THE KPI INSTITUTE

Celebrating **12** Years of PERFORMANCE

Advisory Services

Our Practice Areas

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For more than 11 years, The KPI Institute has been making a difference in developing best practices in performance management field and sustaining the rapid growth of hundreds of institutional and corporate clients from Middle East and Asia.

Today, the TKI Advisory Team continues this mission in offering customized services to meet every company's performance management goals. At The KPI Institute, we understand that business strategy is a constant, evolutionary process and we are here to offer you the insights for reaching the desired level of performance, consolidate competitive advantage and differentiate yourself to competitors.

STRATEGY AND BUSINESS PLANNING	PERFORMANCE MEASUREMENT	PERFORMANCE MANAGEMENT	EMPLOYEE PERFORMANCE
BALANCED SCORECARD SYSTEM	DATA VISUALIZATION	DATA ANALYSIS	BENCHMARKING
INNOVATION PERFORMANCE	CUSTOMER SERVICE	SUPPLIER PERFORMANCE	PERSONAL PERFORMANCE

Our Approach

Focusing on driving performance may not be a new practice for many organizations, but it seems like most of them are struggling to ensure relevant, clearly defined and balanced performance indicators to measure their strategy and the processes encompassed in a specific project. In this context, our Advisory hands-on approach is based on 4 main action steps.

We rely on our extensive research capability to offer the best practices you need from strategy development to measuring and implementing performance systems based on using the most relevant KPIs. By developing tools, processes and techniques comprised into customized toolkits, you are enabled to deploy and manage a sound performance measurement framework. We want to empower professionals and organizations to take control over their businesses. By working closely with our clients, we managed to develop sustainable performance solutions, maintained by working with competent employees and their professional expertise.

Best practices → Tools → People & Systems → Sustainable solutions

Our Practice Areas

Through our Advisory Team, you have access to a diverse range of services from KPI advisory calls to complex performance management systems implementation spread over 12 different practice areas.

The KPI Institute was established in 2004, with the purpose of providing cutting-edge solutions for every business sector and connecting professional peers. Founded on our strength in innovation, as well as commitment and responsiveness to our customer's needs, we have grown into a complex and diverse structure that offers customized and exclusive business advisory. Based on ultimate performance management and measurement tools and techniques, our advisory services cover 12 practice domains. The key segments that compound a competitive business model have been analyzed by our experienced research team so that every professional or enterprise can benefit from customized and resourceful insights and gain a unique competitive advantage.

Our Practice Areas

The KPI Institute Landmark service

Service title: Performance Management Audit

Performance Management Audit refers to assessing the performance management system within an organization. It consists of analyzing all the instruments (such as strategy map, scorecard, dashboard, KPI documentation form) and processes that create the performance management system. The audit provides feedback on performance policies, procedures and accountability. Based on this analysis a series of recommendations are made in order to improve the current architecture and maximize the value provided by using key performance indicators. The Performance Management Audit Report relies on a core instrument used to assess organizations – the Performance Management Maturity Model developed based on 10 years of research in the field of performance and analysis of good practice examples coming from more than 20 different industries.

Implementation

How does it work?

▸ Maturity Model Questionnaire - 240 statements, structured around the main building blocks of a performance management system, to be answered by key the stakeholders of the entity;

▸ Off-side analysis of key documents;

▸ Interviews with key stakeholders;

▸ Audit report drafted.

Benefits

▸ Ensure that you can deploy the right tools, processes and people in the right place;

▸ Maximize the added value generated by your performance management system, by elevating current practices to best practices;

▸ Inform stakeholders in order to recognize the potential of continuous learning and improving;

▸ Justifying investments in process improvement.

Key deliverables

▸ Performance Management Maturity Level score;

▸ Performance Management Audit report;

▸ Performance improvement initiatives proposals.

