

Innovation in five acts: creating a innovative culture by Design and Balanced Scorecard

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Resume

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Dynamics of global markets demand more flexibility and agility from companies, and so do their strategies. This economic scenario is characterized by the growing demand for differentiated products and processes, new technologies and new organizational arrangements. Reevaluating strategies has become a crucial issue. "Planning must be transformed into a continuous process. There needs to be constant evaluation of one's actions in light of information collected about competitors, new technologies and customers. [...] If a given strategy is no longer effective, it must be modified and updated according to the new scenario." (REINCKE & CAJARAVILLE, 1998:3-4). In this scenario, this article aims show a way to create an innovative culture with Design and Balanced Scorecard

According to KAPLAN & NORTON (2004:34), "strategy is not an isolated management process; it is a stage within a logical continuous process that involves the whole organization, from its mission statement to the work done by frontline and support employees." A company's operational actions must be aligned with the company's strategy, and strategies of different areas must also be aligned with the company's global strategy.

Keeping strategies aligned in all levels of the company and receiving feedback to reevaluate them is a challenge. "The great challenge is to have middle management and frontline employees more committed". (REINCKE & CAJARAVILLE, 1998:3) Hence, communication and leadership abilities are of paramount importance.

Companies need to have innovation as a part of their organizational culture. The best scenario would be an innovative culture. DAVILA (2007:35) states that "in order for a business to succeed, innovation has to be a whole part of its mentality." The author believes that innovation is a key element for the continuity of a company. Ichak Adizes (REINCKE, 2001) emphasizes that a company must change before its competitors do. In his opinion, "Those who adapt to changes can only manage to stay in business. The most successful company will be the one that can anticipate change and take quick actions, as well as manage to gather as many people as possible to engage in the transformation

process.” Companies are urged by technological changes; however, investing only in technological changes (from R&D activities) is not enough to achieve success. Business Model is a strategic component that must be integrated to these changes. This integration offers two important activities to innovation.

“..poor knowledge management and the difficulty to promote learning can hinder creation and innovation skills, launch of new products, and improvement of the company itself” (SILVA, 2003:89).

Innovation calls for resources, experiences and competences. Some authors see innovation and design as strategic factors in organizations. “When organizational change is necessary, designers can facilitate stakeholder communications and identify new goals and resources. As regards strategy, designers can join efforts in defining the corporate brand and building synergies that make the most of brand assets across business units.” (WALTON, 2006:1)

A model called Design Ladder shows that “a company at the top of the ladder, on the ‘design as innovation’ step, considers design to be of such critical importance that it can reformulate some or even all the aspects of its business (10 POINTS, 2007).” In addition, another belief about Design as innovation is that “The designer works closely alongside the company’s owners/management in the complete or partial renewal of the whole business concept.”

Although Design is seen as innovation, there is a gap between Design and Management. Mozota (2006:53) claims that “the design value model and its application through the Balanced Score Card both provide a common language for designers and managers.” The Balanced Scorecard characteristics and its similarities with Design, as Mozota shows in her article, made BSC into a good tool for design managers to join the management universe. She explains that “for designers, the BSC is also easy to adjust, because it is vision-based, as well as holistic.” (MOZOTA, 2006: 47).

According to KALLAS & COUTINHO (2005:3), “BSC is a tool that materializes the vision and the strategy of a company through a coherent system with goals and measures of performance, organized in different perspectives: finance, customers, business internal process, and learning and growth. These measures must be interconnected.” The authors state that the alignment between strategic planning and operational actions can be achieved by BSC through the following actions: “clarifying

and translating vision and strategy; communicating and associating objectives and strategy measures; planning, establishing goals and aligning strategic initiatives; and promoting better strategic feedback and learning.” (KALLAS & COUTINHO, 2005:4)

