



# THE KPI INSTITUTE



Training Catalogue 2014



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## Introduction

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### About us

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 developed the first KPI Management Framework and operates several research programs dedicated to performance management, strategy, Balanced Scorecard and Key Performance Indicators. It operates smartKPIs.com, the result of the research program dedicated to documenting and cataloguing how KPIs are used in practice, an online portal containing the largest collection of well documented KPI examples, supported by a community of tens of thousands of members.

**We understand that business success starts with competent people and we have assessed thousands of businesses, so we can genuinely train professionals in developing new skills.**

### Our unique training approach

The training portfolio currently contains 20 training courses which provide a combination of practical solutions for improving organizational performance. The courses are informed by:

- ▶ Practical experience in implementing and using tens of Balanced Scorecard based performance management systems in organizations;

### Why study with The KPI Institute?

We understand that business success starts with competent people and we have assessed thousands of businesses, so we can genuinely train professionals in developing new skills.

The training courses are structured to enable both the theoretical understanding and practical experience of using a variety of performance management tools and techniques for deploying KPIs correctly across industries and functional areas:

- ▶ Group discussions, exercises, simulations and case studies;
- ▶ Presentations of performance management templates as tools to support the integration of performance management practices in organizations;
- ▶ Access to over 30 templates used for KPI management;
- ▶ Customized feedback regarding the present use and the future plans for implementing performance management systems;
- ▶ Active involvement of all the participants in a collaborative learning environment where opinions and experiences are shared.

- ▶ Insights gained by researching and reviewing hundreds of organizational Balanced Scorecard systems, Performance Scorecards and Strategy Maps;
- ▶ Literature review of the most important publications and materials on this topic;
- ▶ Academic research on the key drivers of organizational performance.



## Certified and Specialized Courses

In an effort to improve the ways in which KPIs are understood and employed in organizations worldwide, The KPI Institute provides a broad set of education services.

The training offer includes KPI Professional and Practitioner Certifications as well as preparatory courses. These training courses are designed to provide a strong foundation to deploying business management systems and BI software by developing the next generation of KPI professionals. These KPI professionals will form the basis of the organisational performance measurement capability, becoming the go-to place for advice about understanding, establishing, activating, reporting and generating value by using KPI across organisations.

The Institute also offers specialized training courses customized to specific functional areas, industries or topics related to performance management.

The KPI Institute training courses are divided into the following categories:

- ▶ Certification Preparation
- ▶ KPI Framework
- ▶ KPI by Functional Area
- ▶ KPI by Industry
- ▶ Balanced Scorecard
- ▶ Performance Management
- ▶ Procurement Performance
- ▶ Performance Through People
- ▶ Business Simulations

## In-house Training Courses

The courses offered by The KPI Institute can also be accessed as in-house training solutions. Any of the topics and subjects covered in this catalogue can be adapted to suit your business needs. We will take the time to understand your company's learning needs so that we can develop a tailored training solution that satisfies your business objectives.

The in-house solutions combine The KPI Institute's expertise in training thousands of professionals with different backgrounds from a multitude of industries with the organizational customization needs as identified during the initial analysis stage of the process.

The certification programs are designed to provide a strong foundation to deploying business management systems and BI software.

New training programs on topics related to KPIs, performance management, business strategy, risk management and business intelligence can also be designed at your organization's request. We welcome the opportunity to discuss your company's training and business development initiatives.

Should you be interested in scheduling an in-house training course, email us at [office@kpiinstitute.org](mailto:office@kpiinstitute.org) and you will receive a customized offer.

*"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. AlFaadel, Strategy Planning Executive Director,  
Saudi Food & Drug Authority**



## Training Courses

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Category	Code	Course	Description
Certification Preparation	CP01	Certified KPI Professional	Acquire a rigorous standardized approach to using KPIs to achieve organization's desired level of results.
	CP02	Certified KPI Practitioner	Understand how KPIs can be used in practice by reviewing case studies, exercises and running simulations.
KPI Framework	KP01	KPI Performance Architecture	Learn to design the most popular performance management tools: dashboards, scorecards and healthograms.
	KP02	KPI Masterclass	Understand the key stages of KPI Management Framework implementation and review best practices.
	KP03	KPI Essentials	Gain guidance in building a performance culture and assessing performance measurement capabilities.
KPI by Functional Area	KA01	KPI, Dashboard & Scorecard for Departments	Practice deploying a performance management system and designing scorecards and dashboards.
KPI by Industry	KI01	KPI, Dashboard & Scorecard for Industries	Practice deploying a performance management system and designing scorecards and dashboards.
Balanced Scorecard	BS01	Implementing and using a BSC based Performance Management System	Learn about the architecture of a performance management system, what it includes and how to design it.
	BS02	Balanced Scorecard Simulation	Work with "what-if" scenarios to explore the processes and elements of Balanced Scorecard perspectives.
Performance Management	PM01	Managing and Improving Individual Performance	Review best practices and learn how to establish and use criteria for performance evaluations.
	PM02	Integrated Performance Management	Learn to link different elements of the performance management system.
Procurement & Logistics Management	PL01	Supplier Performance Management	Practice designing a supplier performance management system and review tools for maximizing performance.
	PL02	KPI, Dashboard & Scorecard for Purchasing /Logistics	Identify the most relevant KPIs and learn how to overcome challenges in improving performance.
	PL03	A Strategic Approach to Procurement & Logistics Processes	Shape the strategy for increasing supply chains efficiency and optimizing warehousing and distribution.
Performance Through People	PP01	Implementing Employee Engagement Programs	Participate in simulations, review templates and tools and learn how to improve the employee engagement program.
	PP02	Solutions for Managing Change in Organizations	Practice the development of key documents involved in planning change initiatives.
	PP03	Implementing Succession Management Programs	Learn how to select and employ the best methods and tools for assessing performance and potential.
	PP04	Integrating Talent Management Processes	Understand how the talent management processes are connected and how to integrate them in the organization.
Business Simulations	SI01	Friday Night at the ER	Learn about key tools of process improvement, reengineering and cross-functional team performance.
	SI02	FishBanks	Learn about renewable resource management by analyzing patterns of complex, dynamic systems.

