

COURSE OVERVIEW LS0340
Certificate in Strategy Management and the Balance Scorecard

Course Title

Certificate in Strategy Management and the Balance Scorecard

Course Date/Venue

October 04-08, 2026/TBA Meeting Room,
Elite Byblos Hotel Al Barsha, Sheikh Zayed
Road, Dubai, UAE

Course Reference

LS0340

Course Duration/Credits

Five days/3.0 CEUs/30 PDHs



Course Description



This practical and highly-interactive course includes various practical sessions and exercises. Theory learnt will be applied using our software tools.

This course provides participants with a practical understanding of strategic management and the Balanced Scorecard (BSC) as an integrated framework for translating strategy into measurable organizational results. Participants will learn how to analyze their strategic environment, formulate effective strategies, develop strategic objectives and measures, construct strategy maps and Balanced Scorecards, establish meaningful KPIs and targets, and create a disciplined approach to strategy execution and performance review.



Further, the course will also discuss the strategic management, vision, mission, values and strategic direction and external business environment; the internal strategic analysis, SWOT and TOWS analysis and stakeholder and strategic issue analysis; the strategic analysis into strategic choices, alternative strategic directions, establishing criteria for evaluating strategic options and selecting strategies based on feasibility, suitability, and organizational capability; the competitive and corporate strategy and developing strategic themes, priorities and SMART strategic objectives; and the strategy prioritization and resource allocation.



During this interactive course, participants will learn the strategic initiatives, action planning, balanced scorecard and four balanced scorecard perspectives; translating strategy into strategic objectives and developing strategy map; the strategic measures and KPIs, targets and strategic initiatives and effective key performance indicators; the leading and lagging indicators, benchmarking, performance reporting and strategic dashboards; the strategic performance review meetings, strategy execution and implementation, strategic governance and accountability; the strategy, budget and resources, organizational alignment and strategy communication; and the strategic risk and change, strategy evaluation and continuous improvement.

Course Objectives/Outcomes & Benefits for the Participants

Upon the successful completion of this course, each participant will be able to:-

- Apply and gain an in-depth knowledge on strategy management and the balance scorecard
- Discuss the strategic management, vision, mission, values and strategic direction and external business environment
- Carryout internal strategic analysis, SWOT and TOWS analysis and stakeholder and strategic issue analysis
- Convert strategic analysis into strategic choices, identify alternative strategic directions, establish criteria for evaluating strategic options and select strategies based on feasibility, suitability, and organizational capability
- Employ competitive and corporate strategy, developing strategic themes and priorities, developing SMART strategic objectives and strategy prioritization and resource allocation
- Implement strategic initiatives and action planning and recognize balanced scorecard and the four balanced scorecard perspectives
- Translate strategy into strategic objectives and develop a strategy map, strategic measures and KPIs
- Set targets and strategic initiatives and design effective key performance indicators
- Identify leading and lagging indicators and apply target setting and benchmarking
- Cascade balanced scorecard and carryout performance reporting and strategic dashboards
- Employ strategic performance review meetings, strategy execution and implementation as well as strategic governance and accountability
- Align strategy, budget and resources and apply organizational alignment and strategy communication
- Manage strategic risk and change and implement strategy evaluation and continuous improvement

Exclusive Smart Training Kit - H-STK®



*Participants of this course will receive the exclusive “Haward Smart Training Kit” (H-STK®). The H-STK® consists of a comprehensive set of technical content which includes **electronic version** of the course materials conveniently saved in a **Tablet PC**.*

Who Should Attend

This course provides an overview of all significant aspects and considerations of strategy management and the balance scorecard for project directors and project engineers, risk management and corporate planning professionals, team leaders, supervisors and department heads and other technical staff.

Training Methodology

This interactive training course includes the following training methodologies as a percentage of the total tuition hours:-

30% Lectures

70% Practical Exercises, Case Studies, Engaging Slides/Games, Customized Videos, Site Visits, Simulations, Role Play, Group Skill Sessions, Outdoor & Indoor Activities, Ice Breaking Activities, Group Activities and E-learning associated with the course topic is preferred

In an unlikely event, the course instructor may modify the above training methodology before or during the course for technical reasons.

Learning Design & Customization

This course can be customized to the exact requirements of clients. Haward Technology is so proud of our huge capabilities in tailoring our courses to the training needs of our valued clients.

