Ask yourself, if I examined the goals of each individual in my firm, would I have specific outcomes that I could plug into each of the categories below? There should be an equal number in each of the 4 categories. All of them should be considered equally important by the leaders of the firm. I encourage you to read the articles on Balanced Scorecard and educate yourselves on why the theory is so important to the firm.

*Introduction to Balanced Scorecard*: <https://boomer.box.com/s/anceevc4gh4mx3yg4mfj>

*Balanced Scorecard – Linking it to Compensation*: <https://boomer.box.com/s/fjbvbr4zsczxuw2zrd64>

|  |  |  |  |
| --- | --- | --- | --- |
| Employee Name: | | | |
| **Category** | **Objective** | **Score** | **Value** |
| Financial | 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
|  | 25% |  |
| Client Service | 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
|  | 25% |  |
| Processes | 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
|  | 25% |  |
| Learning/Training | 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
|  | 25% |  |