

**MSS SUCCESS SPACES**

Units 2K-2L, 2nd Floor E.C. Valle Commercial Center M.L.
Quezon Avenue Brgy. San Isidro, Angono, Rizal



(02) 7255 5568



0995 846 2495 | 0917 123 1017



info@mssccorporation.com.ph



www.MSSCorporation.com.ph

Balanced Scorecard Template

A Practical Balanced Scorecard Template for Strategic Planning, KPI Development, and Strategy Execution

If you are looking for a **Balanced Scorecard Template** that can help your organization translate strategy into clear objectives, measurable KPIs, strategic initiatives, and accountable action plans, this guide is designed for you.

Many organizations already have vision statements, mission statements, annual goals, and department targets. The problem is that these are not always connected. Some teams focus on financial results, others focus on customer concerns, some focus on operations, and others focus on people development. Without a clear structure, performance management becomes scattered.

The **Balanced Scorecard** helps solve this problem by aligning strategy, performance measures, and execution across different areas of the organization.

This downloadable **Balanced Scorecard Template** by **Your Strategy Guy** is designed for business owners, executives, department heads, managers, HR leaders, planning teams, government agencies, cooperatives, schools, hospitals, non-profit organizations, and companies in the Philippines that want a practical way to measure and execute strategy.

What is a Balanced Scorecard?

The **Balanced Scorecard** is a strategic planning and performance management tool that helps organizations translate their strategy into measurable objectives and actions.

Instead of measuring success using financial results alone, the Balanced Scorecard looks at organizational performance through four major perspectives:

1. **Financial Perspective**
2. **Customer / Stakeholder Perspective**
3. **Internal Process Perspective**
4. **Learning and Growth Perspective**

These perspectives help leaders answer one important question:

Are we measuring the right things that truly support our strategy?

A good Balanced Scorecard connects vision, strategy, goals, KPIs, initiatives, owners, and execution review.

Balanced Scorecard Template

Use this template to develop your organization's Balanced Scorecard.

1. Organization and Planning Details

Item	Details
Organization Name	
Industry / Sector	
Planning Period	Example: 2026–2028
Date Prepared	
Prepared By	
Key Participants	
Facilitator / Consultant	
Main Strategic Planning Objective	

Guide Questions:

What is the purpose of creating this Balanced Scorecard?

What strategic plan or organizational direction will this support?

Who will use this scorecard for decision-making and performance monitoring?

How often will this Balanced Scorecard be reviewed?

2. Vision, Mission, and Strategic Direction

Before creating a Balanced Scorecard, clarify the organization's overall direction.

Strategic Element	Statement / Description
Vision Statement	
Mission Statement	
Core Values	
Overall Strategic Direction	
Key Strategic Priorities	

Guide Questions:

Where does the organization want to go?

What is the organization trying to achieve in the next few years?

What values should guide decisions and behaviors?
What strategic priorities must be measured and managed?

3. Strategy Map Overview

A strategy map shows how the four Balanced Scorecard perspectives connect with each other.
Use this simple structure:

Balanced Scorecard Perspective	Strategic Question
Financial Perspective	What financial results must we achieve?
Customer / Stakeholder Perspective	What value must we deliver to customers or stakeholders?
Internal Process Perspective	What internal processes must we improve?
Learning and Growth Perspective	What people, culture, leadership, and capability improvements must support the strategy?

Simple Cause-and-Effect Flow:

Learning and Growth
supports

Internal Process Improvement
which improves

Customer / Stakeholder Value
which contributes to

Financial / Organizational Results

Guide Questions:

What must our people learn or improve?
What processes must become better?
What customer or stakeholder outcomes should improve?
What financial or organizational results should follow?

4. Balanced Scorecard Template by Perspective

A. Financial Perspective

The Financial Perspective measures how the organization creates financial sustainability, growth, profitability, cost efficiency, or responsible budget utilization.

For government agencies and non-profit organizations, this may also focus on fund utilization, resource optimization, financial stewardship, or sustainability.

Strategic Objective	KPI / Measure	Baseline	Target	Strategic Initiative	Owner	Timeline	Status
							Not Started / Ongoing / Completed
							Not Started / Ongoing / Completed
							Not Started / Ongoing / Completed

Sample Strategic Objectives:

- Increase revenue growth
- Improve profitability
- Reduce operating costs
- Improve budget utilization
- Increase return on investment
- Improve cash flow management
- Strengthen financial sustainability

Sample KPIs:

- Revenue growth rate
- Gross profit margin
- Net profit margin
- Cost reduction percentage
- Budget utilization rate
- Return on investment
- Collection efficiency
- Operating expense ratio

Guide Questions:

What financial outcomes must we achieve?

What financial risks must we manage?

What costs should be reduced or optimized?

What revenue, profit, budget, or sustainability goals must be measured?