Accommodation

Accommodation is not included in the course fees. However, any accommodation required can be arranged at the time of booking.

Course Fee

US\$ 5,500 per Delegate + **VAT**. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

Course Certificate(s)

- (1) Internationally recognized Competency Certificates will be issued to participants who completed a minimum of 80% of the total tuition hours and successfully passed the exam at the end of the course. Certificates are valid for 5 years.

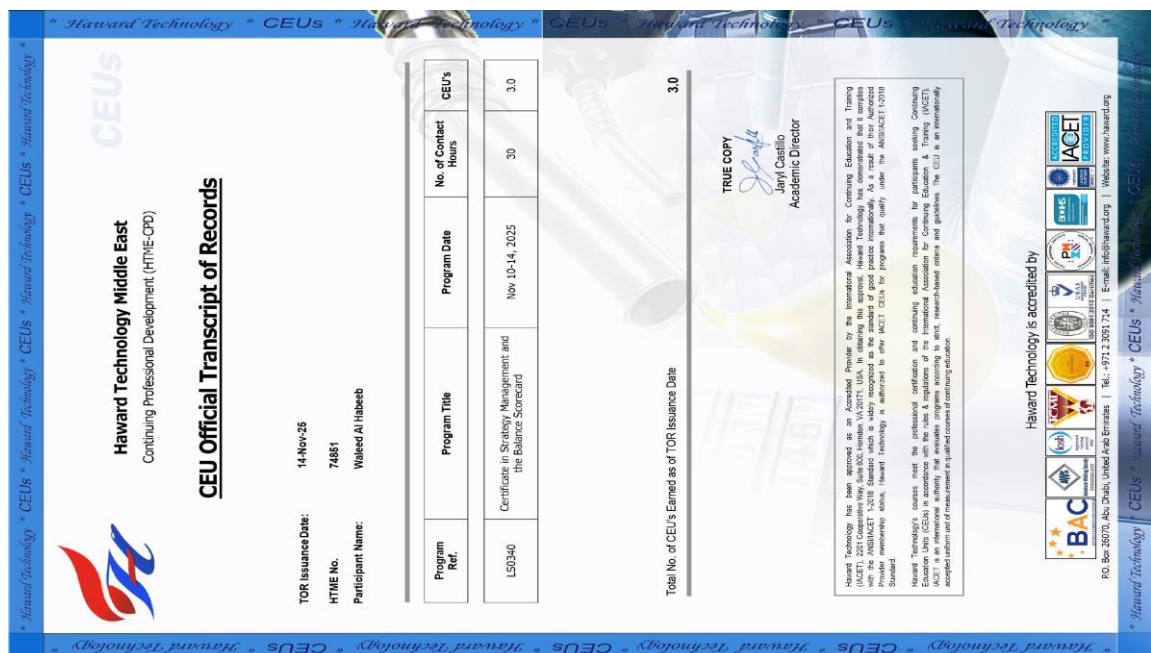
Recertification is FOC for a Lifetime.

Sample of Certificates

The following are samples of the certificates that will be awarded to course participants:-



- (2) Official Transcript of Records will be provided to the successful delegates with the equivalent number of ANSI/IACET accredited Continuing Education Units (CEUs) earned during the course.



Certificate Accreditations

Haward's certificates are accredited by the following international accreditation organizations:

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British Accreditation Council (BAC)

Haward Technology is accredited by the **British Accreditation Council** for **Independent Further and Higher Education** as an **International Centre**. Haward's certificates are internationally recognized and accredited by the British Accreditation Council (BAC). BAC is the British accrediting body responsible for setting standards within independent further and higher education sector in the UK and overseas. As a BAC-accredited international centre, Haward Technology meets all of the international higher education criteria and standards set by BAC.

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The International Accreditors for Continuing Education and Training (IACET - USA)

Haward Technology is an Authorized Training Provider by the International Accreditors for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this authority, Haward Technology has demonstrated that it complies with the **ANSI/IACET 2018-1 Standard** which is widely recognized as the standard of good practice internationally. As a result of our Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for its programs that qualify under the **ANSI/IACET 2018-1 Standard**.

Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking **Continuing Education Units** (CEUs) in accordance with the rules & regulations of the International Accreditors for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology Middle East will award **3.0 CEUs** (Continuing Education Units) or **30 PDHs** (Professional Development Hours) for participants who completed the total tuition hours of this program. One CEU is equivalent to ten Professional Development Hours (PDHs) or ten contact hours of the participation in and completion of Haward Technology programs. A permanent record of a participant's involvement and awarding of CEU will be maintained by Haward Technology. Haward Technology will provide a copy of the participant's CEU and PDH Transcript of Records upon request.



Course Instructor(s)

This course will be conducted by the following instructor(s). However, we have the right to change the course instructor(s) prior to the course date and inform participants accordingly:



Dr. Chris Le Roux, PhD, M.Com, B.Com (Hons), PMP, Industrial Psychologist (HPCSA Reg.), PMI-ATP Instructor PMI-PMP, PMI-CAPM Instructor is a **Senior Management Consultant & Project Management Professional** with over **30 years** of combined engineering, managerial, consulting, counseling, and international training experience across Africa, the Middle East, the Gulf region, and Europe. His expertise lies extensively in the areas of **Project & Contracts Management Skills, Project & Construction Management, Project Planning, Scheduling, Cost Control, and Earned Value Management, Project Management (Predictive, Agile, and Hybrid), PMO setup and governance, Project Delivery & Governance Framework, Project Management Practices, Project Management Disciplines, Risk and Contract Management** (including contract development, tendering, dispute resolution, and claims), **Risk Identification Tools & Techniques, Project Life Cycle, Stakeholder Management and Communication, Performance Coaching and Difficult Conversations, Project Management Processes, Project Integration Management, Project Management Plan, Project Work Monitoring & Control, Project Scope Management, Project Time Management, Project Cost Management, Project Quality Management, Quality Assurance, Project Human Resource Management, Project Communications Management, Leadership Orientation Programme, Leadership & Team Development, Psychology of Leadership, Interpersonal Skills & Teamwork, Coaching & Mentoring, Innovation & Creativity, Leadership & Performance Management, Leadership Communication, Leadership Excellence for Senior Management, Supervisory, Leadership, Coaching & Mentoring, Leadership, Communications & Interpersonal Skills, Administrative Leadership Skills, Office Management & Administration Skills, Contract Management, Tender Development, Contract Standards & Laws, Dispute Resolution & Risk Identification, Myers-Briggs Type Indicator (MBTI), Organization Development Consultation, Advanced Debriefing of Emotional Trauma, Interpersonal Motivation, Model Based Interviewing, Coaching & Motivation, Creative Thinking & Problem-Solving Techniques, Emotional Intelligence and Resilience, Presentation Skills, Communication & Interpersonal Skills, Effective Communication & Influencing Skills, Effective Business Writing Skills, Writing Business Documents, Business Writing (Memo & Report Writing), Controlling Your Time & Managing Stress, Crisis Management and Decision-Making Under Pressure; and Customer Experience, Service Excellence, and Negotiation Skills, Strategic Human Resources Management, Change Management and Organizational Development, Human Capital and Talent Management (succession planning, performance management, competency frameworks, and behavioral assessment), Strategic Planning and Execution, Project Risk Analysis & Risk Management, Global Diverse & Virtual Teams Operation, Exceeding Customer Expectations, Corporate Governance Best Practice, Business Performance Management & Improvement, Building Environment of Trust & Commitment, Win-Win Negotiation Strategies, Quality Improvement & Resource Optimization, Neuro Linguistic Programming (NLP), Personal Resilience Developing, Effective Role Modelling & Development, Managing Dynamic Work Environments, Organizational Development, Career Management, Situation & Behaviour Analysis, Interpersonal Motivation Skills, Inventory Management and Financial Administration. Further, he has also led or supported Training Needs Analyses (TNA), large-scale capability development programs, and leadership pipelines for technical, operational, and graduate employees.**

During his career life, Dr. Le Roux has gained his academic and field experience through his various significant positions and dedication as the **Training & Development General Manager, Departmental Head (Electrical), Project Manager, Account Manager, Commercial Sales Manager, Manager, Sales Engineer, Project Specialist, Psychology Practitioner, Senior Consultant/Trainer, Business Consultant, Assistant Chief Education Specialist, ASI Coordinator, Part-time Lecturer/Trainer, PMP & Scrum Trainer, Assessor & Moderator, Team Leader, Departmental Head, Senior HR Consultant, Senior Lecturer / Academic Supervisor, Technical Instructor/Qualifying Technician, Apprentice Electrician: Signals, International Trainer, and Part-Time Electrician** from various companies and universities such as the South African Railway (SAR), Department of Education & Culture, **ESKOM**, Logistic Technologies (Pty. Ltd), Human Development: Consulting Psychologies (HDGP) & IFS, Mincon, Eagle Support Africa, Sprout Consulting, UKZN, Grey Campus, Classis Seminars and CBM Training.