# Essential Resources

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## Inclusions

*The KPI Institute offers at the end of each course a collection of valuable learning resources that bring added value and support to professionals working in the Performance Management area.*

### Performance Management System Architecture template

Visual representation of the performance management system and its processes, which outlines the interdependencies between the system's components.

### Desired State of Evolution template

Performance management tool used to integrate all strategic statements of an organization. Having a pyramid structure, it closes the gap between mission and vision, by integrating the company's targeted progress in the center of the pyramid.

### Strategy Map template

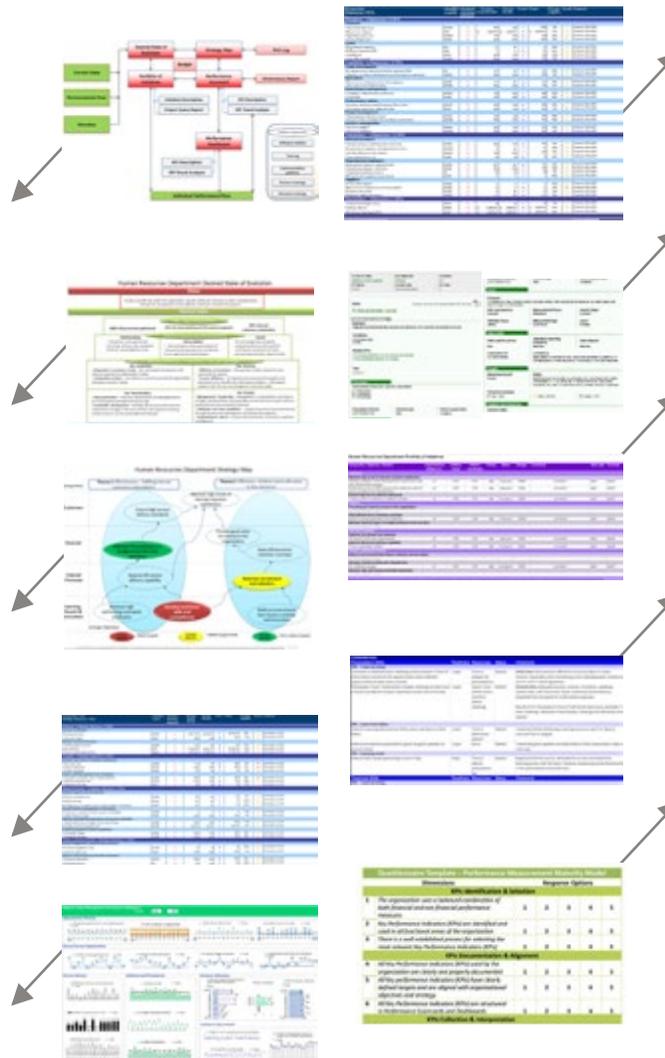
Powerful communication tool that translates the strategy into clear actions and enables employees to better understand their role in the organizational strategy.

### Performance Scorecard template

Scorecard used to measure the performance of companies against established objectives, by assigning relevant KPIs for each strategic objective.

### Performance Dashboard template

Dashboards are visual representations of the company's performance. As an operational tool, it displays the most important data in regards to everyday activities and processes



### Performance Healthogram template

Tool designed to measure the "health" of each organizational level entity. It can reveal the root causes of under-performance, being able to track important aspects related to an organizational entity's capabilities which are often excluded from scorecards and dashboards.

### KPI Documentation template

Template that structures the most relevant information regarding a KPI.

### Initiatives Portfolio template

Instrument used to monitor the progress of the organization's project portfolio.

### Individual Performance Plan

Instrument used to establish performance expectations and to identify the competences that require improvement.

### Performance Measurement Maturity Model Questionnaire

Primary tool used for Performance Management Maturity Model survey conducted among the employees of an organization, to support the analysis and the optimization of current organizational performance measurement processes.

### Monthly Performance Management Process

Shows the main steps to be taken monthly in the Performance Management Process.

### Premium Membership Access on smartKPIs.com

Associate membership valued at \$249 which gives access to the world's largest database of documented KPIs. This membership allows you to browse over 7,000+ documented KPIs as well as view and export 500 documented KPIs.

## Our Trainers

### Top-class International Expertise

All our trainers are certified professionals, with abundant experience as both practitioners and education providers. Altogether, our team possess excellent PhD. and Master Degrees, as well as certifications in their respective fields.

Being extensively certified reaffirms our credibility as a training provider and also supports our goal of delivering consistent quality to our valued clients.

Having both professional and academic experience, our trainers are able to bring the depth and breadth of their knowledge to our courses.

*“I found the course rather good as an introduction to the KPI world. I definitely benefited from it and already started to apply some of the key points in my daily work. I am glad that I participated in the training and met The KPI Institute team.”*

Isil Aras, EUROCONTROL, Belgium

*“The course was very comprehensive and informative. It helped me have a clear understanding of KPIs and developed my skills around setting my own departmental KPIs.”*

Maha Ayish, AMMROC, UAE



#### Aurel Brudan

- ▶ PhD in Management (in progress)
- ▶ PRINCE2 Practitioner
- ▶ TOGAF 9 Certified
- ▶ Certified Trainer



#### Adrian Brudan

- ▶ Master in Business Administration
- ▶ PRINCE2 Practitioner
- ▶ Certified KPI Professional
- ▶ Certified Trainer



#### Ahmed Samy

- ▶ PhD in Business Forecasting
- ▶ Certified Manager of Quality/Organizational Excellence
- ▶ Kaplan & Norton BSC Certified Graduate



#### Ahmed Gadelhak

- ▶ Master in Information Technology
- ▶ Project Management Professional
- ▶ Six Sigma Certified Green Belt



#### Ibrahim Neyaz

- ▶ Master in Management Information Systems
- ▶ ITIL V3 Certified
- ▶ Certified KPI Professional
- ▶ Certified Trainer



#### Cristina Tarata

- ▶ Master in Accounting
- ▶ Certified KPI Professional
- ▶ Certified Trainer



#### Andreea Trimbitas

- ▶ Master in Finance
- ▶ Certified KPI Professional
- ▶ Certified Trainer



#### Raluca Vintila

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- ▶ Certified Trainer



#### Teodora Gorski

- ▶ Master in Project Management
- ▶ Certified KPI Professional
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#### Mihai Toma

