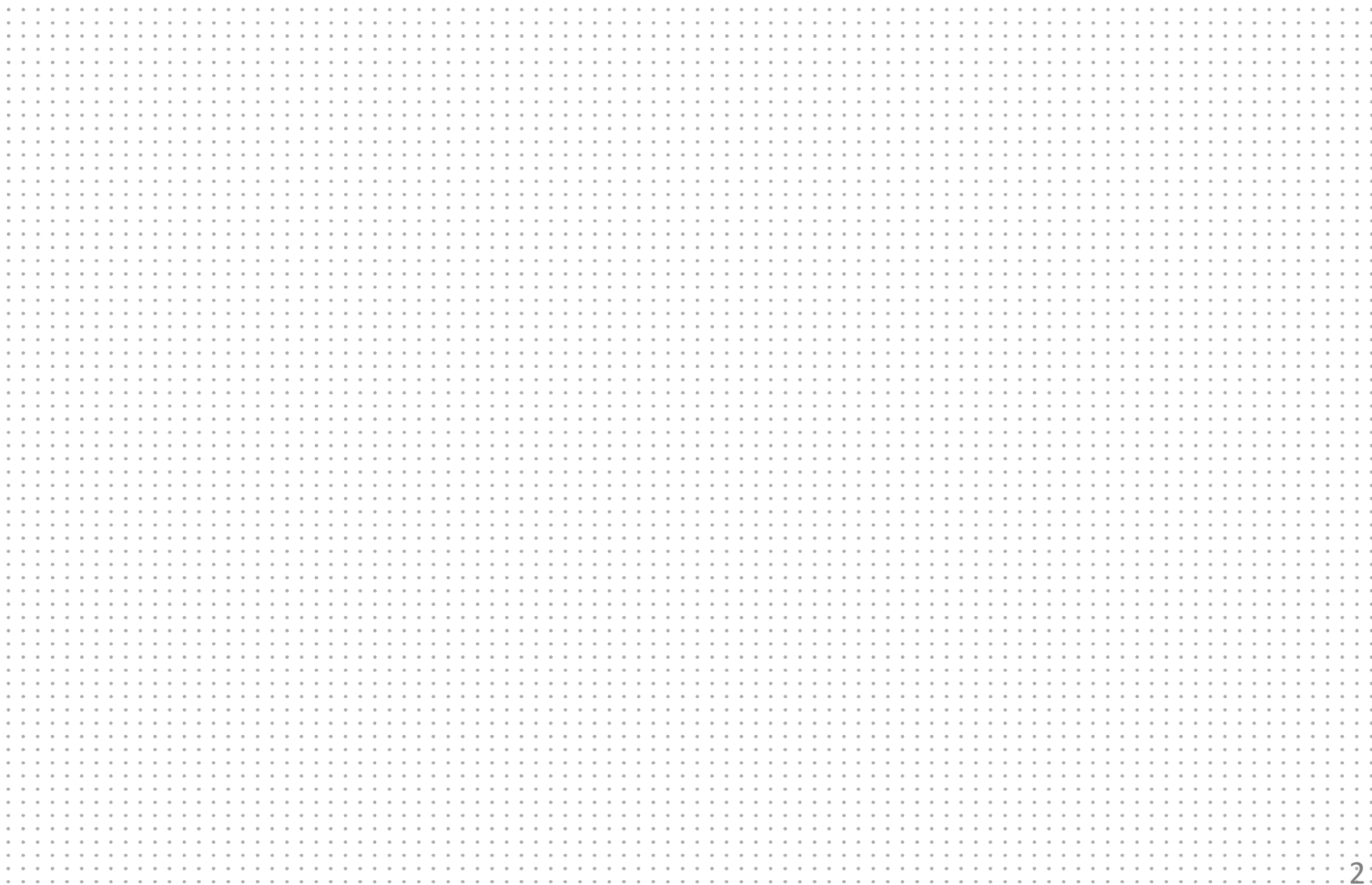


THE CEO SCORECARD



5 Key Principles...

1. Clarity on Success...

2. Get What You Measure...



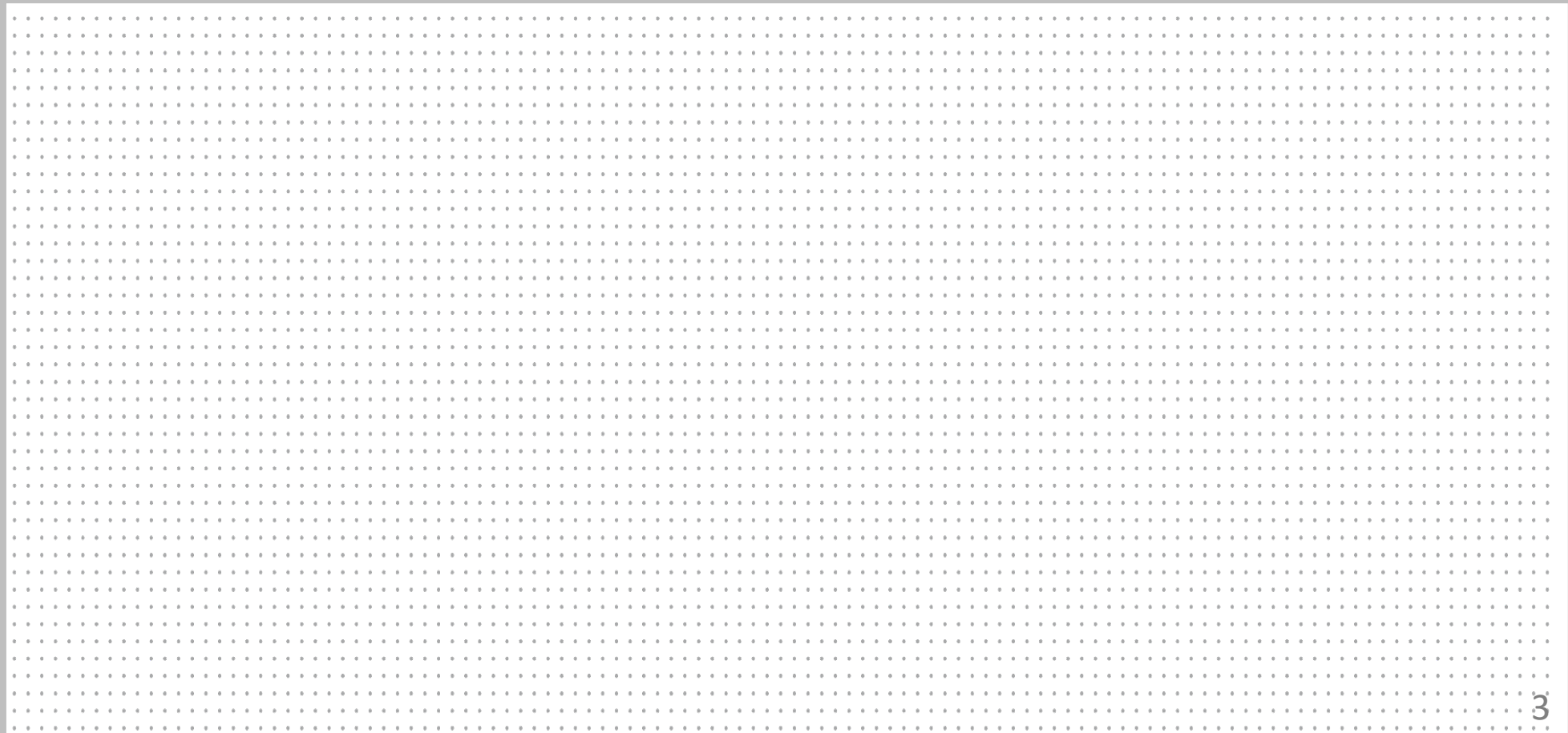
**3. Incorporate
Importance...**

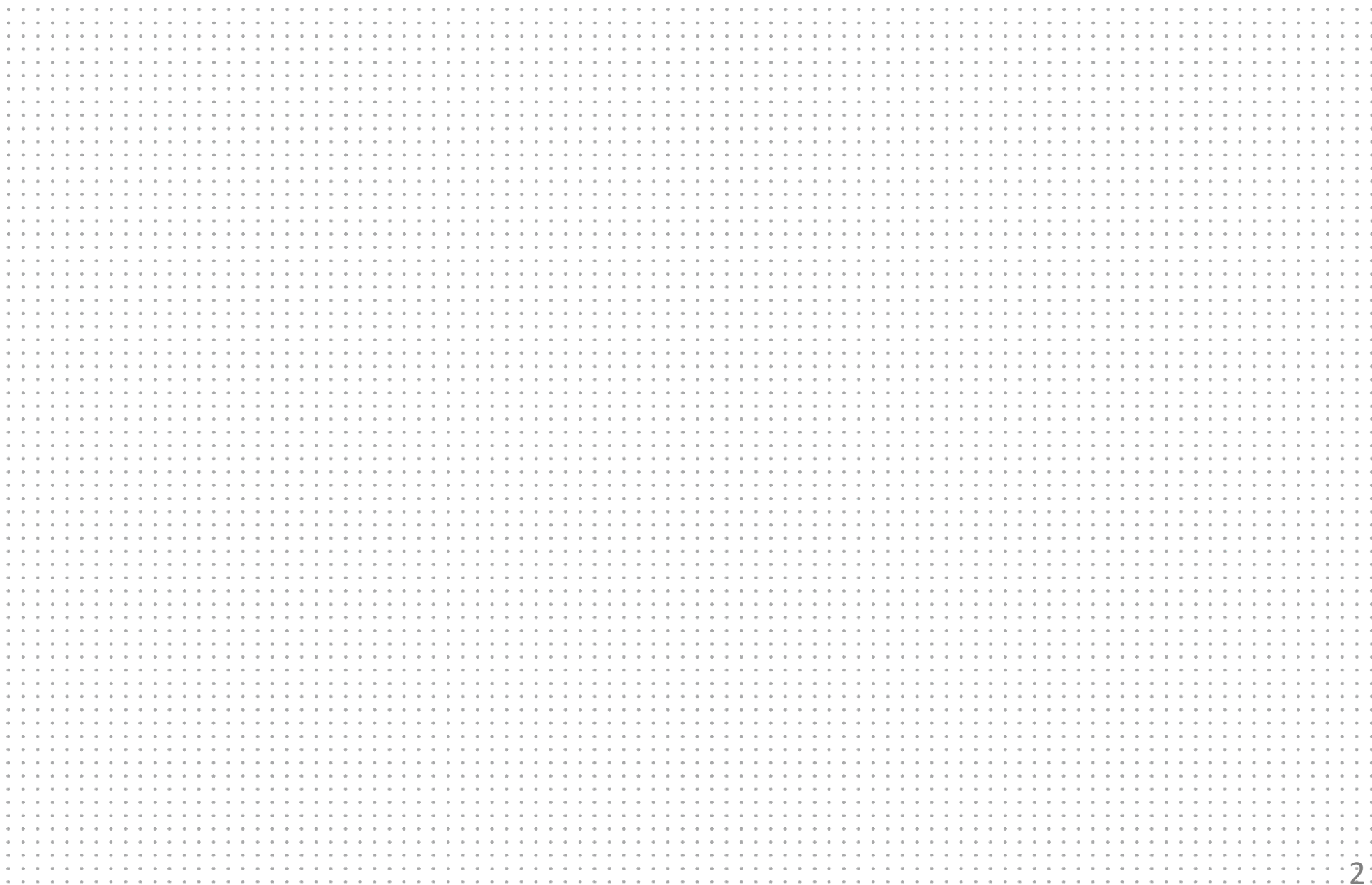


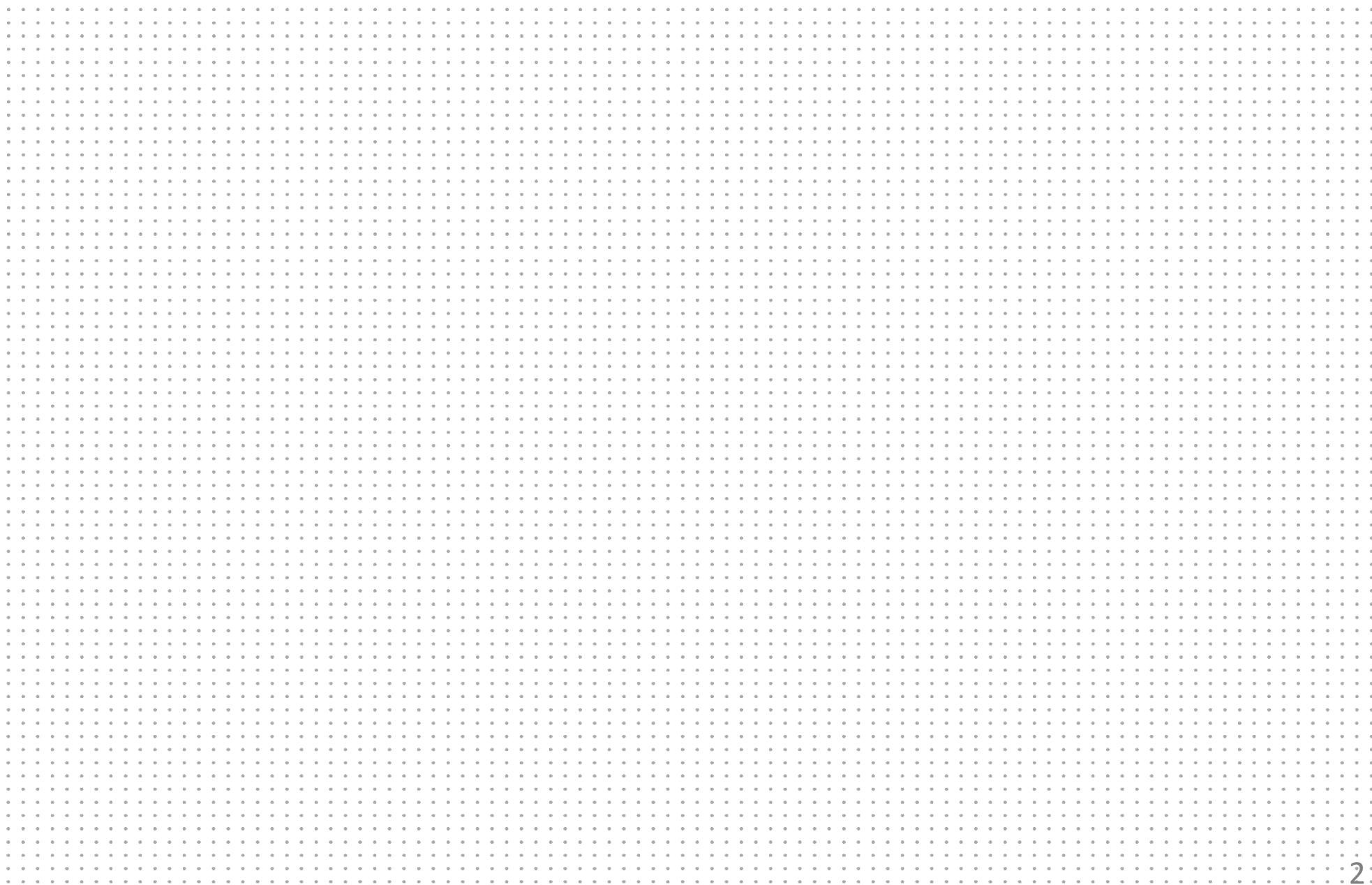
**4. Include Leading
Indicators...**



5. Align with Strategy...

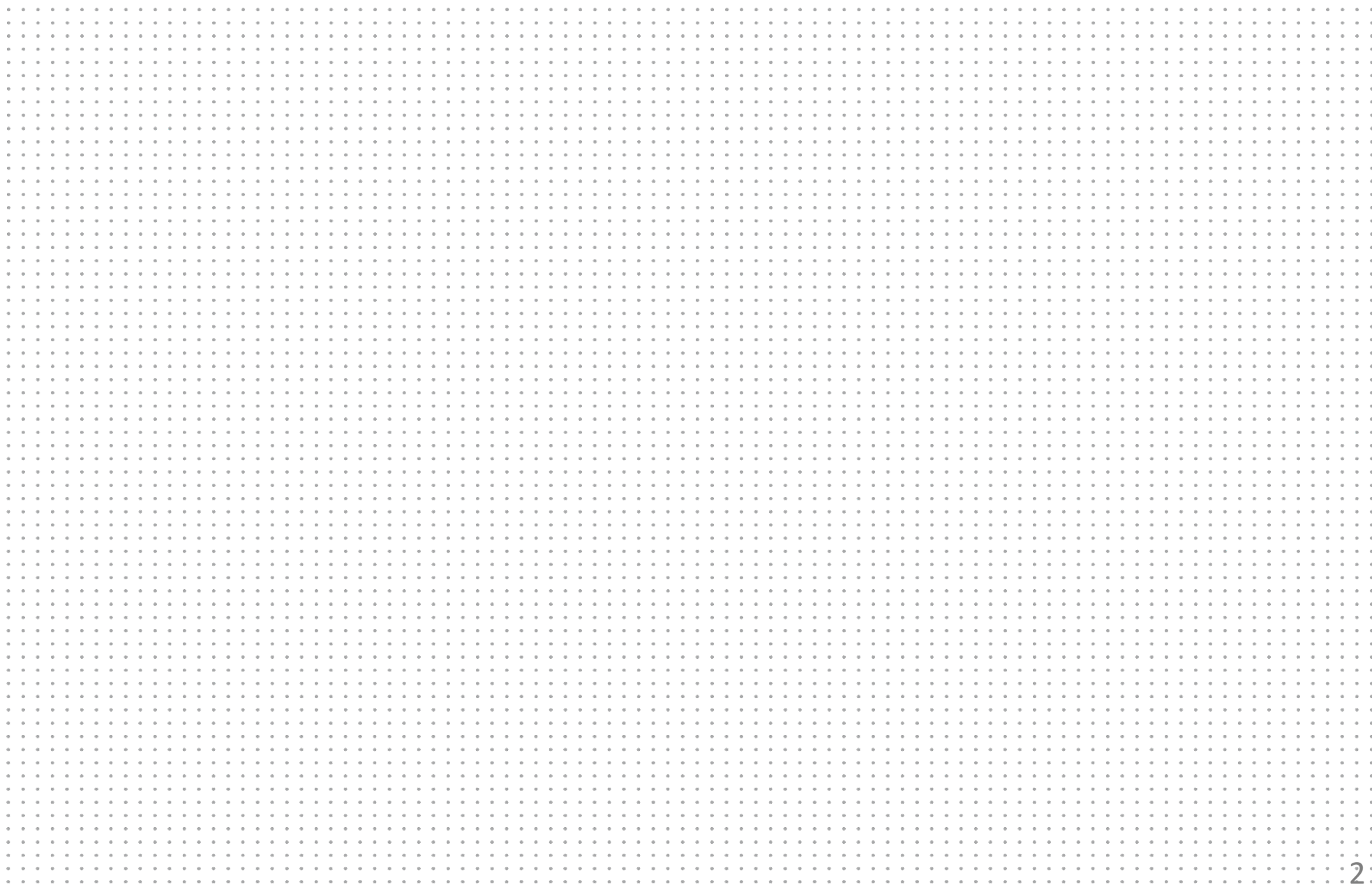




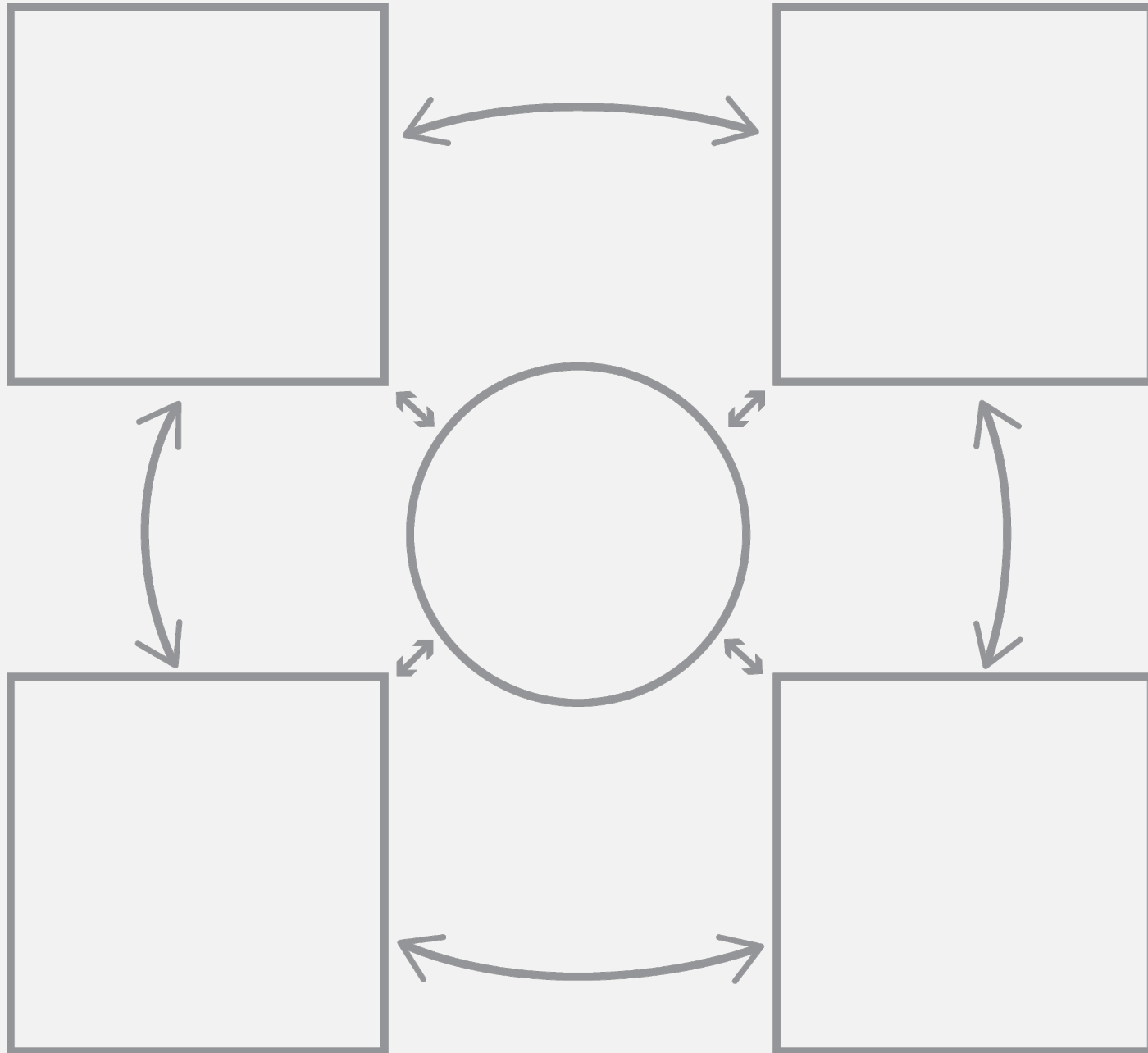


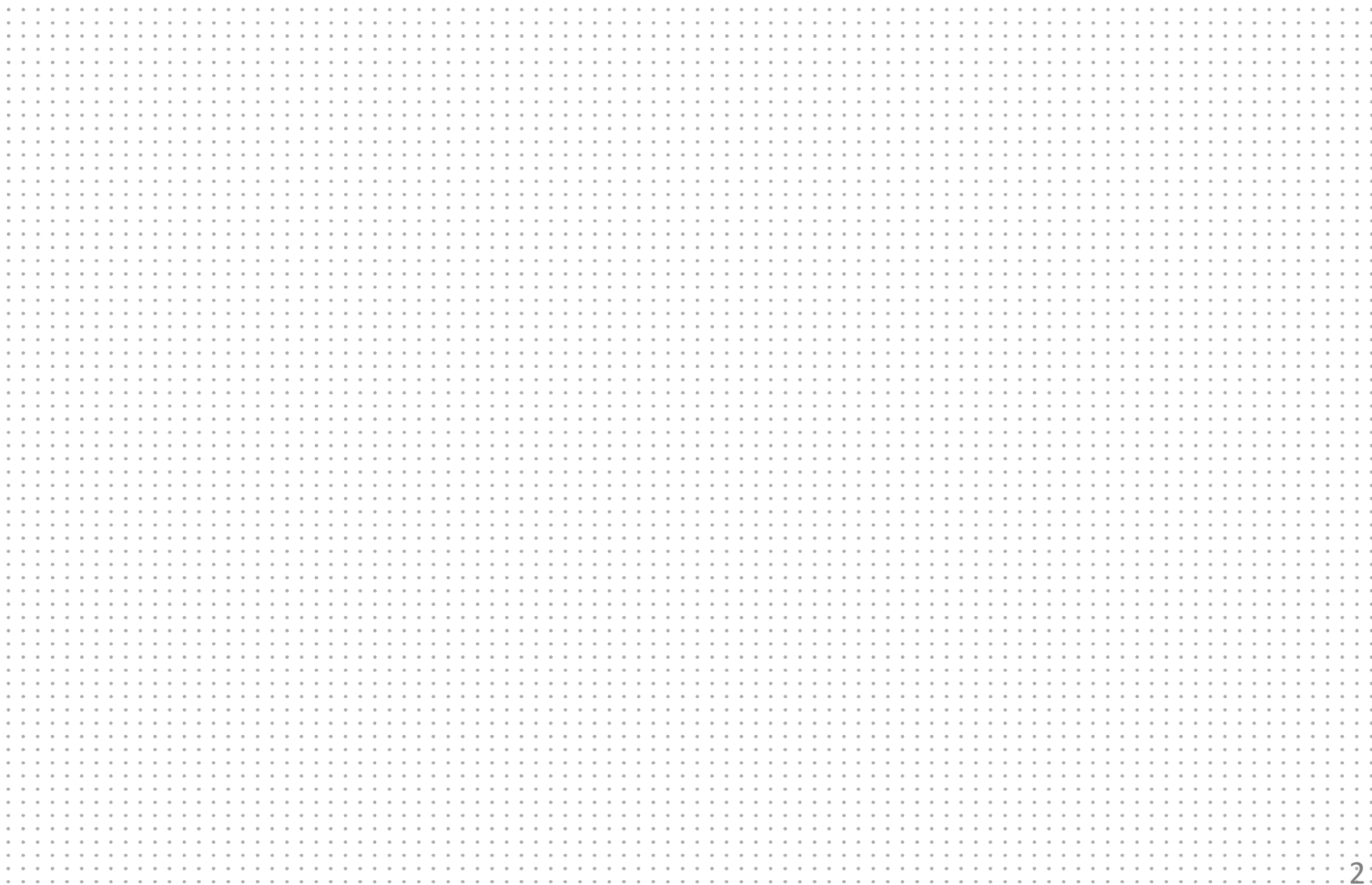
Stephen Covey's 4 Quadrants





The 4 Areas of a Balanced Scorecard



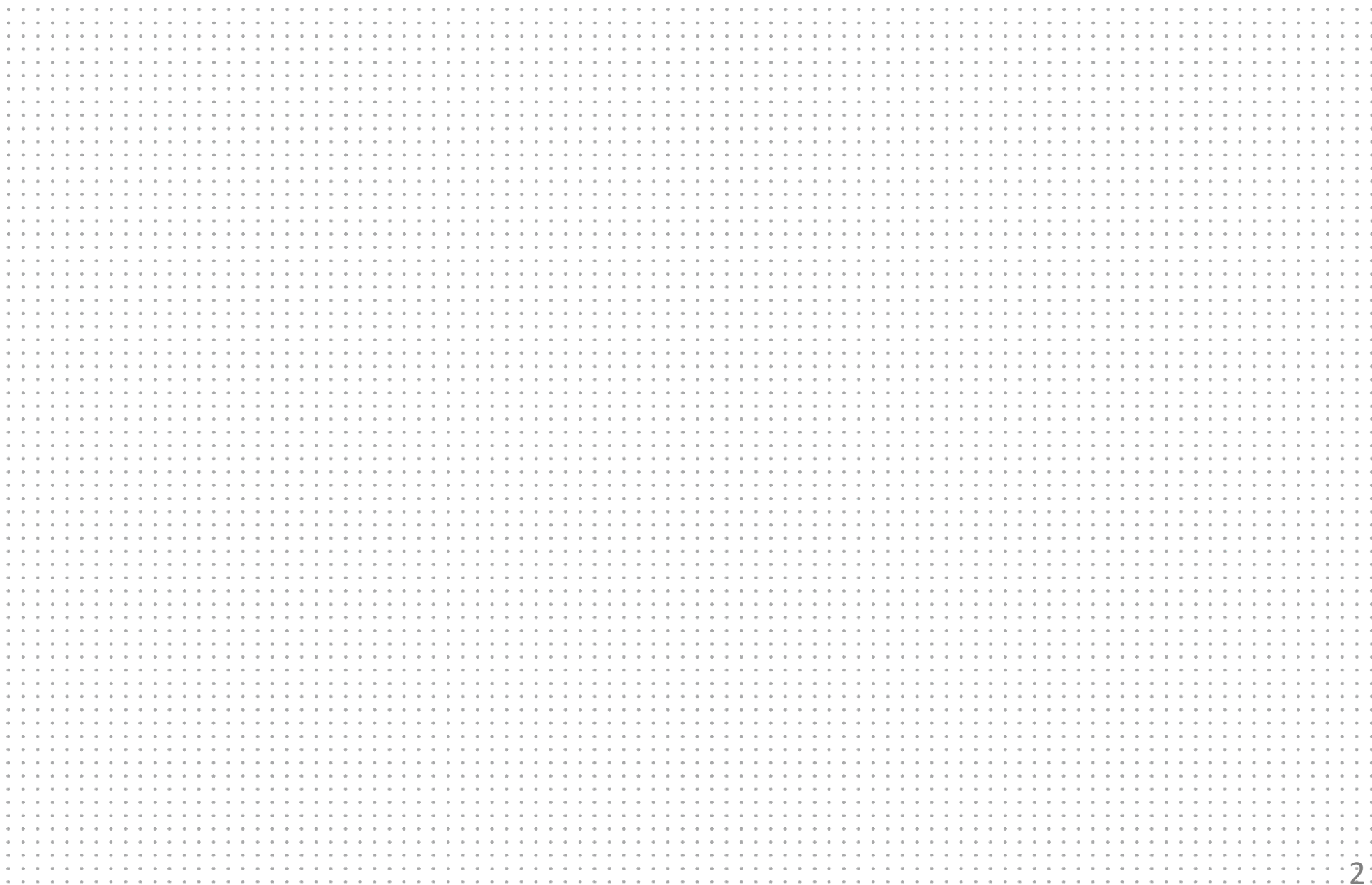


Menu of the KPI'S for Scorecard