Design and Balanced Scorecard

Balanced Scorecard is both a strategy management tool and an innovation management tool. Innovation management because works with indicators and measures, two important elements to innovation. It is a strategy management tool because it offers a vision of the future and a way to achieve it (REINCKE & CAJARAVILLE, 1998). Balanced Scorecard is more easily incorporated into a company because it materializes and simplifies the company’s vision and strategies, in a visual system of indicators. Maybe this is BSC’s best contribution. Companies need to keep focused and to concentrate efforts to achieve their objectives. Consequently, there must be clarity and consensus concerning the strategy

BSC works with implementation and strategy control, in a financial and a non-financial focus. It complements financial indicators with other indicators, such as customers, internal business processes and learning and growth, in all of the company’s levels. The objective is to obtain alignment, support, strategic control, generation of skills (competences) and knowledge to a company, in all levels and areas. The measurement and indicators are derived from the company’s vision, mission statement and strategies.

BSC has five management principles (SILVA, 2006): 1) to translate strategy into an operational view; 2) to align the company with its strategy; 3) to turn strategy into everyone’s task; 4) to convert strategy into a continuous process and 5) to foster changes through executive leadership.

Kaplan and Norton proposed BSC with four perspectives (finance, customers, internal process and learning and growth), cause-and-effect relationships, boosting factors, strategic derivation and strategic feedback. MOZOTA (2006:47) associates the four perspectives of the BSC model with four powers of design: customer perspective and design as differentiator; process perspective and design as coordinator; learning perspective and design as transformer; and finance perspective and design as

good business. Some companies have included other perspectives to the four perspectives of the BSC model, for example sustainability and innovation.

In the BSC model, the finance perspective results from the three other perspectives. LOBATO (2007:110) says that “the financial objectives and measures show if the implementation of strategies is contributing to the improvement of financial results in the organization.” Thus, financial objectives and measures must be in a cause-and-effect relationship, defining the performance and guiding objectives and measures of others non-financial perspectives. MOZOTA (2006:47), proposes to designer ask “to succeed financially, how should design appear to our shareholders?” She show “Good Design as Good Business”.

“How should we appear to our customers in order to achieve our vision?” This is the question in the customer’s perspective. Adding value measures and customer satisfaction are strongly linked. The answer to that question helps to identify “the market and the segments where the company wants to operate in order to get higher growth and profitability.” (LOBATO, 2007:112) In Design viewpoint, the question could be “how should we appear, through design, to our customers in order to achieve our vision?” (MOZOTA, 2006:47) It is the differentiator power of design according MOZOTA.

“To satisfy our shareholders and customers, what business process must we excel at?” (KAPLAN & NORTON, 1996:54) The BSC approach incorporates innovation processes to the process perspective. It not only focuses on improving existing processes, but also attempts to identify entirely new processes, in which the company aims at excellence to reach financial and clients’ objectives. “Not only are the existing processes monitored, but also a proper environment is created to identify new processes that can anticipate clients’ needs. [...] For example, by monitoring performance measurement, the company can acknowledge the demand to develop a process to preview clients’ needs or offer new services to which clients can assign great value.” (LOBATO, 2007:114) To this perspective, MOZOTA (2006:47) proposes to designer ask “to satisfy our stakeholders, how can design help in the business process we excel in?” She emphasizes the coordinator power of Design: Design as Performance.

Transformation, and consequently differentiation, comes from learning and growth as “they are key elements because they form the basis of quality improvement and innovation.” (REINCKE &

CAJARAVILLE, 1998:2) One must always wonder: “To achieve our vision, how are we supposed to sustain our ability to change and improve?” The employees are one of the company’s sources of learning and growth. “In several organizations, one can notice the need for ongoing improvement in current processes and also for creativity for the introduction of innovations and additional skills. “The value of the organization is directly related to its ability to continue developing human resources, identifying and improving leadership, creating values for the customer and improving operational efficiency.” (LOBATO, 2007:118) Designers can ask “how will we sustain, through design, our ability to change and improve?” (MOZOTA, 2006:47) “Design as vision”.