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#### Paul Albu

- ▶ Bachelor in Organizational Psychology
- ▶ Certified KPI Professional
- ▶ Certified Trainer



#### Cristina Bleoca

- ▶ Bachelor in International Business Transactions
- ▶ Supply Chain Professional
- ▶ Certified KPI Professional
- ▶ Certified Trainer



#### Radu Coccan

- ▶ PhD in Political Marketing
- ▶ Project Management Professional
- ▶ Expert in Public Procurement
- ▶ Certified Trainer



#### Nicoleta Pulbere

- ▶ Master in Journalism & Communication Sciences
- ▶ Information Technology
- ▶ Infrastructure Library (ITIL) Expert
- ▶ Certified KPI Professional



#### Andrada Iulia Ghete

- ▶ PhD Engineering and Management (in progress)
- ▶ Certified KPI Professional
- ▶ Certified Trainer

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# Our Clients

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## Training across five continents

Over the last 5 years, The KPI Institute has provided education and expertise to professionals looking to develop the skills required in deploying and using KPIs worldwide. To this effect, The KPI Institute has:

- ▶ Assisted over 28,000 organizations in finding solutions to their KPI needs;
- ▶ Delivered training courses in 20 countries on 5 continents;
- ▶ Trained over 1,500 participants from 41 countries on how to work rigorously with KPIs;
- ▶ Delivered over 2,200 training hours;
- ▶ In 2014 The KPI Institute makes available 42 open certification courses in 18 countries.

More than 1,500 practitioners have taken part in The KPI Institute training courses.

### Chemicals



### Manufacturing



### Construction



### Oil and Gas



### Energy



### Pharmaceuticals



### Aviation



### Government Administration



### Professional Services



### Banking



### Healthcare



### Telecommunications





## Certification Preparation

Certified KPI Professional ▶

Certified KPI Practitioner ▶

The Certification Programs were designed to improve the understanding of performance management at a conceptual level and gain practical experience in using a variety of performance management tools and techniques for KPI management. These courses can be accessed as open or in-house training solutions.

For dates and locations of our upcoming certification courses, visit: <http://kpiinstitute.org/education/upcoming-courses/>

## CP01 Certified KPI Professional

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## Overview

The course provides the opportunity to get acknowledged for 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. In order to obtain the certification there is a mandatory three-day course at the end of which participants will take an exam.



## Benefits

- ▶ Learn insights from the largest research project on KPIs;
- ▶ Understand the big picture around KPIs in the context of strategy and analytics;
- ▶ Acquire a rigorous standardised approach to using KPIs;
- ▶ Practice using KPIs in applied case studies and exercises;
- ▶ Access subject matter resources and tools;
- ▶ Receive a 6 months complimentary Premium subscription to smartKPIs.com KPI library;
- ▶ Obtain professional recognition based on competency certification;
- ▶ Have more career opportunities in a field of growth.

## Objective

Based on its research and education activities, The KPI Institute developed the premier global KPI Certification Program designed to provide a strong foundation to deploying business management systems and BI software by developing the next generation of KPI professionals.

## Attendees

This 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.

## Assessment

You will be pre-tested by using a multiple choice questionnaire at the beginning of each session. On the last day, you can opt to attend a final test to obtain the KPI Professional certificate from The KPI Institute.

*“We see the ability to understand and monitor the vital numbers behind the strategies and capabilities of our investments as vital to our competitive edge. I am confident that the course will help us to both sharpen our internal tools and to provide further value in our strategic sparring with company management.”*

**Angus Steel, Portfolio Manager Equities, Delta Lloyd Asset Management, Netherlands**



## Day 1 - Establishing KPIs

**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 2 - Activating KPIs

**KPI Documentation**

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

**Exercise:** Documenting a KPI

**In practice:** KPI documentation form typology

**Case study:** Customizing a KPI documentation form

**Case study:** Setting KPI targets

**Data Visualization: Designing KPI Dashboards And Scorecards**

- ▶ Good practice in data visualization
- ▶ KPI toolkit spotlight: The Balanced Scorecard
- ▶ KPI toolkit spotlight: The KPI Dashboard

**Exercise:** The importance of data visualization

**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 3 - Generating value with KPIs

**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:** Review of documented KPI examples

**Case study:** KPI modeling

**Generating Value From Using KPIs**

- ▶ Building organizational 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

## CP02 Certified KPI Practitioner

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## Overview

This experiential learning course is almost entirely structured on case studies, exercises and simulation. All these will prepare you for obtaining the Certified KPI Practitioner status, while practicing the use of the KPI Management Framework, customizing and developing templates in accordance with the standards required for the certification application package.



## Benefits

- ▶ Gain thorough understanding of how KPIs can be used in practice by reviewing and discussing case studies;
- ▶ Familiarize yourself with over 30 templates that can be used for KPI management;
- ▶ Test your knowledge around KPI management and performance measurement through exercises and simulation;
- ▶ Understand the challenges of using and adapting KPI management tools and how to address them;
- ▶ Practice the preparation of KPI management documents similar to those that you would submit for KPI Practitioner Certification.

## Objective

To complement the KPI Professional Certification, we launched a second certification option for business professionals interested in gaining further recognition for their practical experience in developing and employing KPI management frameworks. It focuses on practical exercises, which account for 90 percent of the course's time, the remaining time being dedicated to reviewing relevant theoretical concepts.

## Attendees

This course is designed for executives, managers and analysts from functional areas such as strategy, finance, project management, quality control, operations, logistics, marketing, risk management, accounting and human resources, as well as any professional interested in experiencing a two-day intensive KPIs in practice simulation.

## Assessment

Apart from the course, participants are given the opportunity to obtain their KPI Practitioner Certification by following the steps highlighted in the Certification Process section.

