



**Measure and control business performance with:
Strategy2Act, a Balanced Scorecard software and
Mind Pad, a strategy mapping software.**

Table of contents

Balanced Scorecard Software Implementation	3
Example: Balanced Scorecard for IT Security	7
Strategy2Act reports.....	10
Balanced Scorecard: Strategy tree report	11
Balanced Scorecard: Scorecard report	13
Balanced Scorecard: Full Report	14
Example: Balanced Scorecard for HR	17
Example: Balanced Scorecard with mind map.....	21
Example: business-critical people map.....	26
Balanced Scorecard Software List.....	30
Strategy2Act dashboard	41
Get evaluation versions of Strategy2Act and Mind Pad.....	43

Balanced Scorecard Software Implementation

Specialized BSC software provides a wide range of capabilities for successful implementation and maintenance of the Balanced Scorecard.

Balanced Scorecard methodology

Balanced Scorecard (BSC), developed in 1992 by Robert Kaplan and David Norton as a new type of performance measurement system, has been proclaimed one of the 75 most influential ideas of the 20th century by Harvard Business Review. Bain & Co. 2005 survey indicated that 57 per cent of business organizations use Balanced Scorecard, which is an 18% increase since 1996 ([The 2005 Management Tools Strategy Brief](#)).

“Balanced Scorecard approach” introduces a range of measures for evaluating organizational performance. However, in contrast with most traditional measurement systems, the majority of the BSC measures should be “non-financial”. As the government and corporate management becomes increasingly complicated, purely financial evaluations no longer suffice. BSC focuses the organization on the issues which the management decides are key to its success. Thus, BSC approach allows the company management to extend its business perspectives and provides opportunities for effective strategic planning.

In fact, many non-financial measures are often used to overcome difficulties associated with the use of financial performance measures: for instance, changes in customer satisfaction and numbers of warranty claims often lead to future changes in revenues and profits (Gerald K. DeBusk, CPA, CMA, Ph.D., [The Balanced Scorecard: A Useful Tool for Strategy Implementation and Improved Performance](#), June 24, 2005).

Using BSC as an integrated management system, the organizational leadership can link its performance measurements to the company strategic planning objectives and value proposition.

Key Performance Indicators

The Balanced Scorecard provides a comprehensive set of objectives and performance measures that can be more easily analyzed, prioritized and communicated among the departments and employees of the organization. Typically, the performance measures are viewed from the following perspectives:

- Financial Perspective
- Customer Perspective
- Internal Processes Perspective
- Employee Learning and Growth Perspective

To measure the business performance, an organization needs to define its key performance indicators (KPIs). KPIs are cross-business enterprise standards that measure those vital few activities and processes that monitor the health of the organization (Kent Bauer, [The Power of Metrics, DM Review Magazine](#), September 2004). For instance, KPIs in IT organizations are usually associated with the developer productivity, quality of delivered code, and ability to meet project deadlines and estimates.

BSC provides a multi-layered approach and comparatively large number of parameters that can be used in evaluating KPIs. In complex IT projects, BSC can be used as a framework for choosing a set of measures that address the operational excellence, user orientation, business value, and future orientation of an IT organization. BSC highlights the crossover measures that make the connection between IT activities and business success. These measures should illustrate actionable items and allow the organizational leadership to make better decisions. According to the 2004 Forrester survey, more than two-thirds of IT decision-makers said that metrics regarding project management and cost management were very valuable to their organizations, while over 40% also cited the value they receive from quality and productivity metrics (Liz Barnett, [Metrics for Application Development](#), Forrester Research, May 2, 2005).

BSC metrics include both quantitative and qualitative factors. In application development, system response times or downtimes are typical examples of

quantitative factors. Qualitative factors, such as users' satisfaction with a particular service, are more difficult to measure and are usually based on the data collected from regular surveys of the employees.

Deployment of Balanced Scorecard

In the early 1990s, most organizations deployed paper-based management reporting solutions. However, paper-based measurement systems do not satisfy the needs of fast-paced businesses operating in competitive markets as they are, in general, too slow, cumbersome, labor intensive and unreliable.

Nowadays, organizations use various software solutions to support a Balanced Scorecard implementation. Most companies prefer standard spreadsheet document and presentation software applications (generally, MS Excel and MS PowerPoint). However, such applications lack scalability (desktop capacity is restricted), collaboration (the data is usually stored in individual spreadsheets on different machines) and require more time consuming maintenance (the data should be entered manually, which is typically a very slow and error-prone process). Besides, as the data is stored in individual flat files, it is more difficult to perform analysis across data in different spreadsheets (Andy Neely and Bernard Marr, [Automating Your Scorecard: The Balanced Scorecard Software Report](#), October 2003).

Specialized BSC software

In order to facilitate the implementation of the Balanced Scorecard methodology, specific software may be used. BSC software is an efficient instrument for successful implementation and maintenance of the Balanced Scorecard. It is able to leverage the total potential of the BSC methodology by offering capabilities for creating a Balanced Scorecard model, defining and appraising key performance indicators, monitoring the status of individual initiatives and tasks, and communicating the business strategy across the departments of an organization and among the employees.

BSC software allows the company management to reduce "information overload" by providing data analysis and visual representation tools. It automatically collects

relevant information from all organizational systems and data sources and facilitates building organizational metrics and defining key performance indicators. Typically, BSC software application tracks all necessary data for KPI management, including individual projects' description, projects' deadlines, departments and employees responsible for the implementation of day-to-day tasks, etc. Visual representation of KPIs highlights current trends and provides comparative information. Performance measures may be aligned with each strategic objective.

BSC software provides a "visual read-out" of the business model which makes it easier to understand and convey the main strategic objectives and goals to employees and partners. Personalized performance information may be delivered to specific business units and individuals. Besides, some BCS software applications contain graphical representation tools for monitoring the status of all initiatives and subordinate tasks with links to existing project management systems. Clear employee accountability allows the organizational leadership to fine tune operations and identify main performance issues.

BSC software has to match the needs of a specific organization. As BSC plays an important role in creating and implementing organizational strategy and objectives, it is essential that the functionality of the BSC software should fit the organizational culture, the skills as well as the existing IT infrastructure. Among other factors, an organization should consider the scope of the implementation and the number and type of potential Balanced Scorecard users.

Example: Balanced Scorecard for IT Security

Implementation of IT security metrics enables the organizational management to analyze the IT systems technical, operational, and management controls performance.

Metrics Development and Implementation

Performance metrics are tools designed to facilitate decision making and improve performance and accountability through collection, analysis, and reporting of relevant performance-related data. IT security metrics are based on IT security performance goals and objectives, which state the desired results of a system security program implementation and identify practices defined by security policies and procedures. Overall, IT security metrics monitor the accomplishment of the goals and objectives by quantifying the level of implementation of the security controls and the effectiveness and efficiency of the controls, analyzing the adequacy of security activities and identifying possible improvement actions.

The requirement to measure IT security performance is driven by regulatory, financial, and organizational reasons. A number of existing laws, rules, and regulations cite IT security performance measurement as a requirement. The results of an effective metric program can provide useful data for directing the allocation of information security resources and should simplify the preparation of performance-related reports. Besides, the process of data collection and reporting will enable the management to pinpoint specific technical, operational, or management controls that are not being implemented or are implemented incorrectly. Using the results of the metrics analysis, program managers and system owners can isolate problems, use collected data to justify investment requests, and then target investments specifically to the areas in need of improvement.

The metrics that are ultimately selected for implementation will be useful not only for measuring performance, identifying causes of unsatisfactory measurements, and pinpointing improvement areas, but also for facilitating continuous policy implementation, effecting security policy changes, and redefining goals and

objectives. Once the measurement of security control implementation commences, subsequent measurements can be used to identify performance trends and ascertain whether the rate of implementation is appropriate. A specific frequency of each metric collection will depend on the life cycle of a measured event. For instance, a metric that pertains to crackable passwords should be collected at least monthly.

