



Cascading Scorecards

Introduction

Cascading scorecards within the application is a relatively simple procedure. However, it will only work successfully if a considered approach is taken **before** embarking on the process.

There are several ways a cascade can take place, here are a few examples:

- **Exact Match Cascade (with auto roll-up)** - where a master scorecard is created and an exact 'structure' replica is cascaded to teams within a department. Typical examples of this approach can be seen in call-centres when all of the team KPIs are the same as the management KPIs, or in a safety scorecard where the same scorecard is used across multiple departments.
- **KPI/Measure Calculated Roll Up Cascade** - where targets are set at departmental levels (usually financial) and the values are rolled up to the top-level scorecard. For example, a sales revenue target is set across several sales groups and the result is rolled up to a company level scorecard.
- **Linked Element Scorecard** - Where a scorecard is created with all of the required measures and appropriate measures are linked into other scorecards. For example, an executive incentive scorecard that is distributed to a set of directors. The managing director will hold all of the measures and they will be shared across the reporting directors. They might be weighted appropriately.
- **Strategy Scorecards** - where a top-level or executive scorecard is created and some objectives are cascaded exactly and others are cascaded but the names change to reflect the departmental activity. For example, Improve Customer Satisfaction at the top-level might be translated to Improve Customer Information Responses by the Marketing department

The application can be used with all of the scenarios above (and more) but again, it must be stressed, careful consideration needs to be given to the cascade before building the scorecard.

The following provides information about Exact Match Cascade (with auto roll-up).

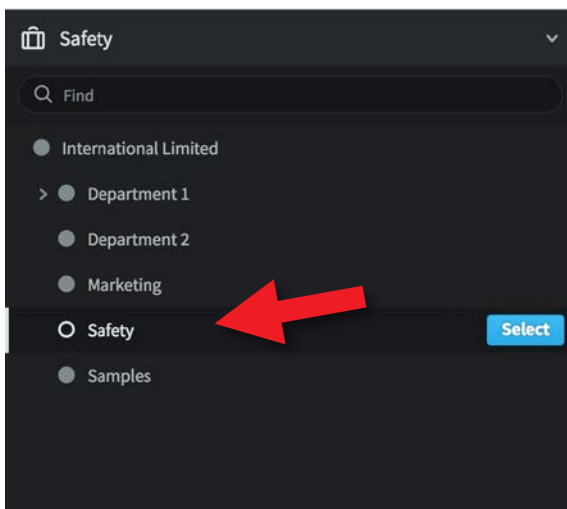


Cascading Exact Match - 1

Exact Match Cascade

If you are cascading a set of scorecards to several departments and the structure (not the actual values) is the same, then this method can be used.

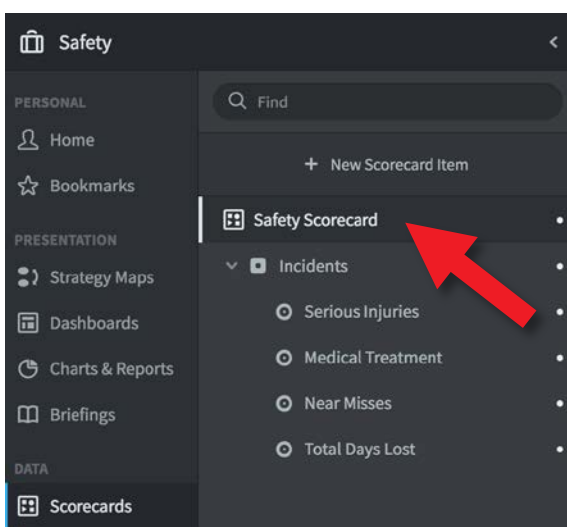
First build the Master scorecard. If you have not built scorecards yet, go to the Intrafocus [Getting Started Guides](#) and work through the first guide.



For this example we have created a group level safety scorecard.

It appears in the Organization structure (briefcase) as 'Safety'.

Once you have created the Safety organization, click on it and create the master scorecard itself.



