

# BUILDING STRATEGY MAPS AND SCORECARDS IN UTILITIES

**September 25-26, 2017**  
**Baltimore Marriott Inner Harbor**  
**at Camden Yards**  
**Baltimore, MD**



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EUCI is authorized by IACET to offer 0.9 CEUs for this course

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## OVERVIEW

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The utility industry is facing dramatic changes over the coming years—from renewables reaching grid parity to proliferation of distributed energy resources and rising competition from non-utility service providers—and for many utilities, their current business models and strategies are ill-equipped to deal with these challenges. If utilities want to survive and thrive in the coming energy future, they will need to become more customer-centric and innovative in their strategies, and find better ways of communicating and managing strategy so everyone in the organization understands their role in its execution.

The Balanced Scorecard strategy execution system is a proven approach that helps executives drive strategic change in their organizations by connecting the dots between high-level strategy and what people do every day. This one-and-a-half day “how-to” training course will show utility executives how to build a strategy map and that clarifies and communicates their organization’s strategy, and how to translate that strategy map into a Balanced Scorecard of measures, targets and initiatives to make strategy everyone’s job. The BSC approach has achieved excellent results in complex organizations like utilities that need to balance the interests of many diverse stakeholders, and can be applied to IOUs as well as cooperatives and municipal utilities.

## LEARNING OUTCOMES

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- Define Balanced Scorecard concepts and processes within the Strategy Execution Program
- Create a Strategy Map that clarifies and communicates your utility’s strategic destination, strategic themes, and linked objectives
- Translate your Strategy Map into a prototype Balanced Scorecard comprised of measures, targets and initiatives
- Accelerate the adoption and application of the BSC framework in your organization via case studies of other utilities successfully using this approach
- Develop an implementation plan that addresses accountability (roles & responsibilities), reporting and strategy review meetings
- Build an office of strategy management to monitor and manage the strategy execution process

## WHO SHOULD ATTEND

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Utility professionals—electric, gas and water

In the following areas:

- Strategic Planning
- Corporate Planning
- Finance & Treasury
- Corporate Performance Measurement
- Customer Relations
- Information Systems / Technology
- Quality, Six Sigma and Benchmarking
- Performance Reporting & Analytics
- Human Resources
- Workforce/Human Capital Analytics
- Organizational Change Management
- Knowledge Management
- Stakeholder Relations
- Regulatory Affairs

# AGENDA

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MONDAY, SEPTEMBER 25, 2017

- 8:00 - 8:30 am**                    **Registration & Continental Breakfast**
- Building a Balanced Scorecard in Your Utility Organization**
- 8:30 - 8:45 am**                    **Welcome, Introduction and Session Objectives**
- 8:45 - 9:30 am**                    **Overview of Strategy Execution Methodology**
- Review strategy execution program using XPP
  - Overview of strategy development
  - Positioning of Balanced Scorecard as tool to translate strategy
- 9:30 - 10:30 am**                    **BSC Overview including Architecture, Strategic Destination, Strategic Themes, Strategy Map and Scorecard**
- Review options for design of strategic architecture – 4 or 5 perspective models
  - Quantifying the vision – strategic destination
  - Defining strategic themes
  - The Balanced Scorecard: strategy map and scorecard
- 10:30 - 10:45 am**                    **Morning Break**
- 10:45 - 11:15 am**                    **Facilitated Discussion: Architecture, Strategic Destination, Strategic Themes**
- 11:15 - 11:45 am**                    **Strategy Mapping Case Study: AVANGRID Networks**
- Charles Jones will present a case study on moving from a company’s discussion on strategy to leveraging the Balanced Scorecard to effectively map how the elements of your strategy work together to achieve strategic goals. He will:
- Review Utility Balanced Scorecard process at AVANGRID Networks
    - o Describe the strategy development process used
    - o Review the Balanced Scorecard used to translate the strategy
    - o Review of the utility strategy map and scorecard
    - o Discuss the pros & cons of the experience
- Charles Jones, PMP, CBCP, Strategy & Risk Manager, AVANGRID Networks***
- 11:45 am - 12:30 pm**                    **Facilitated Strategy Mapping Exercise - Linking Strategic Objectives**
- Build Strategy Map using participant data
  - Report out Strategy Map and lessons learned
- 12:30 - 1:30 pm**                    **Group Luncheon**
- 1:30 - 2:30 pm**                    **Overview of Scorecard: Measures, Targets & Initiatives**
- Using the Strategy Map, learn how to draft measures that matter
  - Review process and approaches for setting targets
  - Defining and selecting strategic initiatives
- 2:30 - 2:45 pm**                    **Afternoon Break**
- 2:45 - 3:15 pm**                    **Facilitated Scorecard Exercise**
- Using the Strategy Map from previous exercise, draft measures that matter

# AGENDA

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MONDAY, SEPTEMBER 25, 2017 (CONTINUED)

- 3:15 - 3:45 pm**      **Review Inventory and Manage Initiatives**
- Define strategic initiatives needed to achieve strategic objectives
  - StratEx – funding for strategic initiatives
- 3:45 - 4:15 pm**      **Facilitated Initiative Mapping Exercise**
- Using Strategy Map and scorecard measures from previous exercises, map initiatives to objectives
- 4:15 - 4:45 pm**      **Scorecard Case Study: Public Service Enterprise Group**
- Dennis Ciemniecki will describe how PSEG translated its strategy map into a corporate scorecard that served as the foundation for all lines-of-business and shared services scorecards. He will:
- Present the PSEG scorecard—objectives, measures, targets and initiatives
  - Highlight continuous improvement including the integration of best practices
  - Capture lessons learned
- Dennis L. Ciemniecki, Interim Director, Business Performance & Improvement, Public Service Electric & Gas Co., Public Service Enterprise Group***
- 4:45 - 5:00 pm**      **Day One Summary and Adjournment**