The main goals of the learning and growth perspective are to support the accomplishment of objectives of other perspectives and help to align strategies and resources, emphasizing the importance of investing in equipment, Research and Development of new products, systems and procedures.

For a company’s Balanced Scorecard to be created, it is of paramount importance to consider cause-and-effect relationships. According to the model proposed by Kaplan and Norton, one departs from the financial perspective. The other perspectives are introduced from a cause-and-effect relationship with the preceding perspective, and then performance boosters are defined.

At an interview, Kaplan gave the example below, which clearly illustrates the construction process of the BSC perspectives: “... supposing the goal is that of improving financial performance, that is, gain higher profits or a larger revenue over the capital. This is the goal, but what is the boosting factor? Sales or businesses can increase with the existing clients. One may then state that increasing market share is a boosting factor of the “improve financial performance” goal. Then one may wonder: how can sales increase? The answer is simple: if the clients are satisfied and enjoy doing business with us, they’re most likely to keep doing so. In this case, customer satisfaction is the boosting factor for an increase in market share. Then another question emerges: what are we supposed to do to increase the level of customer satisfaction? Let’s suppose we value product delivery within the deadline or before the deadline. This will be the boosting factor to generate customer satisfaction. The following question is: what should we do to meet the delivery deadlines or to deliver the product earlier? This concern leads us to the internal process, and we measure production time. Then we wonder: how can we speed

up the production process? The answer can be: we have to train our employees in just-in-time processes and implement a faster manufacturing process.” (REINCKE & CAJARAVILLE, 1998:6)

Because they are not isolated, boosting factors differentiate the process. They lie within a cause-and-effect relationship in the four perspectives aforementioned, and result in an integrated view of the system.

The strategy has to be communicated so that it can involve everyone in the task. This communication process may represent the development of objectives in lower levels in the organization. Kaplan and Norton even suggest a personal Balanced Scorecard. According to REINCKE & CAJARAVILLE (1998:3), the goal is to win a big challenge: “have more committed middle management and frontline employees. “ The authors emphasize the importance of all the employees understanding the company’s objectives, as they claim that “by understanding all the goals that a company aims to achieve, middle managers, lower scale employees and frontline workers will have the necessary knowledge to offer suggestions on the implementation of strategies designed by the upper management.”

It can be stated that one of the best contributions of BSC is to represent these elements aforementioned on a Strategic Map, integrated in a visual, simple manner. Strategic Maps from the Balanced Scorecard are an important translation tool. The objectives have to be attended too, since operational level contributors to the company’s until company’s stackholders. “Strategic maps guide businesspeople as they aim at market leadership, greater economic value of their businesses or sustainability through the definition of balanced objectives in the economic, social and environmental perspective.” (KALLAS & COUTINHO, 2005:7)

The map is designed top-down. However, it can be clearly noted that the learning and knowledge perspective is the one that supports the whole process. Figure 1 has an example of a strategic map which shows the four perspectives, the cause-and-effect relationships and the boosting factors (identified by the arrows pointing out from them).

