



## Higher Education Institution

### Business Need:

Balanced Scorecard Development & Strategic Planning Initialization

### Abstract:

Our client is the metropolitan campus of one of the nation's premier land grant higher education institutions. The school's Business, Education, Liberal Arts, and Sciences offer more than 90 areas of study, including programs designed to meet admission requirements of medical, law, and other professional schools.

# Case Study: Balanced Strategic Planning & Management

## Business Challenge & Client Vision

Responding to multiple demands from the Board of Regents, the State Legislature, and State Executive Leadership, our client was challenged to develop an effective and meaningful planning and measurement process without stifling its current operations or jeopardizing the future of the organization. Among its challenges, the institution was hindered by resource constraints, a multitude of oversight demands, a variety of regulatory process requirements, and a time frame that demanded adherence to an aggressive schedule. Oculus Consulting Group was asked to organize and architect a planning and performance management process that would help this client realize their vision of rapid, significant, and efficient development of a strategic plan that included performance metrics and goals that were measurable and achievable.

## How Oculus Consulting Helped

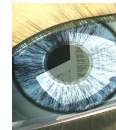
Our engagement team was composed of project and performance management experts with the multi-disciplinary background necessary to address higher education organization, administration, and reporting issues across the whole university. Initially, efforts focused at the Chancellor and Trustee level and expanded to include academic, student service, and business functions. Our experienced professionals executed our balanced scorecard methodology and established a strategic planning management team that oversaw strategy development and response management throughout the institution. Our experts facilitated a planning process that focused on critical success factors and established a project-oriented culture that resonated throughout the institution.

## The Measurable Reality

Oculus Consulting Group was instrumental in helping this client with the development and execution of its vision for accomplishing strategic planning and the development of a balanced scorecard measurement process, from identifying critical goals and establishing planning objectives, to monitoring performance measurement development and tactical accomplishment. Oculus Consulting Group's leadership worked with our client in redirecting efforts that were contrary to the original scope and vision of the leadership team.

At the start of the process, the planning team met the overall effort with much skepticism and reservation. However, as the institution's leadership began to execute compliance with the process, their acceptance and enthusiasm for the results our methodology would achieve increased dramatically. *"I firmly believed the effort would fail"*, said the Vice Chancellor for Financial and Administrative Affairs. *"Three years later, the process has been an overwhelming success. We have our 10-year accreditation and certification visits beginning later this year. As a result of the effort we put into this planning and measurement process, we are better prepared for these audits than we have ever been in the past. This process has returned more value than was ever imagined when we first initiated the effort."* In conjunction with the goals and objectives set forth, the institution has experienced double-digit enrollment growth, 82% of faculty now hold a doctorate or terminal degree, and its BSBA & MBA programs rank in the top 20% of business schools nationally.

Subsequent planning and measurement efforts have driven performance enhancement to the division level and the process will be rolled out for department implementation at the end of the next fiscal year.



## Oculus Consulting Group

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Another Example of Transforming an Organization's Vision into Measurable Reality!

To find out how Oculus Consulting can transform your vision into a measurable reality, please call 314.422.6365 or e-mail: [oculus.consulting.group.llc@gmail.com](mailto:oculus.consulting.group.llc@gmail.com).