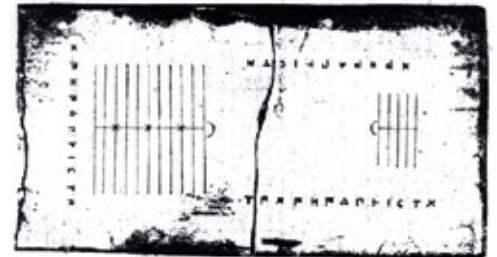


# Measuring and learning

with

# Key Performance Indicators



“Man is the measure of all things.” Protagoras of Abdera (c. 480-410 B.C.)

## Topics covered:

- Understanding Performance Management;
- Key Performance Indicators (KPIs), performance measures and metrics;
- Selecting and documenting KPIs;
- Dashboard design;
- Rules in data visualization;
- Business analysis techniques;
- Performance review meetings;
- Establishing and implementing improvement initiatives;
- Pitfalls in performance measurement;
- Cultural and human aspects of performance;
- Performance Measurement Maturity Model;
- Insights into implementing and using KPIs smartly.

Four editions across  
Australia in 2012:

Sydney, 29-30 March  
Brisbane, 18-19 April  
Canberra, 10-11 May  
Melbourne, 26-27 June

# The KPI Institute



## General presentation

The course content contains a unique combination of know-how and is informed by:

- Practical experience in implementing and using of Key Performance Indicators as part of organizational performance management systems;
- Insights gained by researching and documenting over 7000 KPIs from 15 business functional areas and 24 industries;
- Review of over 1000 performance reports from 100 countries;
- Literature review of the most important published materials on the topic;
- Academic research of the theory behind using performance measures.

## 10x10 reasons for attending this training course

- 10 years of experience in performance management synthesized in the course material;
- 10s of performance management system implementations informing the course content;
- 10 hours of technical training, complemented by over 2 hours of interactive discussions;
- 10 interactive exercises and group activities;
- 10 key concepts clarified;
- 10 smartKPIs explored in detail;
- 10 insights into implementing and using KPIs smartly;
- 10 quick reference guides;
- 10 templates to support deployment of course learning;

- 10 months of free access to the [www.smartKPIs.com](http://www.smartKPIs.com) premium content.

## Templates provided

- Desired State of Evolution template;
- Strategy Map template;
- Performance Scorecard template;
- Performance Dashboard template;
- KPI selection template;
- KPI documentation template;
- Initiatives portfolio template;
- Initiatives documentation template;
- Project status report template;
- Performance Management System (PMS) architecture template;
- PMS maintenance process template.

over  
**\$450**  
in value

One report from the "Top 25 KPIs of 2010" series

## 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.

## Day 1 – Understanding, selecting and documenting KPIs

8:30 - 9:00 Registration and coffee

### SESSION 1 Introduction - Key aspects of performance measurement

9:00 - 10:30

#### Discussion: Challenges in performance measurement

- Understanding performance management and measurement historical overview
- The role and value added by performance measures
- Theoretical framing of goal and target setting

### SESSION 2 Selecting Key Performance Indicators

10:45 - 12:30

#### Exercise: Proposing five measures

- Clarifying terminology: Key Performance Indicators (KPIs), measures and metrics
- An integrated approach to performance management: from strategy to results
- Understanding KPIs selection criteria
- Techniques for Identifying and selecting KPIs; Reviewing important KPIs

#### Group activity: KPI selection case study

12:30 - 13:30 Catered group lunch for participants

### SESSION 3 Documenting Key Performance Indicators

13:30 - 15:00

#### Exercise: Recognising KPIs

- KPI documentation – a key ingredient for success
- Designing the KPI documentation template
- Techniques for understanding and refining selected KPIs
- Target setting for KPIs

#### Group activity: using KPI templates and documentation rules

### SESSION 4 Performance data gathering and reporting

15:15 - 17:00

#### Exercise: Good practice in data visualisation

- Designing and improving the data gathering process
- Techniques for mobilising the data custodians team and activating measures
- Creating relevant performance reports
- Designing great dashboards / scorecards
- Rules in data visualization



## Participant profile and background

This course is relevant to representatives of organizations that:

- Aim to understand the complexities of using KPIs from both a technical and human perspective;
- Have an interest in developing organizational performance measurement skills easily applied in practice;
- Want to improve the quality of their planning and reporting through improving the use of performance measures;
- Have implemented or have plans to implement performance management systems at either strategic, operational, or individual level.

The course is addressed to executives, directors, coordinators and analysts from both delivery and support functions such as Finance, Accounting, Project Management, Human Resources, Sales, Marketing, Logistics, Quality Control and Improvement, Strategy and Planning and Operations.