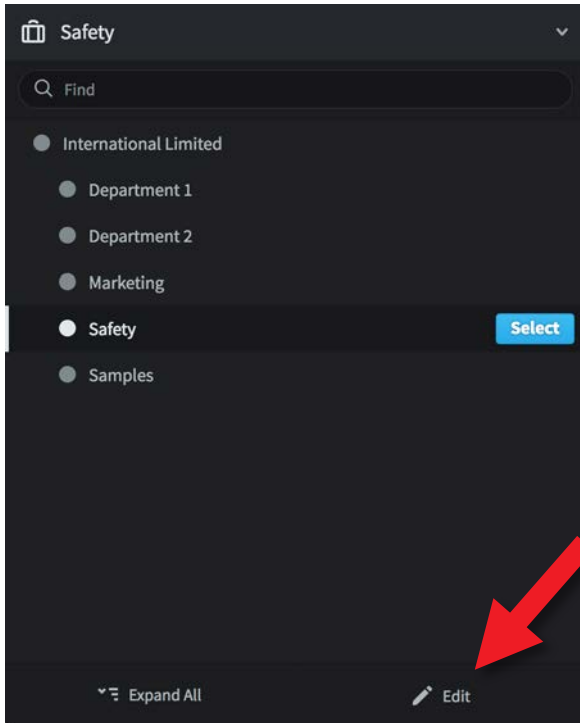
We have named the scorecard **Safety Scorecard**.

Do not add any actual values or Thresholds at this time.



Cascading Exact Match - 2

Next we will copy the master structure to the departments responsible for adding the actual values to the scorecard. The organizational structure will be created automatically as part of the copy process.

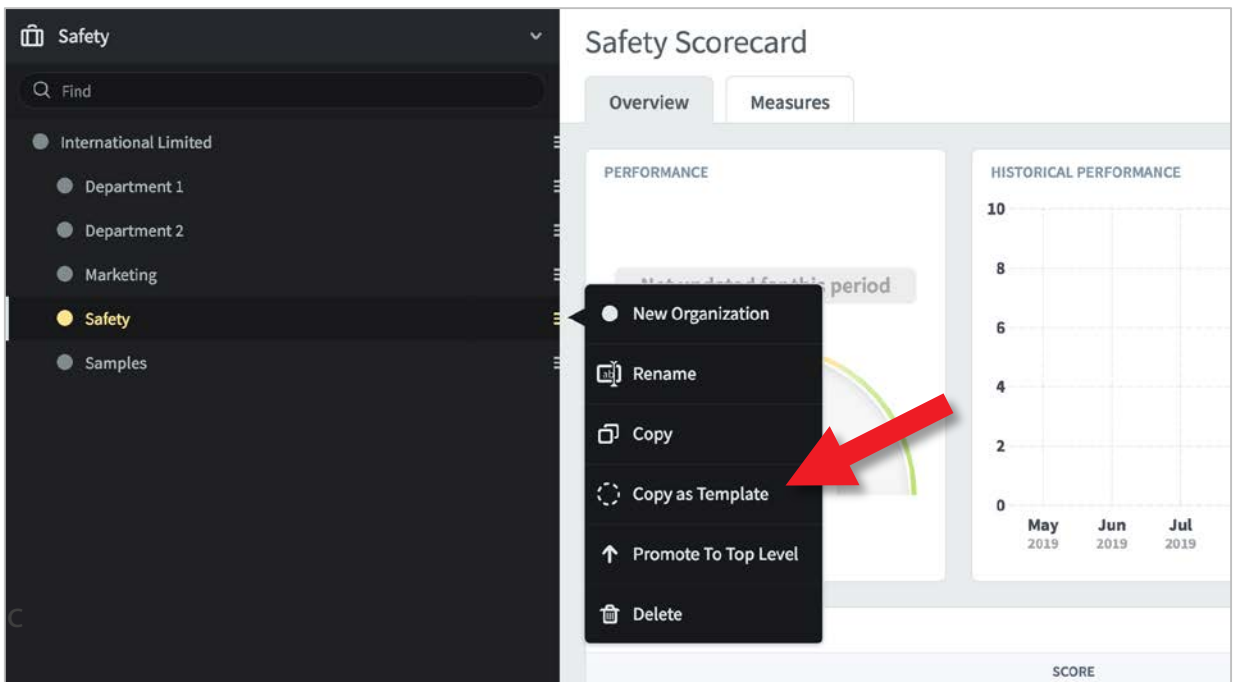


Click on the briefcase icon to reveal the organizational structure.

Highlight the top-level organizational object, in this case **Safety**.

Click on **Edit** at the bottom of the screen.

