



Cascading Scorecards

Introduction

Cascading scorecards within the application is a relatively simple procedure. However, it will only work successfully if a considered approach is taken **before** embarking on the process.

There are several ways a cascade can take place, here are a few examples:

- **Exact Match Cascade** - where a master scorecard is created and an exact 'structure' replica is cascaded to teams within a department. Typical examples of this approach can be seen in call-centres when all of the team KPIs are the same as the management KPIs, or in a safety scorecard where the same scorecard is used across multiple departments.
- **Measure Roll Up Cascade** - where targets are set at departmental levels (usually financial) and the values are rolled up to the top-level scorecard. For example a sales revenue target is set across several sales groups and the result is rolled up to a company level scorecard.
- **Linked Element Scorecard** - Where a scorecard is created with all of the required measures and appropriate measures are linked into other scorecards. For example, an executive incentive scorecard that is distributed to a set of directors. The managing director will hold all of the measures and they will be shared across the reporting directors. They might be weighted appropriately.
- **Strategy Scorecards** - where a top-level or executive scorecard is created and some objectives are cascaded exactly and others are cascaded but the names change to reflect the departmental activity. For example, Improve Customer Satisfaction at the top-level might be translated to Improve Customer Information Responses by the Marketing department

The application can be used with all of the scenarios above (and more) but again, it must be stressed, careful consideration needs to be given to the cascade before building the scorecard.

The following provides information about each scenario above.

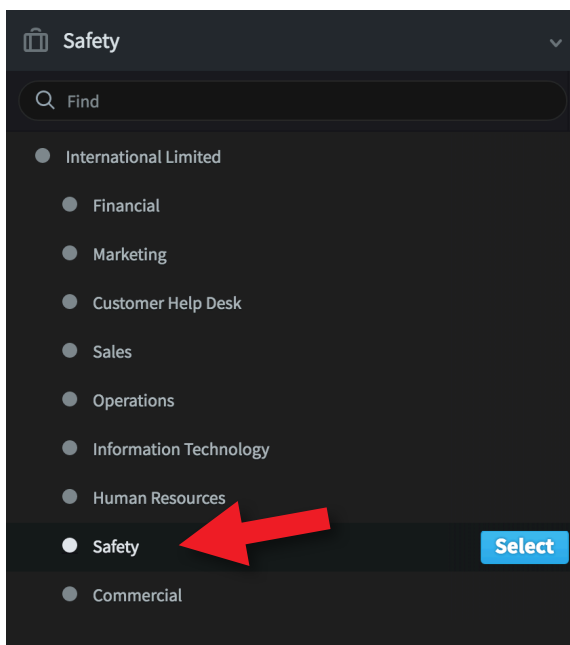


Cascading Exact Match - 1

Exact Match Cascade

If you are cascading a set of scorecards to several departments and the structure (not the actual values) is the same, then this method can be used.

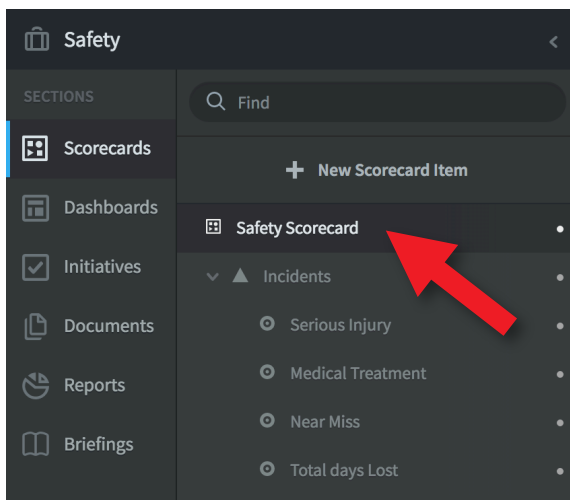
First build the Master scorecard. If you have not built scorecards yet, go to the Intrafocus [Getting Started Guides](#) and work through the first guide.



For this example we have created a group level safety scorecard.

It appears in the Organisation structure (briefcase) as 'Safety'

Once you have created the Safety organisation, click on it and create the master scorecard itself



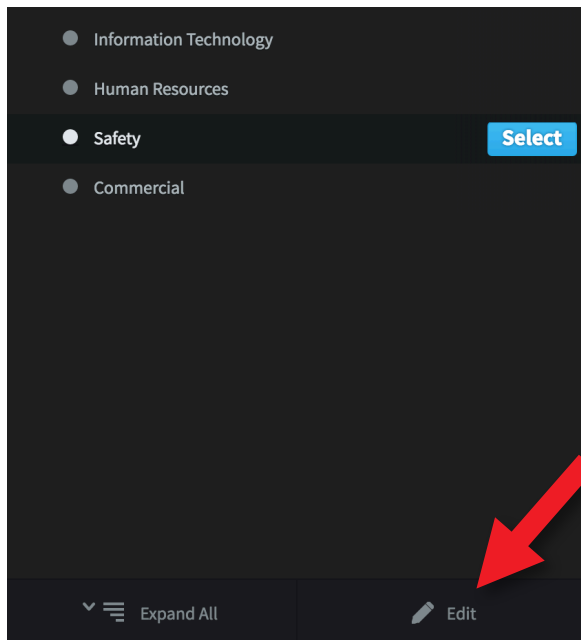
We have named the scorecard 'Safety Scorecard'

Do not add any actual values to this scorecard, the actual values will be rolled up automatically through a calculation - see next section; Cascading Roll Up.



Cascading Exact Match - 2

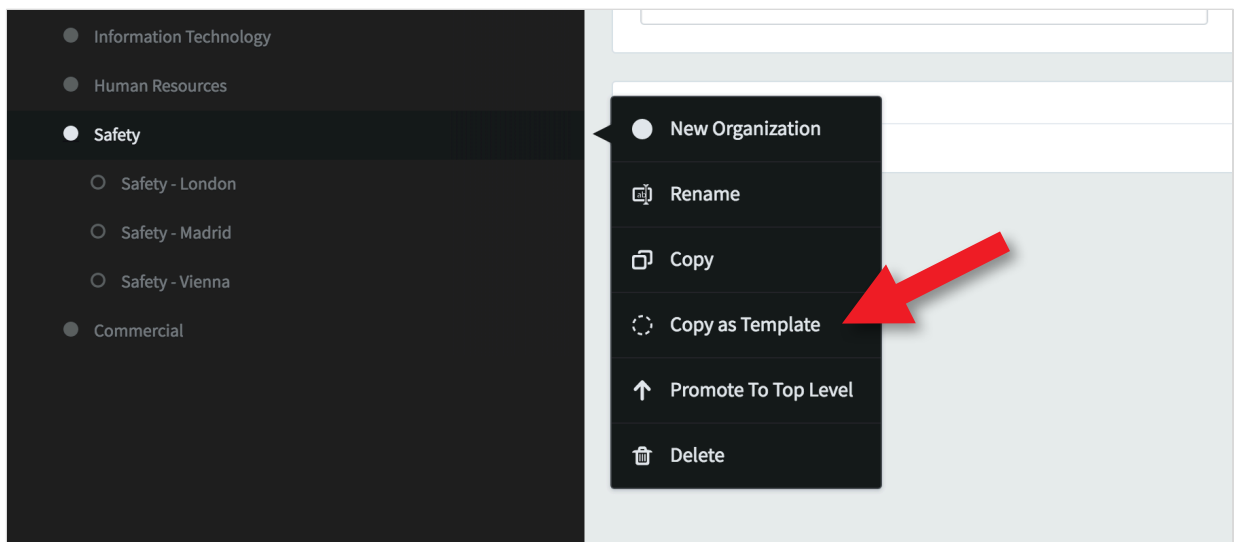
Next we will copy the master structure to the departments responsible for adding the actual values to the scorecard. The organisational structure will be created automatically as part of the copy process