## Day 2 – Using KPIs smartly

8:30 - 9:00 Registration and coffee

### SESSION 5 Analyzing and using performance results

9:00 - 10:30 **Exercise: Performance report value generation**

- Business analysis techniques (i.e. root cause analysis, deep dive)
- Performance review meetings
- Using KPIs to drive value generating decisions and actions
- Monitoring and improving KPIs (double-loop learning)

### SESSION 6 Performance measurement in practice

10:45 - 12:30 **Simulation: KPIs and the Balanced Scorecard.**

- Pitfalls in performance measurement
- Stories from the field
- 10 smartKPIs explored in detail

12:30 - 13:30 Catered group lunch for participants

### SESSION 7 Enablers of successful performance management

13:30 - 15:00 **Case study: Ethics and performance measurement**

- Using a Performance Measurement Maturity Model
- Designing great performance measurement architecture
- The cultural and human aspects of performance
- Performance reporting data accuracy

### SESSION 8 Applying the course learnings in organizations

15:15 - 16:45 • 10 Insights into implementing and using KPIs smartly

- Review of the course material
- Deploying key templates in practice
- How to take back in organizations what was learned during the course
- Overview of learning and conclusions

**Questions and answers; open discussion.**

## About the trainer

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.



Under Aurel's editorial coordination, the Institute published over 30 research reports and developed tens of performance management toolkits illustrating the use of performance management tools in practice. Aurel has published a number of forward thinking academic articles on performance management topics and presents his work at both academic and practitioner conferences at international level.

As a consultant, Aurel conducted numerous performance management systems implementations using solutions such as the Balanced Scorecard, operational dashboards and functional performance scorecards. Among his most important clients are Australia Post, Centrelink, Australian Taxation Office, Department of Treasury and Finance (Victorian Government), National Australia Bank, Thales Australia, Opportunity Microcredit and SABIS.

As an educator, Aurel 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 and 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 Commercialization at the Melbourne Business School in Australia. His certifications in Enterprise Architecture (TOGAF 9) and Project Management (PRINCE2) complement certifications in training and tutoring.

## About the course organiser

The KPI Institute is the global authority on Key Performance Indicators (KPIs) research and education, providing through its publications and training courses insights on how to measure and learn with KPIs.

It runs five main research programs, dedicated to performance management, the Balanced Scorecard, KPIs and organisational strategy. The main program, dedicated to documenting and cataloguing how KPIs are used in practice, resulted in the establishment of [www.smartKPIs.com](http://www.smartKPIs.com), the largest online database of well documented KPI examples, with over 7000 examples from 15 functional areas and 24 Industries. Over the last 8 years, The Institute assisted over 3,000 organizations in finding solutions to their KPI needs.

# The KPI Institute

in partnership with

## smartKPIs.com

The *smart* choice in performance management



## Bank transfer payment to The KPI Institute

1. Fill in and send the registration form available online at [www.smartKPIs.com](http://www.smartKPIs.com);
2. An email confirmation containing bank account details will be sent to you;
3. Proceed with the attendance fee payment by bank transfer;
4. Send through email or fax the proof of the payment transaction completion;
5. A tax invoice 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](http://www.smartKPIs.com). Pay by credit card using the online facility;
2. 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.

## Course design and participation fee

Date	Sydney, 29-30 March Brisbane, 18-19 April Canberra, 10-11 May Melbourne, 26-27 June
Location	CBD locations in each city
Course duration	9:00-17:00 on Day 1 and 9:00-16:45 on Day 2
Course attendance fee	<b>\$1540</b> (GST included)
Discounts offers	Option 1: <b>\$1430</b> for members of the <a href="http://www.smartKPIs.com">www.smartKPIs.com</a> community Option 2: <b>\$1320</b> for early bird payment 3 weeks before the event Option 3: <b>\$1045</b> for 2 or more participants from the same organization, in conjunction with any other course booked with The KPI Institute and for existing customers.
Other inclusions	Course support handouts, certificate for course completion, lunch-catering service, coffee breaks
Class size	Limited to a maximum of 16 participants
Registration deadline	3 days before start
Contact person	Anita Liang, Project Manager, Tel: + 61 3 9670 2979

## Registration methods

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

<b>Online</b>	at <a href="http://www.smartKPIs.com">www.smartKPIs.com</a> for credit card payments
<b>Email</b>	by sending the completed registration form to: <a href="mailto:info@smartKPIs.com">info@smartKPIs.com</a>

## 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

*"The Supplier Performance Management System designed and implemented by Aurel for the Victorian Government eServices Panel was an outstanding success. It was very well received by industry, departments and the panel administer. Aurel is particularly adept at building and sharing knowledge and his creativity, research and exemplary stakeholder management skills were essential to success."*

Gavin Haberfield, General Manager, Technology Projects, Government Services Division, Department of Treasury and Finance, State of Victoria, Australia.