



# Certified KPI Professional Training Course

19-21 September 2012, Melbourne, Australia

**Getting Key Performance Indicators (KPIs) right by using a rigorous KPI management framework**

**Over the last 3 years, the team at The KPI Institute:**

- Documented 7,000+ KPIs from 15 functional areas and 24 industries;
- Reviewed 1,000+ performance reports from 125 countries;
- Referenced 20,000+ resources (books, articles, performance reports) as part of the documentation process;
- Developed over 20 KPI Dashboards and Balanced Scorecards.

**With the insights gained we:**

- Assisted over 5,000 organisations in finding solutions for their KPI needs;
- Trained over 300 participants in 20 countries on how to work rigorously with KPIs.



## 3 Key Business Benefits

1. Understand the complexities of working with KPIs and learn how to address them
2. Develop a working knowledge of the Key Performance Indicators Management Framework
3. Use over 30 performance measurement tools to facilitate the deployment and value added by KPIs

*"I contacted smartKPIs.com for an in-house training with my team. We found both the material and the way of explaining concepts by doing examples invaluable. I would also say that this is a great value for money if you want to build the competency within your organization."*

Fahad A. AlFadel, Saudi Arabia, Saudi Food and Drug Authority

This certification course trains participants in how to **establish and work with KPIs** and offers them the opportunity to get **certified on the ability to deploy and use KPIs** in accordance with The KPI Institute's **Key Performance Indicators Management Framework**, the main body of knowledge on the rigorous use of KPIs in business.

## Overview

For all the advancement in technology infrastructure and considerable investments made by organisations, generating value from Business Intelligence (BI) software relies on managers and staff using accurate data, in the right format, for the right KPIs. This requires developing a robust performance measurement capability, based on mature KPI architecture and supported by a collaborative performance culture.

Even the success of popular performance management systems such as the Balanced Scorecard relies on using relevant KPIs that actually mean something to the business and are presented in a readily intelligible form.

This training course is designed to provide a strong foundation to deploying business management systems and BI software by developing the next generation of KPI professionals. These KPI architects will form the basis of the organisational performance measurement capability, becoming the go-to place for advice around understanding, establishing, activating, reporting and generating value by using KPI across organisations.

By completing the course, you will gain both the theoretical understanding and practical experience of using a variety of performance management tools and techniques for KPI management. In addition, on the last day of the course you are eligible to complete an examination for obtaining the Certified KPI Professional status, the premier global certification programme dedicated to rigorous KPI practice.

At the end of the course you will be able to:

- Have a clear understanding of the KPI management challenges and how to address them
- Facilitate the KPI selection process and establishment of scorecards and dashboards at a functional and organisational level
- Choose the right tools from the KPI management toolkit to maximise the impact of performance management in practice
- Deploy and promote good practice in KPI activation, reporting and visualisation
- Provide advice and coach colleagues on the rigorous approach to establish and use KPIs

## Reasons to Attend

This course is relevant to representatives of organisations that:

- Aim to understand the complexities of using KPIs from both a technical and human perspective
- Have an interest in developing organisational performance measurement skills easily applied in practice
- Want to improve the quality of their planning by selecting and reporting on the right KPIs at the right time and in the right way.
- Have implemented or have plans to implement performance management systems at strategic, operational and individual level.

## Participant Profile

The course is designed for executives, operational managers and analysts from both delivery and support functions such as finance, accounting, project management, human resources, sales, marketing, logistics, quality control and improvement, strategy/planning and operations.

*"Aurel has extensive knowledge in this topic and he is able to arrange the training in a very efficient way, covering even history and research. He is definitely an expert and worth the training"*



## Facilitator

Aurel Brudan is the founder and CEO of The KPI Institute, the global authority on Key Performance Indicators research and education. Under his coordination the Institute research team documented over 7,000 KPI examples from 15 functional areas and 24 industries, reviewed 1,000+ performance reports from 125 countries and referenced 20,000+ resources, the result being [www.smartKPIs.com](http://www.smartKPIs.com), the premier

destination for quality performance management and measurement resources. Other research programmes resulted in the development of two maturity models for performance management and measurement, as well as the establishment of the KPI Management Framework to provide the theoretical base for the Certificate in Key Performance Indicators Management.

As a consultant, Aurel conducted numerous performance management system implementations using solutions such as the Balanced Scorecard, operational dashboards and functional performance scorecards. Among his most important clients are Australia Post, the Australian Federal Administration, the Victorian State Government, Brisbane City Council, National Australia Bank, Qatar Supreme Council Of Health and SABIS.

As an educator, Aurel has accumulated hundreds of hours of experience in a variety of settings, from open and in-house training delivery to tutoring management for the University of Melbourne. Aurel is a member of the Academy of Management, the Australian New Zealand Academy of Management, the Australian Marketing Institute and Fellow of the Australian Institute of Management.