Notes

It can be applied in various contexts at organizational level, business unit, department or team level. The services can be customized for each of the twelve practice areas, revealing valuable insights related to performance practices and systems.
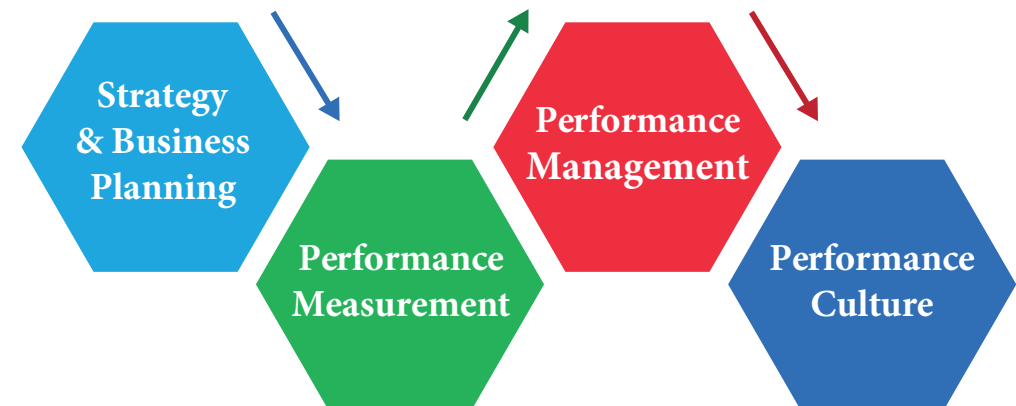
Our Practice Areas

Strategy and Business Planning

Service title: Strategy and Business in-house workshops

Strategy and Business in-house workshops are tailored on the client's needs. The workshops are focused on assessing and understanding the current state of the business, as well as on shaping the desired long-term evolution. To close the gap between the current and desired states, we are going to define together long, medium and short term strategic objectives and facilitate this process implementation across all levels of the organization. This way, you are going to get a clear image illustrating the desired contributions of each functional area and how it impacts the overall strategy implementation.

Implementation

The service is delivered through a 4 steps implementation process:

▶ Analyzing the current organizational state achieved and the internal documentation related to performance;

▶ Designing the future state of the organization in order to reflect the perspectives of major stakeholders;

▶ Defining clear goals and objectives based on the organization desired state of evolution;

▶ Translating the organizational strategy into easy-to-follow performance metrics and cascading them across the organization.

Benefits

▶ Shed light on the identity of your company and its desired state of evolution;

▶ Make precise, data-based decisions established on your strategic plan;

▶ Transform complex, elaborate strategies into actionable, easy to understand objectives;

▶ Plan a sustainable growth for the business.

Key deliverables

▶ Organizational identity framework (vision, mission, values);

▶ Environmental Scan Report;

▶ SWOT Analysis;

▶ Desired State of Evolution;

▶ Strategic Plan;

▶ Performance Scorecard and Dashboard.

Envisioning defined

▶ What was the initial plan established by the company?

▶ How is the company going to manage change and adapt to a dynamic market?

▶ What direction is the company headed towards?

▶ What practices can be considered to be value adding?

Notes

Most of the documentation work can be done off site and though online meetings. However, we strongly recommend the workshops to be delivered in-house, with the direct participation of decision makers.

Complementary dedicated services

Strategy audit

Overview

Strategy audit represents a top to bottom analysis of the organizational strategy and the support documents enclosed. The entire examination is focused on the strategy implementation process in every functional area and how it influences the objectives and their lines of action. The result is an audit report that consists of clear, complex and strategic recommendations aimed at improving the maturity level of your organization.

Our Practice Areas

Performance Measurement

Service title: Performance Measurement System Implementation

This complex project will enable professionals to improve their current system and develop a state of art Performance Measurement Architecture that not only facilitates the contributions of each organizational area, but also transparently delivers added value for the business.

Implementation

The service is implemented through 6 steps:

- Organizational performance context mapping: Analysis of instruments in place and processes;
- Strategy review for the organization;
- KPI structure establishment (strategy maps, scorecards, dashboards, portfolio of initiatives);
- KPI selection for strategic objectives;
- KPI documentation and activation;
- KPI reporting architecture configuration.

Benefits

- Get a clear overview on the progress of the business;
- Improve your business results through a better objective alignment in each department, more relevant, clearly defined and precise data to support the decision making process;
- Inform the key stakeholders in order to fully develop the internal performance management capability;
- Build the foundation for the performance management culture.

Key deliverables

- Training / Awareness sessions educational materials (course slide, additional resources);
- Performance Management Architecture System Map;
- Performance Management System Toolkit (Strategy Map, Scorecard, Dashboard, KPI Documentation Form, KPI Catalogue, Portfolio of Initiatives);
- Performance Management Manual.

Notes

The services involves on and off site activities, based on project specifications

Complementary dedicated services

KPIs Advice

We provide ""the best case scenarios"" in the business world towards implementing KPIs at organizational, departmental and individual levels.

KPIs Selection Facilitation

Dedicated advisors will work with you conductive to selecting the most relevant, properly defined and balanced KPIs in accordance with the practice you want to measure and monitor.

KPIs Documentation Assistance

Documenting KPIs can be a very elaborate process. Therefore, we consider it important to provide you assistance with using the proper tools and guide you across a more accessible structure.