IT security metrics implementation consists of five stages:

1. IT security metrics identification, definition, and development;
2. Metrics data collection and results analysis;
3. Remediation actions identification;
4. Evaluation of necessary resources;
5. Technical, administrative and operational remediation activities.

Identification of IT Security Metrics

During metrics development, goals and objectives from federal, internal, and external guidance, legislation, and regulations are identified and prioritized to ensure that the measurable aspects of security performance correspond to operational priorities of the organization. Security metrics must use the data that is readily obtainable, and yield quantifiable information (percentages, averages, and numbers).

National Institute of Standards and Technology published a report which identified 17 IT security topics affecting the security posture of an organization (<http://csrc.nist.gov/>). These topics range from risk management and security controls assessment to personnel security, training and awareness to incident response capability and audit trails.

- **Risk Management** measurements quantify the number of conducted system risk assessments and the degree of managerial involvement in the risk assessments procedures. **Security Plan** metrics quantify the percentage of systems with approved system security plans and the percentage of current system security plans. **Security Controls** metrics determine the efficiency of closing significant system weaknesses by evaluating the existence, the timeliness and effectiveness of a process for implementing corrective actions.

- **Personnel Security** metrics quantify the percentage of users with special access to systems who have undergone background evaluations. **Security Awareness** metrics concern with the percentage of employees with significant security responsibilities who have received specialized training.
- **Data Integrity** metrics quantify the percentage of systems with automatic virus definition updates and automatic virus scanning and the percentage of systems that perform password policy verification. **Logical Access Controls** metrics concern with the number of users with access to security software that are not security administrators. To ensure that personnel with access to security software have the appropriate skill sets and have undergone appropriate screening, no person should be allowed such access unless they are designated as a security administrator. These metrics also include the percentage of systems running restricted protocols and the percentage of websites with a posted privacy policy (if an organization runs websites with public access).
- **Contingency Planning** measurements include the percentage level of critical data files and operations with an established backup frequency as well as the percentage of systems that have a contingency plan. **Incident Response Capability** metrics quantify the percentage of agency components with incident handling and response capability and the number of incidents reported to FedCIRC, NIPC, and local law enforcement.
- **System Development Life Cycle** metrics quantify the percentage of systems that are in compliance with the OMB requirement for integrating security costs into the system life cycle. **Audit Trails** metrics quantify the percentage of systems on which audit trails provide a trace of user actions.

The IT security metrics also include **Authentication, Authorize Processing, Physical and Environmental Protection, Hardware and Systems Software Maintenance, Input/Output Controls** and **Documentation** measurements.

After applicable metrics are identified and described, the appropriate performance targets should be identified. Performance targets establish a goal by which success is measured. The degree of success is based on the metric result's proximity to the stated performance target.

Strategy2Act reports

Let me give some clarification about all mentioned reports, metrics and Strategy2Act software.

1) In this article we have described the most popular and useful IT security metrics. There are many ways of how to use them. What we suggest are Security Metrics incorporated into balanced scorecard. In this way you can connect your future security measures with your company security strategy.

2) Security Metrics Balanced Scorecard is a tree of security metrics, that you can see at this screenshot. This is how this balanced scorecard looks in our Strategy2Act software:

The screenshot displays the Strategy2Act software interface. The main window is titled 'Strategy2Act' and contains a 'Strategy tree: IT Security Metrics' on the left and a 'Solution Scorecard' on the right. The strategy tree is a hierarchical list of metrics with their scores and weights. The 'Logical Access Controls' metric is highlighted in blue. Below the tree is a 'Strategy tree edit' section with fields for Name, Measure, Description, and Target. The 'Solution Scorecard' section includes a title 'Security audit with Strategy2Act', a description, and a 'Set a score for this factor/goal' section with a score of 8 and a comment 'We have about 20% of employees'. At the bottom, a red bar shows the 'Total score: 74 of 100'.

Metric	Score	Weight
Risk Management		3
Security Plan	7 of 10	4
Security Controls	6 of 10	6
Contingency Planning		2
Backup Frequency	10 of 10	7
Incident Response Capability	6 of 10	3
System Life Cycle		1
OMB requirement	0 of 10	6
Audit Trails	3 of 10	4
Personnel Security		2
Security Awareness	10 of 10	7
Authentication and Authorize Processing	5 of 10	3
Data Integrity		2
Logical Access Controls	8 of 10	2
Anti-virus and spyware protection	10 of 10	8

Strategy tree edit

Name:	Measure
Logical Access Controls	The number of users with access
Description	Target
Logical Access Controls metric:	10%

Solution Scorecard

Security audit with Strategy2Act
Created by AKS Security Expert

Solution description:
Learn strong and weak points of organization. Suggest possible ways to solve security problems.

Scorecard: [Print] [Email] [Save] [Refresh]

Set a score for this factor/goal:
The score is: 8
Your comment to this score:
We have about 20% of employees

Total score: 74 of 100

3) You can design your own security metrics tree or use suggested in sample files, then you will have a **Strategy Tree report**. That shows all metrics and describe the measurement way.

Balanced Scorecard: Strategy tree report

Creation time stamp: 10.05.2006 0:16:40

Vision tree: IT Security Metrics

Strategy tree details:

IT Security Metrics	Description	Measure	Target	Score
Risk Management	Risk Management measurements quantify the number of conducted system risk assessments and the degree of managerial involvement in the risk assessments procedures.			30
Security Plan	Security Plan metrics quantify the percentage of systems with approved system security plans and the percentage of current system security plans. <i>Comment: 90% coverage, except some laptops and pocket pc computers</i>	The percentage of systems with approved system security plans	100%	12
Security Controls	Security Controls metrics determine the efficiency of closing significant system weaknesses by evaluating the existence, the timeliness and effectiveness of a process for implementing corrective actions. <i>Comment: Measured for spam fighting, it required about 1 hour to install patch for all systems. Consider time for other possible threats.</i>	The time required for implementing corrective actions	2 hours	18
Contingency Planning	Contingency Planning measurements include the percentage level of critical data files and operations with an established backup frequency as well as the percentage of systems that have a contingency plan			20
Backup Frequency	Backup Frequency depends on changes frequency and data value <i>Comment: We do backup two times a day</i>	Backup frequency time period	2-8 hours	14
Incident Response Capability	Incident Response Capability metrics quantify the percentage of agency components with incident handling and response capability and the number of incidents reported to FedCIRC, NIPC, and local law enforcement <i>Comment: We need better reporting features for database</i>	The number of components with incident handling and response capability	80% of installed components	6
System Life Cycle				10
OMB requirement	The percentage of systems that are in compliance with the OMB requirement for integrating security costs into the system life	Systems with integrating	100%	4

cycle *Comment: Need to be integrated, in case of data or hardware problems we will save some money*

Audit Trails	Audit Trails metrics quantify the percentage of systems on which audit trails provide a trace of user actions <i>Comment: 100% audit is possible now only for customer support employees, should consider to add a policy for other employees</i>	Systems on which audit trails provide a trace of user actions	90%	4
Personnel Security	Personnel Security metrics quantify the percentage of users with special access to systems who have undergone background evaluations.			20
Security Awareness	Security Awareness metrics concern with the percentage of employees with significant security responsibilities who have received specialized training. <i>Comment: The latest training date is March, 2006</i>	Employees who have received specialized security training	100%	14
Authentication and Authorize Processing	Authentication and Authorize Processing measurements <i>Comment: Most marketing materials are accessible without authorization, it's OK for our business</i>	Non-public data that is accessible after authorization	100%	6
Data Integrity	Data Integrity metrics quantify the percentage of systems with automatic virus definition updates and automatic virus scanning and the percentage of systems that perform password policy verification			20
Logical Access Controls	Logical Access Controls metrics concern with the number of users with access to security software that are not security administrators <i>Comment: We have about 20% of employees, it's a little more than it's really needed</i>	The number of users with access to security software that are not security administrators	10%	4
Anti-virus and spyware protection	The number of systems protected with anti-virus, anti-spyware and firewall software <i>Comment: We have all computers with protection software installed</i>	The number of systems protected with anti-virus, anti-spyware and firewall software	100%	16

This report was generated by [Strategy2Act - balanced score card support program](#).
Find more report templates on www.strategy2act.com

4) Security experts can work with Strategy2Act software to do a real audit of your security. They can use Strategy2Act to assign their score for metrics. Once expert did this, he or she can generate a **Scorecard report**, which includes expert's scores together with total score (see "74 of 100" total score).