Aurel has tertiary qualifications in both Economics and Marketing, complemented by postgraduate certificates in Advanced Learning and Leadership. Aurel is also in the final stages of his PhD. candidature, researching Integrated Performance Management Systems at the University of Melbourne and a Graduate Certificate in Commercialisation at the Melbourne Business School in Australia.

## Methodology

- Active involvement of all the participants in a collaborative learning environment where opinions and experiences are shared;
- Group discussions, exercises, simulations and case studies;
- Explanation of the theory informing performance measurement, in plain English;
- Presentation of the performance management templates as tools to support the integration of performance management practices in organisations;
- Customized feedback regarding the present use and the future plans for implementing performance management systems.

## Participant Certification

Participants will be pre-tested by using a multiple choice questionnaire at the beginning of each session. On Day 3, delegates can opt in to attend a final test to obtain the Certified KPI Professional certification from The KPI Institute.

**Sarah Mubarak**, Malaysia, 1 Malaysia Development Berhad

Day One: Establishing KPIs

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Introduction To The World Of KPIs

- Course outline and expectations
- Challenges In Performance measurement
- Key Performance Indicators concept map
- Strategy and performance management terminology review
- KPI historical overview and current state of practice
- Management theory informing the value added by using KPIs

*Exercise: Systems thinking exercise*

*In practice: Examples of how KPIs are used in business*

*Case study: Good and bad practice in the use of KPI terminology*

The Pillars Of KPI Architecture

- Interdisciplinary systemic worldview (weltanschauung)
- KPI lifecycle
- KPI use case scenarios
- KPI architecture toolkit
- KPI architecture skills map
- KPI architect's role in the world of KPIs

*Exercise: Needs addressed by KPIs*

*In practice: KPI architecture in practice*

*Case study: Matching architecture tools to use case scenarios*

KPI Selection

- KPI typology
- Sources of relevant KPIs
- Essential KPI examples
- The generic KPI selection process
- KPI toolkit spotlight: KPI filtering criteria
- KPI selection based on use case scenarios

*Exercise: Developing a KPI cluster map*

*In practice: KPI selection workshop agenda*

*Case study: Scenario based KPI selection*

Day Two: Activating KPIs

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KPI Documentation

- Functions of the KPI documentation form
- KPI documentation form design
- KPI documentation process
- Functions of the organisational KPI library
- Approaches to KPI target setting
- Target setting process

*Exercise: What we need to know about each selected KPI?*

*Exercise: Documenting a KPI*

*In practice: KPI documentation form typology*

*In practice: Review of documented KPI examples*

*Case study: Customising a KPI documentation form*

*Case study: Setting KPI targets*

Data Visualisation: Designing KPI Dashboards And Scorecards

- Good practice in data visualisation
- KPI toolkit spotlight: The Balanced Scorecard
- KPI toolkit spotlight: The KPI Dashboard
- KPI toolkit spotlight: The Performance Healthogram

*Exercise: The importance of data visualisation*

*Exercise: Scorecard and dashboard design*

*In practice: Review of scorecard and dashboard designs*

*Case study: Selection of KPI graphs*

KPI Data Gathering And Reporting

- The KPI data gathering process
- KPI data sources taxonomy
- KPI activation tools and techniques
- Business analysis techniques
- Report compilation
- Initiative management (documentation and progress review)

*Exercise: Preparing commentary on KPI results*

*In practice: Examples of performance reports*

*Case study: Managing performance through KPI reporting*

Day Three: Generating value with KPIs

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KPI Management Enablers: Software, Hardware, Communication And Culture

- Overview of KPI software marketplace
- Overview of KPI hardware marketplace
- KPI results communication tools taxonomy

*Exercise: Using software for KPI reporting*

*In practice: Comparison of Microsoft Excel vs. KPI software reporting*

*In practice: KPI reporting (websites and annual report examples)*

*In practice: Comparison of Microsoft Excel vs. KPI software reporting*

*Case study: KPI modeling*

Generating Value From Using KPIs

- Building organisational performance measurement capability
- The Performance Measurement Maturity Model
- Benchmarking typology
- Pay for performance and KPIs
- The human aspects of performance

*Exercise: Assessing performance measurement maturity*

*In practice: Pay for performance models*

*Case study: Motivation today*

Measuring And Learning With KPIs

- Review of the performance management toolkit components
- Review of the KPI toolkit components
- Review of course content
- KPI Professional certification test
- Questions and answers / free discussion

In-house training

Contact us if you would like to  
run this course in-house

T: +61 3 9670 2979 | M: +61 42 456 8088 | E: office@kpiinstitute.org

KPI Certification

Exam based certification available to  
course participants

Work samples assessment  
certification available to  
Certified KPI Professionals



"Good program, well organized. Well experienced trainer. Great job. Definitely recommendable."