*"It is the willingness of experts like yourself with the capability in the area of KPIs and your response to the interest and needs of the participants that makes this program effective and worthwhile for our organization. The way you run the last day and your ideas certainly sparked a lively dialogue among all of those in attendance and letting them know what and how to do next."*

Hanan Abdelmajeed, Supreme Council of Health, Qatar



## CP02 Certified KPI Practitioner

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## Day 1 - Establishing KPIs

**KPI Project Coordination**

- ▶ The business case for KPI implementation
- ▶ KPI implementation project outline
- ▶ Stakeholder matrix development
- ▶ Primary input sources data analysis
- ▶ Secondary input sources data analysis
- ▶ Reporting catalogue development
- ▶ KPI workshop briefing pack development

**KPI selection**

- ▶ Probing questions for KPI selection
- ▶ Value driver concept mapping
- ▶ Value flow analysis
- ▶ KPI balancing

**Scorecard and dashboard development and documentation**

- ▶ Selection of KPIs based on objectives
- ▶ KPI clustering
- ▶ Content structure
- ▶ Scorecard and dashboard design
- ▶ KPI documentation form design
- ▶ Target setting

## Day 2 - Managing with KPIs

**Data collection, analysis and reporting**

- ▶ Data gathering communication
- ▶ Working with KPI data custodians
- ▶ KPI trend analysis
- ▶ Reporting commentary

**KPI review meetings and initiative management**

- ▶ KPI review meeting preparation, facilitation and follow-up
- ▶ Initiative selection, documentation and monitoring

**KPI management evaluation**

- ▶ Double loop learning / lessons learned
- ▶ Managing the cost of measuring KPIs
- ▶ Using the Performance Measurement Maturity Model
- ▶ Audit of performance measurement enablers (software, hardware, culture)
- ▶ Review of the KPI Management Framework toolkit





## KPI Framework

KPI Performance Architecture ▶

KPI Masterclass ▶

KPI Essentials ▶

The KPI Framework courses provide a strong theoretical foundation and a multitude of practical examples, helping participants develop the skills required in deploying and using KPIs. These courses also provide useful guidance in regards to building a performance culture and assessing the organizational performance measurement capability.

## KP01 KPI Performance Architecture

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### Overview

This course is designed as a short, intensive course to help you understand the basics of KPI management. It focuses on clarifying the structure and components of the performance management architecture. It also discusses the most commonly used techniques for selecting KPIs and some of the most popular performance management tools.

#### Benefits

- ▶ Build your knowledge foundation in regards to KPI management;
- ▶ Understand the importance of integration in the context of performance management;
- ▶ Review critical aspects and examples of using KPIs;
- ▶ Learn how to design and use dashboards, scorecards and healthograms;
- ▶ Identify next steps for leveraging KPI in your organization/department.

### Attendees

This course was designed for professionals from different functional areas seeking to understand the basics of KPI management as well as managers who need to track performance at departmental level and to cascade objectives and KPIs to employee level.

*“What I’ve learned from the course is very useful for me as we are developing the KPI of 2013 for our Holding Co. and two SBUs under Kingfisher group.”*

Ongard Wijitjiltert, Kingfisher Holdings, Thailand

### Day 1 - A KPI Performance Architecture

#### Performance Integration Overview

- ▶ Agenda outline and expectations
- ▶ Performance management and integration
- ▶ Performance management systems architecture
- ▶ Understanding value drivers, objectives, KPIs and initiatives
- ▶ KPI naming standards and use of terminology

#### Working with KPIs

- ▶ KPI lifecycle
- ▶ KPI selection process
- ▶ Techniques for KPI selection (Value Flow Analysis, KPI balancing)
- ▶ Examples of KPIs in practice

#### Designing and using performance management tools

- ▶ Understanding Dashboards, Scorecards and Healthograms
- ▶ Practical exercises on designing dashboards and scorecards
- ▶ Best practice industry specific performance management tools

#### Review and next steps

- ▶ Cascading KPIs at employee level
- ▶ Benefits of using an integrated performance management system in practice
- ▶ Review of the most important 10 slides of the day
- ▶ Roadmap of possible next steps
- ▶ Questions and answers



*“KPI course has changed the way to measure the performance of many elements in my everyday life.  
Ihab N. Abuziyad, Salehiya Est., Saudi Arabia*

## KP02 KPI Masterclass

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### Overview

This course will provide you with a solid understanding of performance management and KPI management theories and best practices. The topics covered expand on the KPI Management Framework in the larger context of data-based decision making and range from KPI terminology and lifecycle to benchmarking and business intelligences.

### Benefits

- ▶ Understand the concept and terminology around KPIs in the broader context of business strategy and integrated performance management;
- ▶ Learn various techniques for selecting and cascading KPIs;
- ▶ KPIs, reporting on KPIs and conducting business analyses;
- ▶ Follow the key stages of KPI Management Framework implementation, accompanied by best practices and practical exercises;
- ▶ Practice the development of improvement initiatives and their documentation;
- ▶ Review case studies highlighting best practices in data visualization and KPI tools deployment.

### Attendees

This course is designed for executives, managers and analysts from various departments, as well as Performance Management professionals.

*“The course delivered was the expression of a very strong practical and pedagogical experience, and used interactive teaching methods, thus reaching its objectives. I myself have interiorized both the theoretical information and the practical abilities taught during the course, which led to an enhanced knowledge and understanding of Performance Indicators and their applicability within a company. I recommend Adrian Brudan to all his potential clients because he is a trustworthy consultancy trainer who offers high-quality services.”*

**Mihaela Todor, Electrogrup, Romania**

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**Gain a solid understanding of performance management and KPI management theories and best practices.**

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*“I really enjoyed going through the topics and examples. The quizzes were a really good way to check that you’ve understood and digested everything. This is a great learning and revision tool. I feel that going through this course was very useful and I will share what I have learned in this course with my colleagues.”*

**Meshal Almotairi, Salehiya Medical, Saudi Arabia**



**KP02 KPI Masterclass**

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**Day 1 - Understanding KPIs**
**Fundamentals of Performance Measurement and KPI Management**
**Simulation:** KPIs and the Balanced Scorecard

- ▶ Performance Management terminology review
- ▶ Management theory supporting good KPI practice
- ▶ 10 smartKPIs examples