Click on the briefcase icon to reveal the organisational structure.

Highlight the top-level organisational object, in this case 'Safety'

Click on the Edit button at the bottom of the screen

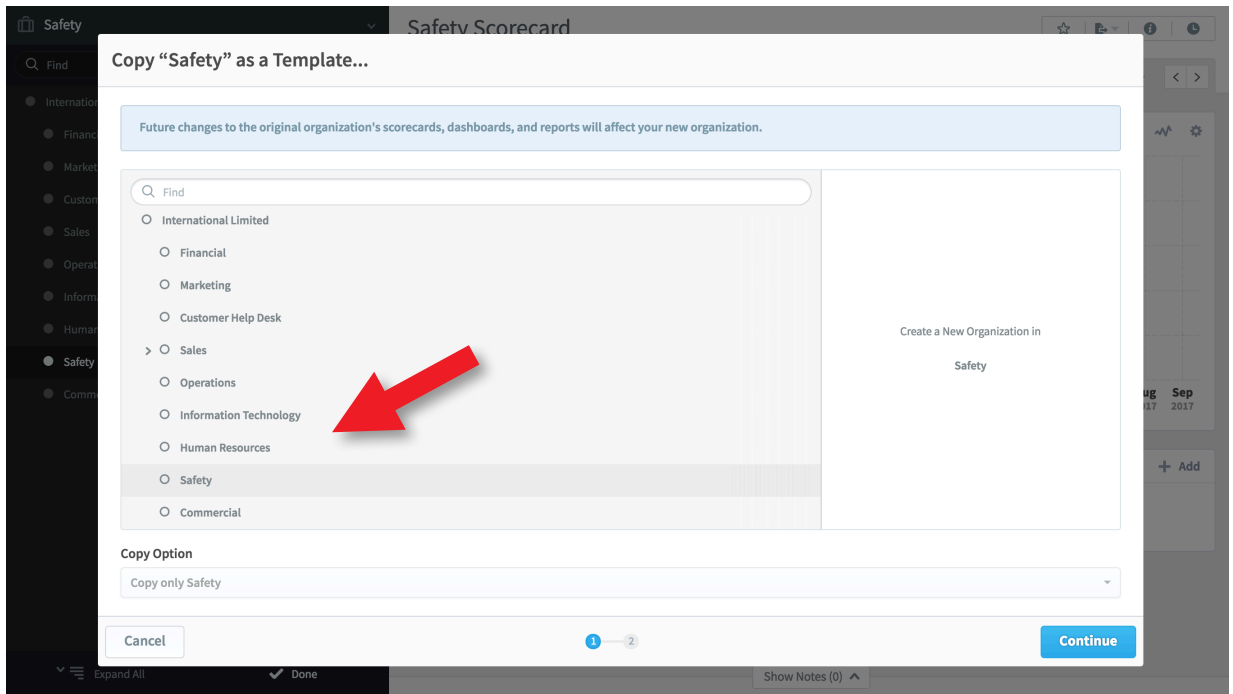


Another menu will appear, Click on 'Copy as Template'



Cascading Exact Match - 3

A panel will appear asking where to make the copy. Select the top-level scorecard as previous created, in this case 'Safety' and click **Continue**:



At this point you can name the new cascaded organisational object and optionally provide a unique suffix or prefix for the Scorecards, Dashboards and Reports that you will go on to create.

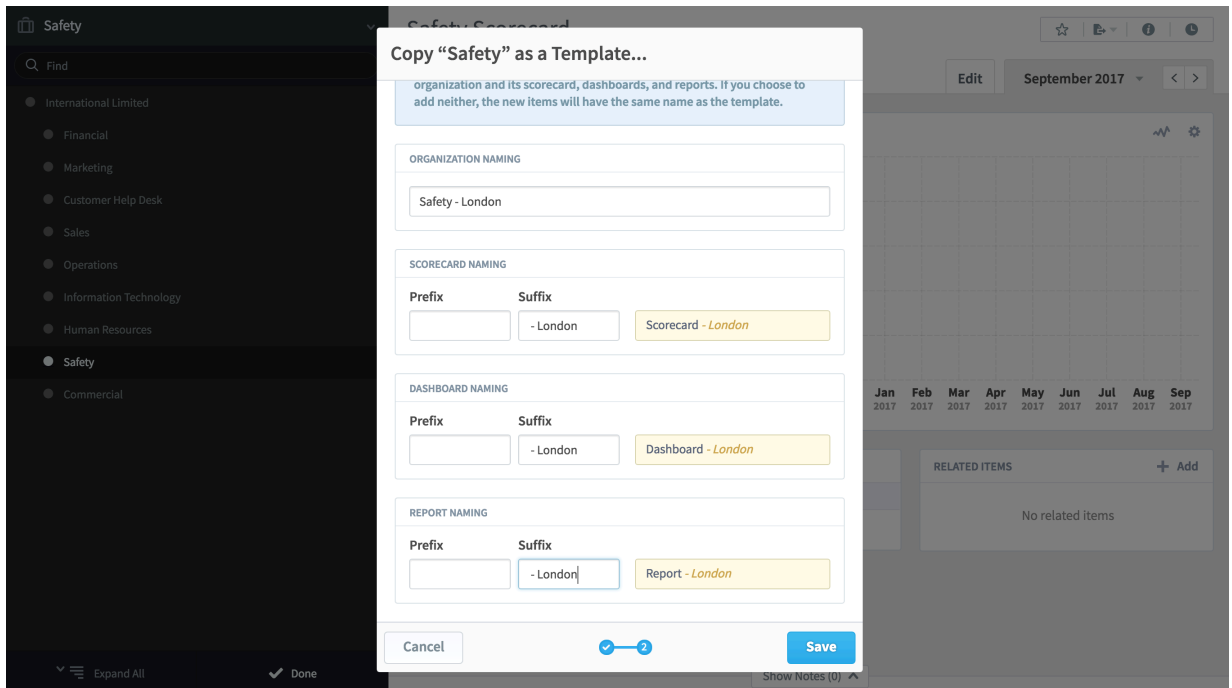
In the example shown on the next page you will see that we have created a new sub-organisational object called Safety - London and we have added the suffix ' - London' to the Scorecards Dashboards and Reports.