Target Setting Workshops

Taking into consideration industry standards, historic data and the organizational strategy, we are going to make sure that the KPIs you settled on are properly aligned with the organizational target-setting.

Data Gathering Workshops

We dedicated an entire workshop to teaching you how to identify the most relevant data sources and channels for documenting your KPIs in order to provide clear decision making inputs.

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Performance Management

Service title: Organizational processes mapping and optimization

Performance management refers to the collection of practices conductive to analyzing performance results, identifying potential lines of action and establishing corrective initiatives with the aim of achieving better results.

Implementation

Performance management can be implemented at all organizational levels. Starting by mapping the individual and departmental processes, then focusing on the interconnection between several departments and in the end approaching a holistic processual perspective over the entire organization and the employees involved.

Benefits

▶ It provides a more clear image of the current work flow;

▶ It provides visibility over the employee interaction map and the potential bottlenecks;

▶ It identifies the areas that need processual improvement;

▶ It generates recommendations for further process optimization;

▶ It provides support on the matter of documenting each process procedure.

Key deliverables

▶ Video-doodle on how to map processes and document procedures;

▶ Mapped processes for all requested areas;

▶ A plan of actions needed to optimize the processes.

Notes

We can provide both off-site and on-site support, comprising of:

▶ Workshops on how to map processes and document procedures;

▶ Support with the mapping process;

▶ Insights into properly optimizing processes for overall performance improvement.

Complementary dedicated services

Performance management in-house workshops

Overview
If performance management represents a subject of interest and you need to acquire more knowledge, we can assist you with the consolidation of the following skills:

▶ Data reporting;

▶ Decision making;

▶ Initiative management;

▶ Learning & improvement;

▶ Building a performance culture.

The added value

▶ They provide support on specific subjects – very useful if you don't want to enroll in the entire Certified Performance Management Professional training course;

▶ They can be customized according to your needs and you can focus on what it is important for you;

▶ They are very interactive, providing an experiential learning, based on practical exercises and case studies.

Our Practice Areas

Performance Management

Service title: Performance reporting

Your monthly reporting process doesn't work as smooth as you want? Maybe it is time to ask for some support. Our consultants specialized in performance management will assist you in improving performance reporting.

Implementation

Performance reporting can be provided as a monthly subscription that includes us gathering, analyzing and reporting data for you, in real time, during the first months after implementing a Performance Measurement System. The purpose is to better understand what are the current needs for developing more accurate and on-time reporting.

Benefits

▶ Provide support to gather data for the KPIs that need to be reported on;

▶ Analyze performance results and add comments for each KPI;

▶ Develop proper graphs for each KPI type;

▶ Help compiling the performance report.

Key deliverables

▶ KPI reporting pages for each KPI;

▶ The overall performance report;

▶ List of actions that will improve your reporting process.

Notes

If you are considering the off-site option, we can provide you with the organizational performance report in 2-4 working days, depending on the number of KPIs that need to be reported. In order to generate departmental performance reports, the timeframe will vary in direct proportion to the number of departments that need reporting.

Regarding on-site support, the process can take up to 5 working days. This includes gathering KPI data on the spot, directly from KPI owners, followed by compiling the performance report and participating in the performance review meeting that will provide the support for a more efficient solution.

Complementary dedicated services

Projects Performance Management

Overview
Managing your projects optimally involves having access to the right reporting method, but also timing the report of the right status. We are here to provide you with the assistance you need to achieve the previously established outputs in a set timeframe.

Off-site and on-site support:
▶ Develop a series of tools that will help you better monitor your projects;
▶ Identify relevant KPIs to measure the progress and the success of your projects;
▶ Provide support in reporting the status of each project, by answering specific questions and coming up with solutions to certain issues that refer to the project.

Deliverables
▶ Portfolio of Initiatives, Initiative Documentation Form and Project Status Report for each project;
▶ Clear KPIs for each project.

Portfolio scorecard and portfolio dashboard development
Efficient project management relies on metrics and data. In this context, organizations can consider assistance in implementing a scorecard and dashboard to monitor strategic projects.

Our Practice Areas

Employee Performance

Service title: Individual Performance Management System

The Individual Performance Management System is developed as the final puzzle piece to an integrated Performance Measurement System. In practice, the implementation project can be part of the strategy and KPIs cascading process or it can start as an isolated initiative which will be later on connected to the KPI organizational framework.