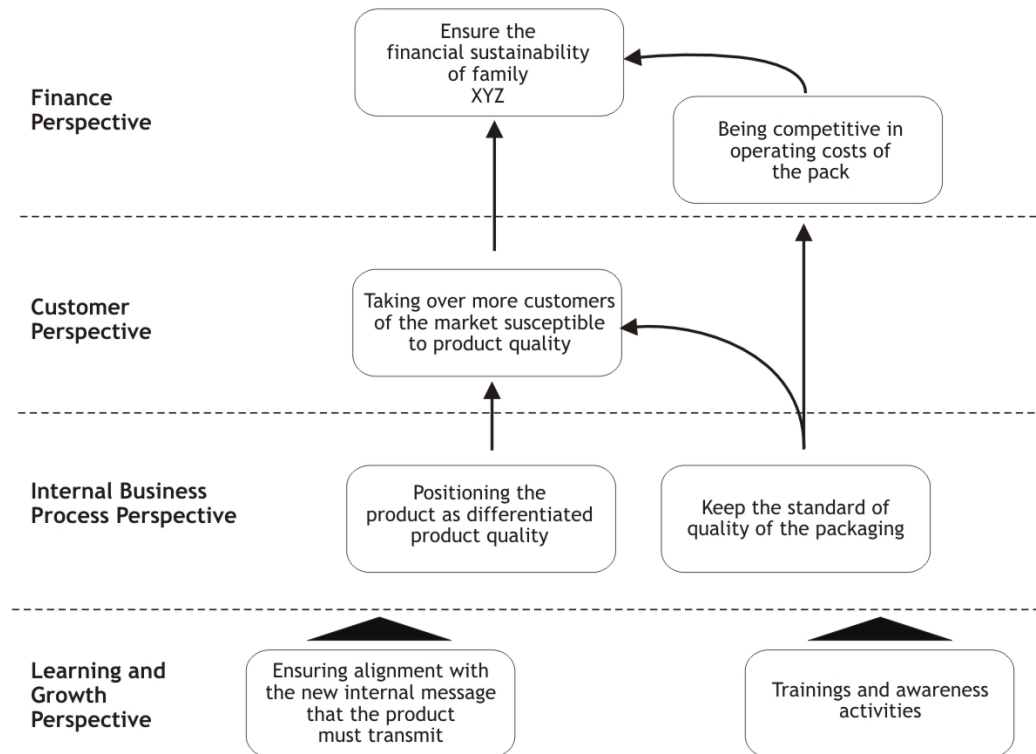


Figure 1 - Example of Strategic Map applied to the family culture. Source: Adapted from CARVALHO and BONASSI (2005:152).

The Strategic Feedback System is another key element offered by BSC. One can verify whether or not the strategy meets the existing expectations by the time they were set. “The strategic feedback system [...] definitely determines where we wish to be within three or five years and puts forward a hypothesis as to what the path to get there will be like.” (REINCKE & CAJARAVILLE, 1998:3)

The analysis of the indicators enables the correction of the paths and also the reassessment of strategies. It is important not only to correct the paths, but also verify if the objectives are still effective. In addition to indicators, knowledge of the operational process and of other levels in the company also provides a solid scenario about changes in the competitive environment. As discussed previously, the employees are an important source of knowledge for the company.

The five acts

In this context, Design and Balanced Scorecard can facilitate the creation of an innovative culture inside a company. The innovative culture will be created and maintained an innovative cycle, in five

acts: Act1 – Design managers need to participate in the strategy formation process; Act 2 - Design strategies must be broken down from corporative strategies; Act 3 - Design communication strategies; Act 4 - Strategic feedback and Act 5 - Improving process and identifying new processes. This innovative cycle is created with a systematic innovation effort.

Act 1: Design managers need to participate in the strategy formation process

Liedtka (2007:1) says that “it is from the designers’ world that comes the most differentiated and promising approach” to strategy planning. She believes that strategy and creativity go hand in hand. Strategy is creation; it is one possibility of future within other possibilities.

Design managers need to participate in the strategy formation process in a company. Best (2006:28) claims that “the purpose of design management is to identify and communicate the ways in which design can contribute to a company’s strategic value.” In addition, she says that “the designer manager is responsible both for keeping the coherence and consistency of the organization’s design message, and for ensuring that this aligned to its business strategy (2006:46).”

Design can contribute to a company’s strategic value and it is responsible for a part of the company’s performance. Business processes that incorporate design are able to produce innovation more easily than others. According to the Design Ladder model, when design is seen as strategic, it fosters the renewal of business models and business process.