**Discussion:** Challenges in performance measurement

**Understanding Key Performance Indicators**
**Exercise:** Performance management toolkit

- ▶ Clarifying terminology: Key Performance Indicators (KPIs), measures and metrics
- ▶ The role and value added by performance measures
- ▶ Types of KPIs and their characteristics
- ▶ The KPI lifecycle
- ▶ An integrated approach to performance management from strategy to results

**Exercise:** From KPIs to performance criteria

**Assessing and selecting the right Key Performance Indicators**
**Exercise:** KPI clustering

- ▶ Techniques for Identifying and selecting KPIs
- ▶ Conducting a KPI selection workshop
- ▶ KPI selection criteria

**Case study:** Qualitative and quantitative aspects in performance measurement

**Getting it right: Excellent Template Formulation and KPI Goal-setting**
**Exercise:** Recognizing 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:** KPI documentation

**Day 2 - Using KPIs**
**Effective Business Intelligence: Paving the way for Performance Management**
**Exercise:** Analyzing performance data

- ▶ Designing and improving the data gathering process
- ▶ Data gathering and KPI activation techniques
- ▶ Creating relevant performance reports
- ▶ Designing great dashboards / scorecards
- ▶ Rules in data visualization

**Exercise:** Good practice in data visualization

**Performance Reporting and decision making techniques**
**Exercise:** Establishing performance improvement initiatives

Performance review meetings

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

**Case studies:** Generating value by managing with KPIs

**Examining good KPI practices**
**Case studies:** Ethics and gaming in performance measurement

- ▶ Using a Performance Measurement Maturity Model
- ▶ Designing great performance measurement architecture
- ▶ Performance Management Software and hardware
- ▶ Building a culture of performance
- ▶ Performance reporting data accuracy

**Exercise:** Review of KPI software solutions

**Implementing Performance Management from strategy to results**
**Quiz:** 10 things that matter in working with KPIs

- ▶ Insights into implementing and using KPIs smartly
- ▶ Stories from the field
- ▶ Review of the course material
- ▶ How to take back in organizations what was learned during the course

**Case study:** Deploying key templates in practice


## KP03 KPI Essentials

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## Overview

This course will provide you with a thorough understanding of each stage involved in the KPI Management Framework deployment and usage. In addition, the course provides useful guidance in regards to decision making and communications, building a performance culture and assessing the organizational performance measurement capability, as key related processes impacting the KPI management.

*“Mr. Adrian Brudan is a talented instructor, and has a good experience in KPIs field. He handled the course very well, he answered all of our questions, he managed all discussions in a professional way, and he used a lot of real life examples which facilitated the course.”*

**Ibrahim A. Neyaz, Saudi Food & Drug Authority, Saudi Arabia**



## Benefits

- ▶ Learn how to make the business case for KPI initiatives;
- ▶ Understand the linkage between KPIs, Key Risk Indicators and predictive analytics;
- ▶ Follow the key stages of KPI Management Framework implementation, accompanied by best practices and practical exercises;
- ▶ Review new directions in performance management, most popular and most recent tools in the field;
- ▶ Gain understanding of how to leverage communications, analytics and organizational culture in order to improve performance results.

**Gain a thorough understanding of each stage involved in a KPI Management Framework deployment and usage.**



*“I would like to thank you for this course. It was extremely useful. The material was presented in a highly intuitive way and it has helped me to recognize and work with KPIs in better way. Also, thanks to all my fellow participants who were just great and put up great Q&As. It is awesome when one is in a course where everyone is so enthusiastic and interested in learning. I think everyone in the course had a great time and this has been a most enjoyable 3 days.”*

**Fayez Alshehri, Turkey**



## Attendees

This course is designed for executives, managers and analysts from various departments, as well as Performance Management professionals.

*“Thank you so much for your effort and your contribution to this workshop. I'm very pleased to have you as facilitator of the topic.”*

**Settha Yok, Vattanac Bank, Cambodia**

## Day 1 - KPI Basics

**Understanding KPIs**

- ▶ Understanding KPIs
- ▶ Return on investment from KPI deployment
- ▶ From metrics to KPIs, KRIs and predictive analytics
- ▶ KPI typology (leading/laging, input/process/output/outcome)
- ▶ On indexes and weights
- ▶ KPI use case scenarios

**Exercise:** KPI identification

**KPI implementation context**

- ▶ Strategic planning and the performance management system
- ▶ Business case and project plan
- ▶ Securing sponsorship
- ▶ Approach to rolling-out KPIs

**Exercise:** Building the case for KPI implementation

**KPI selection principles**

- ▶ KPI lifecycle
- ▶ Methodology, tools, techniques for KPI selection

**Exercise:** Value Flow Analysis and KPI clustering

**Workshop: KPI selection in practice**

- ▶ KPI selection exercises
- ▶ KPIs by functional area
- ▶ KPIs by industry

## Day 2 - KPI development and alignment

**Cascading KPIs**

- ▶ Cascading from organisational to operational level
- ▶ Cascading from operational to employee level
- ▶ KPIs for processes, SLAs, suppliers and alliances

**Exercise:** Cascading KPIs

**KPI documentation - target setting**

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

**Exercise:** Target setting for KPIs

**Data visualization**

- ▶ Good practice in data visualisation
- ▶ Graph selection
- ▶ Understanding Scorecards and Dashboards

**New directions:** The Performance Healthogram

**Exercise:** Visualising KPI results

**Data gathering**

- ▶ Consistency in data quality and KPI measurement
- ▶ Best practice in the measurement of KPI
- ▶ The KPI data gathering process
- ▶ KPI data sources taxonomy
- ▶ KPI activation tools and techniques

**Exercise** Data custodian communication

## Day 3 - KPI based decision making

**Analysis and reporting**

- ▶ Report compilation
- ▶ Reporting meeting
- ▶ Business analysis techniques
- ▶ Benchmarking

**Exercise:** Analytics

**Decision making and communications**

- ▶ Cognitive biases affecting decision making
- ▶ Initiative management (documentation and progress review)
- ▶ Communication and transparency in KPI reporting

**Case studies:** Performance communication

**Exercise:** Decision making biases

**Building a performance culture**

- ▶ Performance leadership
- ▶ Performance architecture
- ▶ Integrating KPIs to organisational systems

**In focus:** Linking KPIs to incentives

**Exercise:** Gamification and KPIs

**Measuring And Learning With KPIs**

- ▶ Software and hardware
- ▶ Performance Measurement Maturity Model
- ▶ KPI capability building
- ▶ Review of course content
- ▶ Questions and answers / free discussion

**Exercise:** KPI quiz competition



## KPI by Functional Area

KPI, Dashboard & Scorecard for Departments ▶

This collection of courses is tailored to participants' needs, depending on the functional areas that is relevant to them. The one-day courses contain a unique combination of practical solutions for improving the performance of departments such as HR, Marketing and Purchasing/Logistics.