Implementation

The service comprises a set of key actions designed to align the employees contribution to departmental and organizational strategic directions:

▶ Job description analysis and correlation to actual working activities;

▶ Establishing individual objectives and performance criteria;

▶ Establishing relevant KPIs for each position;

▶ Development and deployment of Individual performance monitoring tools: Competencies, Scorecards and Behaviors;

▶ Development of Performance evaluation tools and processes.

Benefits

▶ Implement an Individual performance management system aligned with the organizational strategy;

▶ Offer clarity in individual performance expectations and tools to assess them;

▶ Get a simple and transparent performance evaluation process;

▶ Foster the individual contribution to the organizational growth;

▶ Increase the employee engagement level across the organization.

Key deliverables

▶ Individual Performance customized toolkit;

▶ Individual Performance Plans;

▶ Organizational KPI, Competences and Behaviors Frameworks;

▶ Individual Performance Management workshops;

▶ Performance evaluation guidance;

▶ Individual Performance Management Manual.

Notes

The services involves on and off site activities.

Complementary dedicated services

Organizational culture assessment

We provide a non-intrusive organizational diagnosis to assess your performance culture and correlate the core values with the desired behaviors.

Employee engagement program implementations

Employee engagement has a high impact on employee performance, but driving and stimulating engagement requires the development of a well-defined and coherent strategy. The KPI Institute provides assistance in developing annual programs that increase the level of employee engagement within the organization

Reward Systems Implementation

Rewards are one of the most sensitive points into an organizational context. We help you define the line between targets, performance and incentives and to increase the level of engagement through a fully customized rewards scheme.

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Balanced Scorecard

Service title: Balanced Scorecard Implementation

If you want to improve your current level of performance using a clear and concise tool-set, the Balanced Scorecard is the answer. We are here to support you in this Performance Management journey, by developing and implementing the Balanced Scorecard System down to employee level.

Implementation

In order to properly implement a Balanced Scorecard System, we need to deploy off-site and on-site activities, comprising of:

▶ Analysis of your internal performance management related documents;

▶ Analysis of the external environment of the company;

▶ In-house training course to introduce terminology and clarify Performance Management related process, tools and techniques;

▶ Strategic workshop facilitation – to review or set up the strategic objectives, the associated KPIs and to identify possible initiatives to support the strategy;

▶ Cascading the established performance management architecture from organizational to departmental and employee levels.

Benefits

▶ It helps the organization better focus on its strategic objectives;

▶ It ensures a simple and clear measurement for success, by using KPIs to monitor the progress towards achieving the desired objectives;

▶ It facilitates improvement, as decision making is based on data;

▶ It enhances alignment across the organization, by having all employees striving for the same goals.

Key deliverables

▶ Environmental scan– an analysis about the company's external and internal environment, pointing out factors that might affect the business' performance;

▶ Desired State of Evolution – describing how the company will close the gap between its mission and vision;

▶ Strategy Map – a visual representation of the strategic objectives set;

▶ Organizational, Departmental and Individual Scorecards and Dashboards;

▶ Portfolios of Initiatives – a collection of projects running in the organization and departments, meant to ensure strategic objective are achieved;

Notes

We can provide this service at organizational level, and by cascading, also at departmental and employee level.

Complementary dedicated services

BSC Workshops

Overview
We can assist you in achieving superior know-how in using BSC through customized workshops:

▶ Develop the System's architecture;

▶ Establish objectives;

▶ Select relevant KPIs for your objectives;

▶ Document KPIs;

▶ Recalibrate the Balanced Scorecard System.

They are provided as on-site support for the BSC system implementation.

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Data Visualization

Service title: Data Visualization Standards Deployment

What makes this service work so well is how we weave all the essential components of the SFERA (Structure, Format, Express, Report and Assess) Model into a concise, succinct and complete process that delivers results every time. After deploying the service both managers and employees will be able to:

▸ Create effective and efficient visual representations;

▸ Introduce, implement and sustain performance reporting tools;

▸ Apply practical tips, tools and techniques for designing effective blended visualization solutions;

▸ Efficiently collect and analyze data to provide feedback and help management clarify outcomes, establish realistic expectations and identify boundaries;

▸ Develop visual representations that raise awareness, build commitment and ensure understanding.

Implementation

Our Data Visualization Professional Service focuses on three main pillars. The first is identifying the current state of information flow within your organization. Starting from here, in the second phase, the need of visual data communication is clearly mapped with interdepartmental connections. The third and final part of the service includes the implementation of new or updated visualization tools to ensure a clear, direct and concise transmission of data inside and outside the organization.

