

# REGISTRATION

## Designing and Implementing a Balanced Scorecard Framework

### ☐ CHICAGO, ILLINOIS

**Date:** November 8, 2006 **Location:** Illinois CPA Society Education Center, 550 W. Jackson, Suite 900, Chicago, IL **CPE Credits:** 8 hours **Time:** 8:00 AM Registration; 8:30 AM - 5:00 PM Program **Course Code:** C35821

### ☐ INDIANAPOLIS, INDIANA

**Date:** November 10, 2006 **Location:** INCPAS Professional Development & Conference Center, 8250 Woodfield Crossing Blvd., Indianapolis, IN **CPE Credits:** 8 hours **Time:** 8:30 AM - 5:00 PM

**FEE: \$495 for all CCFL State Society Members/\$565 for Non-members.**

**TOTAL AMOUNT ENCLOSED:** \$ \_\_\_\_\_

**COMPLETE THE FOLLOWING:** (Please print or attach your business card below)

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Title: \_\_\_\_\_

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

### PLEASE CHECK ONE BOX:

☐ ICPAS Member ☐ INCPAS Member ☐ Non-member

From other CCFL State: \_\_\_\_\_

**MEMBER I.D. #** \_\_\_\_\_ **Are you a CPA?** ☐ Yes ☐ No

### METHOD OF PAYMENT (Must be Included with Registration):

☐ Check (Payable to the state CPA Society in the location you will be attending)

☐ American Express ☐ Discover ☐ MasterCard ☐ Visa

Card Number: \_\_\_\_\_ Exp.: \_\_\_\_\_

Cardholder Name: \_\_\_\_\_

Cardholder Signature: \_\_\_\_\_

### CHICAGO, ILLINOIS

To register in **ILLINOIS:** **MAIL** this form to the Illinois CPA Society, 550 W. Jackson, Suite 900, Chicago, IL 60661, or **FAX** to 312-993-9432, or **PHONE** 312-993-0393, or **ONLINE** at [www.CCFLinfo.org](http://www.CCFLinfo.org)

### INDIANAPOLIS, INDIANA

To register in **INDIANA:** **MAIL** this form to the Indiana CPA Society, 8250 Woodfield Crossing Blvd., Suite 100, Indianapolis, IN 46240, or **FAX** to 317-726-5005, or **PHONE** 800-272-2054 or 317-726-5000, or **ONLINE** at [www.CCFLinfo.org](http://www.CCFLinfo.org)

**All course information is subject to change; please verify upon registration.**

Non-Profit Org.  
U.S. Postage  
**PAID**  
Chicago, IL  
Permit No. 438

Center for  
Corporate Financial Leadership™

Illinois CPA Foundation  
550 W. Jackson, Suite 900  
Chicago, Illinois 60661-5716

Center for  
Corporate Financial Leadership™

## Who We Are:

The Center for Corporate Financial Leadership (CCFL) currently serves over 34,000 corporate finance professionals across seven Midwest states through affiliation with participating state CPA organizations in Illinois, Indiana, Kansas, Kentucky, Minnesota, Missouri, and Wisconsin. Through membership in those organizations, finance professionals, both CPAs and non-CPAs, can avail themselves of CCFL services and benefits.

## Our Mission:

The Center for Corporate Financial Leadership is dedicated to meeting the needs of corporate finance professionals through high-quality executive education, knowledge resources and networking communities.

[www.CCFLinfo.org](http://www.CCFLinfo.org)



The Illinois CPA Society's  
Center for  
Corporate Financial Leadership™

# Designing and Implementing a Balanced Scorecard Framework

two locations:

November 8, 2006 - Chicago, IL  
November 10, 2006 - Indianapolis, IN

featuring:

**Mark Frigo, PhD, CPA, CMA**

Director, The Center for Strategy, Execution, and  
Valuation, Kellstadt Graduate School of Business,  
DePaul University

8 CPE Credit Hours

[www.CCFLinfo.org](http://www.CCFLinfo.org)

# INTRODUCTION

## Designing and Implementing a Balanced Scorecard Framework

With so many performance metrics available, **how are you measuring the success of your company?**

### To do:

- ✓ 1. Develop a Strategy
- ✓ 2. Execute the Strategy
- ✓ 3. Measure its Success

No two companies are alike. Using the right measures for your company is **vital to managing and accurately assessing your performance and building your success.**

This hands-on, interactive class will help you to **design and implement a Balanced Scorecard Framework** for your organization based on its **specific strategy, critical success factors and customer-value propositions. This is knowledge you can take back and utilize in your company right away.**

## Who Should Attend:

Financial professionals in corporate settings who want to master the competencies of performance measurements and help build their company's success.