Balanced Scorecard: Scorecard report

This scorecard was created by AKS Security Expert, using Strategy2Act software.

Creation time stamp: 10.05.2006 0:16:36

Vision tree: IT Security Metrics

Suggested solution:	Security audit with Strategy2Act software
	Learn strong and weak points of organization. Suggest possible ways to solve security problems.
Solution response:	Invest necessary means to integrate security costs into the system life cycle, check and approve system security plans for laptops
Score:	74 of 100

Scorecard:

IT Security Metrics		
Risk Management		30
Security Plan	<i>Comment: 90% coverage, except some laptops and pocket pc computers</i>	7 of 12
Security Controls	<i>Comment: Measured for spam fighting, it required about 1 hour to install patch for all systems. Consider time for other possible threats.</i>	6 of 18
Contingency Planning		20
Backup Frequency	<i>Comment: We do backup two times a day</i>	10 of 14
Incident Response Capability	<i>Comment: We need better reporting features for database</i>	6 of 6
System Life Cycle		10
OMB requirement	<i>Comment: Need to be integrated, in case of data or hardware problems we will save some money</i>	0 of 6
Audit Trails	<i>Comment: 100% audit is possible now only for customer support employees, should consider to add a policy for other employees</i>	3 of 4
Personnel Security		20
Security Awareness	<i>Comment: The latest training date is March, 2006</i>	10 of 14

Authentication and Authorize Processing	<i>Comment: Most marketing materials are accessible without authorization, it's OK for our business</i>	5 of 6
Data Integrity		20
Logical Access Controls	<i>Comment: We have about 20% of employees, it's a little more than it's really needed</i>	8 of 4
Anti-virus and spyware protection	<i>Comment: We have all computers with protection software installed</i>	10 of 16

This report was generated by [Strategy2Act - balanced score card support program](#).
Find more report templates on www.strategy2act.com

5) Also, two more report types are available. **Full Report** combines both - security metrics and experts scores. Report for PDA is a modified report that you can upload to your PDA to read it later.

Balanced Scorecard: Full Report

Strategy tree: IT Security Metrics

Scorecard: Security audit with Strategy2Act software

This scorecard was created by AKS Security Expert, using Strategy2Act software.
Creation time stamp: 10.05.2006 0:16:45

Vision tree: IT Security Metrics	
Suggested solution:	Security audit with Strategy2Act software
	Learn strong and weak points of organization. Suggest possible ways to solve security problems.
Solution response:	Invest necessary means to integrate security costs into the system life cycle, check and approve system security plans for laptops
Score:	74 of 100

Scorecard:

IT Security Metrics	Description	Measure	Target	Score
Risk Management	Risk Management measurements quantify the number of conducted system risk assessments and the degree of managerial involvement in the risk assessments procedures.			30
Security Plan	Security Plan metrics quantify the percentage of systems with approved system security plans and the percentage of current system security plans. <i>Comment: 90% coverage, except some laptops and pocket pc computers</i>	The percentage of systems with approved system security plans	100%	7 of 12
Security Controls	Security Controls metrics determine the efficiency of closing significant system weaknesses by evaluating the existence, the timeliness and effectiveness of a process for implementing corrective actions. <i>Comment: Measured for spam fighting, it required about 1 hour to install patch for all systems. Consider time for other possible threats.</i>	The time required for implementing corrective actions	2 hours	6 of 18
Contingency Planning	Contingency Planning measurements include the percentage level of critical data files and operations with an established backup frequency as well as the percentage of systems that have a contingency plan			20
Backup Frequency	Backup Frequency depends on changes frequency and data value <i>Comment: We do backup two times a day</i>	Backup frequency time period	2-8 hours	10 of 14
Incident Response Capability	Incident Response Capability metrics quantify the percentage of agency components with incident handling and response capability and the number of incidents reported to FedCIRC, NIPC, and local law enforcement <i>Comment: We need better reporting features for database</i>	The number of components with incident handling and response capability	80% of installed components	6 of 6
System Life Cycle	The percentage of systems that are in compliance with the OMB requirement for integrating security	Systems with		10

costs into the system life cycle
Comment: *Need to be integrated, in case of data or hardware problems we will save some money*

	Audit Trails	<p>Audit Trails metrics quantify the percentage of systems on which audit trails provide a trace of user actions</p> <p>Comment: <i>100% audit is possible now only for customer support employees, should consider to add a policy for other employees</i></p>	Systems on which audit trails provide a trace of user actions	90%	3 of 4
Personnel Security		Personnel Security metrics quantify the percentage of users with special access to systems who have undergone background evaluations.			20
	Security Awareness	<p>Security Awareness metrics concern with the percentage of employees with significant security responsibilities who have received specialized training. Comment: <i>The latest training date is March, 2006</i></p>	Employees who have received specialized security training	100%	10 of 14
	Authentication and Authorize Processing	<p>Authentication and Authorize Processing measurements</p> <p>Comment: <i>Most marketing materials are accessible without authorization, it's OK for our business</i></p>	Non-public data that is accessible after authorization	100%	5 of 6
Data Integrity		Data Integrity metrics quantify the percentage of systems with automatic virus definition updates and automatic virus scanning and the percentage of systems that perform password policy verification			20
	Logical Access Controls	<p>Logical Access Controls metrics concern with the number of users with access to security software that are not security administrators</p> <p>Comment: <i>We have about 20% of employees, it's a little more than it's really needed</i></p>	The number of users with access to security software that are not security administrators	10%	8 of 4
	Anti-virus and spyware protection	<p>The number of systems protected with anti-virus, anti-spyware and firewall software</p> <p>Comment: <i>We have all computers with protection software installed</i></p>	The number of systems protected with anti-virus, anti-spyware and firewall software	100%	10 of 16

This report was generated by [Strategy2Act - balanced score card support program](http://www.strategy2act.com).
 Find more report templates on www.strategy2act.com

Example: Balanced Scorecard for HR

Human resource function has serious impact on general business performance. In fact, an organization's competitive advantage largely depends on the way it manages its largest asset - its people.

Human resources strategy

Human resources are the most critical asset of any organization. According to the latest research, the efficiency level of an organization largely depends on its human capital management (HCM). The study showed that over 80% of managing directors believed Human Capital Management to be vital for the fundamental success of a business, while effective measurement is crucial to deliver effective HCM. Comprehensive human resources measurement policy enables the organizational management to collect consistent information about the employee population, which alleviates decision-making and ensures that management and development activities remain relevant with overall business strategy. With a sound HR metrics program, HR management can make business decisions that are based on cold facts rather than "gut feeling", and use the exact figures to back up business cases and requests for resource.

The screenshot displays the Strategy2Act software interface. The main window is titled "Strategy2Act" and contains a "Strategy tree: HR metrics" on the left and a "Solution Scorecard" on the right. The strategy tree lists various HR metrics with their scores and weights. The solution scorecard shows a suggested bonus and learning system created by John Smith, with a score of 0 out of 10. A "Strategy tree edit" section at the bottom left allows for modifying measures, and a "Total score: 40 of 100" bar is at the bottom.