Additional courses on topics related to Performance Management for specific functional areas can be developed on request.

## KA01 KPI Dashboard & Scorecard for Departments

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### Overview

This course will help you improve the performance of your department through practical solutions. It provides an overview of key performance management and KPI management concepts and tools adapted to your specific needs.

#### Benefits

- ▶ Understand how to overcome common challenges and to improve performance;
- ▶ Learn about the main theories regarding performance management;
- ▶ Practice the deployment of a performance management system and the design of a scorecard and dashboard; Identify most important KPIs for your department;
- ▶ Analyze key areas processes.

### Attendees

This course is particularly designed for executives, operational managers and analysts from various departments.

*“It has been an excellent program and our participants are appreciative of the course contents and its brilliant delivery. We trust your contributions would add enormous value to our efforts directed towards achieving optimized performance in our business.”*

Jason Cutajar, National Australia Bank, Australia

### Day 1 - Developing and using performance management tools

#### Introduction - Challenges and key aspects of improving performance

**Mind Mapping:** Major challenges for the activities of a department (brainstorming)

- ▶ Understanding performance management and measurement
- ▶ Performance management analysis at strategic, operational and individual level
- ▶ Deployment of the main theories about performance management: Goal Setting Theory, Principal-Agent Theory, Social Learning Theory

#### Developing a departmental performance management system

**Simulation:** Deployment of a performance management system based on Balanced Scorecard

- ▶ An integrated approach to performance management: from strategy to outcomes
- ▶ Architecture of performance management system - the analysis of the system components and the association between them
- ▶ Departmental Scorecard - an essential part of the performance management system

**Case study:** Departmental performance review meeting and setting performance improvement initiatives

#### Key Performance Indicators (KPIs) and Departmental Dashboard

**Group exercise:** Identifying the 5 most important KPIs

- ▶ KPIs - performance measurement tool
- ▶ Developing a KPI catalog: KPIs selection, documentation and communication
- ▶ Departmental Dashboard - an essential performance management tool at operational level

**Group activity:** The analysis of a completed Dashboard example

#### Insights for improving performance management in a department using KPIs

- ▶ 9 insights for optimizing the performance of a department
- ▶ Review of the course material
- ▶ Deploying key templates in practice for performance improvement
- ▶ How to implement within your organization what you've learned in this course
- ▶ Questions & answers; open discussion





## KPI by Industry

[KPI, Dashboard & Scorecad for Industries](#) ▶

The KPI training by Industry is a series of courses offered by The KPI Institute adapted to the needs of various industries. The course addresses industries such as Medical Centers, Hotels, Real Estate Agencies, and Call Centers.

Additional courses for other industries can be developed on request.

## KI01 KPI Dashboard & Scorecard for Industries

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### Overview

This course will help you improve the performance within your industry through relevant solutions, that take into account both practical experience in implementations and the most recent research directions. It provides an overview of key performance management and KPI management concepts and tools adapted to your specific needs.

#### Benefits

- ▶ Understand how to overcome common challenges in improving performance within your industry;
- ▶ Learn about the main theories regarding performance within your industry;
- ▶ Practice deploying a performance management system and designing a scorecard and dashboard for your specific industry;
- ▶ Identify the most important and relevant KPIs;
- ▶ Analyze key activities within your industry.

### Attendees

This course is designed for all types of managers, executives and individual contributors working in various industries.

*"It was a very interactive course and all attendees participated as one team. The course content was very applicable to our sales work and the mentor satisfied our needs and objectives."*

Hussam M. Hassania, Salehiya Medical, Saudi Arabia

### Day 1 - Developing and using performance management tools

#### Introduction - Challenges and key aspects of improving performance

**Mind Mapping:** Major challenges within your industry (brainstorming)

- ▶ Understanding performance management and measurement
- ▶ Performance management analysis at strategic, operational and individual level
- ▶ Deployment of the main tools for performance management

#### Developing a performance management system

**Simulation:** Deployment of a performance management system based on Balanced Scorecard

- ▶ Integrated approach to performance management: from strategy to outcomes
- ▶ Performance Management system architecture - the analysis of the system's components and the association between them
- ▶ Scorecard for monitoring performance - an essential part of the performance management system

**Case study:** Performance review meeting and setting performance improvement initiatives

#### Key Performance Indicators (KPIs) and Dashboard for monitoring performance within the industry

**Group exercise:** Identifying the 5 most important KPIs for the industry

- ▶ KPIs - performance measurement tool
- ▶ Developing a KPIs catalog: KPIs selection, documentation and communication
- ▶ Dashboard for monitoring performance - an essential performance management tool

**Group activity:** The analysis of a completed Dashboard example for monitoring performance within the industry

#### Insights for improving performance and competitiveness

- ▶ 9 insights for optimizing performance
- ▶ Review of the course material
- ▶ Deploying key templates in practice for performance improvement
- ▶ How to implement within your organization what you've learned in this course
- ▶ Questions & answers; open discussion





## Balanced Scorecard

Implementing and using a Balanced Scorecard based Performance Management System ▶

Balanced Scorecard Simulation ▶

This collection of courses provides a systematic approach to understanding, building and implementing a Balanced Scorecard system. These courses also offer practical solutions for integrating Balanced Scorecard with other organizational systems: budgeting, communication and performance assessment.

## BS01 Implementing & using a Balanced Scorecard based Performance Management System

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### Overview

This course will help you understand the Balanced Scorecard Performance Management System and how it can help you in the context of strategic management. It will also prepare you for deploying and using a Performance Management System based on the Balanced Scorecard philosophy.

