Getting Started

Once you have logged into the application you will be presented with the **Getting Started** screen. This entry point can be changed later once you are familiar with the system, but for now it will enable you to quickly create a balanced scorecard.

Getting Started -		0 umread alerts Search New User Log C
My Organization	Welcome to QuickScore!	0
My Progress: 0%	Let's get started! Do you already have a balanced scorecard?	
	Yes, I have a balanced scorecard. No, help Lets get your data into QuidScore and automate your strategy Well walk you thr • Perspectives SWOT • Objectives SWOT • Measures and Targets Contomer Values (about 10 minuteg) Perspectives • Objectives Objectives (about 10 minuteg) Perspectives • Statespectives Octomer Values • Statespectives Statespectives • Subscription Statespectives • Statespectives Statespectives • Statespectives Statespectives	p me build a balanced scorecard. Sough al of the steps of defining your strategy and need scorecard: ment enent nd Stakeholders kue Proposition
		(about 60 minutes)

On this screen are two options, the first to build a scorecard from some existing data the second to build a scorecard from scratch. Depending on how much time you have, select either option.

Important Note: you can come back to Getting Started at any time to complete the process.

For the purpose of this Quick Start tutorial we suggest you take the first option **Yes, I have a Balanced Scorecard**. You will then be presented with the following screen:



The four major elements of the Balanced Scorecard have been added to the left hand pane; Perspectives, Objectives, Strategy Map and Measures and Targets. Click on Perspectives to define the top-level areas of your scorecard. QuickScore has pre-built the four perspectives (and given you an option to add further perspectives). You do not need to use these names, just delete and add your own names if applicable. These Perspectives will be the major categories for you first scorecard. Next click on Objectives:

Getting Started -		
My Organization	Objectives	2
My Progress: 25%	Objectives are specific continuous improvement activities, balanced across the perspectives, that d strategy actionable by involving all employees in operationalizing the organization's goals. Your Ob understand and represent opportunities for continuous improvement. You should have at least one	efine the value proposition and make gettwes should be actions that are easy to Objective supporting each Perspective.
Strategy Map	Financial	
Measures and Targets	Type Name	Description
	Customer	
	Type Name	Description
	Internal Processes	
	Type Name	Description
	Learning and Growth	
	Type Name Vobjective	Description

Next, click on Objectives in the left hand pane. QuickScore has added an Objective to each Perspective. Fill in the details in each box. Once you have saved an Objective, you will be given the option to add another under the same Perspective. You can add as many objectives as you wish.

Important Note: It is best practice to have three or less Objectives per Perspective.

We are going to skip Strategy Maps, they are dealt with in another Quick Start guide (Quick Start – Strategy Maps) so for now click on Measures and targets:

Getting Started -		0 unread siler	ts Search New User Log
My Organization	4	Measures and Targets	2
My Progress: 50%		Measures are the numbers you use to determine how well your organization is meeting its Objectives. Targets are the numeric goals you set for your Measure. When you setup your Measures, you can enter a default target.	
Objectives Strategy Map		To add new Performance Measures: Show me	
Measures and Targets		 Switch to the Related Scorecardingection. Switch to the Rulef subscription of the Rulef subscription. Expand the scorecard tree unit you see an YOBjective, then cick on the objective. Enter the Information for a Performance Measure and cick Save. 	

The tutorial will ask you to switch to a new section in the application called Balanced Scorecards. Hit the **Show Me!** button and you will be guided to the correct place as shown below:

My Organization	4	Balanced Scorecard Build	Enter the information for a Performance Measure and click Save.	
(expand all college all) My Organization Balanced Scorecard △ Prancel M To reduce the all overhead / profit rates △ container △ container → con		Type Performance Measure	Anne Description	

Once you have entered the name and the description of the Performance Measure, you will need to provide the following information:

- Scoring Type QuickScore has a range of measures, the most common is red/amber/green. Experiment with the other types.
- Calendar the frequency data is collected for the Performance Measure, this is usually monthly but can be based on any default or customer defined calendar.
- Data Type QuickScore has three data types, standard numeric, percentages and currency (currency type can be defined in Administration)
- Red Flag and Goal These are the targets associated with the performance measure. This is an important bit: You need to determine what is considered 'good' for this metric and what is considered 'bad'. For the metric type 'Goal/Red Flag' there are two targets, for other metric types there are more or less.

This process should be repeated for each performance measure. For more detailed information on Performance Measures (often referred to as Metrics or KPIs) take a look at the Quick Start Guides **Creating Metrics** or **The Builder**.