hands-on exercises.</p>	<p><u>Selecting the Right Measures &amp; Targets</u> Most organizations have far too many measures on their Scorecards. How do you focus on the right ones? Session covers techniques to identify the most effective strategic measures, plus various ways to establish targets or goals (and when to use which).</p>	<p><u>Selecting the Right Measures &amp; Targets</u> Most organizations have far too many measures on their Scorecards. How do you focus on the right ones? Session covers techniques to identify the most effective strategic measures, plus various ways to establish targets or goals (and when to use which).</p>
<p><u>Cascading YOUR Scorecard Workshop</u> Using the attendees' prepared SWOT Analyses, we will work through the process of cascading objectives and measures for lower-level scorecards.</p>	<p><u>Initiative Prioritization and Alignment</u> Initiatives (a.k.a. Action Plans or Improvement Projects) are key to closing performance gaps identified on Balanced Scorecards. But how do you focus your organization on the right ones, given that people and funding are always constrained?</p>	<p><u>Working with Measures &amp; Targets in Software</u> Best practices for working with various types of measures, targets, goals, and scoring in ASE software.</p>

<p><u>Selecting Scorecard Measures and Setting Targets</u> After cascading Objectives, the next step is to identify the right Measures to track progress. Session covers various techniques to find the right measures, plus exercises to apply the techniques. Also covers ways to set appropriate targets or goals for achievement.</p>	<p><u>Improvement Techniques</u> Overview of statistics-based problem solving (DMAIC steps), Rapid Process Improvement, and benchmarking techniques, plus when to use each.</p>	<p><u>Initiative Prioritization and Alignment</u> Initiatives (a.k.a. Action Plans or Improvement Projects) are key to closing performance gaps identified on Balanced Scorecards. But how do you focus your organization on the right ones, given that people and funding are always constrained?</p>
<p><u>Initiative Prioritization and Alignment</u> Initiatives (a.k.a. Action Plans or Improvement Projects) are critical to closing performance gaps identified on Balanced Scorecards. But how do you focus your organization on the right ones, given that people and funding are always constrained? Also covers ways to manage individual Initiatives more effectively.</p>	<p><u>Managing Processes &amp; Projects within the ESE Context</u> Best practices for ensuring the business processes and high-level projects that support your organization are aligned to your strategy execution efforts.</p>	<p><u>Improvement Techniques</u> Overview of statistics-based problem solving (DMAIC steps and how to manage high-level improvement projects within ASE software.</p>
<p><u>Conducting Scorecard Business Reviews</u> Learn the techniques that help organizations move from the typical superficial reviews to constructive Scorecard-based reviews that help identify root causes of performance problems. Features role-play based exercises and group discussions.</p>	<p><u>Conducting Scorecard Business Reviews</u> Learn the techniques that help organizations move from the typical superficial reviews to constructive Scorecard-based reviews that help identify root causes of performance problems. Features role-play based exercises and group discussions.</p>	<p><u>Effectively Reviewing Performance Using Software</u> Advanced business review techniques, drill-down best practices, and tips on how to discover root causes more effectively in software-based reviews. Includes overview of linking individual employee performance to corporate goals.</p>

**Closing Plenary Session:**

**Leading the Change Now & Later**

How can you build and sustain the momentum necessary to implement these Strategy Execution methodologies and ingrain them within your corporate culture? What specific things should you do to lead your organization through this shift toward a more strategic, aligned, performance-driven culture? How can you build these methodologies and tools into existing business planning cycles, budget processes, and operations? This session will provide a discussion forum for the various attendees to share best practices, ask questions, and develop a plan of action for their own stage of the Strategy Execution journey.

**Optional Private Meetings (included in registration fee)**

Sign up for a 30-minute consultation with an ActiveStrategy Executive Consultant to discuss your particular questions or organizational challenges. Sign up early as space is limited.