### Benefits

- ▶ Understand what Balanced Scorecard is and how it can help drive strategic efforts;
- ▶ Learn about the architecture of a performance management system, what it includes and how to design it;
- ▶ Practice the preparation of a Balanced Scorecard based on a given template;
- ▶ Understand what are the key steps following Balanced Scorecard rollout and how to use it on an ongoing basis;
- ▶ Identify ways to connect the use of Balanced Scorecards and the performance management system with other key business areas such as Leadership, Risk Management and Project Management.

### Attendees

This course is designed for executives, operational managers and analysts from various functional areas such as strategy, finance, project management, quality control, operations, logistics, marketing, risk management, accounting and human resources.

*“My participation in the course entitled “The implementation and utilization of a performance management system based on Balanced Scorecards” organized by Acumen Integrat has met all my expectations regarding its content, organization, and, most importantly, its trainers. Adrian Brudan was successful in facilitating this course, as he allotted equal time for theory, case studies, and practical exercises, and made sure that all the participants were involved in the practical cases and that everybody’s questions were answered.”*

**Corina Slav, Star Storage, Romania**

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**Understand the Balanced Scorecard Performance Management System and learn how it can help you.**

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*“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. AlFaadel, Saudi Food & Drug Authority, Saudi Arabia**



## BS01 Implementing & using a Balanced Scorecard based Performance Management System

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### Day 1 - Understanding the BSC based Performance Management System

#### Performance Management and BSC

- ▶ Expectations from the Balanced Scorecard in practice
- ▶ The role of the Balanced Scorecard in a strategic performance management context
- ▶ The evolution of the Balanced Scorecard, current state and emerging trends
- ▶ Performance Management System Architecture

**Analyses:** Command and control thinking vs. System thinking

#### Architecture of a Balanced Scorecard based Performance Management System

- ▶ Desired State of Evolution (DSOE) - linking values, mission, value drivers and vision
- ▶ Strategy Map - objectives as a performance road map
- ▶ Performance Scorecard - balance and alignment
- ▶ Portfolio of Initiatives - translating priorities into action
- ▶ KPIs as performance management enablers

**Discussion:** Best practice in Balanced Scorecard design

#### Case study - Developing Balanced Scorecard Performance Architecture

- ▶ Mapping the Balanced Scorecard Architecture
- ▶ Formulating the Desired State of Evolution
- ▶ Building the Strategy Map - grouping and linking objectives by perspectives and themes
- ▶ Developing the Performance Scorecard - defining most relevant KPIs
- ▶ Setting-up the Initiatives Portfolio - identifying and prioritizing strategic initiatives

#### Exercise - Customizing Balanced Scorecard templates

- ▶ Review of DSOE, Strategy Map, Performance Scorecard and Portfolio of Initiatives templates
- ▶ Documentation of Balanced Scorecard components
- ▶ Questions & answers, guidance in the documentation process

### Day 2 - Implementing/using a BSC based Performance Management System

#### Balanced Scorecard implementation process

- ▶ Review of Day 1 and exercise outputs
- ▶ Stages of the implementation
- ▶ Planning and deploying the implementation process
- ▶ Technology as an enabler

**Discussion:** Preliminary review of outputs

#### Generating value with the Balanced Scorecard

- ▶ Data gathering and KPI activation
- ▶ Performance reporting with the Balanced Scorecard
- ▶ Performance review meetings
- ▶ Initiatives management
- ▶ Reviewing the Balanced Scorecard

**Exercise:** Identifying initiatives during a performance review meeting

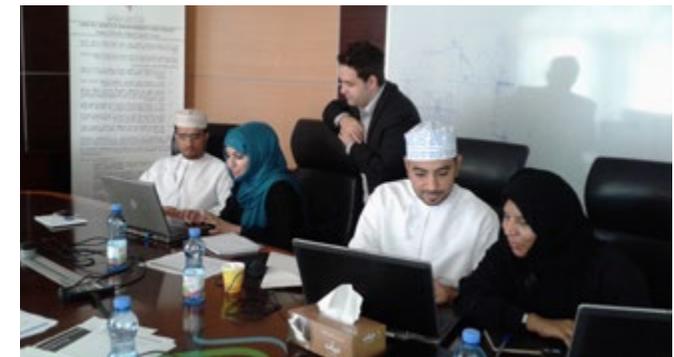
#### Balanced Scorecard in practice - success factors and challenges

- ▶ Integration with other organizational systems: budgeting, communication and performance assessment
- ▶ Balanced Scorecard and Leadership
- ▶ Balanced Scorecard and Risk Management
- ▶ Balanced Scorecard and Project Management

**Quiz:** Pitfalls in working with the Balanced Scorecard

#### Applying the course learnings in organizations

- ▶ 10 insights into implementing and using the Balanced Scorecard smartly
- ▶ Taking back in organizations what was learned during the course
- ▶ Overview of learning and conclusions
- ▶ Questions & answers; open discussion



*"The course provides a good basic foundation of setting up KPIs."*  
Sharon Noronha, National Bank of Fujairah, UAE

## BS02 Balanced Scorecard Simulation

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### Overview

This course is a business simulation leveraging the Balanced Scorecard tool and specialized software for running systems thinking-based models. You will have the chance to explore the linkages between the various processes and elements of the four Balanced Scorecard perspectives. You will also work with “what-if” scenarios and see on the screen how each of your team’s decisions is impacting the organizations’ performance results.

#### Benefits

- ▶ Understand the potential impact of your decisions on the larger system represented by your organization;
- ▶ Learn about systemic thinking and the Balanced Scorecard concept;
- ▶ Develop a more proactive approach of dealing with business problems;
- ▶ Improve your ability to work in teams and persuade your audience;
- ▶ Review best practices in implementing and using Balanced Scorecards.

### Attendees

This course is designed for executives, operational managers and analysts from various departments.