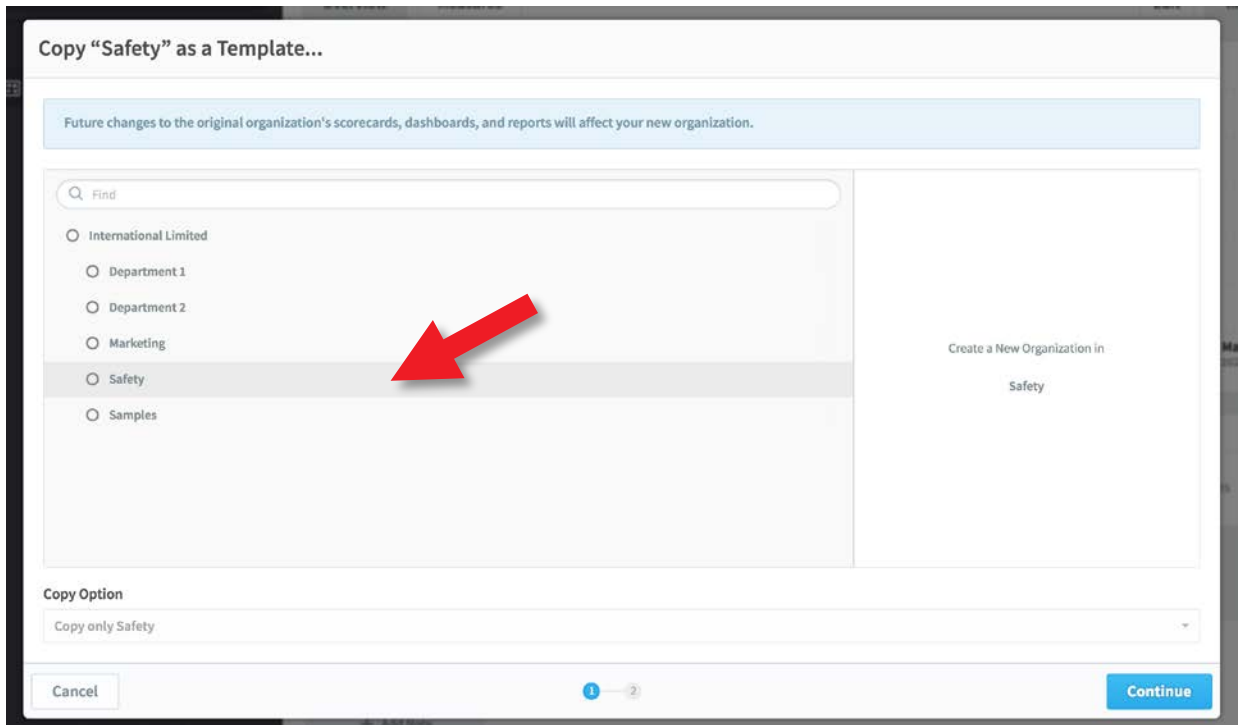
Another menu will appear, Click on **Copy as Template**.





Cascading Exact Match - 3

A panel will appear asking where to make the copy. Select the top-level scorecard as previously created, in this case **Safety** and click **Continue**:



At this point you can name the new cascaded organizational object and optionally provide a unique suffix or prefix for the Scorecards, Dashboards and Reports that you will go on to create.