Strategy tree: HR metrics

- HR metrics
 - Employee turnover (weight: 2)
 - Cost per Hire (score: 3 of 10; weight: 1)
 - Turnover Cost (score: 7 of 10; weight: 3)
 - Turnover Rate (score: 8 of 10; weight: 1)
 - Time to Fill (score: 4 of 10; weight: 3)
 - Length of Employment (score: 5 of 10; weight: 2)
 - Recruiting (weight: 3)
 - Vacant Period (score: 8 of 10; weight: 2)
 - New Hires Performance Appraisal (score: 4 of 10; weight: 4)
 - Manager Satisfaction (score: 2 of 10; weight: 1)
 - Turnover Rates of New Hires (score: 8 of 10; weight: 1)
 - Financial Impact of Bad Hire (score: 2 of 10; weight: 2)
 - Retention (weight: 2)
 - Preventable Turnover (score: 8 of 10; weight: 4)
 - Diversity Turnover (score: 4 of 10; weight: 2)
 - Financial Impact of Employee Turnover (score: 8 of 10; weight: 3)
 - Training and Development (weight: 1)
 - Learning and Growth Opportunities (score: 2 of 10; weight: 4)
 - On-the-job learning Contentment (score: 3 of 10, Sample: Suggest a system...; weight: 3)
 - Opportunities for New Hires (score: 3 of 10; weight: 2)

Solution Scorecard

Suggest a bonus and learning s:
Created by John Smith

Solution description:
Sample: Suggest a system that connects learning and growth results with bonus fees

Scorecard: [Icons]

Set a score for this factor/goal:
The score is:
Your comment to this score:
[Set]

Strategy tree edit

Name:	Measure
Description	Target

[Add] [Balance] [Modify]

Total score: 40 of 100

Main practices

Human resources practices have direct impact on general business performance. Typically, the most significant HR practices are viewed from 6 perspectives: rewards and accountability; collegial, flexible administration; recruiting and retention excellence, communications integrity, dedicated HR service technologies, prudent application of resources. Most research analyses have shown a strong correlation between these practices and a 30% increase in shareholder value.

HR strategy should be linked to the business goals and objectives. When creating effective HR measurements, an organizational management should consider whether each set of HR metrics contributes to its business performance and provides an insight into productivity assessment and resources appraisal which lead to efficiency gains and customer experience improvement.

Typically, HR metrics are classified in three key categories: historical, real-time and forward-looking. HR strategy should specify the starting point of business development in order to assess the motivation and future impact of the changes in the HR profile and general business structure. To evaluate the business development, the HR can either use its own historical data or benchmark its organization against other similarly sized businesses or industry ‘best of breeds’.

HR analysis requires the allocation of specific resources. It is essential to implement periodical assessment of HR performance without interfering with existing business procedures. Most companies prefer to employ dedicated technology to optimize the data collection. Besides, the HR report should be presented in comprehensive and clear format. For instance, graphical representations with short textual summaries provide for better accessibility and readability of the HR data. The HR report may also be presented in a form of HR scorecard, which is relevant not only to HR professionals, but also organizational management and employees.

HR metrics

The most widely used HR metrics are typically concerned with employee attitudes, employee turnover, employee skill levels, as well as outsourcing costs, service center operations, the number HR transactions processed, staffing process, training programs utilization and effectiveness, and promotions. These measurements are employed by 25 to 75% of all business organizations.

Each metric contains 2 to 5 performance indicators. For instance, “**employee attitudes**” metric includes the following indicators: Job Contentment (the percentage of employees satisfied with their job), and Manager Contentment (the percentage of employees satisfied with their manager).

“**Employee turnover**” metric generally include such indicators, as Cost per Hire (calculation of advertising, agency fees, employee referrals, relocation, recruiter pay and benefits costs and the number of hires), Turnover Cost (calculation of termination, new hire, vacancy and learning curve costs), Turnover Rate (rate of the employees leaving an organization), Time to Fill (the period from job requisition approval to new hire start date), Length of Employment (this indicator considers the job title, department, etc.).

“**Recruiting**” metric includes Vacant Period (number of overall days the positions were vacant), New Hires Performance Appraisal (average performance appraisal of new hires, compared to

previous period), Manager Satisfaction (according to the survey of hiring managers, compared to previous period), Turnover Rates of New Hires (during a specified period), Financial Impact of Bad Hire (according to turnover cost and cost per hire).

“Retention” metric includes Overall Employee Turnover, especially in the key positions, Preventable Turnover (this indicator considers the reasons the employee left the organizations and what measures may be taken to prevent it), Diversity Turnover (turnover rate in professional, managerial, and technical positions), Financial Impact of Employee Turnover.

“Training and Development” metric includes Learning and Growth Opportunities (percentage of employees who are satisfied with the learning and growth opportunities in the organization), On-the-job learning Contentment (percentage of employees who are satisfied with on-the-job learning, project assignments for growth and development, and job rotations), Opportunities for New Hires (percentage of employees who report training opportunities among the top three reasons they accepted the job).

Although most organizations use similar set of HR measurements, however, even common metrics don't always include standard components. For instance, a common “cost per hire” metric may contain different expense categories, such as advertising, online services, background checks and recruiter costs. Recruiting and staffing metrics may also comprise various aspects. For instance, organizations usually measure “college recruiting” by analyzing the source of organization newcomers and their progress at the workplace.

HR measurements have significant implications for all areas of the business performance. For instance, employee attitudes and turnover metrics are reported to have key influence on decision making in the organization.

Implications of HR measurements

The organizational leadership may benefit from periodical HR assessment if it employs HR methodology to identify the main areas of improvement in its human capital. For instance, tracking absenteeism can help increase productivity, or measuring diversity can help save a company from costly discrimination awards. Besides, HR data may be used in creating financial reports in order to link human resources measurements to investment return.

On the whole, HR measurements transform human resources capabilities to measurable strategic value, which provides for better accessibility and readability of HR data, and improves HR interconnection with leadership across the organization.

Balanced Scorecard

Vision tree: HR metrics	
Suggested solution:	Suggest a bonus and learning system
	Sample: Suggest a system that connects learning and growth results with bonus fees
Solution response:	Improved on-the-job learning satisfaction, decrease a vacant period for new hires
Score:	40 of 100

Scorecard:

HR metrics	Description	Measure	Target	Score
Employee turnover				20
Cost per Hire	calculation of advertising, agency fees, employee referrals, relocation, recruiter pay and benefits costs and the number of hires		Sample: lower hire costs to 1K\$ per hire	3 of 2
Turnover Cost	calculation of termination, new hire, vacancy and learning curve costs			7 of 6
Turnover Rate	rate of the employees leaving an organization			8 of 2
Time to Fill	the period from job requisition approval to new hire start date			4 of 6
Length of Employment	Length of Employment (this indicator considers the job title, department, etc.)			5 of 4
Recruiting				30
Vacant Period	number of overall days the positions were vacant			8 of 6
New Hires				
Performance Appraisal	average performance appraisal of new hires, compared to previous period			4 of 12
Manager Satisfaction	according to the survey of hiring managers, compared to previous period			2 of 3
Turnover Rates of New Hires	during a specified period			8 of 3
Financial Impact of Bad Hire	Financial Impact of Bad Hire (according to turnover cost and cost per hire)			2 of 6
Retention				20
Preventable Turnover	this indicator considers the reasons the employee left the organizations and what measures may be taken to prevent it			8 of 8
Diversity Turnover	turnover rate in professional, managerial, and technical positions			4 of 4
Financial Impact of Employee Turnover	Financial Impact of Employee Turnover			8 of 7
Training and Development				10
Learning and Growth Opportunities	percentage of employees who are satisfied with the learning and growth opportunities in the organization			2 of 4
On-the-job learning Contentment	percentage of employees who are satisfied with on-the-job learning, project assignments for growth and development, and job rotations Comment: Sample: Suggest a system that connects learning and growth results with bonus fees			3 of 3
Opportunities for New Hires	percentage of employees who report training opportunities among the top three reasons they accepted the job			3 of 2

Example: Balanced Scorecard with mind map

Balanced Scorecard is a strategic planning approach that describes companies goals in four perspectives - "Customer", "Business Process", "Financial" perspective and "Learning and Growth" perspective. We created a Balanced Scorecard mind map to support creation of scorecard for personal or business needs.