Benefits

▸ Receive relevant guidance for developing visual representations in order to discover, understand and communicate information;

▸ Create better and more relevant reports by understanding the fundamental concepts in data visualization;

▸ Offer intelligible data sets to decision-making parties through creating excellent graphical representations;

▸ Improve your performance in presenting data and enhance viewer experience by acknowledging the importance of communication through visual representation;

▸ Have a clear overall image of your company by creating specific data visualization tools tailored for your organization's needs and reality.

Key deliverables

▸ Performance Dashboard configured;

▸ Performance Scorecard uplift;

▸ Power point templates developed;

▸ Presentation guidelines developed;

▸ Annual reports visualization guidelines developed;

▸ Corporate color scheme developed;

▸ Integration with corporate identity guidelines.

Notes

This service can be provided as on-site and off-site support.

Complementary dedicated services

Data Visualization workshops

Overview

Based on pre-workshop documentation, we analyze the data visualization practices in the organization and design the workshop to address the main challenges in the company. During the 1 - 2 days workshop, participants will become aware of the stakeholders specific needs, understand the impact of poor Data Visualization practices and define their own guidelines that will be included in the company Best Practices Manual.

83%	11%	3%	1%	1%
Visually	Hearing	Smell	Touch	Taste
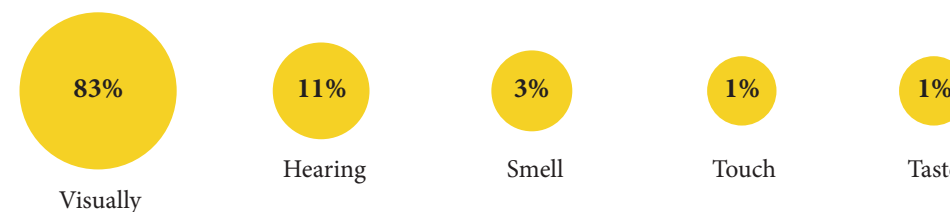
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Data Analysis

Service title: Data Analysis Framework implementation

The ultimate goal of data analysis is to provide valuable information that helps professionals better understand the market and their business, so that more relevant strategic plans are built and better decisions are made on a daily basis. Our consultancy service on data analysis is meant to retrieve essential information from the client's data sets and make it accessible to his stakeholders.

Implementation

We map and analyze your data flow process; identify bottlenecks and faulty processing sources. Based on your needs, we can deploy specific analysis techniques to ensure the accuracy, manipulation and communication of data.

Benefits

▸ Outline correlations between different variables;

▸ Offers reliable arguments to promote or suspend certain projects / programs;

▸ Identify the variables that caused processes / projects to become less effective;

▸ Ensure better decision making through the use of data.

Key deliverables

▸ Data reporting and monitoring framework;

▸ Customized statistical techniques;

▸ Data analysis report.

Complementary dedicated services

Data Analysis off-site support

Overview
Delivered in a timely manner, off-site support can facilitate the implementation of distinctive projects which require a large amount of data collection and analysis.

Data Analysis Workshop

Overview
It is a customized workshop, built upon current data analysis practices in your company, addressing key topics on working with data: collection sources, relevancy, analysis techniques and the degree of difficulty interpreting or translating data into call-to-action instructions.
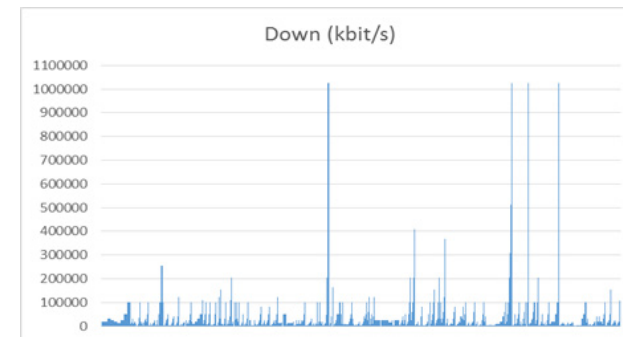
Fig 1. Histogram

Fig 2. Analysis and variable types

Variable Analysis type	Continuous	Discrete			
		Cardinal	Ordinal	Nominal	Binary
Counts	Yes	Yes	Yes	Yes	Yes
Missing values	Yes	Yes	Yes	Yes	Yes
Mean	Yes	Yes	Yes*	No	Yes*
Standard deviation	Yes	Yes	Yes*	No	Yes*
Quantile, Minimum, Maximum	Yes	Yes*	No	No	No
Frequency distributions	Yes	Yes	Yes	Yes	Yes
Bar/Pie Charts	Yes	Yes	Yes	Yes	Yes
Histogram	Yes	Yes	No	No	No
Correlation	Yes	Yes	Yes*	No	Yes*

Our Practice Areas

Benchmarking

Service title: Benchmarking Studies Development (on demand / syndicated)

The KPI Institute's benchmarking projects aim at leveraging performance by gathering and analyzing the best practices of measuring performance across different industries. A successful benchmarking service implies high commitment from all stakeholders involved, willingness to share practices, learning from different approaches, the ability to communicate and flexibility to implement improvement initiatives, when possible.