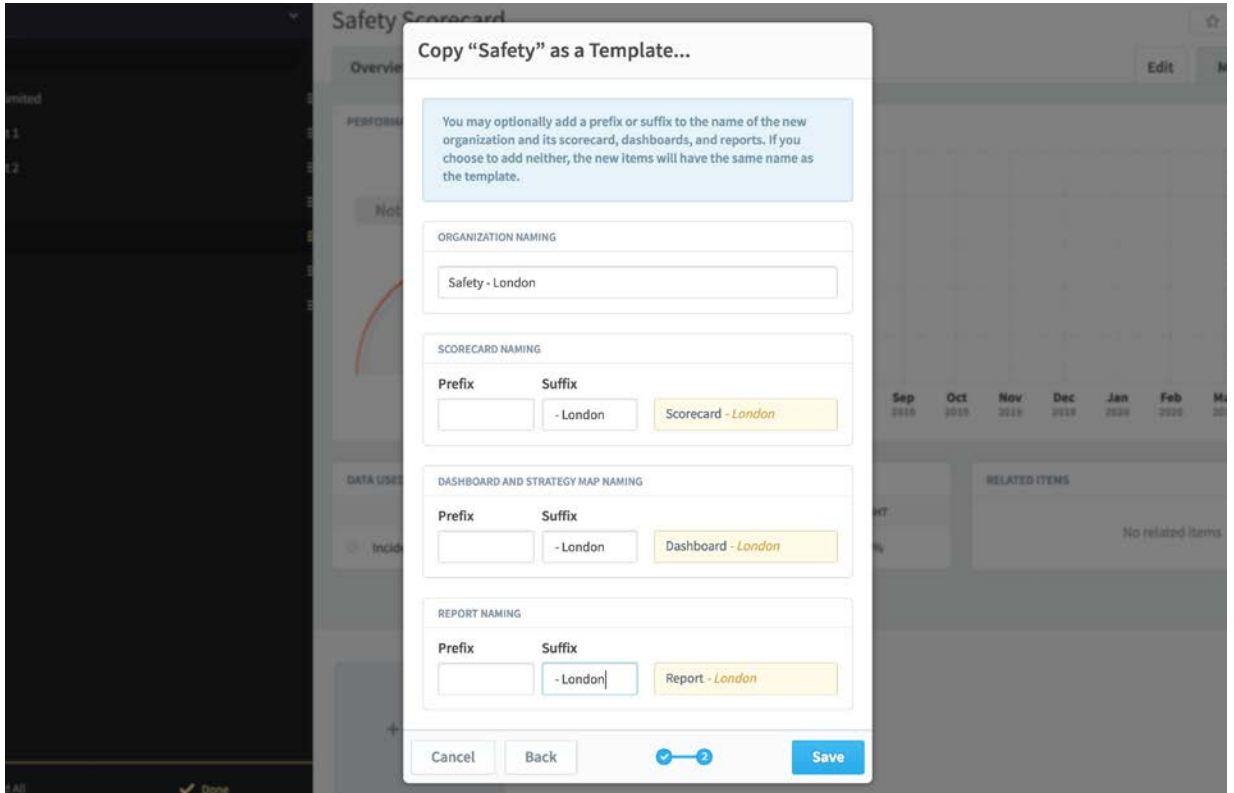
In the example shown on the next page you will see that we have created a new sub-organizational object called **Safety - London** and we have added the suffix ' - **London**' to the Scorecards, Dashboards and Reports.

It is good practice to add a suffix or prefix as this helps considerably at later stages when looking at measures that have the same name.

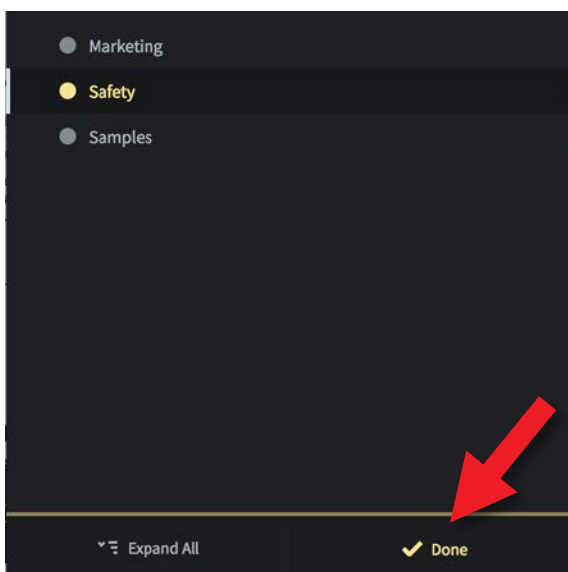


Cascading Exact Match - 4

Example with a 'suffix' added to a cascaded scorecard:



Click Save to save the cascaded scorecard.



Click **Done** at the bottom of the screen.

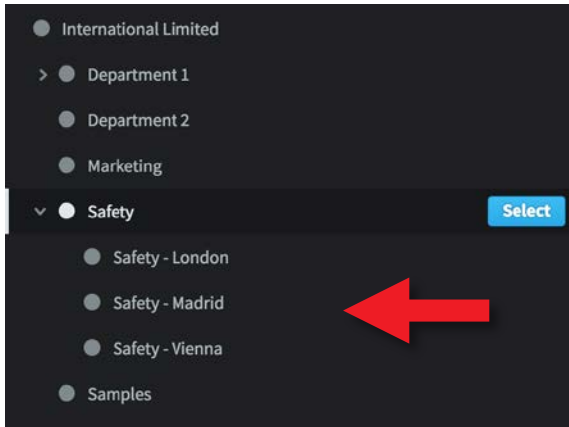
You may have to refresh the browser screen at this point to see the newly added cascaded scorecard.