Dr. Le Roux has a **PhD in Leadership in Performance & Change**, a **Master's degree in Human Resource Management**, a **Bachelor's degree (with Honours) in Industrial Psychology**, a National Higher Diploma and a National Technical Diploma in **Qualified Electrical & Mechanical Engineering** from **Germiston College, South Africa**. Further, he is a **Certified Project Management Professional (PMP)**, a **PMI Authorized Training Partner (ATP) Instructor**, a **Certified Associate in Project Management (PMI-CAPM)**, a **Certified Scrum Master Trainer** by the VMedu, a **Certified Instructor/Trainer** and a **Certified Internal Verifier/Assessor/Trainer** by the **Institute of Leadership & Management (ILM)**. Moreover, he is a **Registered Industrial Psychologist** by the Health Professions Council of South Africa (HPCSA), a **Registered Educator** by the South African Council for Educators (SACE) and a **Registered Facilitator, Assessor & Moderator** with Education, Training and Development Practices (ETDP) SETA. He has further delivered numerous trainings, courses, seminars, conferences and workshops globally.

Course Program

The following program is planned for this course. However, the course instructor(s) may modify this program before or during the workshop for technical reasons with no prior notice to participants. Nevertheless, the course objectives will always be met:

Day 1: Sunday, 04th of October 2026

0730 – 0800	Registration & Coffee
0800 – 0815	Welcome & Introduction
0815 – 0830	PRE-TEST
0830 – 0930	Understanding Strategic Management Definition, Purpose and Scope of Strategic Management • Differences Between Strategic, Tactical, and Operational Management • The Strategic Management Cycle: Formulation, Execution, Evaluation and Adaptation • Roles of Executives, Managers and Employees in the Strategy Process
0930 – 0945	Break
0945 – 1030	Vision, Mission, Values & Strategic Direction Developing an Effective Organizational Vision • Defining a Clear and Meaningful Mission • Establishing Organizational Values and Guiding Principles • Aligning Vision, Mission, Values and Long-Term Strategic Direction
1030 – 1130	Understanding the External Business Environment Conducting Political, Economic, Social, Technological, Environmental and Legal (PESTEL) Analysis • Identifying External Trends, Uncertainties, Opportunities and Threats • Understanding Industry Dynamics and Competitive Forces • Evaluating the Impact of External Changes on Organizational Strategy
1130 – 1215	Internal Strategic Analysis Assessing Organizational Resources and Capabilities • Identifying Organizational Strengths and Weaknesses • Understanding Core Competencies and Sources of Competitive Advantage • Evaluating Organizational Readiness and Strategic Capability
1215 – 1230	Break
1230 – 1330	SWOT & TOWS Analysis Developing an Evidence-Based SWOT Analysis • Distinguishing Symptoms from Genuine Strategic Issues • Converting SWOT Findings into Strategic Alternatives Using TOWS • Prioritizing Strategic Issues Requiring Management Attention
1330 – 1400	Stakeholder & Strategic Issue Analysis Identifying Internal and External Stakeholders • Assessing Stakeholder Influence, Interests and Expectations • Identifying Critical Strategic Challenges and Opportunities • Prioritizing Strategic Issues According to Impact and Urgency
1400 – 1420	Practical Application Conduct a Strategic Situation Analysis Using PESTEL, Internal Analysis, SWOT/TOWS and Stakeholder Analysis and Identify the Organization's Most Important Strategic Issues
1420 – 1430	Recap Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day One