Implementation

Our benchmarking process is based on four main stages:

▸ Planning: establishing the objectives, performing research regarding the industry, targeting stakeholders, as well as conducting a preliminary survey for identifying the indicators and validating the items used;

▸ Data Collection: generating customized survey instruments, by employing quantitative research as a methodology. For an in depth analysis, we can also provide specific qualitative studies, if the company makes the request. All the data received is analyzed in order to eliminate all confusion, discrepancies or mistakes in gathering, compiling and interpreting it. All omissions and uncertainties are solved, both during and after the questionnaire completion;

▸ Analysis: statistical analysis is performed based on the data previously gathered, with the purpose of identifying the market position of each company at different levels (regional, national or international, depending on the benchmarking survey's amplitude). Statistical analysis will identify the overall tendencies of the market/industry and the position that each participant holds on that specific market. Our statistical analysis involves regression models (for tendency identification), descriptive statistics through the quartiles, percentiles and absolute frequencies of the requested data among participant companies;

▸ Improvement advice: As a results of the study, you have the possibility to apply changes into the organizational management system, in order to improve performance, monitor progress and plan ongoing benchmark.

Key deliverables

▸ General benchmarking reports depending on the topic / duration;

▸ Customized comparison reports.

Benefits

▸ Develop a measurement set for project system performance, regarding survey topics and indicators;

▸ Generate a baseline and evaluate the project system improvement by comparison with the standard;

▸ Make use of the opportunity to compare your performance against other industry competitors, exploring strengths, weaknesses and project execution particularities;

▸ Acknowledge both the leading and the lagging competitors in your industry.

Notes

To deliver a successful benchmarking study, we will make sure that the parties involved:

▸ Get a shared, common vision of the study objectives;
▸ Assume commitment of providing the data during the process;
▸ Manifest willingness to critically examine one's own practices and learn from others' best practices.

Complementary dedicated services

Secondary Research Benchmarking Surveys

Overview
Secondary research benchmarking projects usually imply the requirement of placing the company at a certain level amongst the industry competitors. Although this type of research does not involve the complexity of a Benchmarking Project, it can highlight specific and relevant aspects for the company, in order to calibrate its strategy and consolidate its position on the market.

Secondary Research Benchmarking Projects require a full understanding of the company's requirements, as well as comparisons of the company's indicators with industry tendencies identified by The KPI Institute. Industry tendencies are identified based on our primary research activity.

Through secondary research studies you:

▸ Acquire a general overview upon the industry your company activates in;
▸ Have a clear understanding of specific performance indicators for your industry;
▸ Compare your organization with general industry performance trends;
▸ Receive recommendations for improvement and further development;
▸ Clearly understand and implement performance appraisal systems in accordance with the industry's demands.

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Innovation Performance

Service title: Internal Innovation Framework Development

The innovation framework aims at growing an organization's innovative potential, through shaping an optimal infrastructure that can enhance the innovation processes. The innovation system is focused on following various dimensions, like: explore future opportunities, industry perspectives and emerging trends understanding, analysis of the core internal competencies, consumer insights and needs.

Implementation

Deploying these services, we will focus on:

▸ Identifying the premises of innovation in your organization;

▸ Developing the Performance Innovation System Architecture;

▸ Develop the Performance Innovation tools;

▸ Define the Performance Innovation System Governance;

▸ Facilitate Innovation Project Management.

Benefits

▸ Determine the internal innovation capabilities;

▸ Impact organizational culture in a positive manner;

▸ Generate new ideas on a constant basis;

▸ Create an innovation organizational culture.

Key deliverables

▸ Innovation framework customized to fit your organization's needs;

▸ Internal innovation system deployed;

▸ Guidelines in building the culture of innovation;

▸ Idea management tool implementation.

Notes

When aiming at a successful innovation activity, an organization should focus on the innovation strategy by setting the right goals and undertake all investment opportunities. Moreover, for developing a culture of innovation, the organization needs the right people, effective processes, a suited organizational structure and a talent management implementation system. Beneficial to creating valuable ideas, innovators should observe consumers needs, the capabilities of the company as well as the competition in a certain industry.