In our example, we have gone on to add two more 'copied' scorecards for the regions of Madrid and Vienna.

Just repeat the process above for as many cascaded scorecards that you require.

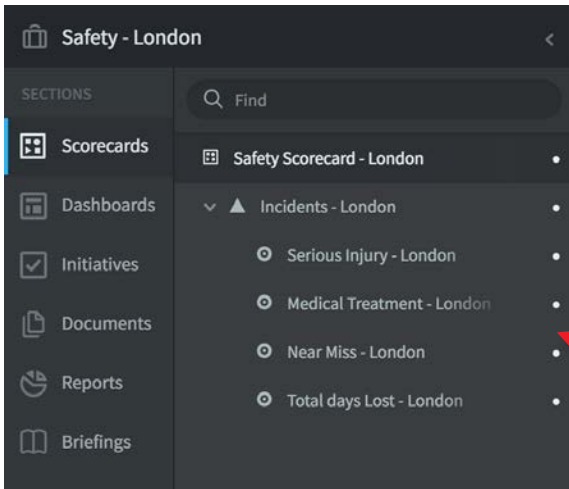


Cascading Exact Match - 5



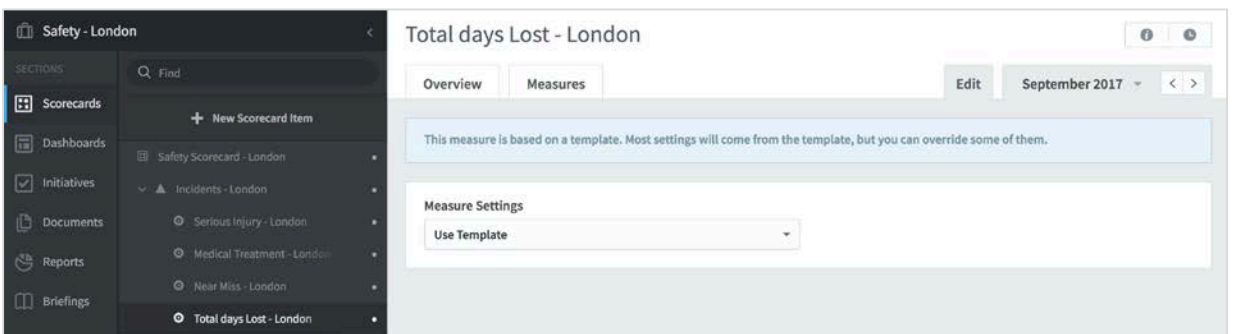
As can be seen in our example, the three new objects have been created.

Select one of them and look at the scorecard.



We have selected the London scorecard. If you have completed the process correctly, you will see that the suffix has been appended to not only the scorecard, but the perspective and each of the measures.

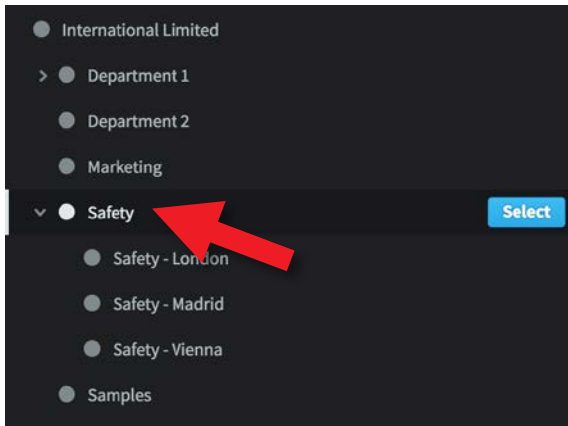
From this point onward, any changes to the scorecard must be made in the **Master**. These will be reflected in the lower-level scorecards. If you attempt to change an object in a lower-level scorecard you will receive the following message:





Cascading Exact Match - 6

To enable **automated roll-up** you need to go back to the master scorecard.



Click on the **Briefcase** icon and select the master scorecard organisation. In our example we have selected **Safety**.

Go to the scorecard view and select the first KPI/Measure. Depending on the KPI/Measure Data Type and exactly what you are trying to achieve, the next actions can be varied but will follow a similar process.