B. Customer / Stakeholder Perspective

The Customer or Stakeholder Perspective measures how well the organization delivers value to customers, clients, members, beneficiaries, or stakeholders.

Strategic Objective	KPI / Measure	Baseline	Target	Strategic Initiative	Owner	Timeline	Status
							Not Started / Ongoing / Completed
							Not Started / Ongoing / Completed
							Not Started / Ongoing / Completed

Sample Strategic Objectives:

Improve customer satisfaction

Increase customer retention

Strengthen brand trust

Improve service quality

Increase client engagement

Improve stakeholder satisfaction

Enhance customer experience

Sample KPIs:

Customer satisfaction rating

Net Promoter Score

Customer retention rate

Complaint resolution time

Customer acquisition rate

Repeat purchase rate

Service quality rating

Stakeholder satisfaction score

Guide Questions:

Who are our customers or stakeholders?
What do they expect from us?
How do we measure satisfaction, trust, loyalty, or service quality?
What customer or stakeholder experience must improve?

C. Internal Process Perspective

The Internal Process Perspective measures how well the organization's systems, workflows, operations, service delivery, and internal processes support the strategy.

Strategic Objective	KPI / Measure	Baseline	Target	Strategic Initiative	Owner	Timeline	Status
							Not Started / Ongoing / Completed
							Not Started / Ongoing / Completed
							Not Started / Ongoing / Completed

Sample Strategic Objectives:

Improve process efficiency
Reduce turnaround time
Improve service delivery
Strengthen quality control
Reduce errors and rework
Improve compliance
Increase operational productivity
Streamline internal coordination

Sample KPIs:

Turnaround time
Error rate
Process cycle time
Productivity rate
Quality compliance rate
Service delivery time
Rework percentage
Project completion rate
Backlog volume

Guide Questions:

Which processes directly affect performance?
What bottlenecks slow down execution?
What workflows need improvement?
What quality, compliance, or productivity measures should be monitored?

D. Learning and Growth Perspective

The Learning and Growth Perspective measures the people, leadership, culture, technology, competencies, and organizational capabilities needed to support the strategy.

Strategic Objective	KPI / Measure	Baseline	Target	Strategic Initiative	Owner	Timeline	Status
							Not Started / Ongoing / Completed
							Not Started / Ongoing / Completed
							Not Started / Ongoing / Completed

Sample Strategic Objectives:

Develop leadership capability
Improve employee engagement
Strengthen workforce competencies
Build a culture of accountability
Improve digital skills
Enhance innovation and continuous improvement
Strengthen succession readiness

Sample KPIs:

Employee engagement score
Training completion rate
Training effectiveness rating
Leadership competency score
Internal promotion rate
Employee retention rate
Innovation initiatives completed
Succession readiness percentage

Guide Questions:

What skills and capabilities must people develop?
What leadership behaviors must improve?
What culture must support execution?
What systems, tools, or technologies must be strengthened?

5. Balanced Scorecard Summary Table

Use this summary table to consolidate all strategic objectives, KPIs, and initiatives in one view.

Perspective	Strategic Objective	KPI / Measure	Baseline	Target	Initiative	Owner	Review Frequency
Financial							Monthly / Quarterly
Customer / Stakeholder							Monthly / Quarterly
Internal Process							Monthly / Quarterly
Learning and Growth							Monthly / Quarterly

6. KPI Definition Sheet

A KPI must be clearly defined so everyone understands how it will be measured.

KPI Name	Definition	Formula / Computation	Data Source	Target	Frequency	Owner
					Monthly / Quarterly	
					Monthly / Quarterly	
					Monthly / Quarterly	

Guide Questions:

What exactly does this KPI measure?
How will it be computed?
Where will the data come from?
Who will collect and report the data?
How often will the KPI be reviewed?

7. Strategic Initiatives Tracker

Strategic initiatives are the projects, programs, or major actions that help achieve the objectives.

Initiative	Related Strategic Objective	Perspective	Owner	Start Date	Target Completion Date	Key Milestones	Status
		Financial / Customer / Internal Process / Learning and Growth					Not Started / Ongoing / Completed
		Financial / Customer / Internal Process / Learning and Growth					Not Started / Ongoing / Completed
		Financial / Customer / Internal Process / Learning and Growth					Not Started / Ongoing / Completed

Guide Questions:

Which initiatives will create the biggest strategic impact?

Who is accountable for each initiative?

What milestones should be tracked?

What risks may delay completion?

8. Balanced Scorecard Review Plan

A Balanced Scorecard should not be created once and forgotten. It must be reviewed regularly.

Review Activity	Frequency	Participants	Purpose	Output
KPI Monitoring	Monthly	Department Heads / KPI Owners	Track progress against targets	KPI Update Report
Strategy Review	Quarterly	Leadership Team	Assess strategy execution	Updated Scorecard
Initiative Review	Monthly / Quarterly	Project Owners	Review milestone completion	Initiative Status Report
Annual Strategy Refresh	Annually	Executive Team / Key Leaders	Review and update strategic priorities	Updated Strategic Plan

Guide Questions:

How often will the Balanced Scorecard be reviewed?