AREA	STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	INTERVAL
FINANCIAL	Profitability	Net Profit Against Budget	Monthly
	Profitability	Net Profit % Against Budget	Monthly
	Revenue Growth	Revenue Against Budget	Monthly
	Revenue Growth	Revenue Growth % Against Budget	Monthly
	Return to Equity	Return on Equity % Against Budget	Monthly
	Liquidity (ability to pay the bills)	Current Ratio Against Budget	Monthly
	Liquidity (ability to pay the bills)	Quick Assets Ratio	Monthly
INTERNAL BUSINESS SYSTEMS	Sales Performance	\$ amount of confirmed contract work (e.g. more than \$500,000 of confirmed contract work)	Monthly
	Profit per lead source	\$ amount of gross profit generated per lead source (e.g. gross profit per lead is positive)	Monthly
	Excellence in performance	KPI appraisals for team completed on time	Quarterly
	On job quality	% of quality assurance checklists completed (e.g. 100% of QA checklists completed)	Monthly
	Efficiency of technology & systems	% of invoices sent within X days of job completion (e.g. 95% of invoices sent with 2 days of job completion)	Monthly
	Efficiency of technology & systems	% of jobs priced with X days of customer inquiry (e.g. 90% of jobs priced within 5 days of customer inquiry)	Monthly