We will provide two examples:

1. Actual Values and Thresholds rolled up from lower levels, for example, Number of Serious Injuries, where the targets are set locally.
2. Actual Values as a calculation and Thresholds set at the master level. For example a Safety Incident Ratio (a percentage).



Cascading Exact Match - 7

1. Actual Values and Thresholds rolled up from lower level

Go to the master Scorecard and click on the KPI/Measure. In this example we are using Serious Injuries. Click on Edit at the top right of the screen.

In the **Series** box under Actual Value, Red Flag, and Goal, select **+ Rollup** from each drop-down box.

Click **Save**.

The application will now expect the Actual Values, Red Flags and Goals to be set at the lower levels in our example in Safety-London, Safety-Madrid and Safety-Vienna.



Cascading Exact Match - 8

Go to the lower level organisation and scorecard. In our example we will start with Safety-London (the same steps will need to be taken at all lower levels). Select a scorecard KPI/Measure and click on the **Edit** tab. The following message will appear:

Overview Measures Edit May 2018 < >

This measure is based on a template. Most settings will come from the template, but you can override some of them.

Measure Settings

Use Template Use Template ✓

Override Template

Advanced Options

Add Owner...

Click on the **Measure Settings** drop-down and select **Override Template**. The Series box will appear allowing you to enter local Thresholds. In our example we have added a Red Flag value of 5 and a Goal of 3:

Serious Injuries - London ☆ ⓘ ⌚

Overview Measures Edit May 2018 < >

This measure is based on a template. Most settings will come from the template, but you can override some of them.

Measure Settings

Override Template Advanced Options

MEASURE DETAILS

Manual Aggregation Type

+ Sum

SERIES

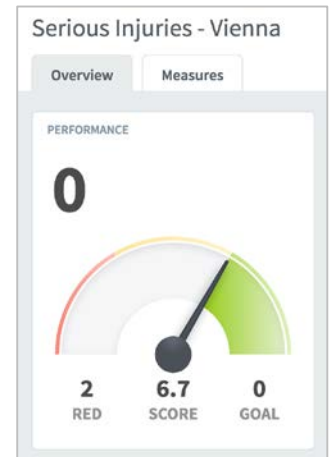
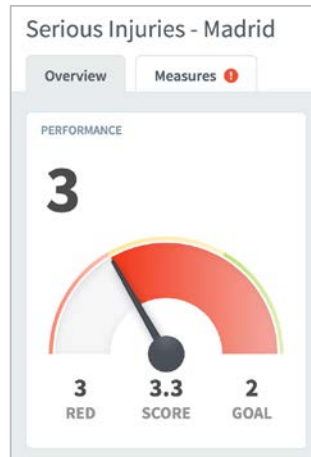
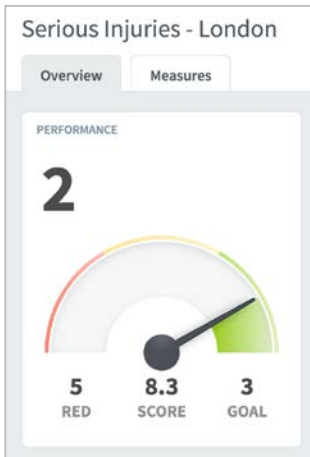
Actual Value	Red Flag	Goal
+ Rollup	+ Rollup	+ Rollup
Treat missing values as N/A	Treat missing values as N/A	Treat missing values as N/A
	5	3

Click **Save**.