Complementary dedicated services

Innovation research
Quantitative innovation research is used for measuring data and extrapolating the results acquired from a particular sample in order to measure the prevalence of a certain hypothesis. However, quantitative research by itself can be insufficient. Conductive to validating the results and exploring the conclusions, organizations can take a step further and execute a qualitative research which is going to enable a wider perspective on problem-solving and generate new ideas and hypotheses.

Research studies on innovation practices:
▸ Get the market insights on innovation systems;
▸ Discover popular innovation trends and developments;
▸ Take the first steps towards a more effective decision making process;
▸ Get a clear overview of the industry ranking and your organization placement amongst competitors.

Our Practice Areas

Why Choose The KPI Institute

Our Practice Areas

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Customer Service Performance

Service title: CS Performance Management System Implementation

Customer Service represents a multidimensional strategic differentiation area. Our dedicated CS analysts are focused on enhancing the value that your Customer Service team adds by using three main approaches:

▶ Developing a CS strategy in alignment with the corporate strategic directions;

▶ Analyze and improve the internal CS performance management architecture (strategy maps, scorecards, dashboards, portfolio of initiatives);

▶ Improve the CS contribution to revenue growth through upselling.

Implementation

The implementation requires an end-to-end Customer Service Performance system encompassing the current CS practices and the system in place, followed by employee competencies correlated with the customer needs and the strategic role of Customer Service Performance within the company. This analysis is going to provide a clear action plan towards improving the results along with the CS performance tools development and calibration.

Benefits

▶ Develop the Customer Service strategy and performance measurement architecture;

▶ Clarifiy the roles and individual contribution in the CS department;

▶ Pozition CS as a strategic function within the organizational architecture.

Key deliverables

▶ Assessment of CS work documentation, tools and processes;

▶ Performance Management System Toolkit (Strategy Map, Scorecard, Dashboard, KPI Documentation Form, KPI Catalogue, Portfolio of Initiatives);

▶ Customer service training for managers and leads.

Notes

The service can be mainly delivered off-site. However, depending on the project characteristics, specific actions like engaging mystery client and on-site visits may be required.

Complementary dedicated services

Customer Service workshops

CS KPIs selection
Highly interactive and thoroughly planned day, meant to develop/calibrate strategic objectives and select KPIs for your Customer Service team.

Customer Service Performance Reporting
1-3 days workshop focused on analyzing the current state of performance, monitoring and reporting instruments and developing new processual flows in reporting data inputs for a simplified decision making process.

Mystery Client services
We can perform on-site visits, phone or email requests in order to test a full range of responses regarding the following aspects: timeliness, the ability to cope with difficult situations, customer approach or product know-how. All of the results are compared against the best practices in the client industry and as a result a report containing recommendations for future improvement is drafted.

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Supplier Performance

Service title: Supplier Performance System Implementation

Every organization works with several suppliers and inevitably their ability accomplish actions has an impact on the entire supply chain performance. Our approach offers a new perspective that allows you to proactively manage your supplier performance by extending your own performance management system across the supply chain. By involving us, you will be able to manage effectively the supplier life-cycle from one end to the other, followed by the selection and validation of similar strategic objectives measured through KPIs and sharing the real time progress. We support you entering the "customer of choice" league.

Implementation

This service is dedicated to bringing the relationship with the suppliers to the next level of performance by:

▸ Drafting the performance strategy of the Procurement department in relationship with suppliers;

▸ Define / calibrate the supplier code of conduct in accordance with the company values, principles, legislation and industry standards;

▸ Develop supplier selection and performance criteria;

▸ Develop supplier development plans and rewards policies.

Benefits

▸ Consolidate the internal decision making process with clear and easy to measure inputs from suppliers;

▸ Define and plan performance strategy with your own suppliers increasing their level of engagement and commitment to quality services;

▸ Implement robust performance principles in managing the relationship with suppliers;

▸ Develop long lasting relationships by setting a rewarding system for your best suppliers.

Key deliverables

▸ Supplier Performance strategy plan;

▸ Supplier selection and performance criteria;

▸ Supplier Scorecard and Dashboard;

▸ Supplier risk management system;

▸ Supplier strategic partnerships development guideline.

Notes

The service can be mainly delivered off-site. However, depending on the project characteristics, specific actions like engaging mystery clients and on site visits may be required.

