

## Recommended Performance Management Features A Checklist

Although performance management solutions should not be viewed as one-size-fits-all, there are a number of core features that should be considered to establish a solid foundation for effective performance management. Use the checklist below when evaluating solutions to build the right foundation for your organization.

### GENERAL

- Browser-based:** No software components required to install on end-user desktop machines; minimal use of Active-X controls and other client-side plug-ins.
- Customizable user interface:** Facility to brand with organization's own logo, look/feel and design new "screens" for specific needs.
- Distributed architecture:** User interface, business logic, and data storage all able to reside on different physical machines.
- Role-based views:** Ability to dynamically filter each view based on individual needs and responsibilities; change available information (e.g., descriptions) based on roles.
- System-wide comments:** Available on all objects, input by users; must allow posts and responses (threading), searching, and archiving.
- External links:** Available from all objects to other documents, applications and Web sites.
- Object ownership:** Every object has an easily identified owner.
- Flexible hierarchies:** Ability to display performance across multiple hierarchies (e.g., organization, product, region, time) with unlimited members and levels; ability to change structure of hierarchy after initial setup.
- Multiple time periods:** Supports daily/weekly/monthly/quarterly/yearly performance analysis, including comparisons of current period with various previous periods (e.g., this quarter vs. last quarter, this quarter vs. same quarter last year, etc.); supports alternate custom calendars (e.g., fiscal different than calendar, production months start mid-month, New Year's Day on different day in other countries).
- Balanced Scorecard Collaborative Certified™:** Certified by the Balanced Scorecard Collaborative.
- Cascading:** Able to link performance at one level of an organization to those above and below it.
- Printing:** Able to print every view in the system.
- Export:** Able to export applicable data to Microsoft Excel and Word.
- Enterprise scalability:** Able to support an enterprise view along with individual departmental views that may be based on completely different indicators and objectives.

### STRATEGY MAPS

- System-created maps:** Ability to create strategy maps using a visual drawing tool; supports mission, vision, and more than four perspectives, with multiple layout options.
- Externally created maps:** Facility to import a strategy map created with a third-party application (e.g., PowerPoint), preserving current look and feel; imported map has all the same functionality of system-created map, including interactivity — e.g., the ability to click on individual objectives.
- Themes:** Flexibility to organize objectives in a separate grouping from perspectives to show major focus themes; ability to show how these focus areas change over time.
- Cause and effect:** Provides for visual depiction of relationships between objectives; support for bi-directional relationships.
- Interactive maps:** All elements on strategy map link to supporting explanations (e.g., mission, objectives, etc.); strategy map is publishable and interactive even before measures are established or tracked.
- Objectives library:** Ability to create shared library of objectives across multiple strategy maps and scorecards.
- Perspectives:** Flexibility to create and modify multiple perspectives per strategy map and scorecard.

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### INITIATIVES

- Table and graphical views:** Ability to monitor initiative progress using both table and graphical views.
- Flexible filtering:** Flexibility to filter initiatives by characteristics such as associated objective, owner, teams and start/end dates.
- Dependency analysis:** Capacity to display relationship between tasks and milestones within one initiative, as well as between initiatives.
- Priority management:** Provides at-a-glance view of which initiatives are most at risk of failure.
- External links:** Links to external documentation or project management tools (e.g., Microsoft Project).

### PERFORMANCE MEASURES

- Visual status:** Capacity to display status using up to five color-based thresholds; flexibility to change descriptions for each threshold.
- Threshold setting:** Ability to set different thresholds for each individual measure.
- Flexible types:** Flexibility to differentiate between various types of measures, such as leading/lagging, subjective/objective, financial/operational, etc.
- Placeholder measures:** Ability to define and display measures that do not yet affect analysis because associated data is not yet available.
- Exception indicators:** Capacity to identify objectives whose indexed measure may be acceptable but includes an underlying measure which is out of range.
- Indexed objectives:** Flexibility to combine scores of multiple measures, regardless of type or scale, into one overall score associated with an objective; ability to use weighting, as well as best and worst score.
- Indexed perspectives:** Ability to combine the score of multiple objectives into one overall score associated with a perspective.
- Multiple analyses:** Capacity for a range of analyses, including trending (multiple periodicities and time periods), deviation, and benchmarking (compare with internal or external target).

### REPORTING

- Multiple visualizations:** Flexibility to display performance in multiple presentation formats (e.g., scorecard, dashboard, reports) depending on user needs and access rights.
- Flexible publishing:** Ability to publish views to entire user community, a limited group, or to an individual.
- Pre-defined views:** Includes pre-defined views; ability to create a new view based on an existing one rather than starting from scratch.
- Ranking:** Capacity to highlight areas that are performing well and flag potential problems by displaying elements in rank order based on a performance measure.
- Forecasting:** Ability to forecast potential future values for measures, comparing actual to forecast.
- Exceptions:** Capacity to quickly identify exceptions based on a pre-defined threshold.
- Contributions:** Ability to quickly understand how much a particular group is contributing to the total.

### ADMINISTRATION

- Distributed administration:** Flexibility to assign specific administration permissions and roles, such as user set-up, metrics updates, and strategy map creation.
- LDAP/active directory integration:** Supports integration with corporate directory systems such as Microsoft Active Directory.
- Audit trails:** Capacity to track changes to every object in the system.
- Role-based security:** Flexibility to specify and control which activities can be performed by which users, granting rights to conduct certain types of activity, (e.g., create reports or define performance thresholds), without having to specify for each object.