M. R. Rajesh Kumar, India Synthite Industries Ltd

## Reasons for attending this course

- 10s of performance management system implementations informing the course content;
- 18 hours of technical training, complemented by over 2 hours of interactive discussions;
- 15 key concepts clarified;
- 13 insights into implementing and using KPIs smartly;
- 12 templates to support deployment of course learning;
- 11 years of experience in performance management synthesized in the course material;
- 10 smartKPIs explored in detail;
- 9 interactive exercises and group activities;
- 8 quick reference guides;
- 6 months of free access to the www.smartKPIs.com premium content.

## Templates provided

- Desired State of Evolution template;
- Strategy Map template;
- Performance Scorecard template;
- Performance Dashboard template;
- Performance Healthogram template;
- Performance Measurement Maturity Model;
- KPI documentation template;
- Initiatives portfolio template;
- Initiatives documentation template;
- Performance Management System (PMS) architecture template;
- PMS maintenance process template;
- Employee Performance Plan template;
- smartKPIs Premium access;
- Top 20 KPIs of 2010 plus one report from the Top 25 KPIs of 2010 series.



## Course details and investment

Date	19-21 September 2012
Location	The ANU House at Level 11, 52 Collins St., Melbourne
Course duration	9:00-17:00 on Day 1-2 and 9:00-16:45 on Day 3
Other inclusions	Course support handouts, certificate for course completion, lunch-catering service, coffee breaks
Registration deadline	14 September 2012

Course attendance fee **\$3300** (GST included)

## Special offers:

- Option 1: **\$2800** for members of the smartKPIs.com community  
 Option 2: **\$2500** for early bird payment by the 31 August 2012  
 Option 3: **\$2300** for 2 or more participants from the same organisation

## Registration methods

Registrations for the course can be made online or via email. The registration process will be completed only after the attendance fee is paid.

**Online** at www.smartkpis.com for bank transfer payments and credit card payments  
**Email** by sending the completed registration form to: office@kpiinstitute.org

## Bank transfer payment to The KPI Institute

1. Send an email containing your contact details and registration request;
2. An email confirmation containing the tax invoice and bank account details will be sent to you;
3. Proceed with the attendance fee payment by bank transfer;
4. Send through email the proof of the payment transaction completion;
5. A tax receipt together with the registration confirmation will be sent to you via email (after the attendance fee payment is confirmed).

## Credit card payment on smartkpis.com

1. Fill in and submit the registration form available online at www.smartkpis.com
2. Pay by credit card using the online facility;
3. A tax invoice together with the registration confirmation will be sent to you via email (after the attendance fee payment is confirmed).

## Registration cancellation procedure

- Any withdrawals have to be announced at least two weeks before the beginning of the course, through fax or e-mail. In this situation, the attendance fee will be refunded, less \$300 retained for administrative expenditure. The attendance fee will not be refunded if the withdrawal from the course takes place less than 2 weeks before its start date.
- If you find yourself in the impossibility to attend the course after the registration process is already completed you may delegate another person to attend the course in your place without any further fees charged.
- If you have confirmed and made the attendance fee payment but you didn't attend the course, the course attendance fee will not be refunded.
- If you attend the course only partially (one day or a limited number of sessions), you will not benefit from any attendance fee reduction or refund.

## Testimonials

*Aurel Brudan was instrumental in assisting me with the development & implementation of a Balanced Scorecard for the Infrastructure Services Division of Australia Post. His knowledge & understanding of Performance Management and KPIs was of great value that enabled a smooth and successful implementation. Aurel's ability to explain key performance management theory and practical concepts to staff at all levels of management was one of the key learning experiences in this area.*

Clifford Chaperon, Manager Business Performance | Capital Investment, Corporate Services, Australia Post

*Although it seemed a bit technical at the beginning, the training showed us daily business from another perspective: the performance of our activity and the means to increase it. Very well prepared as a trainer, Aurel took us through the themes in a very clear and logical manner! I look forward for the next training course!*

Cristina Bleoca, (former) Logistics Manager, SC Tchibo Brands SRL

*Aurel's knowledge and Expertise in Performance Management and KPIs was an enormous contribution to our project at the National Australia Bank. His professionalism, patience in explaining to stakeholders and passion was a major contributing factor to the success of the project.*

Jason Cutajar, Senior Project Manager and Oakton Business Consultant, providing services for National Australia Bank

*Aurel assisted in delivering for us the necessary tools and training to enable us to introduce balanced scorecard into our Organisation. This was supported through great insights in best practice and an enthusiastic and engaging style. We would recommend him highly.*

S-P O'Mahony, CEO, Opportunity Microcredit Romania

*Thank you for the excellent training workshop on KPIs. It was an eye-opening experience and provided much needed guidance and clarification. The information gained has provided focus and depth.*

Parsa Zoqaqi, Bahrain, Royal University for Women

*It was a good programme, through which I got a clear idea about modern practices in using KPIs"*

Shamima Akter Lovely, Bangladesh, IDLC Finance Limited

## Contact

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