It is good practice to add a suffix or prefix as this helps considerably at later stages when looking at measures that have the same name.

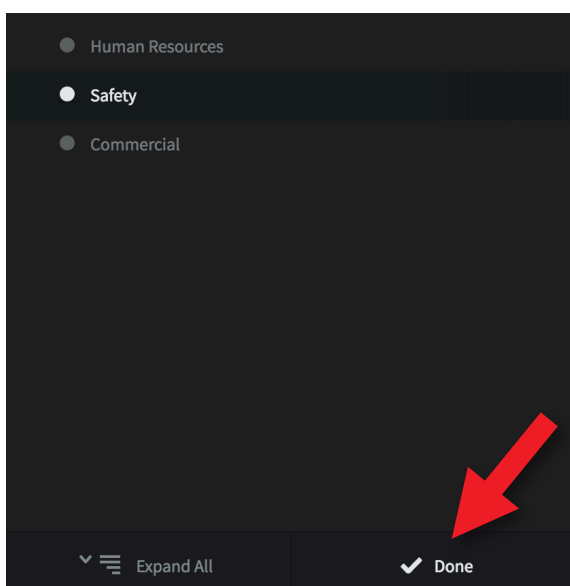


Cascading Exact Match - 4

Example of a suffix added to a cascaded scorecard:



Click Save to save the cascaded scorecard.



Click **Done** at the bottom of the screen.

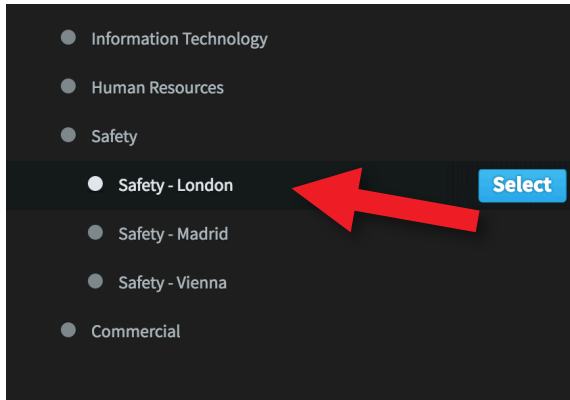
You may have to refresh the browser screen at this point to see the newly added cascaded scorecard.

In our example, we have added two more scorecards for the regions of Madrid and Vienna.

Just repeat the process above for as many cascaded scorecards that you require.

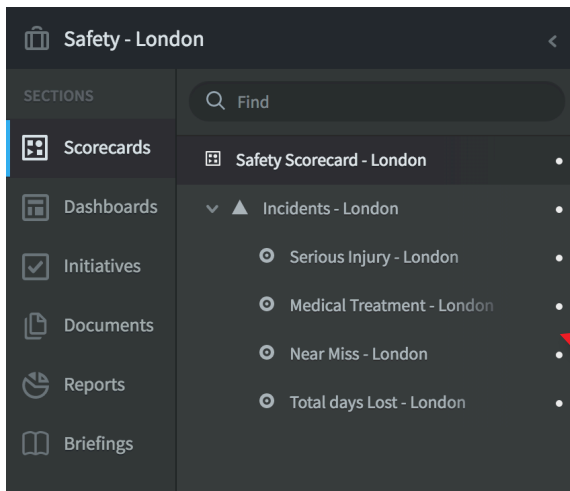


Cascading Exact Match - 5



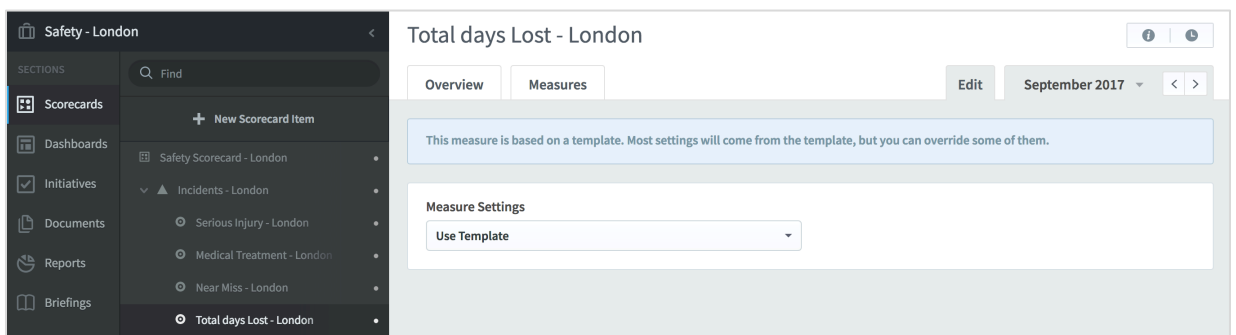
As can be seen in our example, the three new objects have been created.

Select one of them and look at the scorecard



We have selected the London scorecard. If you have completed the process correctly, you will see that the suffix has been appended to not only the scorecard, but the perspective and each of the measures.

From this point onward, any changes to the scorecard must be made in the **Master**. These will be reflected in the lower-level scorecards. If you attempt to change a lower-level scorecard you will receive the following message:





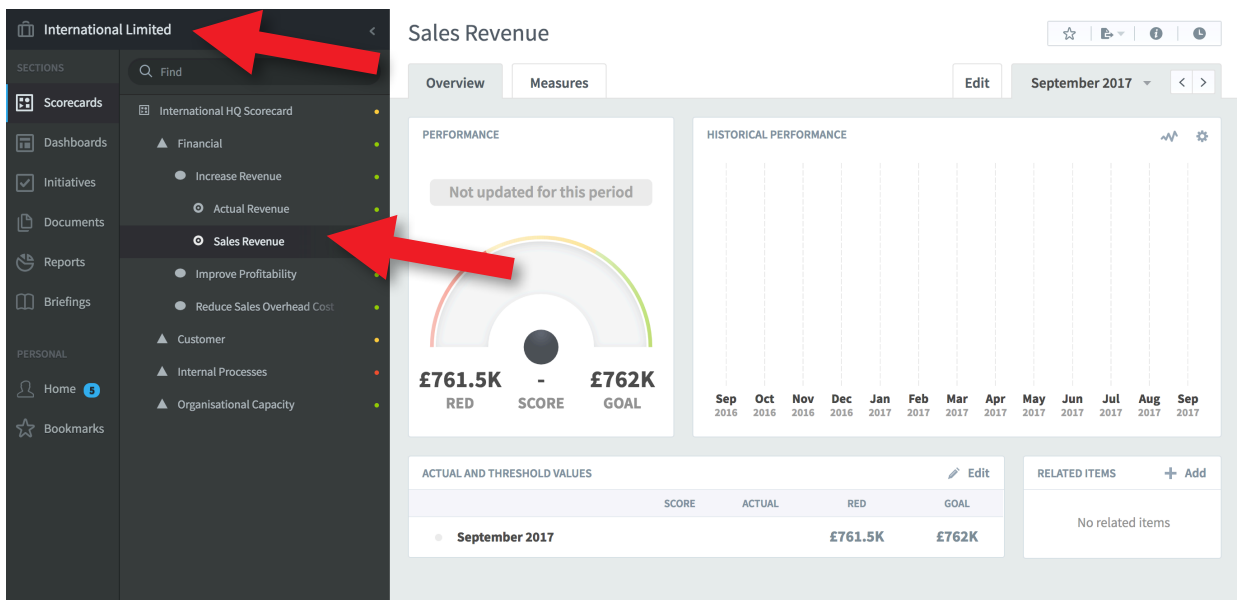
Cascading Roll Up - 1

Measure Roll Up Scorecards

There is frequently a requirement to 'roll up' actual values to a top-level scorecard. Typically this might be in a sales area where the sales teams revenue needs to be rolled up to a company level. Or this could be a customer satisfaction score across multiple customer facing departments rolled up to a total or average company score.

In these instances, rather than copying the whole scorecard, individual measures can be copied and then a calculation performed at the top-most level to aggregate the actual values from the lower-level measures.

For this example we will look at rolling up the Sales Revenue measure to the company level from three sales teams that reside in the sales department

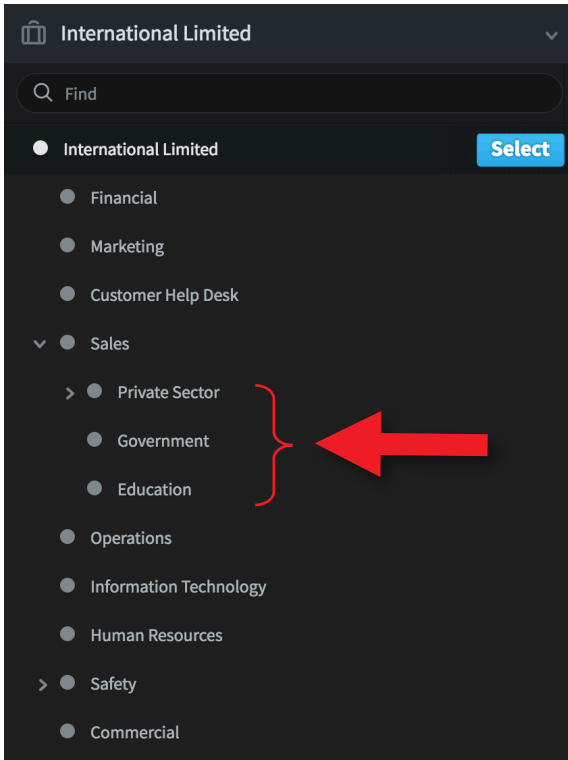


A company scorecard might look something like the one above. Here we can see the measure Sales Revenue. This needs to be defined in the first instance. If you have not defined measures before, go to the Getting Started Guide and create a scorecard first. These examples can be seen in our free-to-view system, user name: sam, password: sam

- <https://intrafocus-v3.qs.spiderstrategies.com/scorecards/1420>
- <https://intrafocus-v3.qs.spiderstrategies.com/scorecards/1242>



Cascading - Roll Up - 2



By clicking on the Briefcase icon the organisational structure is revealed.

For this example we will be looking at the three departments in sales.

- Private Sector
- Government
- Education

These scorecards contain the source Sales Revenue measures that we want to roll up to the top level scorecard.

You will need to identify or create your source measure before the next step.

Click on one of the source measures and check it has been created properly and has some data (actual values) added. In the example below we can see the Private Sector sales team scorecard with Sales Revenue highlighted:



Check all of the other source measures.



Cascading Roll Up - 3

Go back to the measure that you want the values to roll up to. For this example we are looking at International Limited > Sales Revenue:

The screenshot shows the 'Sales Revenue' measure configuration page. The left sidebar lists various sections and items. The main area displays the 'Sales Revenue' measure with a gauge chart showing a score of £761.5K against a goal of £762K. A red arrow points to the 'Edit' button in the top right corner of the measure card.

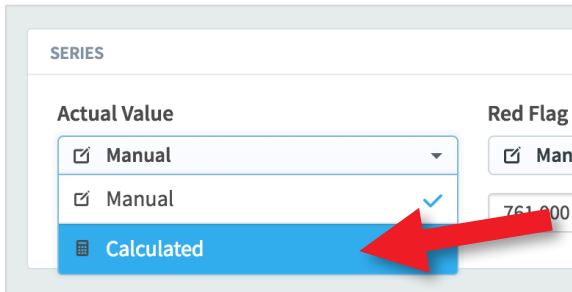
Notice that there are no 'actual values'. These will be 'calculated' from the previous three measures. Click on the **Edit** tab to reveal the edit measure screen and scroll to the third box called **Series**:

The screenshot shows the 'Edit' screen for the 'Sales Revenue' measure. The 'Edit' tab is active, and the 'Series' section is highlighted with a red arrow. The 'Series' section shows the 'Actual Value' set to 'Manual' with a value of 761,000 and the 'Goal' set to 'Manual' with a value of 762,000.

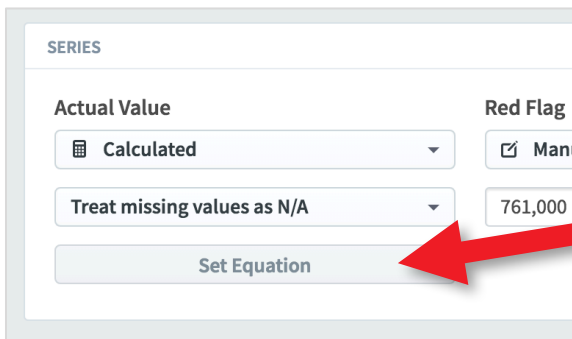
In the Series box you can see that the Goal (green) and Red Flag (red) values have been set. We now need to create the calculation for the Actual Value to sum the Private Sector, Government and Education Sales Revenues.