GILLESPIE (2002) regards Strategic Design Management as “a business process that incorporates design and its management into the strategy formation process, and implemented at every level of the organization.” He also says that “strategy and design are enterprise-wide activities.” Design is not restricted to an area or level inside the company. Design can appear horizontally and vertically in the company, creating possibility of a good communication of strategies and integrating different areas and levels.

Mozota (2006:46) says that “designers lack knowledge of management concepts and of management as a science.” Sometimes, this lack makes the relation between designers and managers difficult,

reducing the design's contribution in the process level. "To be considered useful participants in strategic management process, however, designers must meet three challenges. They must understand clearly the issues the managers consider when deciding a strategy: they must identify the ways in which they could most usefully contribute to managers' strategic decision process; and they must learn how to communicate their potential contributions using language and concepts that strategic managers understand." (SANCHEZ, 2006:1) In this perspective, Balanced Scorecard can help designers to internalize language and management concepts, the first step to bring designers to management and strategy universe.

Act 2: Design strategies must be broken down from corporative strategies

Companies have difficulty realizing how strategy develops into action. Strategy breakdown can be helpful in this way. "In my viewpoint, strategic breakdown enables to develop a sharpen perception about strategy and a bigger effort from the company in relation to intangible assets, intervention in weaknesses and better work when there is a wider range of products" (SCHWARZ et al,2005:22)

Breakdown promotes and keeps the strategic alignment. Each person sees themselves in the corporate strategy. "Strategy breakdown aligns and strengthens the corporative commitment with business areas and support areas to accomplish the strategy." (SCHWARZ et all, 2005:27)

After the definition of corporate strategies and their objectives, it is possible to break down strategic objectives in order to obtain specific design objectives and indicators. This breakdown is important because it warrants focus on global objectives, from which it can extract specific objectives of a specific area such as Design. MOZOTA (2006:48) states that "it is important for design managers to link their own indicators with BSC indicators of the company's performance, as well as with design briefs, as a measure of the everyday performance of design staff." Thus, it is important to keep all design actions aligned with global company objectives. Each design action, in the operational level, contributes to the achievement of the company's vision and strategy.

Design strategic objectives can be broken down from the global strategic objectives of a company through the use of critical success factors. A global strategic objective has one or more critical success factors. "Breakdown does not necessarily mean having the definition of several strategic maps, but

having means to explain the contributions from each area and/or unit towards achieving the strategy. A way used to break down a strategy is not through strategic maps, but rather through the discussion about critical success factors”. (SCHWARZ ET al, 2005:25)

These factors are essential conditions to achieve this objective. For example, in order to attract more customers (global strategic objective), the critical success factor may lie in highlighting the value of a product or service, as well as its characteristics or qualities. Plans of actions can be generated from this strategic objective. This way, design strategies will keep aligned with company strategies and design actions will be aligned with design strategies. Design performance will improve because its actions are aligned with the strategic objectives of the company and its contribution to the company’s performance will be more effective.

Act 3: Design communication strategies

It is fundamental to communicate a given strategy. Many times the process of strategic planning is not very clear and must be demystified. This process needs to be transformed into something simpler and easier to understand. This way, each employee can understand how their activities and tasks will contribute to the implementation and success of the strategy.

To keep the strategic alignment, communication is a key element. Design has an essential role because communication is one of its inherent competences. Design is responsible for communicating strategies to all levels in the company, including its own strategies. It is important to clearly understand the strategic objectives in order to develop correct and aligned actions and start the strategic feedback process. The employees can indicate how their actions must be done and with which degree of effectiveness.

