



## Resilient Strategies

### Plan and Manage the Triple-Bottom Line Business Using the Balanced Scorecard

*with Dan Montgomery*

Can you plan and manage your business to achieve sustainability, social responsibility AND profitability?

The "common sense" about business that has prevailed during the industrial age of the past 200 years has created unprecedented wealth, knowledge, and communication - along with pollution, overcrowding and social dislocation. At this point, with nearly 7 billion people on the planet, we are hitting the limits of the historically cheap resources that have powered our prosperity, including cheap fossil fuels, abundant water and land.

This "common sense" tells us that environmental and social concerns cost us money and detract from the bottom line. Might it be time to take a second look at our "common sense" about business, where that mindset came from, and why it won't get us very far into the 21<sup>st</sup> century?

In this entertaining and provocative presentation, Dan Montgomery outlines how insights from systems thinking and ecology reveal a new "common sense" paradigm about the relationship of profitability, social responsibility, and environmental performance (the so-called "Triple Bottom Line").

This new way of looking at business has critical implications for how you plan, lead and manage your organization.

Triple Bottom Line (TBL) businesses are based on a vision and strategy that combines profitability with environmental stewardship and a social mission. These kinds of companies are typically run by leaders who are values-driven and are able to see the interconnected patterns that tie the human and natural world together.

Unfortunately, most business planning and management tools we are taught derive from an older, more simplistic way of doing business, in which social and environmental costs are externalized, and profitability and cash flow are the only metrics that matter.

How can we address social and environmental concerns, not as an “add-on”, but in a way that integrates with the rest of our business?

Dan will demonstrate how the Balanced Scorecard – a business planning and management tool used by over half of the Fortune 500 – can help you manage your business to the Triple Bottom Line.

### **What you will learn:**

- How typical financial statements and organization charts obscure the real behavior and impacts of your business
- New metaphors for visualizing your business - why your business is more like a forest than a well tuned machine
- How sustainability can improve business performance AND valuation
- The promise, and the limits, of TBL reporting tools, such as the Global Reporting Initiative
- How to recognize the value of “intangibles”, including Leadership, Culture, Brand Equity, and Consistent Execution
- Introduction to the four perspectives of a Balanced Scorecard: Financial Performance, Customer Value, Process Efficiency, and Organizational Capacity
- Key steps in a Triple Bottom Line planning process
- The critical role of metrics and feedback systems to keep you on track and agile

### **Daniel J (Dan) Montgomery**

As an independent management consultant and executive coach, Dan helps organizations translate big visions and strategies into “chewable chunks” – performance metrics, clear targets, initiatives, roles, accountabilities, and budgets. He helps teams develop plans that build commitment, and keep everyone focused on the results that matter. Dan works with individual leaders to strengthen personal focus and results.

He is a veteran of major consulting firms including Andersen Consulting (now Accenture) and Ernst & Young. He has worked in a variety of industries including financial services, social entrepreneurship, economic development, construction, natural products, technology, government and health care. He has an MBA from the University of Colorado, as well as a Masters in Psychology from Naropa University, in Boulder, Colorado.

For a sample, please check out [www.resilient-strategies.com/speaking](http://www.resilient-strategies.com/speaking)

## **Logistics :**

Can be given in person as a 20-45 minute keynote. or a 2-hour mini-workshop

Can be delivered online via Webex

LCD projector and screen required for in-person presentations

Complimentary for qualified business audiences

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