STRATEGY MAP EXAMPLE

SOCIAL PERSPECTIVE

SOCIAL RESULTS

- Clients' businesses expand
- Clients income and assets increase
- Clients have better access to health care, education and other social services

FINANCIAL PERSPECTIVE

FINANCIAL RESULTS

- PAR reduced through better client identification and monitoring
- Outreach improved through better geographical and client targeting
- Efficiency improved through using SP data to enhance client identification, product design and service delivery
- Growth prospects enhanced through better relations with investors and partners
- Profitability improved by increasing client retention/reducing client drop-out

CUSTOMERS PERSPECTIVE

CUSTOMER VALUE PROPOSITION

- SP data are used for more accurate identification and monitoring of target clients.
- SP data are used to enhance existing products and develop new ones
- SP data are used to improve service delivery.

STAKEHOLDER VALUE PROPOSITION

- SP data are used to improve relationship with regulators
- SP data are used to improve relationship with investors
- SP data are used to improve relationship with partners and other stakeholders

INTERNAL PERSPECTIVE

OPERATIONS MANAGEMENT

- How will SP data be used for geographical and client targeting?
- Does MIS produce the right SP reports for operations?
- How will SP data be used to improve operational efficiency and ensure balanced delivery?
- Does board ensure ops reflect MFI's SP goals?

CUSTOMERS MANAGEMENT

- Is there a mechanism to collect and manage clients' feedback?
- Does SP MIS collect and feedback from clients (complaints, satisfaction, exit interviews) and produce appropriate reports?
- How will SP data be used to improve customer care, including develop appropriate/acceptable collection practices?

INNOVATION

- Does product development/ market research team understand why and how SP data will be used for product enhancement/ development?
- What is the process for incorporating SP data into market research design as well as product features and delivery to develop appropriate products for target clients?
- Does MIS produce the right SP reports for product dev?
- Does board ensure enhanced/new products reflect MFI's SP goals?

REGULATORY & SOCIAL

- How are SP data reported to investors and stakeholders and what SP data is reported?

LEARNING AND GROWTH PERSPECTIVE

HUMAN CAPITAL

- Are staff trained on why the MFI will collect SP data?
- Are staff trained on how to collect SP data?
- Are staff trained on how to use SP data to target clients and track their progress?
- Are staff incentives aligned with the MFI's SP goals?
- Are staff training needs, staff satisfaction and other

INFORMATION CAPITAL

- What SP data will be collected, who decided what to collect and is there a plan for how data will be used?
- Have forms & process for collecting SP data been designed?
- Can MIS accommodate entry of new data points?
- What is the plan to roll out data collection and data entry to all branches?
- Does MIS produce timely and accurate reports on SP?

ORGANIZATION CAPITAL

- Do all board members understand SPM and how it relates to the MFI's strategic goals?
- How will the board institutionalize its supervision of SPM integration?
- What is the monitoring framework the board uses to supervise SPM integration?
- Is the MFI's overall organizational structure the right one for achieving its SP goals?
- Does MIS produce the right SP reports for governance?
- Is there a code of conduct for ethical staff behavior