

Enterprise Scorecard Template (Strategic Plan)

| Enterprise Objectives | Scorecard Perspectives | Enterprise Challenges (Trend Analysis/SWOT) | Enterprise Strategic Actions | Enterprise Measures | Enterprise Targets | Measure Type (check one) | Leading or Lagging? (check one) |
|-----------------------|-----------------------------------------------------------------------------|------------------------------------------------|------------------------------|---------------------|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|
| | Community Customer Financial Internal Process Learning & Growth | | | | | <input type="checkbox"/> Input <input type="checkbox"/> Output <input type="checkbox"/> Efficiency <input type="checkbox"/> Effectiveness <input type="checkbox"/> Outcome | <input type="checkbox"/> Leading <input type="checkbox"/> Lagging |



Core Service Template (Business Plan) Deliverables: *(fill in here)*

| Enterprise Objectives | Scorecard Perspectives | Core Service Objectives | Core Service Challenges (Trend Analysis/SWOT) | Core Service Actions (Forward to the exec. team for the development of a strategic action list.) To address Challenge, or to achieve Objective | | | Core Service Measures | Core Service Targets | Measure Type (check one) | Leading or Lagging? (check one) |
|-----------------------|------------------------|-------------------------|--------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|-------|----------|-----------------------|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|
| | | | | Action | Owner | Due Date | | | <input type="checkbox"/> Input <input type="checkbox"/> Output <input type="checkbox"/> Efficiency <input type="checkbox"/> Effectiveness <input type="checkbox"/> Outcome | <input type="checkbox"/> Leading <input type="checkbox"/> Lagging |



Business Process Template

| Core Service Objectives <i>(Use info from Core Service template [blue] to populate this column)</i> | Scorecard Perspectives | Business Process Objectives | Business Process Challenges (Trend Analysis/SWOT) [Optional] | Business Process Actions | | | Business Process Measures | Business Process Targets | Measure Type (check one) | Leading or Lagging? (check one) |
|--------------------------------------------------------------------------------------------------------|------------------------|-----------------------------|--------------------------------------------------------------------|--------------------------|-------|----------|---------------------------|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|
| | | | | Action | Owner | Due Date | | | <input type="checkbox"/> Input <input type="checkbox"/> Output <input type="checkbox"/> Efficiency <input type="checkbox"/> Effectiveness <input type="checkbox"/> Outcome | <input type="checkbox"/> Leading <input type="checkbox"/> Lagging |



Process Activity Template

| Business Process Objectives <i>(Use info from Business Process template [purple] to populate this column)</i> | Scorecard Perspectives | Process Activity Objectives | Process Activity Challenges (Trend Analysis/SWOT) [Optional] | Process Activity Actions | | | Process Activity Measures | Process Activity Targets | Measure Type (check one) | Leading or Lagging? (check one) |
|------------------------------------------------------------------------------------------------------------------|------------------------|-----------------------------|--------------------------------------------------------------------|--------------------------|-------|----------|---------------------------|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|
| | | | | Action | Owner | Due Date | | | <input type="checkbox"/> Input <input type="checkbox"/> Output <input type="checkbox"/> Efficiency <input type="checkbox"/> Effectiveness <input type="checkbox"/> Outcome | <input type="checkbox"/> Leading <input type="checkbox"/> Lagging |



Employee Template

| Employee Objectives <i>(Use info from Process Activity template to populate this column) (Part A, Column 1 of Performance Evaluation)</i> | Scorecard Perspectives <i>(Part A, Column 2 of Performance Evaluation)</i> | Employee Actions <i>(Info from Process Activity Action [orange template] assigned to owners automatically populate Employee template (Part A, Column 5 of Performance Evaluation)</i> | Employee Measures <i>(Part A, Column 3 of Performance Evaluation)</i> | Employee Target <i>(Part A, column 4 of Performance Evaluation)</i> | Employee Challenges (Trend Analysis / SWOT) [Optional] | Individual Development Plan <i>(items to address employee challenges, and enhance skills to achievement of measure) (part C of evaluation)</i> | |
|--------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|------------------------------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| | | Action | Due Date | | | Action | Due Date |