

Balanced Scorecard

Perspective	Goal	Objective	Measure	Target	Actions
Financial	Maximize return on investment.	Enhance return on investment (ROI)	Calculate the actual ROI quarterly.	Achieve an annual ROI of 7%.	<ul style="list-style-type: none">Diversify the investment portfolio to spread risk.Conduct thorough research and analysis before making any investment decisions.Regularly review and adjust investment strategies based on market conditions.
Customer	Provide satisfactory returns to investors.	Maintain a high level of investor satisfaction.	Conduct quarterly surveys to assess investor satisfaction.	Achieve a satisfaction rate of at least 90%.	<ul style="list-style-type: none">Provide clear and transparent communication about investment strategies and performance.Offer personalized investment advice and support.Address investor concerns promptly and effectively.
Internal Process	Efficiently manage the investment process.	Streamline the investment decision-making process.	Monitor the average time taken to make investment decisions.	Reduce the average decision-making time to 14 days.	<ul style="list-style-type: none">Implement standardized procedures for evaluating investment opportunities.Utilize advanced data analysis techniques to expedite decision-making.Continuously review and optimize the investment process for efficiency.
Learning and Growth	Develop the knowledge and skills of the investment team.	Enhance the expertise of investment professionals.	Track the completion of relevant training programs and certifications.	Ensure that at least 80% of the investment team has completed advanced training or obtained relevant certifications.	<ul style="list-style-type: none">Provide ongoing training and development opportunities for the investment team.Encourage participation in industry conferences and seminars.Foster a culture of continuous learning and innovation within the investment team.