Day 2: Monday, 05th of October 2026

0730 – 0830	From Strategic Analysis to Strategy Formulation Converting Strategic Analysis into Strategic Choices • Identifying Alternative Strategic Directions • Establishing Criteria for Evaluating Strategic Options • Selecting Strategies Based on Feasibility, Suitability and Organizational Capability
0830 – 0930	Competitive & Corporate Strategy Understanding Cost Leadership, Differentiation, and Focus Strategies • Identifying Sustainable Sources of Competitive Advantage • Understanding Growth, Consolidation, Diversification and Partnership Strategies • Aligning Corporate, Business-Unit, and Functional Strategies
0930 – 0945	Break
0945 – 1100	Developing Strategic Themes & Priorities Defining Strategic Themes from Organizational Priorities • Grouping Related Strategic Objectives into Coherent Themes • Connecting Strategic Themes with Organizational Vision • Balancing Short-Term Priorities with Long-Term Organizational Development
1100 – 1215	Developing SMART Strategic Objectives Translating Strategic Priorities into Specific Objectives • Applying SMART Criteria to Strategic Objectives • Distinguishing Strategic Objectives from Operational Activities • Establishing Clear Strategic Outcomes and Expected Results
1215 – 1230	Break
1230 – 1330	Strategy Prioritization & Resource Allocation Evaluating Competing Strategic Priorities • Applying Impact-Versus-Effort and Value-Versus-Risk Assessments • Linking Strategic Priorities with Resource Allocation • Managing Strategic Trade-Offs and Competing Organizational Demands
1330 – 1400	Strategic Initiatives & Action Planning Translating Objectives into Strategic Initiatives • Defining Initiative Scope, Deliverables, Ownership, and Timelines • Establishing Resource and Budget Requirements • Creating Accountability Mechanisms for Strategic Initiatives
1400 – 1420	Practical Application Develop Strategic Themes, Strategic Objectives, Priorities and Initiatives for a Case Organization and Assess their Alignment with Its Vision and Mission
1420 – 1430	Recap Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day Two

Day 3: Tuesday, 06th of October 2026

0730 – 0830	Basics of Balanced Scorecard Origins and Evolution of the Balanced Scorecard • Moving from Performance Measurement to Strategic Management • Benefits and Limitations of Balanced Scorecard Implementation • Conditions Required for Successful BSC Adoption
0830 – 0930	The Four Balanced Scorecard Perspectives Financial Perspective: Financial Outcomes and Stakeholder Value • Customer Perspective: Customer Value Propositions and Market Outcomes • Internal Process Perspective: Critical Processes for Delivering Strategy • Learning and Growth Perspective: People, Technology, Culture and Organizational Capabilities



0930 – 0945	Break
0945 – 1100	Translating Strategy into Strategic Objectives Converting Strategic Priorities into BSC Objectives • Writing Concise and Outcome-Oriented Strategic Objectives • Allocating Objectives Across Balanced Scorecard Perspectives • Testing Strategic Objectives for Relevance and Strategic Importance
1100 – 1215	Developing a Strategy Map Understanding the Purpose and Structure of Strategy Maps • Positioning Objectives Within the Four Perspectives • Establishing Cause-and-Effect Relationships Between Objectives • Creating a Coherent Strategic Story from Capabilities to Organizational Outcomes
1215 – 1230	Break
1230 – 1330	Developing Strategic Measures & KPIs Distinguishing Objectives, Measures, KPIs, Targets and Initiatives • Selecting Measures that Accurately Represent Strategic Performance • Understanding Leading and Lagging Performance Indicators • Balancing Financial and Non-Financial Measures
1330 – 1400	Setting Targets & Strategic Initiatives Establishing Baselines and Performance Benchmarks • Developing Realistic but Challenging Performance Targets • Identifying Initiatives Required to Close Performance Gaps • Connecting Objectives, KPIs, Targets and Initiatives within the BSC
1400 – 1420	Practical Application Construct a Strategy Map Showing Cause-and-Effect Relationships and Develop an Initial Balanced Scorecard Containing Objectives, Measures, Targets and Initiatives
1420 – 1430	Recap Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day Three