In this article you will find out more about Balanced Scorecard concept. Also, you can download a sample Mind Pad map that is a basic for building your own scorecard

Overview - Balanced Scorecard with Mind Pad

Let me explain what is Balanced Scorecard designing in Mind Pad and why it's better than tools for balanced scorecard and what value it adds.

Design Balanced Scorecard in Mind Pad

Balanced Scorecard is a conception (not method) that allows to represent company's goals. For designing Balanced Scorecard it's reasonable to apply a [mind mapping](#) or [concept mapping](#) information representation approaches.

Normally mind (or concept) map deals with *topics*. In Mind Pad we use so called *Frames*. Think about frame as an object with special properties set.

Use special model for representing Balanced Scorecard information. It allows creating topics with properties: "Goal", "Measure method", "Action", "Action Feedback" and others. Click to [see all properties of "Goal" object](#).

In Mind Pad it's easy to link some strategic goal with a person card. It looks great and simplifies the information about related person. Read more about [person map](#).

Use special color styles designed for Balanced Scorecard building. It's an easy way to make your map look professionally. Click to see big [balanced scorecard map](#).

Using Balanced Scorecard with Mind Pad

Now, let me show how to benefit from using BSC_Goal object in Mind Pad.

1. I've added to the map a custom designed BSC_Goal object. It has all properties I need to describe some specific company goal for perspective. My goal is "Improve access to business-critical information".

1. First, I wish to describe the measurement method. I put into "Measure method" property the following text: "We will evaluate the number of requests by one employee"
2. Now, I'm describing my goal: "The number of employees that can access strategic information", the goal value is "80%".
3. It's a time to act. I put in "Action" property the value "We will start promoting company entire network".

Access to strategic information

Goal Description The number of employe

Suggested action We will start promoting c

Measure method We will evaluate the nu

Progress Descrip Guys from IT released a

Action
 Action Feedback We should provide a dir
 Suggested action We will start promoting c

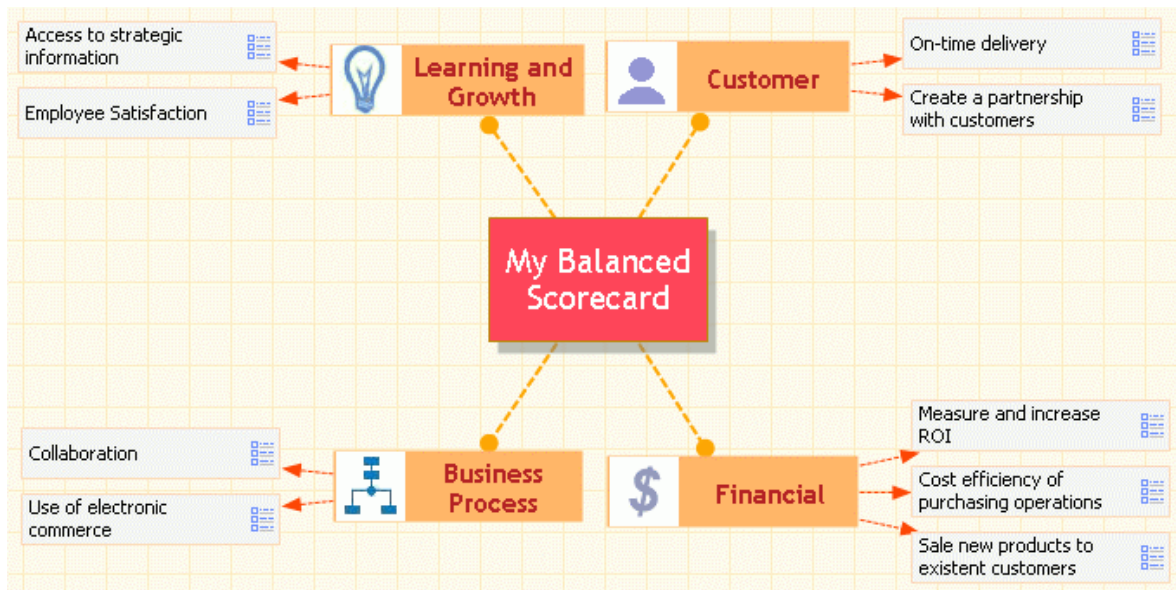
I built this goal of my balanced scorecard map. And after some time I'm getting back to it as I have some results:

1. First, now I know what is the problem, why most people wasn't able to access business-critical information. My IT stuff reported that "We should provide a direct access to company network from the web". Let's put this into "Action feedback" properties.
2. Also, guys from IT did some work to improve access to business information. I evaluate the progress as 10% and put some ideas in "Progress Description" property: "Guys from IT released a wireless access to entire network".

So this example shows how you can manage your goals with Balanced Scorecard map. It's easy because topics represent just the short summary and if you need details - you click at topic and browse for more values.

Why we work with Balanced Scorecard

Balanced Scorecard is what makes company more effective as company employees know about strategic goals, know how their job is linked with strategic goal. In 2004 we have designed a [Strategy2Act](#) product that allows to build and balance scorecard.



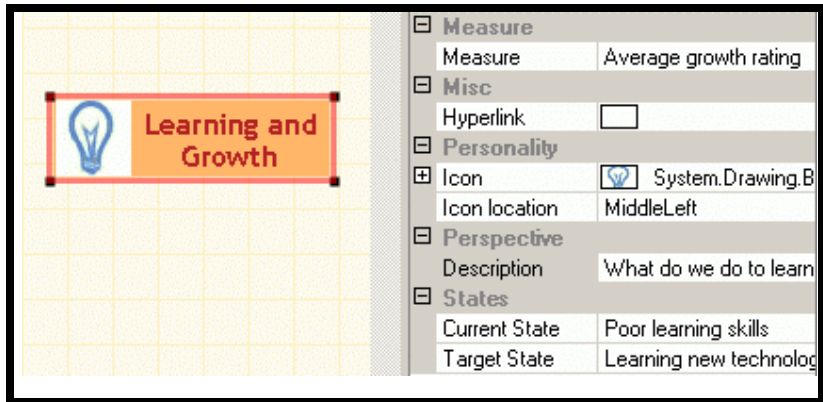
Now we are releasing Balanced Scorecard in mind mapping technique. We used Mind Pad product to describe the sample mind map and show how to create a company/personal balanced scorecard.

What is Balanced Scorecard

The Balanced Scorecard is a business management concept. This concept allows to transform strategy into action. It's not a set of rules or methods, it's a conception that allows to share your strategy and vision with others.

There are three important things you should know about Balanced Scorecard:

- It's a concept (not a set of rules, tools or methods);
- It helps to connect your strategy with real action;
- It lets to describe companies' strategy, vision and mission;

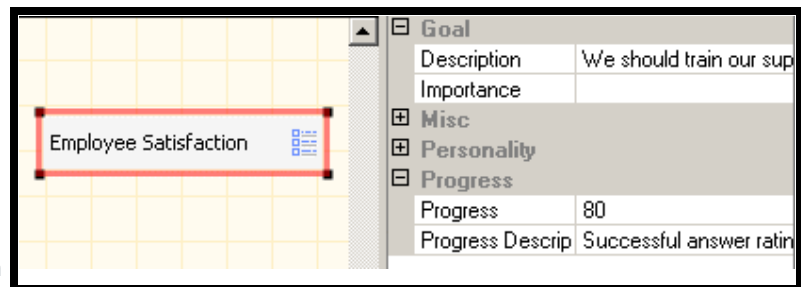


Learning and Growth perspective (strategic goal) in Mind Pad. Pay attention to properties of this frame objects. Note: you can put information about goal description, measure way, current and target state.

Basing Balanced Scorecard concept every strategic goal must have a success factors. For every factor you can have a measure way and target value.