Strategy is a task that should involve all the members of the organization. Communicating the strategy – after establishing measures and objectives for each perspective – is a way to share that responsibility. This communication process represents a breakdown of objectives in the lower levels in the organization. “According to Niven (2000:204), ‘the organization that performs the breakdown in these levels will maximize the BSC value, leading each employee, irrespective of level or function, to

the breakdown of objectives and measures aligned with all the objectives of the organization’.” (LOBATO, 2007:107)

Kaplan and Norton suggest a personal Balanced Scorecard. The goal is, according to REINCKE & CAJARAVILLE (1998:3), to win a great challenge: “to have greater commitment from middle managers and frontline employees.” Authors emphasize the importance of all employees understanding a company’s objectives: “by understanding the objectives that the company wants to reach, middle managers, low hierarchical level employees and frontline operators will have enough knowledge to make suggestions about how to implement strategies routed by executives.”

Calendars, folders, banners, videos, intranet and internet are some ways to communicate the company’s strategies. Some cases, logos are developed and included in internal marketing campaigns. For example, in 2003, Brasil Telecom¹ started its BSC implementation. A campaign called “Estação 14 – Estratégia em Ação” was created, and had the following slogan: “Você no mapa do sucesso da Brasil Telecom” (“You’re on Brasil Telecom’s success map”). The campaign had many materials, such as calendars, folders, intranet and an institutional video that started with the sentence “A team starts to be a winner when everyone has attitude and conducts their activities according to the strategy planned to lead the team to victory...”

Creating and conducting this communicational process are two of the inherent functions of Design.

Act 4: Strategic feedback

Strategy’s effectiveness depends on the collaboration of all corporate levels. The first step towards strategy alignment is to break down a given strategy through Balanced Scorecard and communicate the strategy’s objectives to all staff, regardless of level or position. Hence, “Design implementation is concerned with forming unique design strategies in support of strategic design goals.”(GILLESPIE, 2002:3)

¹ Brasil Telecom is a telecommunication company, offering services that encompass fixed and mobile in many Brazilian states.

“Fostering innovation in the company’s mentality requires learning and change” (DAVILA, 2007:35). Davila also states that “in a healthy, innovative company, its leaders support learning and put into practice the systems required to make it available” (P.242). Complex learning systems are required in order for feedback and guidance to be provided.

The main objectives of the Learning and Growth perspective are to support the achievement of objectives of other perspectives and help to align strategies and resources, emphasizing the importance of investing in equipment, R&D of new products, systems and procedures. FELIX (2003) explains that many companies are not able to innovate because they are not aware of how they can deal with a large mass of information and knowledge.

Optimizing corporate resources means: 1) Realigning structure and strategy by analyzing the company’s structure, and taking into account the fact that an organization might have to change in order to accomplish its mission statement and foster its target values; 2) Reorganizing the information systems so as to assure that the structure can work appropriately and enable the handling of massive amounts of information and knowledge; 3) Reorganizing rewarding systems so that individuals can feel rewarded for their contribution to change.

Learning supports innovation. “Learning and Growth are key aspects because they form the basis for quality improvement and innovation”. (REINCKE & CAJARAVILLE, 1998:2) This movement takes the differentiation path. A company cannot be lack initiative. It must always wonder: “To achieve our vision, how will we sustain our ability to change and improve?” The employees are a source of learning and growth.

“The value of the organization is directly related to its ability to continue developing human resources, identifying and improving leadership, creating values for the customer and improving operational efficiency.” (LOBATO, 2007:118)

To MOZOTA (2002:277), Design Managers must create a favorable environment to Design, providing an understanding about Design to all areas in a company. It is necessary to change how employees act and think about common objectives. These objectives come from the company’s strategic objectives. Innovation needs changes. These changes, however, are affected by organizational culture, interfering in the effectiveness of innovation. The organizational culture is composed by beliefs, unwritten rules,

people's mental models. DAVILA (2007:262) states that "it is the people from an organization that adopt, follow, change or reject a given culture." Hence, the organization culture can be transformed into a new culture, through new systems, process, symbols and values. In this perspective, MOZOTA (2006:47) sees design as a transforming agent.

Designers need employees' feedback and must analyze indicators (previously defined) so they can understand how the design process has contributed to the company's goals.

