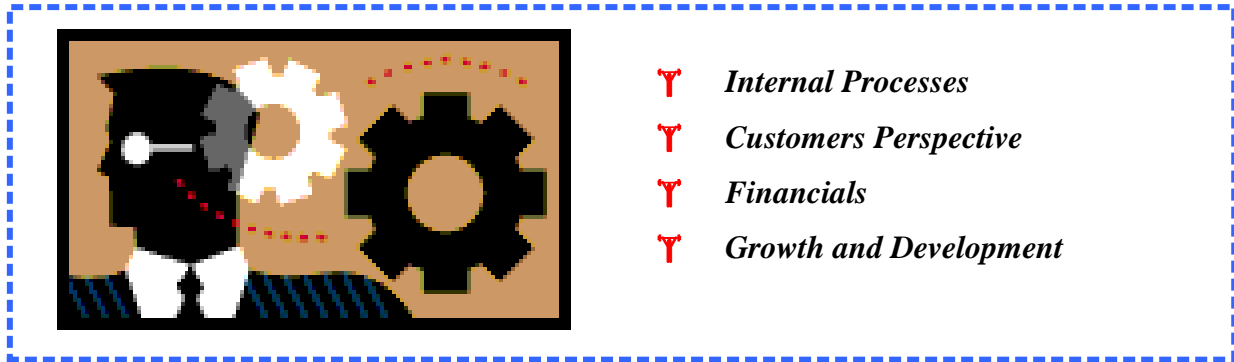


## Creating your PBSC (Personal Balanced Score Card)

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Any enterprise or human group is based on its individuals. Therefore, as individuals, it is important for us to conduct our “operational health check”, in both personal and professional fields, in order to create operationally productive groups. Starting with ourselves, family, friends, and in our professional responsibilities, we assure a balanced performance to our companies.

How to do it? Everyone’s lives and objectives are different. It is difficult to have a standardized formula for life balance. Nevertheless, there is a proven methodology for measuring and growing the operational health of an organization that I recommend to apply. It provides us with a method to plan how to balance all of the key elements in our life. The purpose is to improve our life quality, our health, and our productivity in day to day activities; this tool is the Balanced Score Card. In other words: We can create our own **PBSC (Personal Balanced Score Card)**.

### BSC (Balanced Score Card) Fundamentals:

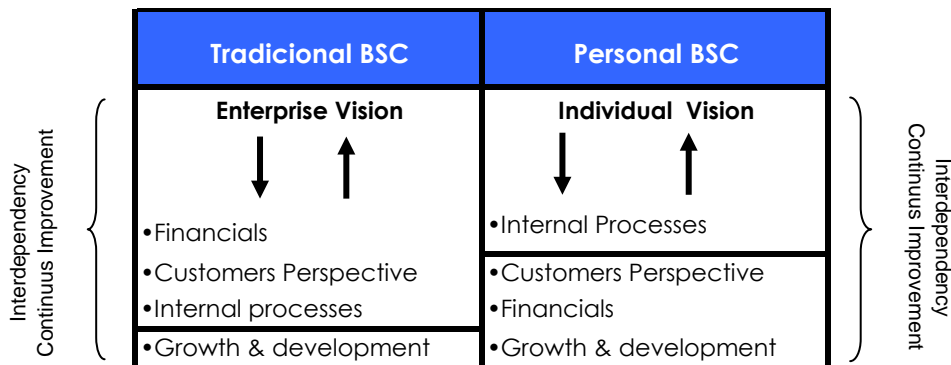
As a starting point, we should have in mind the fundamentals of the BSC Methodology:

1. BSC is a method that complements traditional indicators with financial and non-financial metrics, to measure the strategic results of an Organization.
2. Measurements are taken from four perspectives; the objectives of each one should be consistent with the others, and all should be aligned to the Enterprise/Company Vision. These four perspectives are: Financials, Customer Satisfaction, Internal Processes, and Growth and Development
3. The base of the BSC is a strategic mapping of the cause and effect governed by the relationship between these four perspectives.
4. The integral achievement of the objectives is to form a continuous improving and growing cycle. This is the basic pillar of the BSC methodology.

### PBSC (Personal Balanced Score Card) Customization:

1. Personal BSC is a method to complement traditional indicators with financial and non-financial ones to measure the individual’s life results in key areas.

2. Measurements are developed in the same four areas with objectives consistent and aligned with our own personal life vision and mission. I personally recommend defining our objectives in the following order:



3. The base of the Personal BSC is a strategic mapping of the cause and effect governed by the relationship between these four perspectives.

It is important to mention that, like the original model, all of the elements are connected, and the indicators and goals of everyone should match with the rest of the perspectives, objectives and goals. It needs to be consistent. In order to provide some ideas of how to build the elements for each perspective, a brief explanation of the perspectives and the goals that can be documented is provided below.

- ◆ First step is to define/clarify your integral personal vision/mission in life.
- ◆ Once you have it, you can build your personal balanced score card, taking into consideration the following elements:

Perspective	Definition
Internal Processes	To obtain any type of success, we must evaluate the efficiency of our internal process, which should be consistent with our life mission/ vision. This could be translated to physical, mental, or spiritual health, or energy and consistent motivation in personal and professional fields. The specific targets and goals would vary depending on each individual.
Customer Perspective	We are suppliers and customers of each of the people whom we interact with. Therefore, we should consider their perceptions of ourselves, their main interests, our interaction, and communication. It is important to evaluate our "customers" needs and perceptions. Our customers are: <ul style="list-style-type: none"> <li>• family,</li> <li>• friends,</li> <li>• business peers and partners,</li> <li>• All the people we need to deal with in our lives.</li> </ul>
Financials	This is a very important point. We must be able to support our other objectives by preparing and tracking a budget for all expenses and long term goals.

	There are many mechanisms we can use to plan and monitor our financial health.
<p style="text-align: center;">o e r s O Growth &amp; development n a l</p>	<p>Most of us have goals for our lives. More than buying a house, getting the best job, etc.; those are to reach our integral life mission / vision.</p> <p>We should have performance goals or personal KPI's (key performance indicators) for any of the roles we have in our lives.</p> <p>In other words, track the ones that will help us to move closer to reaching our objectives: our life vision / mission.</p>

4. The integral achievement of the objectives is part of a continuous improving and growing cycle. This is the basic pillar of the PBSC methodology.

**Quick reference to PBSC implementation:**

- ◆ The first step is to have a clear life vision and mission.
- ◆ Once established, we should start with our “internal processes”.
- ◆ There should be consistency between goals and indicators of the four perspectives.
- ◆ As a complementary tool, we can build your own life project Gantt Chart for a monthly, quarterly tracking and update.
- ◆ If possible, look for a coach/mentor on these topics.
- ◆ It is recommended to start with small goals. Little by little we can achieve great success.
- ◆ When planning our future and time management, we should accept only activities that can contribute to our PBSC successful performance.
- ◆ If we are part of an enterprise, we can look inside our company; it could be something that can contribute to us with activities to enrich your life balance.
- ◆ We should not forget the key elements: discipline and consistency.

	Objectives	Objectives	Objectives	Objectives
Internal processes	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3. ←
Customers perspective	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
Financials	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
Growth & development	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.

Proposal for First PBSC objectives draft

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