The balanced scorecard suggests to view the organization from four perspectives:

- The Learning and Growth Perspective
- The Business Process Perspective
- The Customer Perspective
- The Financial Perspective



Goal. As you can see at [this picture](#) Employee Satisfaction goal is linked with Learning and Growth strategic goal. You should show the progress for this goal. "Progress Description" and "Progress" properties were designed for this task.

Then you should develop success measure ways and assign a target values.

Why use Balanced Scorecard

The Balanced Scorecard is another great way to let your employees know about your strategy, mission and vision. People will not just “know” about your strategy, but will be able to answer question:

- What can we do to achieve our strategy;
- What is the relation between things we are doing now and strategy/vision of our company;
- The Balanced Scorecard transforms strategy into action;

Use Balanced Scorecard to transform your strategy into action.

Example: business-critical people map

Change the way you manage your contacts. Replace your old contact list with a new contact map. Visualize all your contacts and relation between them.

It's now a time to change the way you manage your contacts. It's now easy to replace your old contact list with a new contact map. Mind-Pad object oriented mind mapping lets you visualize all your contacts and relation between them.

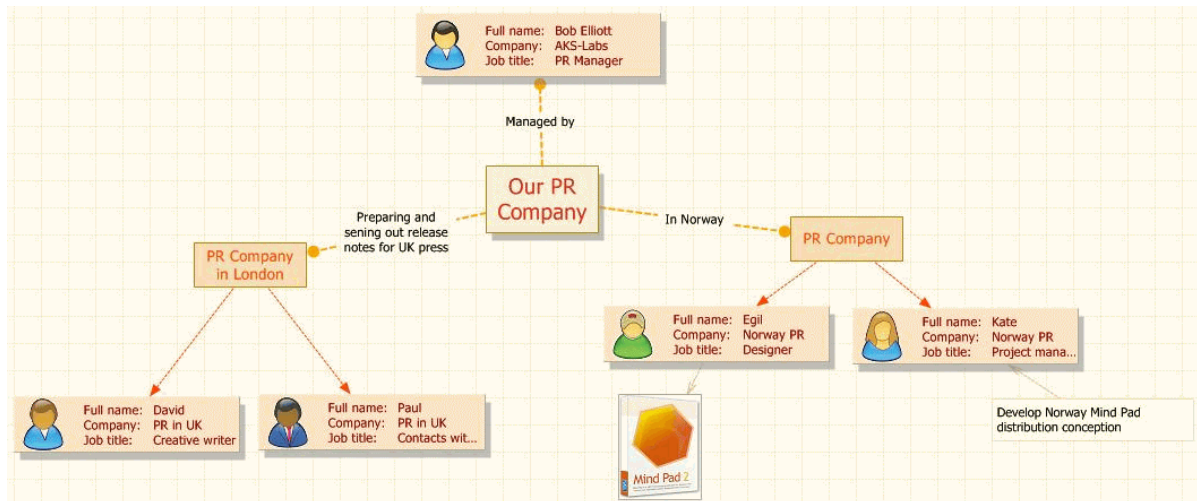
- Learn what is Contact Map;
- Learn how to create map of contacts in Mind Pad ([read now](#))
- View the sample of contact map designed in Mind Pad ([view now](#))
- Download sample contact map ([download now](#))

Represent your contacts as a map

If your contact list is full of records then you probably already thought about some kind of categorization or sorting. The problem of nowadays contact-lists is that you can see just a single contact item without ability to see the relation between items. We applied a powerful object-oriented mind mapping conception to this problem.

Replace contacts list with contacts map

It's now easy to replace your contact list with contact mind map. With Mind Pad you can create contact objects and link them with each other.



Note, Mind Pad suggest object-oriented mind mapping, meaning that you can not just put a name of your contact, but keep in map all contact information.

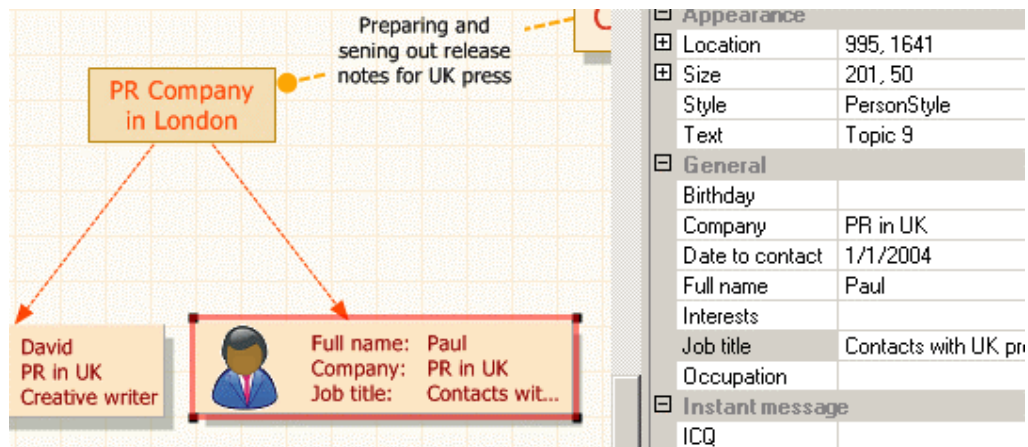
Visualization benefits

For instance, you have a partnership with some companies PR agencies.

Look at the picture, it's visualized a contact relation scheme. You know where Paul works and what project he is working for now. You can link Asbjorn, a project manager from Norway PR company, with someone in your marketing team.

Change contact details

It's easy to make necessary notes or put some additional information.



Let's click on "Tim, Testing and quality team" map item and see what we can change about Tim.

It's amazing as you have the power of companies CRM now! You can put all Tim's details in this contact map.

Put here his interests or contact details.

More over, you can use Mind Pad Model Editor to add some properties to "Contact" object. For instance, if you don't really need "ICQ Number" field then you can remove it. Probably it's more useful to have a "Current project" or "Project history" field, so you can learn if Tim is experienced enough to do some job.

Finally, you can use scripting to make this map active. For instance, you can create a script for your contact map that will highlight contact items that you should manage today, for example give a call or write e-mail.

Create a contact object with Mind Pad:



1. Select a drop-list:
2. Select a "Contact" frame class from Frame class hierarchy.
3. Now when you double click on the workspace you will create a contact object.

Learn more: [Create a contact map step by step](#)

For detailed instruction run Mind Pad. Select "New From Template" in "File menu" and select Contact Map.

Improved contacts performance

It's a simple solution! With Mind Pad you can build a contacts mind map, where you can link contact items with each other and specify all necessary details about contacts.

Using contact mind map improves your performance vastly. Now you don't have to spend time managing, searching or sorting contacts as now it's very easy to manage contacts in map. All contact are structures and visualized in the way you want it to be.

You can now "see" the relation between people, you can make notes right here on the map without running another program.

With Mind Pad contact map you can create a new team for a new project and manage it in efficient way. It's easy and powerful idea as it bases on mind maps.

Balanced Scorecard Software List

Please, find a list of Balanced Scorecard software. All these software requires thousand dollars and months to be installed and about 30% of total cost to support. If you are small company or if you want to have insight first consider using our Strategy2Act software.

- ActiveStrategy Enterprise (ASE)
- Cognos® Metrics Manager
- Comshare MPC™
- Corporater Balanced Scorecard suite
- CorVu5
- Crystal Decisions Balanced Scorecard Solution
- Bizscore®
- Dolphin Navigator System
- InsightVision
- Nexance Performance Management
- Pilot's Performance Management Solution
- Prodacapo Balanced Scorecard
- QPR ScoreCard
- Strategy2Act - if you are running a small company or you want to have an idea about how does balanced score work, then consider using our Strategy2Act software.
- Executive Dashboard
- Scoreboard

ActiveStrategy Enterprise (ASE)

Key Balanced Scorecard related features

Offered in three modular editions to automate each phase of the strategy execution process.