Day 4: Wednesday, 07th of October 2026

0730 – 0830	Designing Effective Key Performance Indicators Characteristics of Strategically Relevant KPIs • Developing Clear KPI Definitions and Calculation Formulas • Identifying Reliable Data Sources and Measurement Frequency • Assigning KPI Ownership and Accountability
0830 – 0930	Leading & Lagging Indicators Understanding the Difference Between Drivers and Outcomes • Identifying Leading Indicators of Future Performance • Selecting Lagging Indicators to Measure Achieved Results • Creating an Appropriate Balance Between Leading and Lagging Measures
0930 – 0945	Break
0945 – 1100	Target Setting & Benchmarking Establishing Baseline Performance Levels • Using Internal and External Benchmarking • Developing Threshold, Target and Stretch Performance Levels • Avoiding Unrealistic Targets and Unintended Behavioral Consequences
1100 – 1215	Cascading the Balanced Scorecard Translating Corporate Strategy into Business-Unit Scorecards • Developing Departmental and Functional Scorecards • Aligning Team and Individual Objectives with Strategic Priorities • Maintaining Strategic Alignment Throughout the Organization



1215 – 1230	Break
1230 – 1330	Performance Reporting & Strategic Dashboards Designing Management-Friendly Performance Dashboards • Applying Appropriate Visualization Techniques to Strategic Data • Using Traffic-Light and Exception-Reporting Approaches • Communicating Performance Information for Effective Decision-Making
1330 – 1400	Strategic Performance Review Meetings Establishing an Effective Strategy Review Cycle • Distinguishing Strategic Reviews from Operational Reviews • Conducting Root-Cause Analysis for Performance Gaps • Converting Review Findings into Corrective Actions and Management Decisions
1400 – 1420	Practical Application Develop KPI Definition Sheets, Establish Performance Targets, Design a Strategic Dashboard and Simulate a Balanced Scorecard Performance Review Meeting
1420 – 1430	Recap Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day Four

Day 5: Thursday, 08th of October 2026

0730 – 0830	Strategy Execution & Implementation Understanding Common Causes of Strategy Execution Failure • Translating Strategy into Coordinated Organizational Action • Establishing Clear Accountability for Strategic Objectives • Connecting Strategic Plans with Operational Execution
0830 – 0930	Strategic Governance & Accountability Establishing Governance Structures for Strategy Execution • Defining Roles of Executives, Strategy Teams, and Objective Owners • Creating Accountability for KPIs and Strategic Initiatives • Establishing Escalation and Decision-Making Mechanisms
0930 – 0945	Break
0945 – 1100	Aligning Strategy, Budget & Resources Linking Strategic Priorities with Annual Budgeting • Allocating Resources According to Strategic Importance • Evaluating the Strategic Contribution of Projects and Initiatives • Managing Resource Conflicts and Changing Priorities
1100 – 1200	Organizational Alignment & Strategy Communication Communicating Strategy Clearly Throughout the Organization • Building Employee Understanding of Strategic Priorities • Connecting Individual Contributions with Organizational Objectives • Developing Strategic Awareness and Employee Engagement
1200 – 1230	Managing Strategic Risk & Change Identifying Risks Associated with Strategic Objectives • Integrating Strategic Risk Management with the Balanced Scorecard • Managing Organizational Resistance to Strategic Change • Building Adaptability and Resilience into Strategy Execution
1230 – 1245	Break



1245 – 1300	Strategy Evaluation & Continuous Improvement <i>Evaluating Whether Strategic Assumptions Remain Valid • Reviewing Objectives, KPIs, Targets, and Initiatives Periodically • Learning from Performance Results and Implementation Experience • Updating and Adapting Strategy in Response to Changing Conditions</i>
1300 - 1345	Practical Application/ Capstone <i>Integrate their Work from the Previous Four Days into a Complete Strategy Management Framework, including Strategic Themes, Objectives, a Strategy Map, Balanced Scorecard, KPIs, Targets, Strategic Initiatives, Ownership, and Governance Arrangements</i>
1300 – 1315	Course Conclusion <i>Using this Course Overview, the Instructor(s) will Brief Participants about the Course Topics that were Covered During the Course</i>
1315 – 1415	COMPETENCY EXAM
1415 – 1430	<i>Presentation of Course Certificates</i>
1430	<i>Lunch & End of Course</i>