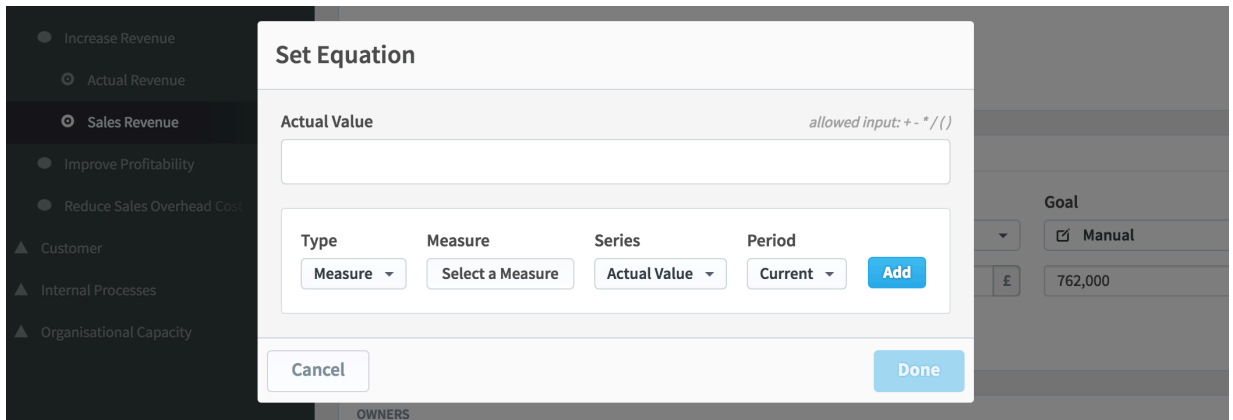
Cascading Roll Up - 4



Click on **Manual** under Actual Value and select **Calculated**



Click on **Set Equation** to reveal the **Set Equation** dialogue box



The box under the words **Actual Value** can be considered as a typical spreadsheet cell. For a list of operands, equations and functions that can be used in this box see the user guide: [Calculated Measures](#)

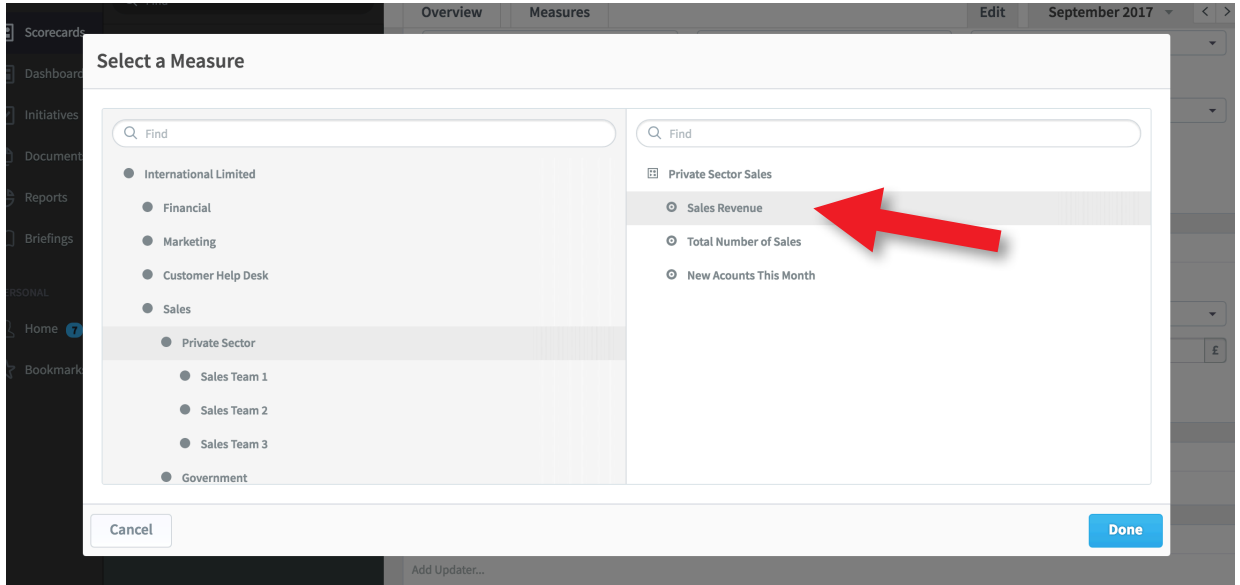
We are going to be 'summing' three measures so will leave the **Type** as Measure. The **Series** will remain as Actual Value and the **Period** as Current.

Click on **Select a Measure** to reveal the Select a Measure dialogue box.

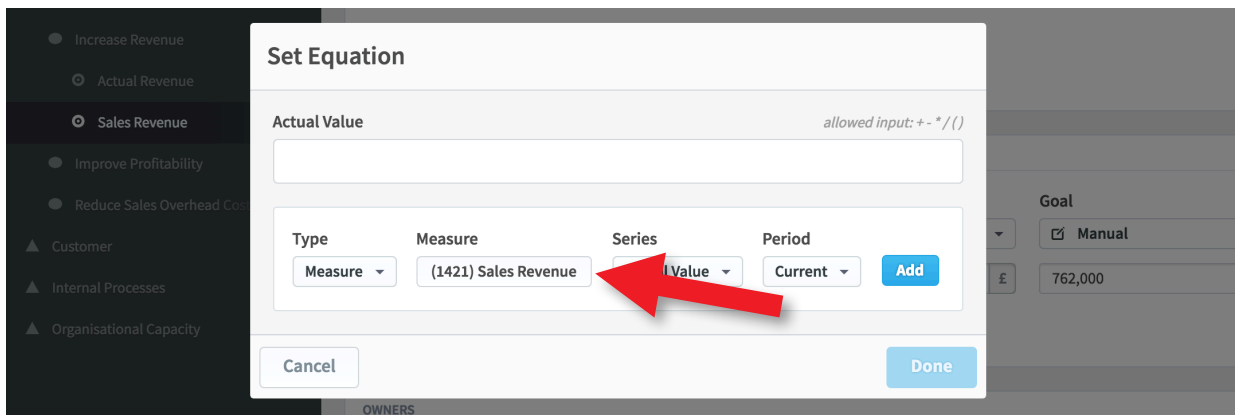


Cascading Roll Up - 5

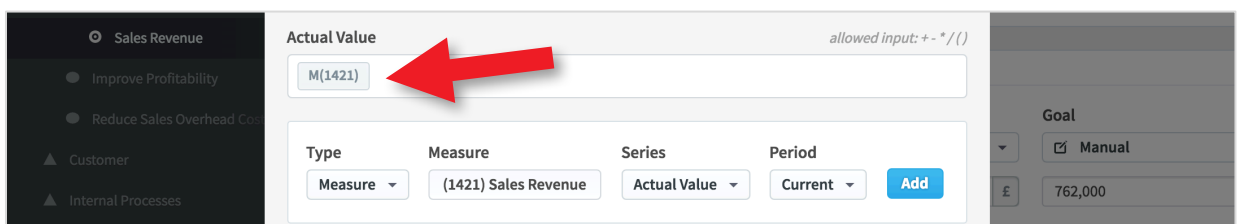
Find the first measure you want to add to the equation, in our example we have selected the **Private Sector** scorecard and the **Sales Revenue** measure:



Click Done and you will see the measure appear in the Measure box:



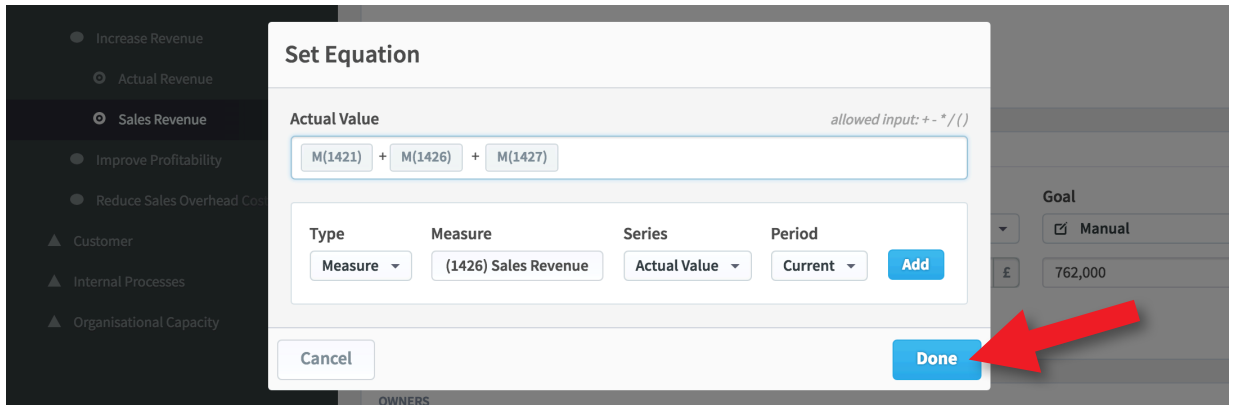
Click on the Add button to add the measure to the Actual Value equation box, notice that the measure unique identifying number has been used:



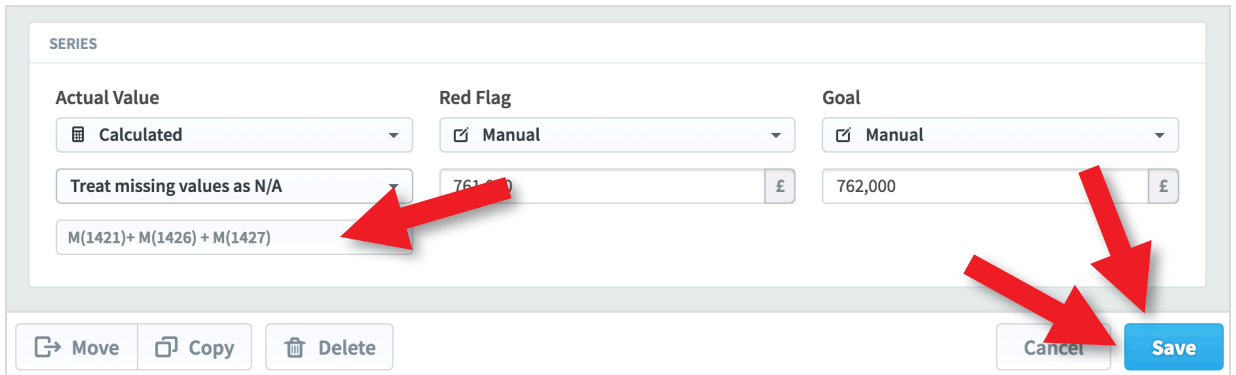


Cascading Roll Up - 6

Next type in the plus (+) operand in the equation box and then find the next measure to add to the equation (repeat the steps on Cascading Roll Up page 5). Keep doing this until the equation is complete as shown below:



Click Done. The Series box will now look like this:

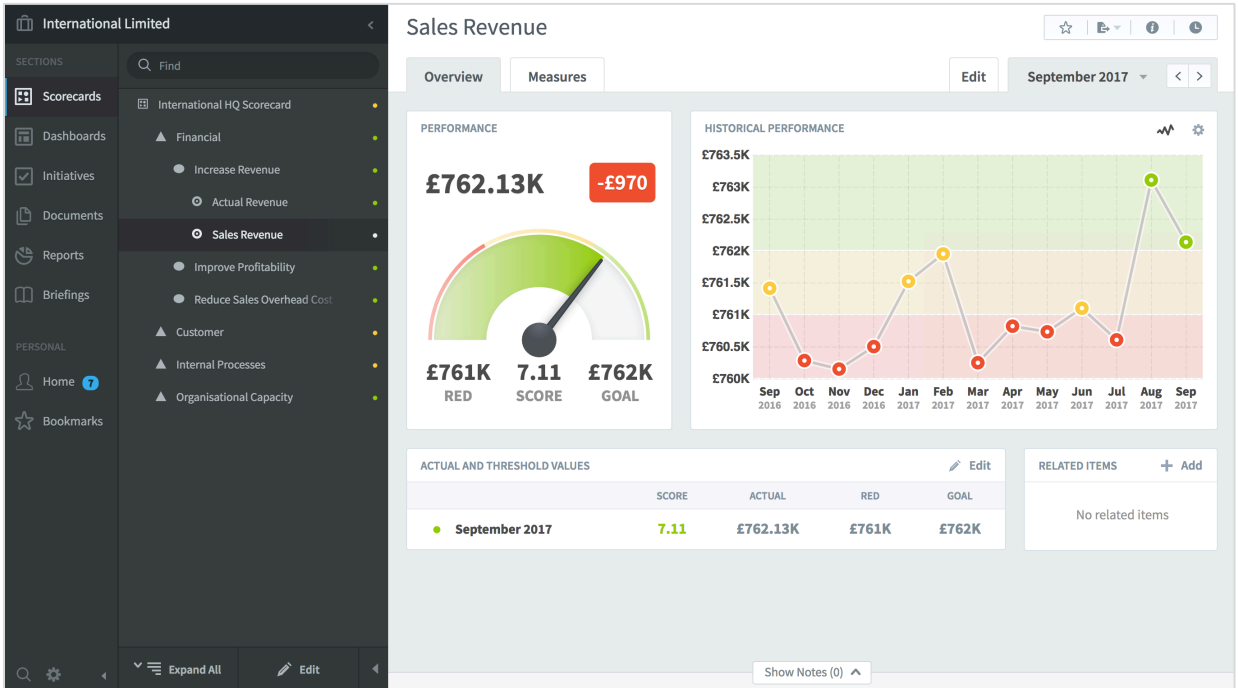


VERY IMPORTANT - Do not forget to click Save at this point. If you do not, your equation will be lost!



