**The Balanced Scorecard & the Financial Perspective**

The purpose of the Session Long Project is to give you the opportunity to explore the applicability of the Module to your own life, work, and place in space and time, and to experiment with the Module to see how the otherwise academically rigorous presentation of a topic may, with more or less work and/or trauma, become "up close and personal". This is done in a number of different ways -- sometimes cumulative papers, sometimes practical hands-on experimentation with a tool of some sort, sometimes reflections on a place of work or life. The common thread is personal application, aimed at demonstrating a cumulative knowledge and understanding of the course's material.

For this course, the Session Long Project will take the form of **putting together background from each of the four perspectives for a balanced scorecard approach to an organization or organizational unit with which you are familiar.**  You’re not building a complete balanced scorecard -- that would be far beyond our current scope – but you’ll have a chance to see what goes into it and how it gets put together into a coordinated whole. As in the cases, you’ll be drawing on your previous course work to help.

The Module 1 assignment has two parts. First, you need to identify an organization (**Apple, IBM, Walmart etc**.), to which you have access to at least some information concerning financial data; staffing and human resource systems; marketing and customer relations; information systems; and operations. While most material on the Balanced Scorecard is written from the private, for-profit point of view, it’s perfectly possible to use this approach with public or non-profit organizations as well.

For the second part of this assignment, consider the organization's mission and strategy from the perspective of its financial operations (from your work on the case, your previous course work, and your background reading, you should be reasonably clear what such operations are). In this section of the assignment you’ll begin to identify objectives and measures relevant to that perspective. If you’re unclear on just what objectives and measures are, [*here is a presentation that describes what they are and how to write them*](https://tlc.trident.edu/content/enforced/108761-BUS499-2018JAN02FT-1/Modules/Module1/111991ObjectivesMeasuresTargets%26ActionPlans.ppt?_&d2lSessionVal=LWhBN4u4oHfXk5TGWqzGBHASP&ou=108761)[*.*](https://tlc.trident.edu/content/enforced/7375-BUS499/modules/module1/111991ObjectivesMeasuresTargets&ActionPlans.ppt?_&d2lSessionVal=k8IphpDmnl0t2wo8KmbOugFa9&ou=7375&_&d2lSessionVal=LWhBN4u4oHfXk5TGWqzGBHASP&ou=108761)  (attached)

**SLP Assignment Expectations**

When you have thought about it and made your selection, please specify (2 pages):

* The name of your organization
* What this organization does – its mission, vision and overall strategy
* The access you have to information about this organization -- remember, you’ll need information about its financial performance, marketing, internal operations, strategy, and management systems.

Once you’re reasonably clear on what’s involved, think about your organization and its finances, and then:

* Identify at least three objectives for improving **the organization's financial position**, and show how they relate to the mission, vision and strategy of the organization.
* For each objective, develop at least one meaningful performance measure (metric).
* For each objective, identify at least one expected level of performance (target).
* For each objective, identify at least one new action or program that needs to be developed to ensure successful implementation of the organization's strategy (initiative).

Here’s a table that you may wish to copy and fill in:

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| --- | --- | --- | --- |
| **Objective** | **Measure** | **Target** | **Action** |
|  |  |  |  |
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