Who should attend the review meetings?

What decisions should be made during reviews?

How will underperformance be addressed?

How will successful initiatives be sustained?

9. Balanced Scorecard Action Plan

Use this section to convert scorecard insights into action.

Performance Gap / Issue	Root Cause	Corrective Action	Owner	Deadline	Success Indicator
1					
2					
3					

Guide Questions:

Which KPI is below target?

What is causing the performance gap?

What corrective action is needed?

Who will own the solution?

When should improvement be seen?

10. Balanced Scorecard Implementation Checklist

Use this checklist to determine whether your organization is ready to implement the Balanced Scorecard.

Implementation Item	Status
Vision and mission are clear	Not Started / Ongoing / Completed
Strategic priorities are defined	Not Started / Ongoing / Completed
Strategy map is drafted	Not Started / Ongoing / Completed
Objectives are identified per perspective	Not Started / Ongoing / Completed
KPIs are clearly defined	Not Started / Ongoing / Completed
Baselines and targets are established	Not Started / Ongoing / Completed
Strategic initiatives are identified	Not Started / Ongoing / Completed
Owners are assigned	Not Started / Ongoing / Completed
Review schedule is established	Not Started / Ongoing / Completed
Scorecard communication plan is prepared	Not Started / Ongoing / Completed

How to Use This Balanced Scorecard Template

This Balanced Scorecard Template may be used during:

- Strategic planning workshops
- Balanced Scorecard development sessions
- KPI development workshops
- Strategy mapping workshops
- Department planning sessions
- Performance management reviews
- Leadership alignment sessions
- Quarterly business reviews
- Annual planning sessions

For best results, complete the template with your leadership team and key department representatives. The goal is not just to fill out tables. The goal is to build strategic alignment, clarify performance expectations, and strengthen execution accountability.

Common Mistakes When Creating a Balanced Scorecard

Avoid these common Balanced Scorecard mistakes:

- Creating too many KPIs
- Choosing KPIs that do not connect to strategy
- Measuring activities instead of outcomes
- Using unclear KPI definitions
- Failing to assign owners
- Not establishing baselines and targets
- Not reviewing performance regularly
- Treating the Balanced Scorecard as a compliance document
- Creating scorecards per department without organizational alignment

A good Balanced Scorecard should be simple enough to understand, meaningful enough to guide decisions, and disciplined enough to drive execution.

Do You Need a Balanced Scorecard Consultant, Facilitator, Trainer, or Resource Speaker in the Philippines?

This **Balanced Scorecard Template** gives your organization a practical starting point. However, many organizations need expert guidance to customize the framework, facilitate strategic discussions, design meaningful KPIs, build strategy maps, and align leaders around execution.

If your organization needs help using this template, **Your Strategy Guy** can support you as your:

Balanced Scorecard Consultant in the Philippines

Balanced Scorecard Facilitator in the Philippines

Balanced Scorecard Trainer in the Philippines

Balanced Scorecard Resource Speaker in the Philippines

Strategic Planning Consultant in the Philippines

Strategic Planning Facilitator in the Philippines

KPI Development Trainer in the Philippines

Strategy Execution Consultant in the Philippines

We can help your organization:

1. Clarify strategic priorities
2. Develop a strategy map
3. Create Balanced Scorecard objectives
4. Identify meaningful KPIs
5. Set baselines and targets
6. Align departmental scorecards
7. Facilitate leadership planning discussions
8. Train managers and teams on scorecard implementation
9. Strengthen performance monitoring and accountability
10. Turn strategy into measurable execution
- 11.

A template gives you the structure.

A consultant helps sharpen the strategy.

A facilitator guides the conversation.

A trainer builds internal capability.

A resource speaker inspires your leaders and teams to execute.

If you want your Balanced Scorecard to become more than a document, let **Your Strategy Guy** help your organization turn strategy into alignment, measurement, accountability, and results.

Looking for a Balanced Scorecard Template in the Philippines?

If you are searching for a:

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Balanced Scorecard KPI Template

Balanced Scorecard Strategy Map Template

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Balanced Scorecard Trainer in the Philippines

Balanced Scorecard Facilitator in the Philippines

Balanced Scorecard Resource Speaker in the Philippines

Strategic Planning Consultant Philippines

KPI Development Workshop Philippines

Strategy Execution Training Philippines

this page provides a practical Balanced Scorecard Template that can help your organization organize strategy, measure performance, and improve execution.

The Balanced Scorecard is not just about tracking numbers.

It is about measuring what matters.

It is about aligning people with strategy.

It is about turning goals into execution.

And most importantly, it is about helping organizations move from planning to measurable results.