Complementary dedicated services

Supplier performance workshops

Supplier Scorecard and Dashboard Development
When it comes to particular cases of suppliers, we can offer assistance in order to correlate the objectives with the KPIs and implement Scorecards and Dashboards as a foundation for performance monitoring.

Alliance scorecards development
Alliance scorecards development refers to assistance services in implementing a scorecard that will enable monitoring the objectives of an entire alliance.

Supply Chain Workshop
It represents an interactive and gratifying business simulation which enables you to identify the weak points of your organization as part of the supply chain and offers you the proper context to draw conclusions and take actions to strengthen them.

Our Practice Areas

Why Choose The KPI Institute

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Personal Performance

Service title: Personal Performance Essentials

Nowadays, the importance and benefits of measuring and managing performance within organizations are broadly recognized and supported. However, reaching above organizational limits, recognizing performance-related principles and mastering tools can also be useful for improving individual performance. Starting with a healthy lifestyle and physical activity, followed by family life and leisure activities and finishing off with career planning and continuous learning, these are all essential factors for personal performance improvement.

Implementation

"Personal Performance Essentials" is designed as a one day interactive workshop that will help you understand personal performance. It focuses on explaining the benefits of having a structured approach to life, on clarifying the specific processes and tools, as well as on the implementation of a sound personal performance framework.

Benefits

▸ Obtain better personal and professional results by implementing a clear and integrated approach to personal performance;

▸ Design your own personal performance plan;

▸ Get motivated to implement life changes by experiencing the daily life applicability of theoretical concepts;

▸ Develop your ability to measure personal performance in a standardized and effective manner.

Key deliverables

▸ Personal SWOT Analysis;

▸ Personal Performance Plan;

▸ Personal performance tracking tools.

Notes

The workshop is dedicated to corporate teams with a high degree of workload, aiming to facilitate the smooth transition towards a better work-life balance.

Complementary dedicated services

Personal time management workshop
It involves an intensive exploratory session designed to identify ""time thieves"" and non-value adding activities which have an impact on the work-life balance. Participants are empowered to explore their potential in getting full control over their time allocation and productivity by using KPIs and a structured approach oriented towards achieving personal goals."

Measurement   **Management**   **Balance**

Productivity   **Performance**

Why Choose The KPI Institute

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About Us

The KPI Institute is a research institute specialised in business performance. It operates research programs in 12 practice domains ranging from strategy and KPIs to employee performance and from customer service to innovation performance. Insights are disseminated through a variety of publications, subscriptions services and through a knowledge platform available to registered members. Support in deploying these insights in practice is offered through advisory services.

2004 YEAR OF **ESTABLISHMENT**

12+ years spent on researching KPI best practice

144+ research reports published *to date*

80+ staff members
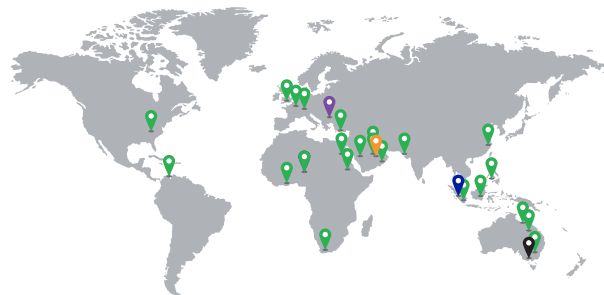
4 OFFICES
- Australia
- Middle East
- Europe
- South East Asia

6 CONTINENTS
on which we delivered trainings

12 global partner organisations

31 countries where we delivered educational programs

75 countries with research clients

smartKPIs.com

20,603 KPI examples published

49,902 companies registered

81,210 members on our online communities

928,946 professionals reaches

TKI Framework

The overall planning and approach to project requests is based on TKI Performance Framework, which can integrate, depending on client specific needs, elements of external business excellence systems such as EFQM, BSC or Baldrige.

Research Data

A characteristic of TKI projects is to leverage on our core research capability to understand the context and provide fundamental solutions. Secondary data from TKI's knowledge base can be used, along with primary research conducted by the project team.

Project Team Competence

Our consultants have an extensive industry experience backed up by valuable expertise on working on similar projects.

Participant Experience

Our purpose is to deliver not only consultancy services, but also to develop a relevant learning experience which will be transferred into practice through a set of workshops, presentations and direct engagement with stakeholders to assure a common level of understanding and gain the right competences to achieve the desired outcomes.

Communication Plan and Road Map

The entire project will conclude with the outline of a roadmap for strategy implementation and the articulation of a strategic communications

Our Practice Areas

Why Choose The KPI Institute

THE KPI INSTITUTE

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12 Years of
PERFORMANCE

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