	Stock Management	Inventory turnover against target (e.g. stock turnover between 2 and 3 times)	Quarterly
	Profit Per Employee	Net profit per FTE against target (e.g. net profit at more than \$5,000)	Monthly
	Efficiency in Scheduling	Labor Utilization Rate against target (e.g. labor utilization rate at greater than 90% for field staff)	Monthly

Menu of the KPI'S for Scorecard

AREA	STRATEGIC OBJECTIVE	KEY PERFORMANCE INDICATOR	INTERVAL
CUSTOMER SATISFACTION	Customer Satisfaction	% of survey score at excellent (survey) (e.g. 80% of respondents at excellent)	Quarterly
	Referral Strength	Net promoter score (NPS) against target (e.g. NPS at greater than 40%)	Monthly
	Customer Satisfaction	# of 5 star reviews on social media against target (e.g. more than five 5 star reviews per month)	Monthly
	Customer Complaints	# of customer complaints against target (e.g. less than 2 customer complaints per month)	Monthly
LEARNING & GROWING	Employer of Choice	Employee Net Promoter Score (eNPS) (e.g. eNPS greater than 50%)	Monthly
	Employee Retention	Employee churn rate at less than target (e.g. employee churn rate at less than 10%)	Quarterly
	Employee Satisfaction	% Extremely satisfied on survey at greater than target (e.g. % of employees extremely satisfied at greater than 70%)	Quarterly
