Balanced Scorecard

The *Balanced Scorecard* pattern creates elements and a diagram that can be used as a Strategic Performance Management tool and includes the four perspectives (dimensions) allowing performance to be measured and understood by a diverse group of stakeholders.
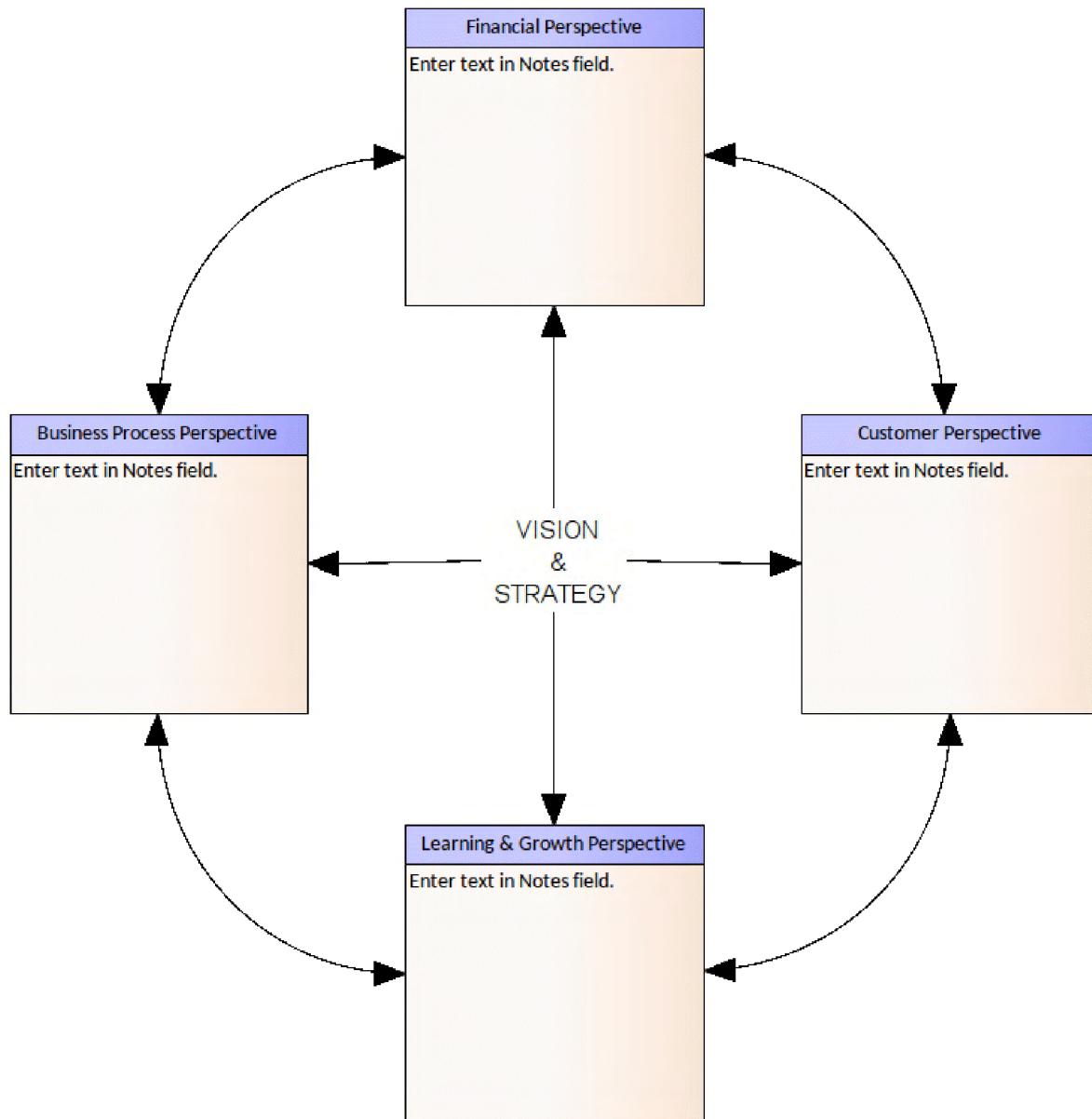
Financial Perspective

Enter text in Notes field.

Business Process Perspective

Enter text in Notes field.

Customer Perspective

Enter text in Notes field.

VISION
&
STRATEGY

Learning & Growth Perspective

Enter text in Notes field.

Figure 1. Shows a Balanced Scorecard diagram with a central vision and strategy and the four perspectives.

Discussion

The purpose of the pattern is to allow Business Analysts, Business Architects and other modelers to create a balanced scorecard that can be accessed by an entire enterprise, division or project team including business and technical audiences. The elements in the model can be traced to other elements and concepts in the repository.

It is typically used early in an initiative and allows an organization to do the following:
- Communicate what the organization is trying to accomplish.
- Align the work that staff are engaged in with strategy.
- Prioritize projects, products, and services.
- Measure and monitor progress towards strategic goals.

The following is a list of some things you may want to do when working with this pattern.
- Add notes or create separate elements in the Financial Perspective to define objectives, measures (KPIs), targets, and initiatives.
- Add notes or create separate elements in the Business Process Perspective to define objectives, measures (KPIs), targets, and initiatives.
- Add notes or create separate elements in the Customer Perspective to define objectives, measures (KPIs), targets, and initiatives.
- Add notes or create separate elements in the Learning and Growth Perspective to define objectives, measures (KPIs), targets, and initiatives.

The following is a list of some of the next steps available when applying the pattern.
- **Create trace relationships to other elements** - the perspective elements or the elements they contain (if separate elements have been created) can be linked to other elements in the model using a trace relationship. This provides traceability between these high level goals and lower level elements that define the details of an initiative.

· **Generate Documentation** - Use the automatic Document Generation facility to create high quality documentation.

Reference

The following help topics will assist you learn about how to work with this pattern.

[Balanced Scorecard](#)

[Business Analysis Body of Knowledge (BABOK)](#)

[Traceability Tools](#)

[Documentation](#)

The following are some of the tools that will be helpful when working with this pattern.

Document Generator

The Document Generator is a powerful facility in Enterprise Architect that allows a Database Engineer or other stakeholder to create high quality corporate or technical documentation directly from the model, suitable for internal or external audiences. For more details see the [Documentation](#) help topic or the more general topic on [Model Publishing.](#)

Element Discussions

The Element Discussion facility is a fully featured collaboration tool allowing modelers and model viewers and reviewers to communicate with each other directly inside the repository. Modelers using the full client or occasional viewers using WebEA can both post and reply to discussions and communicate and engage in chat. For more details see the [Element Discussions](#) help topic.

Specification View

The Specification View can be used as a way of working with the Components and Interfaces particularly when there are a large number of elements as is typically the case when describing a system of any appreciable size. For more details see the [Specification View](#) help topic.

Relationship Matrix

The Relationship Matrix provides a spreadsheet like view of two groups of elements and the relationships that exist between them. It can be a used as a powerful analysis mechanism to visually indicate how elements are related to each other and to discover

which elements are missing relationships. For more details see the [Relationship Matrix](#) help topic.

Traceability Window

The Traceability Window automatically displays the relationships that exist between Use Cases and other model elements including up-process and down-process elements. The traceability tree view can be conveniently expanded to see deeper relationships and elements displayed in the window can be located in all diagrams in which they appear. For more details see the [Traceability Window](#) help topic.