TUESDAY, SEPTEMBER 26, 2017

- 8:30 – 9:00 am**      **Continental Breakfast**
- Using the Balanced Scorecard as a Strategic Management System**
- 9:00 - 9:30 am**      **Review of Day 1**
- 9:30 - 10:00 am**      **BSC Reporting Best Practice**
- Define strategic report – review reporting elements and frequency
  - Identify roles and responsibilities for theme, objective, measure and initiative owners
- 10:00 - 10:15 am**      **Morning Break**
- 10:15 - 11:15 am**      **The Strategy Review Meeting**
- Define reporting best practice in a BSC strategy review meeting – show reporting examples
  - Review the roles and responsibilities for a successful strategy review meeting
  - Typical agenda for a strategy review meeting – objectives-measures-targets and initiatives
- 11:15 - 11:30 am**      **Managing the Strategy Execution Process via an Office of Strategy Management (OSM)**
- Define the purpose of the OSM
  - Establish reporting relationships
  - Review the responsibilities of OSM
- 11:30 - 11:45**      **Facilitated Exercise – Office of Strategy Management**
- Audit of OSM responsibilities currently
  - Recommendation of how OSM should be organized in the future
- 11:45 am - 12:00 pm**      **Summary and Close**

# INSTRUCTORS

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## Mario A. Bognanno

**Managing Director, Balanced Strategy Group, LLC**

Mario Bognanno is the Managing Director of Balanced Strategy Group LLC, a consulting firm specializing in Strategy Execution Training, Consulting and Executive Coaching. For 20 years, he has advised corporations and government agencies in strategy implementation and strategic change initiatives. He has coached executives to execute strategy at the corporate, divisional, and SBU levels. He has worked for domestic and international companies, and public and not-for-profit organizations. Mr. Bognanno is a professional trainer and frequent speaker on the design and implementation of business strategy. Prior to Balanced Strategy Group, he was Vice President of Consulting with organizations founded by Drs. Robert Kaplan and David Norton, co-authors of The Balanced Scorecard and Strategy Focused Organization. He received his MA from the University of Iowa and his BA from Grinnell College in Iowa.



## Charles Jones, PMP, CBCP

**Strategy & Risk Manager, AVANGRID Networks**

Charles Jones is a Strategy and Risk manager in the energy sector at AVANGRID Networks, and has worked extensively with the Balanced Scorecard (BSC) in the corporate and non-profit sectors. He has led implementations of the BSC as well as worked to refine the process in organizations with established strategy functions. Charles is a graduate of the Balanced Scorecard Institute and has presented at numerous conferences on the BSC, Risk Management and Project Excellence. He holds PMP and CBCP certifications as well as certifications in training and facilitation.



## Dennis L. Ciemniecki

**Interim Director, Business Performance & Improvement, Public Service Electric & Gas Co.,  
Public Service Enterprise Group**

## INSTRUCTIONAL METHODS

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Interactive group activities, case studies and PowerPoint presentations will be used in this program.

## REQUIREMENTS FOR SUCCESSFUL COMPLETION

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Participants must sign in/out each day and be in attendance for a minimum of four hours to be eligible for any continuing education credit.

## IACET CREDITS

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EUCI has been accredited as an Authorized Provider by the International Association for Continuing Education and Training (IACET). In obtaining this accreditation, EUCI has demonstrated that it complies with the ANSI/IACET Standard which is recognized internationally as a standard of good practice. As a result of their Authorized Provider status, EUCI is authorized to offer IACET CEUs for its programs that qualify under the ANSI/IACET Standard.

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## EVENT LOCATION

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A room block has been reserved at the Baltimore Marriott Inner Harbor at Camden Yards, 110 S Eutaw Street, Baltimore, MD 21021, for the nights of September 24-25, 2017. Room rates are US \$189, plus applicable tax. Call **1-410-962-0202** for reservations and mention the EUCI event to get the group rate. The cutoff date to receive the group rate is August 27, 2017 but as there are a limited number of rooms available at this rate, the room block may close sooner. ***Please make your reservations early.***

## REGISTER 3, SEND THE 4TH FREE

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Any organization wishing to send multiple attendees to this conference may send 1 FREE for every 3 delegates registered. Please note that all registrations must be made at the same time to qualify.

Please make checks payable to: "PMA"

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## PLEASE REGISTER

### BUILDING STRATEGY MAPS AND SCORECARDS IN UTILITIES COURSE

SEPTEMBER 25-26, 2017: US \$1395,  
Early bird on or before September 8, 2017: US \$1195

How did you hear about this event? (direct e-mail, colleague, speaker(s), etc.)

Print Name | Job Title

Company

What name do you prefer on your name badge?

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List any dietary or accessibility needs here

### CREDIT CARD INFORMATION

Name on Card | Billing Address

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**OR** Enclosed is a check for \$ \_\_\_\_\_ to cover \_\_\_\_\_ registrations.

#### Substitutions & Cancellations

Your registration may be transferred to a member of your organization up to 24 hours in advance of the event. Cancellations must be received on or before August 25, 2017 in order to be refunded and will be subject to a US \$195.00 processing fee per registrant. No refunds will be made after this date. Cancellations received after this date will create a credit of the tuition (less processing fee) good toward any other EUCI event. This credit will be good for six months from the cancellation date. In the event of non-attendance, all registration fees will be forfeited. In case of course cancellation, EUCI's liability is limited to refund of the event registration fee only. For more information regarding administrative policies, such as complaints and refunds, please contact our offices at (201) 871-0474.