1. Creating and reporting an initial corporate scorecard;
2. Deploying scorecards downward and across business units and functions;
3. Deliver personalized performance information to specific individuals, while managing key strategy-related activities.

Enables selection of solution for current needs, with flexibility to upgrade. Scorecard and Dashboard Edition provides core functionality to enable rapid, economical creation and reporting of core scorecards and performance measurement data. Deployment Edition includes above functionality, plus ability to create multiple, aligned, and linked scorecards, objectives, and measures for organisation-wide deployment. Enterprise Edition provides the full functionality set of ActiveStrategy Enterprise, including Personalized User Views for users to see relevant scorecards and performance information; Alert features to ensure prompt system compliance, variance report capture, early warning indications, and workflow management; Initiative Management to drive and focus improvement initiative activities

Product pricing details

License fees range from \$20,000 one-time server fee for the Scorecard & Dashboard Edition, up to \$1,500/per named user license fee for the Enterprise Edition. Maintenance 18% of software license fees, annually

[Cognos® Metrics Manager](#)

Key Balanced Scorecard related features

Cognos® Metrics Manager aligns employee actions and performance to strategic goals through centrally defined metrics. These metrics create the one version of the truth that you need for effective, collaborative decision-making. Cognos Metrics Manager lets you actively monitor, analyse, and report your metrics throughout the company. Cognos Metrics Manager helps you take your strategy off the boardroom wall and communicate it as relevant, measurable goals for people across the organization at every level, in every department. It is a key enabler of corporate performance management. The strategic application of business intelligence at the enterprise level to optimise performance.

[Comshare MPC™](#)

Key Balanced Scorecard related features

Fully integrates modules for planning, financial consolidation, and management reporting and analysis on a single platform, so information is continually cycled throughout the enterprise in a closed-loop process. Proactive, color coded alerts show out-of-range trends and exceptions. Analysis can be performed from any defined business perspective. Supports multiple currency structures (EMU compliant). Supports International Accounting Standards (IAS), US GAAP, Canadian GAAP, UK GAAP, FASB and more. Consolidates data from multiple general ledgers and charts of accounts. Performs asset and salary planning.

Product pricing details

Dependant on number of licenses; generally \$75,000 USD and up

[Corporater Balanced Scorecard suite](#)

Key Balanced Scorecard related features

Powerful way of establishing KPI formulas for non-IT. Form generator for structured manual data collection. Strategy map functionality with active linking and display of achieved results. Integrated survey tool. Integrated report generator tool. Integrated automatic data extraction tool (ETL). Functionality rich authorisation model. Personalised (performance portal). Benchmarking functionality. Supports BSCOL's certification standards.

Product pricing details

Price per company depending on size. 20% annual license fee which includes upgrades and support

[CorVu5](#)

Key Balanced Scorecard related features

- Strategic Management System: A comprehensive system that manages the key business processes that impact strategy execution, including objective management, initiative management, budgeting & planning, risk management and incentive management.
- Performance Metrics: A robust business intelligence platform for automated data exchange, reporting and analysis.

[Crystal Decisions Balanced Scorecard Solution](#)

Key Balanced Scorecard related features

Cause and effect diagrams. Multiple-level scorecard support, from the individual to the enterprise. Data and text driven from industry-standard RDBMS. Integration with the data warehouse and many other data sources. Identification of potential problems and opportunities using the Highlighter view. Weighted scores view (high-level performance overview based on achievement). Multi-dimensional access to textual commentary. Powerful Performance Indicator Engine (PI Engine) for practical data-handling issues.

[Bizzscore®](#)

Key Balanced Scorecard related features

Performance management and Balanced scorecard cockpit and definition tool with: Performance management definition tool assists user in setting up the scorecard lay-out from mission to measure and User friendly performance management cockpit with: Flexible drill down; Reporting and analysis; Business graphics; Connectivity to most standard file types (Excel, XML, HTML, ASCII) and database (MS SQL, Oracle, DB-2, Sybase; Built-in communication system; Plan-do-check-act-cycle; Permissions can fully differentiated per user

Product pricing details

Approx. € 1.000 user. Maintenance ~ 16% of license

[Dolphin Navigator System](#)

Key Balanced Scorecard related features

Specifies your vision and long term objectives. Identifies key areas or Critical Success Factors (CSFs) through the use of the Process Model, to achieve long-term objectives and established goals. Translates strategy into action. Identifies activities that you have to perform well to maintain your CSFs. Measures whether your chosen line of action will adhere to your objectives. Divides indicators into focuses (the value oriented part of the company) in the navigator, to get a balanced overall view of the company.

[InsightVision](#)

Key Balanced Scorecard related features

Based on the “Microsoft Balanced Scorecard Framework” (BSCF) and standard Microsoft tools. Includes the Scorecard Builder, ScoreBoard™ and Interactive Strategy Maps, templates and more. Built on Microsoft’s .NET platform. Requires very little end-user training. Can be used as an enterprise-wide scorecard platform for both strategic “balanced scorecards” and other types of scorecards. Personalized “My Measures” and “My Initiatives” allows easy user-defined monitoring of critical information. Supported by a growing world-wide community of Microsoft-certified partners as well as management consulting firms. Built-in multi-dimensional analysis (where appropriate). Optionally integrates with SharePoint Portal Server (or other portals), and leverages an organization’s existing software tools. The InsightVision software (previously BSCF Toolkit) has won 2 grand prize awards from Microsoft and was rated the #1 value in an independent review of over 65 performance management and scorecard software solutions.

[Nexance Performance Management](#)

Key Balanced Scorecard related features

Custom build your strategy roadmap: cluster your objectives through strategic theme or view them through the BSC perspectives; ability to rename or add new perspectives according to your needs; set and amend on a “as needed basis” the cause and effect strategic diagram.

Communicate: accessing & sharing information: fully web-enabled from our Internet portal or through your Company Intranet; intuitive navigation from the cause and effects linkages diagram; communication around strategic issues using the messenger built-in interface with the possibility to sent through your regular E-mail systems; access to a report generator module including a predefined set of reports. Measure, monitor and analyse: personalized user “all in one” online dashboard; set your own traffic lights system to best suit the way you want to visualise performance; select through the chart generator the way you want to display your indicator data graphically; powerful graphical alerting tools and reminder functions to inform users that data updates are expected; Project Portfolio management; set and manage your own personal objectives.

Product pricing details

£15-50K

[Pilot's Performance Management Solution](#)

Key Balanced Scorecard related features

Pilot's performance management solution offers the essential technologies, services and expertise to rapidly deploy a custom performance management initiative that aligns execution across the organization with strategy. A complete solution, Pilot's performance management solution includes domain expertise and services; and scorecard; dashboard; analysis & reporting; and modeling & integration capabilities. With its flexible, modular, open approach, Pilot Software provides organizations with the necessary ingredients to incrementally build a performance management initiative – without worrying about future scalability issues.

[Prodacapo Balanced Scorecard](#)

Key Balanced Scorecard related features

Certified by Balanced Scorecard Collaborative. Supports also performance management frameworks similar to Balanced Scorecard. Fast and flexible implementation. Very intuitive and easy-to-use. Web-enabled. Extensive and easy-to-use reporting and analysis. Not only a measurement system - it's also a management system providing full functionality to manage and follow up on initiatives and actions to ensure that the strategic objectives are attained. Easy to integrate with existing systems to automatically update measures in the scorecard. Easy to integrate into intranets or portals. Scalable - can be implemented as a pilot and then gradually be expanded into a global roll-out. OLAP -functionality offered as optional add-in component. Part of the Prodacapo world-class suite of software solutions for Enterprise Performance Management, also including solutions for Process Management, Activity- Based Costing/ Management and Interactive Business Planning.

[QPR ScoreCard](#)

Key Balanced Scorecard related features

QPR ScoreCard is a Balanced Scorecard package which emphasises its ability to link to other strategic performance management frameworks. QPR ScoreCard helps organisations to plan, implement, communicate and commit people to organisational strategies and objectives.