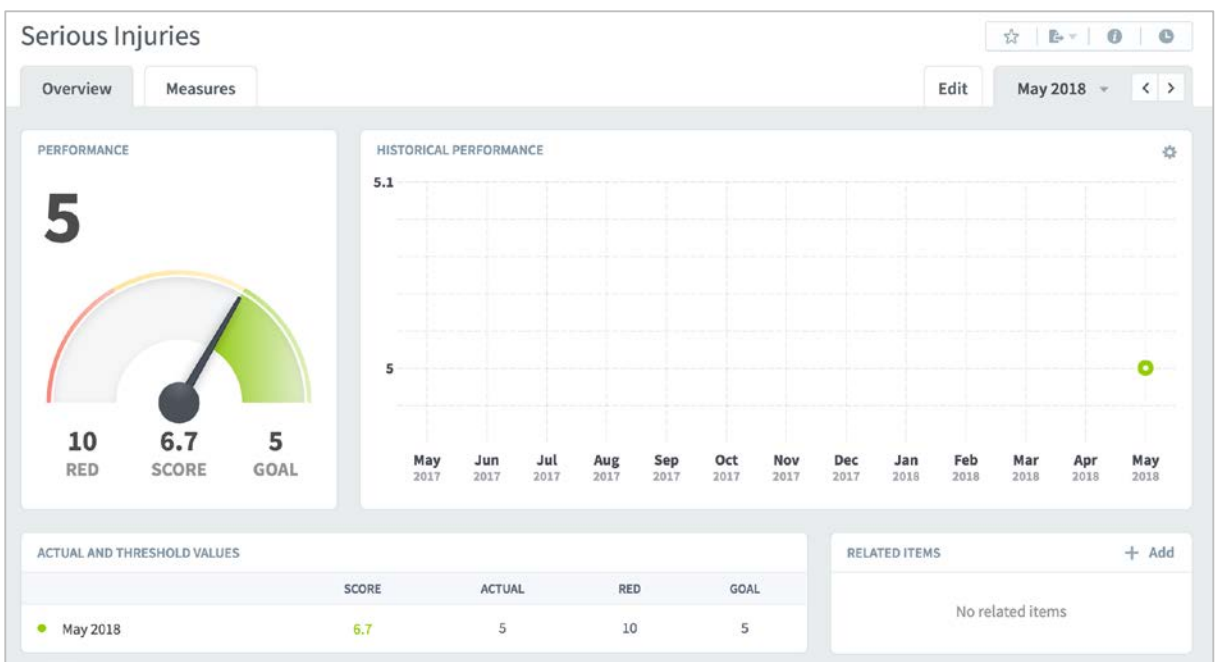


Cascading Exact Match - 9

Looking at each of the lower level actual values and threshold values, we can see that they vary:



Moving to the master scorecard, we can see that the actual values and threshold values have all been rolled up automatically:





Cascading Exact Match - 10

While at the master scorecard level, click on the **i** button (top-right) to display the information about the KPI/Measure:

Overview Measures Edit May 2018

PERFORMANCE: 5

HISTORICAL PERFORMANCE: 5.1

The following pop-out will appear providing information about the lower level scorecards and the calculations used in the roll up:

Measure Info

BASIC INFO

Name: Serious Injuries

DETAILS

ID	Type	Weight	Scoring Type	Calendar	Data Type	Manual Aggregation Type	Rollup Aggregation Type
669	Measure	20%	Goal/Red Flag	Monthly	Standard	Sum	Sum

SERIES

Actual Value	Red Flag	Goal
Update Type: Rollup Treat missing values as N/A sum(M(675),M(681),M(687))	Update Type: Rollup Treat missing values as N/A sum(T(675,Red Flag),T(681,Red Flag),T(687,Red Flag))	Update Type: Rollup Treat missing values as N/A sum(T(675,Goal),T(681,Goal),T(687,Goal))

COPIES

NAME	ORGANIZATION
Serious Injuries - London	Safety - London
Serious Injuries - Madrid	Safety - Madrid
Serious Injuries - Vienna	Safety - Vienna

Close



Cascading Exact Match - 11

2. Actual Values as a calculation and Thresholds set at the master level.

Go to the Master Scorecard and click on the KPI/Measure. In this example we are using **Safety Incident Ratio**. Click on **Edit** at the top right of the screen.

The KPI/Measure is a percentage so we do not want to roll up all of the percentages from the lower levels. The KPI/Measure Actual Value is calculated so needs to be calculated at all levels.

Safety Incident Ratio

Overview Measures Edit May 2018

Name: Safety Incident Ratio Type: Measure

Description: Weight: 20%

Advanced Options

MEASURE DETAILS

Scoring Type: Goal/Red Flag Calendar: Monthly Data Type: % Percentage

Manual Aggregation Type: Average Calculated Aggregation Type: Use Equation Decimal Precision: Default

SERIES

Actual Value: Calculated Red Flag: Manual Goal: Manual

Treat missing values as N/A: 10% Goal: 8%

M(669)/M(695)

The calculation for the Actual Value is set in the Series box under Actual Value. To ensure this is calculated correctly across all calendars, set the **Calculated Aggregation Type** to **Use Equation**. The Red Flag and Goal parameters are set in the master and will automatically cascade to the lower levels.

No further changes are required at the lower levels other than to add the Actual Values.