Act 5: Improvement process and identifying new process

Act 5 starts with this question: "To satisfy our shareholders and customers, what business process must we excel at?" (KAPLAN & NORTON, 1996:54)

A characteristic of Internal Business Process approach of Balanced Scorecard is identifying entirely new business processes at which the company must excel. The traditional approach is focused on watching and improving existing processes.

"For example, customers could value short lead times and on-time delivery. They could value a constant stream of innovative products and services. Or they could value a supplier's ability to anticipate their needs and capability of developing new products and approaches to satisfy those emerging needs." (KAPLAN & NORTON, 1996:53)

The Balanced Scorecard approach incorporates innovation processes to the Internal Business Process perspective.

"Not only watch existing processes are monitored, but also a favorable environment is created to favor the identification of new processes that can anticipate the needs of customers [...]. For example, by watching the measurement of performance, the organization can feel the need to develop a process to provide for the needs of customers or to offer new services to which customers attach great value." (LOBATO, 2007:114)

Design must identify opportunities to create new values, new products and new processes. This characteristic matches this approach of Balanced Scorecard. Creating an environment like the one described above means creating good conditions for the development and improvement of design. i.e. Design as a coordinator (MOZOTA, 2006:47).

Five acts in continuous cycle

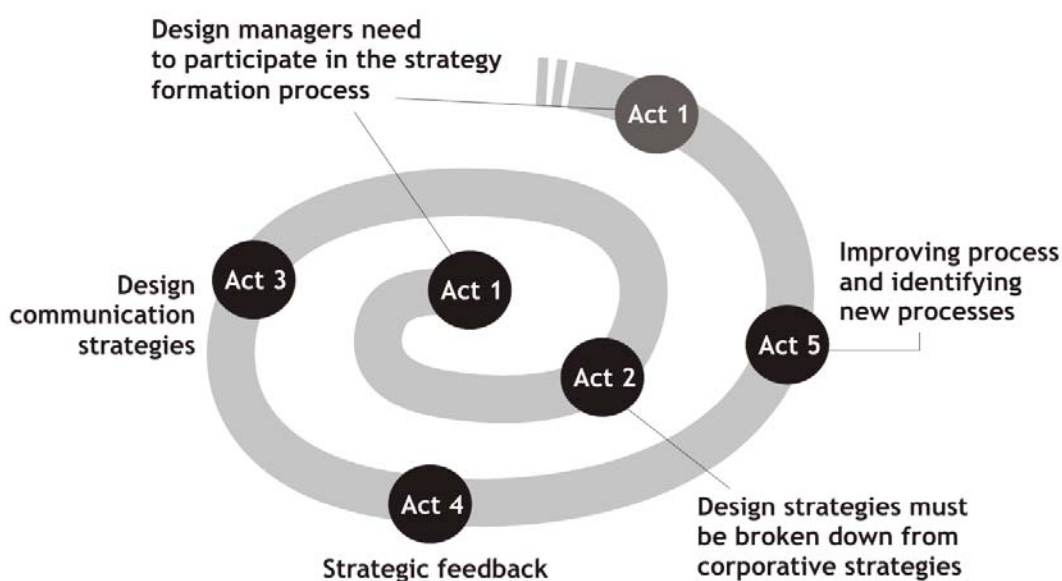


Figure 2 – Cycle of innovative culture: a spiral experience

This paper has shown, in a global view, a way to make companies more competitive through an innovative culture. This innovative culture can be created with the establishment of a cycle (Figure 2) involving Design and Balanced Scorecard. Measurement, feedback, communication, and learning are some elements that can keep design aligned with global strategy and show its real contribution to global company performance. The “five acts” shown in this paper must be accomplished in a continuous cycle in order to change the organization culture and install an innovative culture. A company can innovate its principles and management process, and that can change its practices. By combining design and Balanced Scorecard, a company has the power of innovation, strategy and management.

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