Customize your seminar experience by emailing your specific questions about the Balanced Scorecard to Dr. Frigo at [mfrigo@depaul.edu](mailto:mfrigo@depaul.edu). Dr. Frigo will send a pre-seminar questionnaire to registrants which he will use to customize the seminar presentation.

# PROGRAM HIGHLIGHTS

## Developing an Executable Strategy

- ▶ Develop an executable strategy as a first step in Balanced Scorecard design
- ▶ Energize and refine your strategy
- ▶ Use Return Driven Strategy™ to launch a Balanced Scorecard initiative
- ▶ Use Return Driven Strategy™ to refine an existing Balanced Scorecard

## The Balanced Scorecard and Strategy Maps

- ▶ Understand the Balanced Scorecard terminology and concepts
- ▶ Learn the four perspectives of the Balanced Scorecard
- ▶ Identify cause and effect linkages

## Strategy Mapping

- ▶ Develop a strategy map
- ▶ Identify strategic themes and strategic objectives
- ▶ Link strategic objectives using strategy maps

## Identifying and Assessing Performance Measures

- ▶ Assign performance measures to strategic objectives
- ▶ Assess performance measures
- ▶ Link performance measures
- ▶ Set target performance levels

## Balanced Scorecard Implementation

- ▶ Review best practices in Balanced Scorecards and strategy maps
- ▶ Learn how to continuously improve and refine a Balanced Scorecard Framework
- ▶ Understand how to manage a Balanced Scorecard initiative

## Customer Metrics in a Balanced Scorecard

- ▶ Identify customer metrics that drive profitable growth in your business
- ▶ Improve Scorecards through better customer metrics

# ABOUT THE PRESENTER

## Mark L. Frigo, Ph.D., CPA, CMA



Mark L. Frigo, PhD, CPA, CMA is the Director of The Center for Strategy, Execution and Valuation in the Kellstadt Graduate School of Business and Eichenbaum Foundation Distinguished Professor of Strategy and Leadership in the School of Accountancy at DePaul University. Dr. Frigo has extensive experience as a management consultant with KPMG and in the corporate sector where he was responsible for strategic planning. He has helped many organizations to design and execute strategy for maximum value creation. Dr. Frigo is a leading expert in strategy design and execution, including Balanced Scorecard initiatives and has helped participants from CCFL seminars to lead successful strategic planning and Balanced Scorecard initiatives. A dynamic speaker, Dr. Frigo was presented the Economos Award for Outstanding Teaching in the Kellstadt Graduate School of Business at DePaul and was the recipient of the Illinois CPA Society Outstanding Educator Award. The author of five books and over 60 articles, his work is published in leading business journals including Harvard Business Review. He is a consultant to executive teams and boards of directors. Dr. Frigo is co-creator of the Return Driven Strategy™ Framework with Joel Litman.

## Here is what your colleagues had to say:

*"I'm at the stage where it is important for me to think strategically. CCFL has been instrumental in helping me implement effective performance measures within my organization."*

*"CCFL is a high caliber knowledge source for corporate executives."*

*"I am inundated with educational materials. What brought me to this program were the benefits of building competency and taking the information back and applying it."*

*"When you are moving fast at a small company trying to get things done it is difficult to attend classes, but this one intrigued me because its focus was strategy."*

## Some of the hundreds of companies that have attended a CCFL Executive Education program:

Blue Cross & Blue Shield  
Carhartt, Inc.  
Cinergy  
Clifton Gunderson LLP  
Conseco Services, LLC  
Crowe Chizek & Co. LLP  
Discover Financial Services  
Downers Grove National Bank  
Ernst & Young LLP  
Follett Corporation

Great Lakes Chemical Corp.  
Harris Bank  
John Deere & Company  
McDonalds Corp.  
Midland Manufacturing Corp.  
Siemens Building Technologies, Inc.  
Usher Oil Company  
Wabash National Corp.  
Whirlpool Corporation  
World's Finest Chocolate