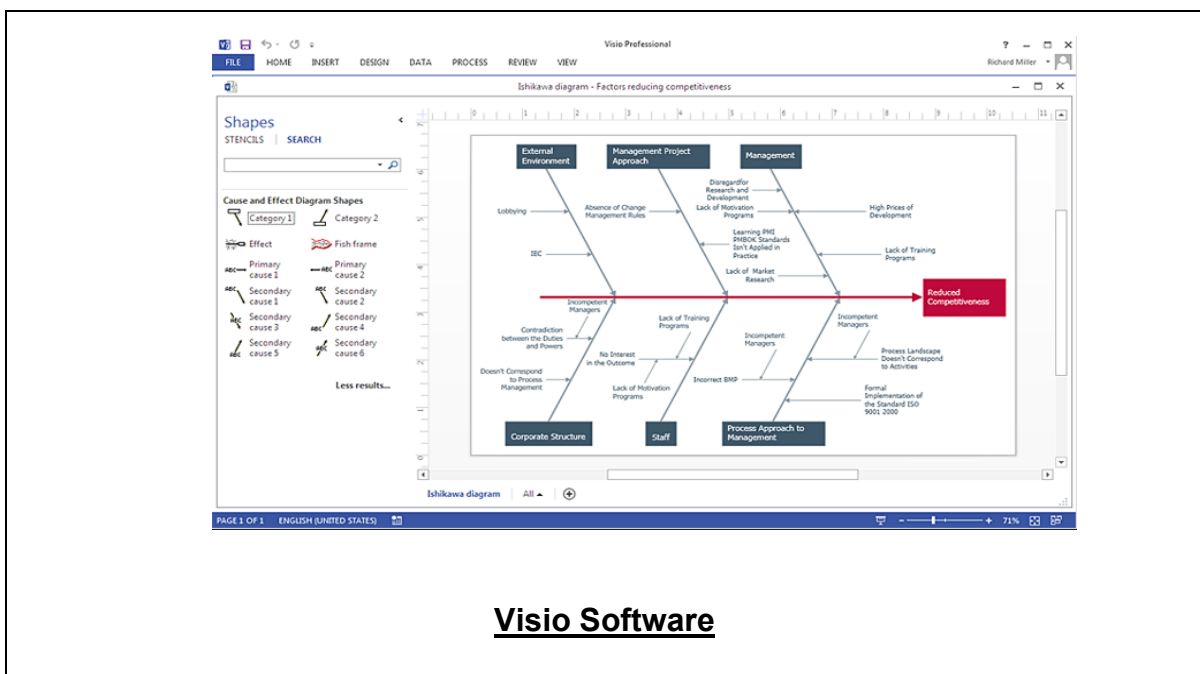
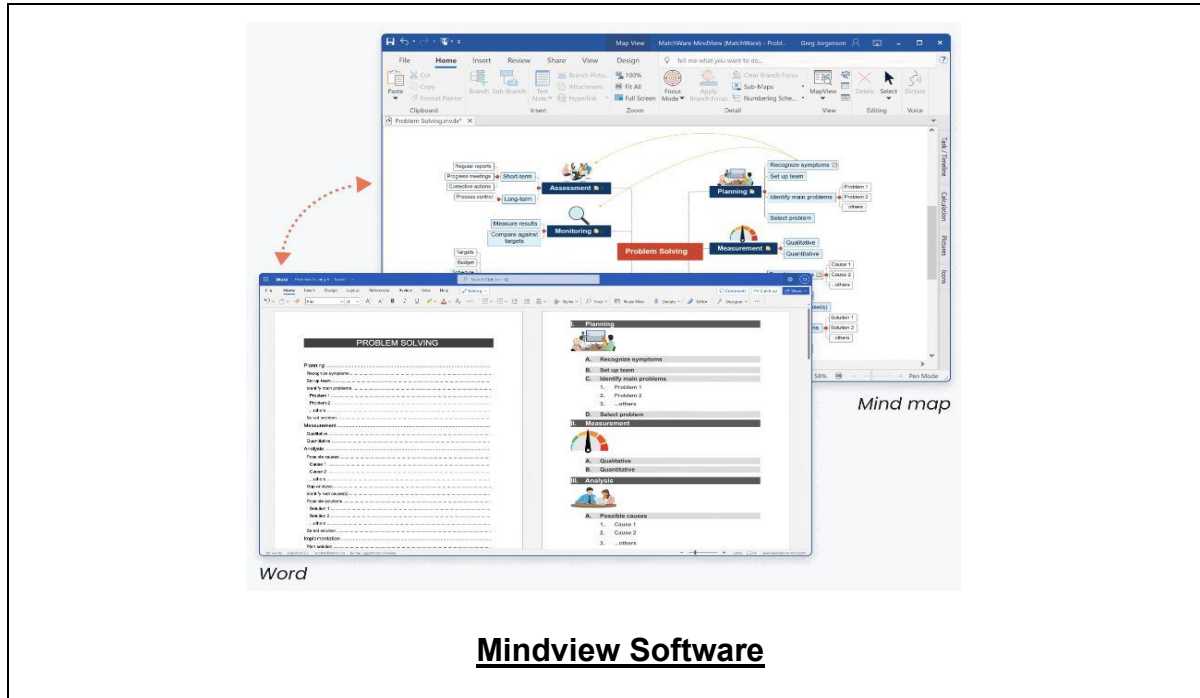
Expected Learning Outcomes