	Capability building for the future	# of training days per FTE against target (e.g. more than 1 training day per FTE)	Quarterly
	Capability building for the future	\$ spent on training against budget	Monthly
	Leadership commitment	# of performance appraisals completed against # due	Quarterly
	Leadership commitment	% of 20's completed against target (e.g. 95% of 20s completed on time or Employee Performance Reviews completed on time)	Monthly / Quarterly
	Quality of meeting cycles	Meeting rhythms completed as prescribed (e.g. quarterly directional, monthly strategic, weekly tactical etc.)	Quarterly
	Management Development	# of days spent on external coaching or development programs	Quarterly
	Marketing Innovation	% of revenue from new market niche(s) (e.g. 15% of revenue from new clients or new niche)	Monthly



The CEO Scorecard

XYZ Plumbing Limited						
DATE						
	STRATEGIC OBJECTIVES	KEY PERFORMANCE INDICATORS	TARGETS			PROJECTS
			ACTUAL	TARGET	INTERVAL	
FINANCIAL	Profitability	Net profit against budget	\$170k	\$165k	M	
	Revenue Growth	Revenue against budget	\$480k	\$500k	M	
	Liquidity	Current ratio against budget	1.1	1.5	M	
CUSTOMER SATISFACTION	Customer Satisfaction	% of survey score at excellent	70%	80%	Q	
	Referral Strength	NPS results	63%	60%	M	
	Customer Complaints	# of customer complaints	1	2	M	
INTERNAL BUSINESS SYSTEMS	Forward Work Booked	\$ amount of confirmed contract work	\$275k	\$250k	M	
	Excellence in Performance	KPI appraisals for team completed	100%	100%	Q	
	Profit per team member	Profit per FTE	\$ 4,258	\$ 5,000	Q	
LEARNING & GROWING	Employer of Choice	Employee Net Promoter Score	65%	50%	M	
	Quality of Meeting Cycles	Meeting rhythms completed as prescribed (e.g. quarterly directional, monthly strategic, weekly tactical, etc.)	Y	Y	Q	
	Employer Retention	Employee Churn Rate at least than target	11%	10%		