Cascading Roll Up - 7

Click on the Overview tab and you will see the final result:



Calculated measures can be used in a variety of ways. For more information on how to build calculations into your scorecard see: [Calculated Measures](#)



Cascading Linked Elements - 1

Linked Element Cascade

Of all the cascade methods, this is the easiest. Measures, Objectives, Themes, Perspectives and even whole Scorecards can be linked into each other to influence scores.

Links can go in any direction. The important thing to remember is that links only influence **Scores**, they do not roll up actual values.

In the example below we will demonstrate how to link a **Customer Satisfaction** measure owned by the Marketing Department's scorecard into the International HQ objective of **Improve Customer Satisfaction**



Notice that the measure **Customer Satisfaction** is in the **Marketing Scorecard**. The measure you are going to link into another scorecard must exist.

Go to the area where you want to use this measure as part of its scorecard.



Cascading Linked Elements - 2

In our example we will be linking the measure **Customer Satisfaction** into the International Limited top-level scorecard under the objective **Improve Customer Satisfaction** which is in the customer perspective

The screenshot displays the 'International Limited' scorecard with the 'Improve Customer Satisfaction' objective selected. The interface includes a left-hand navigation menu, a search bar, and a main content area with 'Overview' and 'Measures' tabs. The 'Measures' tab is active, showing a gauge chart and a historical performance graph. The 'Edit' button is located at the bottom right of the main content area.

Notice there is no score showing for this objective as there are no measures underneath it as this time. We will now add **Customer Satisfaction** as a **Linked Measure**. Highlight the objective **Improve Customer Satisfaction** and Click **Edit** at the bottom of the screen.

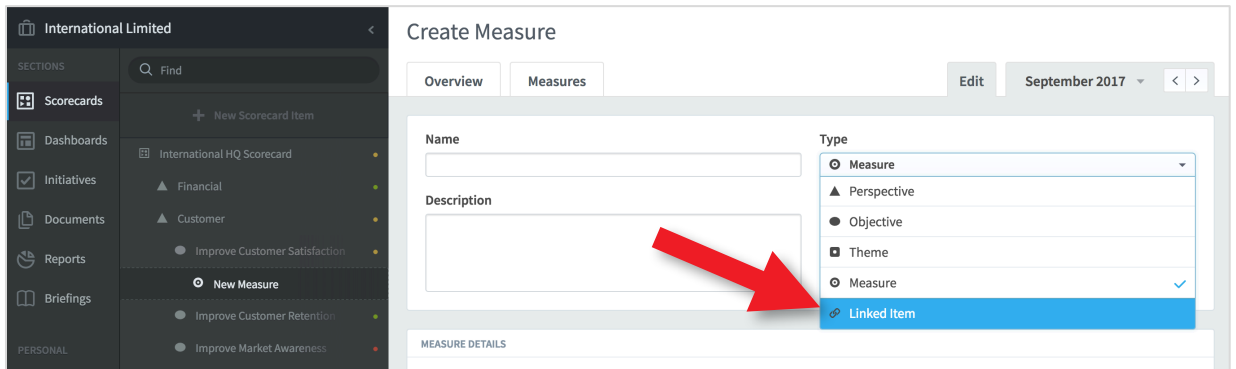
The screenshot displays the 'International Limited' scorecard with the 'Improve Customer Satisfaction' objective selected. The '+ New Scorecard Item' button is highlighted with a red arrow. The 'Edit' button is located at the bottom right of the main content area. The main content area shows a form for adding a new scorecard item, with fields for Name, Type, Description, and Weight.

Click on + New Scorecard Item

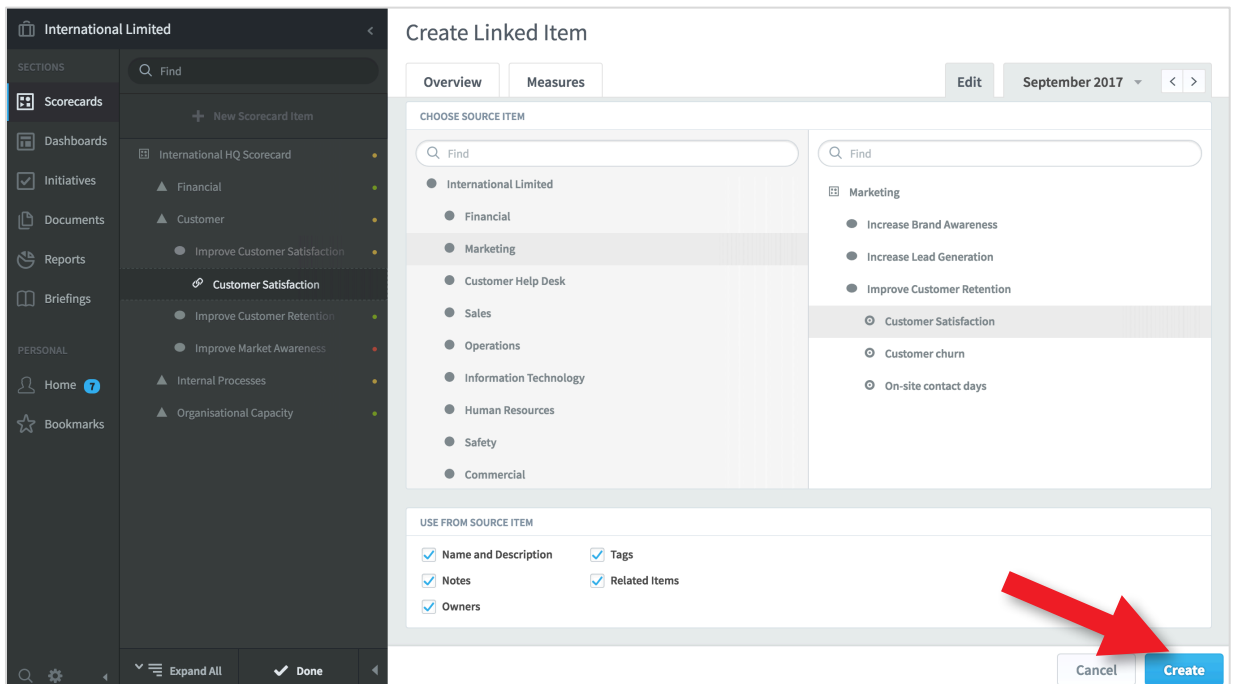


Cascading Linked Elements - 3

The **Create Measure** dialogue will appear. Instead of creating a new measure, Under **Type** click on the drop-down and select **Linked Item**:



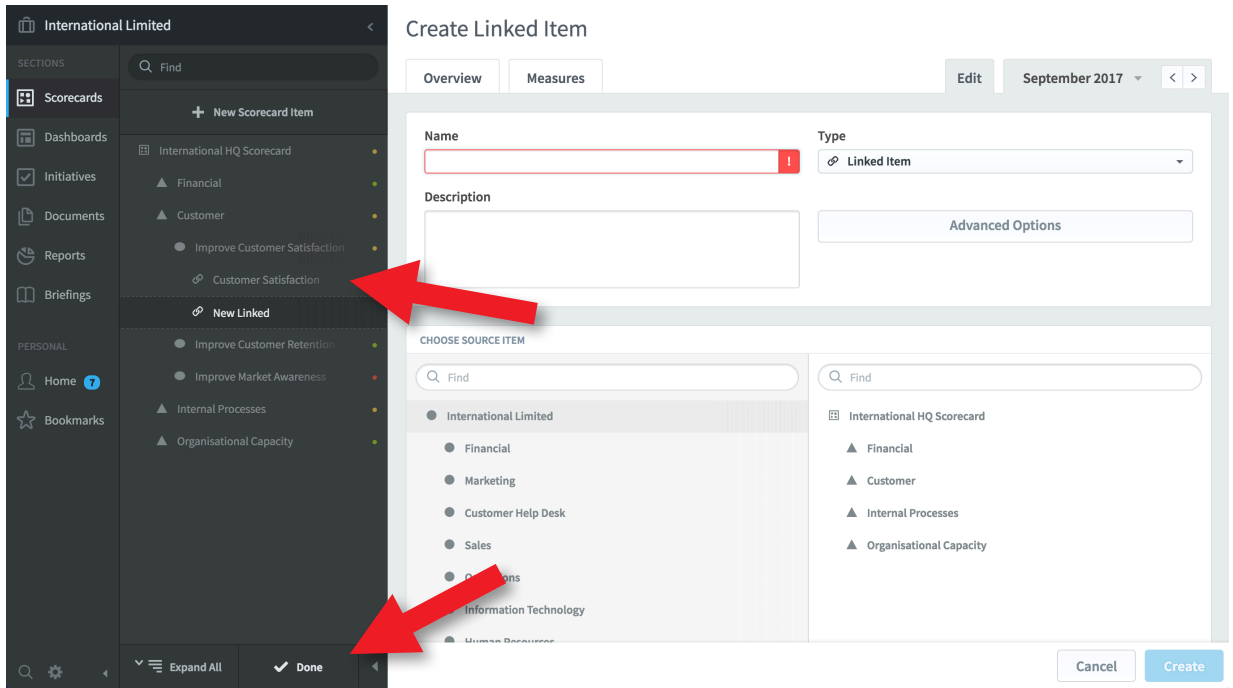
The **Create Linked Item** dialogue will appear with a panel called **Choose Source Item**. Select the item you want to link in. In this case we have selected **Customer Satisfaction** from the **Marketing Scorecard**. You can optionally select the data you want to pull with the item. The default is to pull everything. Click **Create**





Cascading Linked Elements - 4

The application will create the Linked item and go on to create a new linked item by default. Click **Done** to complete the process



Click on **Customer Satisfaction**, the linked measure has appeared. Note the small link icon to the left of the measure name.



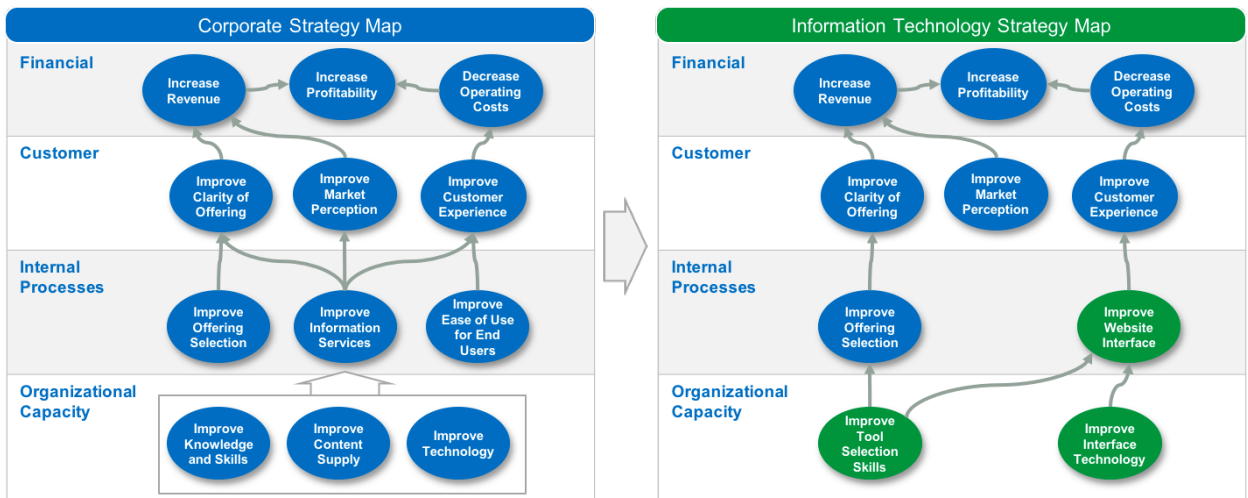


Cascading a Strategy Scorecard

Strategy Scorecard Cascades

Strategy scorecards usually contain a mixture of common elements and departmental elements. As with all scorecard configurations it is important to have a good view as to what the cascade will look like in advance of entering data into the application.

With a strategy scorecard, only objectives are cascaded. In some instances the departmental measures may be the same as the HQ measures, for example sales revenue, but in most instances the departmental measures will be different.



The example above uses a **Strategy Map** as the basis of a cascade. Here we can see a set of top-level corporate objectives and the corresponding strategy map for the IT department.

In this case only three objectives will be cascaded to the IT departments scorecard. The objectives, although obviously contributing to the corporate strategy are all different and will therefore have different measures. However, the IT department might be assessed on its contribution to the corporate objective, for instance, Improve Offering Selection and so that objective might be 'linked' to their scorecard.

Strategy scorecards can use all of the methods described above to reach the right result.