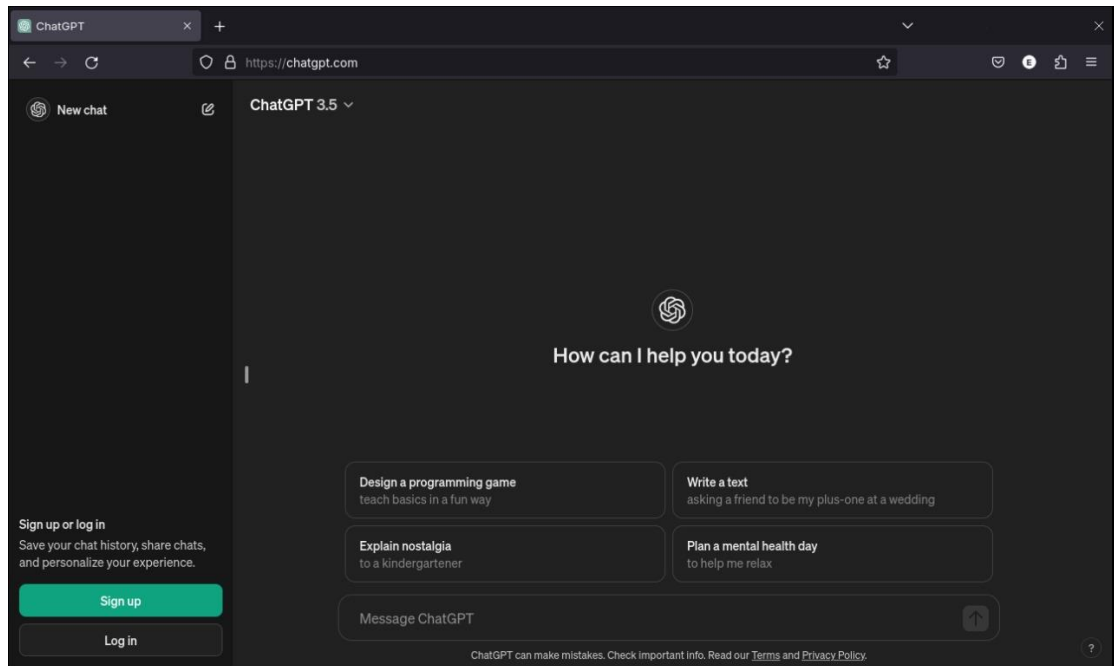
By the end of the course, participants shall be able to:

- Apply a structured strategic management and planning process
- Analyze internal capabilities and external environmental factors
- Formulate strategic priorities, themes, objectives, and initiatives
- Explain and apply the Balanced Scorecard methodology
- Develop a strategy map based on cause-and-effect relationships
- Design strategically relevant KPIs and performance measures
- Establish meaningful performance baselines and targets
- Cascade organizational strategy to departments and teams
- Design strategic performance dashboards and reporting systems
- Conduct effective strategic performance review meetings
- Align resources, budgets, initiatives, and accountability with strategy
- Establish a sustainable process for strategy execution, evaluation, and continuous improvement

Software Tools Demonstration

Practical sessions will be demonstrated through software tools during the course for delegates. Delegates will have an opportunity to understand the exercises using the “Mindview Software”, “Visio Software”, “ChatGPT” and “PMI Infinity”.





ChatGPT Software



PMI Infinity

Course Coordinator

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