[Strategy2Act](#)

Key Balanced Scorecard related features

Strategy2Act is a Balanced Scorecard (BSC) support software. It is designed to help build a Balanced Scorecard. The new version 1.3 includes new metrics necessary to measure and control IT Security. New groups are "Risk Management", "Contingency Planning", "System Life Cycle", "Personnel Security", "Data Integrity". The new scorecard allows to learn strong and weak points of organization IT security and suggest possible ways to solve security problems.

Balanced Scorecard is a conception that transforms strategy to action. Balanced Scorecard is a set of principles that facilitate the understanding of business strategy and goals. BSC is a methodology that converts strategy into real action.

Strategy2Act software is a tool that supports building a Balanced Scorecard system for a company, department or an individual. This program helps to build a system that will make it easy to go from strategy to action.

Potential users

- Small companies. Strategy2Act is priced well, any company can afford it.
- Top-managers of big companies. To get an understanding of how can Balanced Scorecard work for this business.

Product pricing details

Start with 120 US\$ per license, discounted as the number of licenses increases.

Evaluation version [available here](#). [Purchase a single user copy](#) for 120 US\$.

Executive Dashboard

Key Balanced Scorecard related features

- Web Based Application
- Easy to learn and use - training only takes 3 hours
- Menu driven application
- Full security module protects data
- Proven 8 year deployment history
- Visit website for full details
- User defined dashboards and drill downs

Product pricing details

ASP Model \$500 to \$3,200 USD per month plus one time enrolment fee of \$1,200 USD. Self Host Model \$12,000 to \$73,000 USD plus 20% annual support and update fee.

Scoreboard

Key Balanced Scorecard related features

The software is installed at 17 facilities, with over 800 licensed users. The US Army SRS Scorecard users Spider's Replication software for merging their unclassified Scorecard with their classified scorecard.

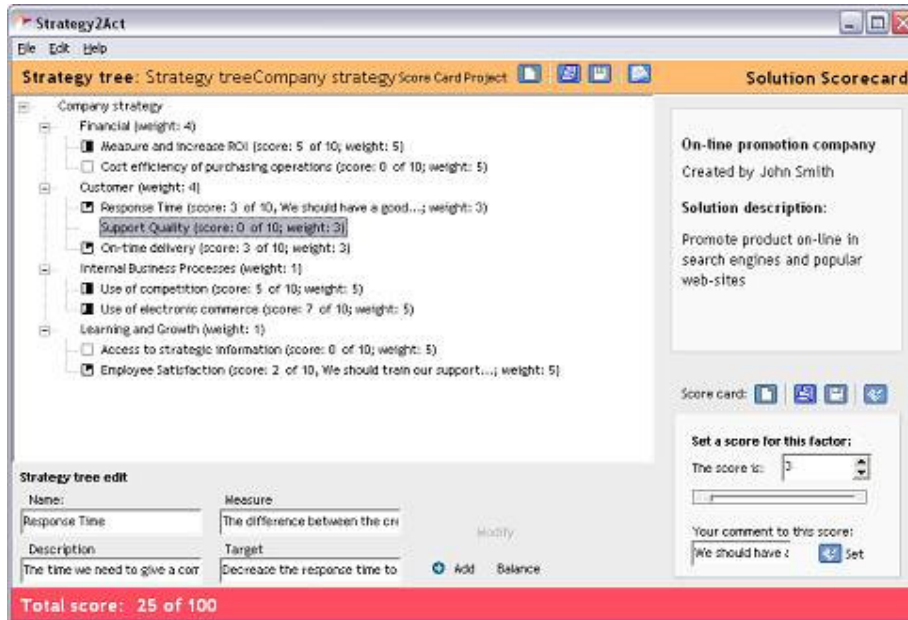
- 100% J2EE Web Application.
- Combines Balanced Scorecard and Digital Dashboard approach to corporate performance management.
- No Cost For View Only Users.
- No applet required for Viewing.
- Uses Oracle, SQL Server or MS Access for data repository.
- Platform independent--works with any web browser.
- Unlimited nested organization depth and highly flexible scorecard structure.

Product pricing details

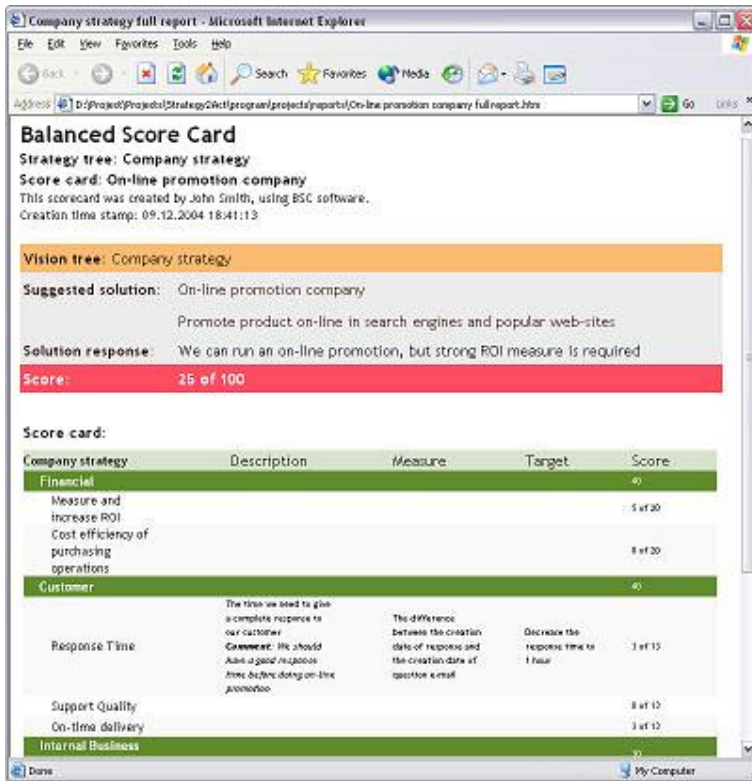
\$850.00 - which includes 1 Administrator and an unlimited number of View-Only user accounts.
Additional Users: Administrators \$850.00 per user, User Account Managers \$425.00 per user, Data Entry Operators \$125.00 per user, View Only User FREE Unlimited Users.

Strategy2Act dashboard

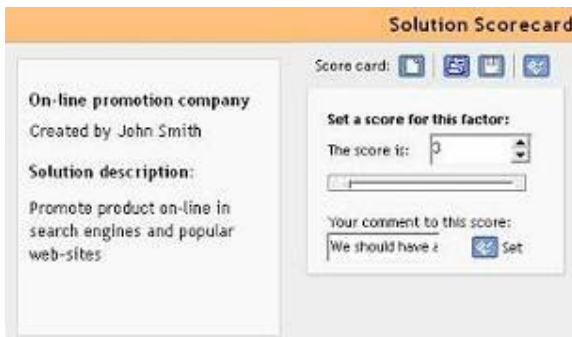
You can view the strategy tree and solution score card.



Strategy2Act Balanced Scorecard Report. You can have a detailed reports Balanced Scorecard report (full report), Strategy Tree report, Scorecard report.



Solution Scorecard. This first box displays information about the solution/area that you are evaluating now and the other box is a way to set a score, that will tell how good is this solution for archiving goals from strategy tree.



Get evaluation versions of Strategy2Act and Mind Pad



Get Strategy2Act

Download the latest fully-function 30-days evaluation version of Strategy2Act. Note: you can use the evaluation version for 30-days with no functional limitation. [Download now...](#)

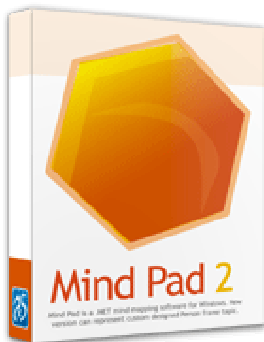
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