*“After undertaking this course I have many reasons to be thankful. Our company will benefit greatly from the training material in the organization process and restructuring of the KPIs.”*

Jason Cutajar, National Australia Bank, Australia

### Day 1 - Emulating Balanced Scorecard best practices

#### Introduction to Balanced Scorecard isee PLAYER

- ▶ Concept and the purpose of the simulation
- ▶ Assigning teams
- ▶ Communicating goals and criterion of success
- ▶ Explaining steps of play

#### Performing the Balanced Scorecard isee PLAYER simulation

- ▶ Team discussions about resource allocation strategies and decision
- ▶ Entering team decisions in software
- ▶ Receiving immediate feedback on the decision’s impact on performance results
- ▶ Completing the simulation

#### Applying the knowledge acquired during the simulation to the organizational environment

- ▶ Teams and group discussions on the experiences offered by the simulation
- ▶ Discussing the scoring and the strategies applied during the simulation
- ▶ Exploring implications of team decisions
- ▶ Clarifying the concepts of systemic thinking

#### Understanding the Balanced Scorecard concept

- ▶ Debriefing on the Balanced Scorecard components
- ▶ Overview of the Balanced Scorecard’s evolution
- ▶ Best practices in implementing and using Balanced Scorecards

#### Applying the knowledge within the organization context

- ▶ Ways of applying to your organizational environment the knowledge gained in this workshop
- ▶ Workshop overview and conclusions





## Performance Management

Managing and Improving Individual Performance ▶

Integrated Performance Management ▶

The training offer contains a unique combination of practical solutions for improving organizational performance. This collection of courses was designed to provide participants with an in-depth synthesis of key trends and practices in the field of performance management.

## PM01 Managing and Improving Individual Performance

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### Overview

This course will clarify key concepts and provide practical tools for establishing or improving your employee performance system. You will gain exposure to best practices in the field of performance management and you will learn how to establish and use criteria for performance evaluations.

### Benefits

- ▶ Understand key concepts in individual performance management and how it relates to organizational performance management;
- ▶ Learn does and don'ts in performance discussions from video examples;
- ▶ Practice the use of key individual performance management tools;
- ▶ Prepare for rolling out new individual performance management tools by learning how to use key planning documents;
- ▶ Receive a free individual performance management toolkit with relevant templates to support you in the deployment of course learning points (e.g. career plan, development plan, competencies, behaviors, performance conversations, etc.).

### Attendees

This course is designed for HR professionals, executives as well as operational managers and analysts from various departments.

*"Thank you very much for very productive and informative workshop. Your talent and professionalism was superior and outstanding. Applying the general performance management process to Saudia Airlines specific environment has proven your capabilities to demonstrate the performance subject to any industry. I will not hesitate to recommend your service to anyone who needs your expertise. Thank you very much and I am looking forward to work with you in the future."*

**Ashour M. Nizar, Saudi Airlines, Saudi Arabia**

**Gain exposure to best practices in the field of performance management and learn how to establish and use criteria for performance evaluations.**

*"It was a very informative course. Materials were very supportive, to the subject, explained in very nice and professional way, with many examples. Live questions and answers and the workshops were excellent."*

**Saleem A. Qureshi, Salehiya Trading Est., Saudi Arabia**

*"All sessions were very well linked together. It was a great course, one of the best courses I attended in Performance Management."*

**Jasim Ali Amur Al Jabrir, OXY, Oman**



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

**M. R. Rajesh Kumar, Synthite Industries Ltd, India**

## PM01 Managing and Improving Individual Performance

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### Day 1 - Performance Management foundations

#### Introduction - Key aspects of performance management

- ▶ Definition of performance management
- ▶ The relation between performance management and performance measurement
- ▶ Positioning at three levels: strategic, operational and individual
- ▶ The motivation for building performance management capabilities at an individual level
- ▶ Theories in performance management at individual level

**Discussion:** Challenges in performance management

#### Performance management architecture

- ▶ Explaining key terms: objectives, KPIs, targets and initiatives
- ▶ Mapping knowledge –performance management system elements
- ▶ Building a glossary and templates catalogue
- ▶ Using the individual performance management system architecture

**Exercise:** Recognizing key terms in performance management

#### Performance management at individual level

**Group activity:** Tools and techniques for improving individual performance

- ▶ The individual performance management system in practice
- ▶ Individual performance management system alignment to strategy
- ▶ Factors that influence individual performance

**Exercise:** Evaluating individual performance

#### Integrating performance management

- ▶ Recurrence and integration of performance management across organizational levels
- ▶ Aligning performance management architecture at strategic, operational and individual level
- ▶ Managing team performance
- ▶ Pitfalls in performance management integration
- ▶ Cultural aspects of performance management

**Case study:** Building organizational alignment

### Day 2 - Measuring and improving Performance

#### Performance assessment and appraisal

- ▶ Purpose and functions of performance assessment and diagnosis
- ▶ Performance appraisal: process and framework
- ▶ Rewarding performance: Pay for performance systems
- ▶ Challenges for effective performance appraisals

**Case study:** Impact of performance appraisal

#### Methods for measuring individual performance

- ▶ Balanced Scorecard and Individual Performance Scorecard
- ▶ 360° Appraisal System: Pros & Cons
- ▶ Results methods (Confluence with MBO, Usage of KPIs), behavioral and trait methods
- ▶ Pitfalls: Self assessment and performance appraisals for senior managers and executives
- ▶ Choosing the right method to measure performance

**Group activity:** Widely spread methods known

#### Performance appraisal meetings

- ▶ Appraisal interviews preparation: checklist and guidelines for appraisers
- ▶ Employees' understanding of performance appraisal system and meetings
- ▶ Follow up: feedback, career path, goals setting and improvement initiative portfolio
- ▶ Dos and Don'ts

Simulation

#### Applying the course learnings in organizations

- ▶ Key drivers of managing and improving individual performance
- ▶ Insights on implementing and using performance management and measurement at individual level
- ▶ Review of the course material
- ▶ Deploying key templates in practice
- ▶ How to apply the acquired knowledge in your organization
- ▶ Course overview and conclusions
- ▶ Questions & answers; open discussion



## PM02 Integrated Performance Management

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### Overview

This course will clarify the key concepts and theoretical foundations of performance management and the importance of integration. It will also walk you through best practices and exercises on how to link different elements of the performance management system and how to address key aspects such as customer satisfaction from a performance management perspective.

### Benefits

- ▶ Learn about key theories and best practices in performance management integration;
- ▶ Understand how to leverage related disciplines such as strategy, project and knowledge management in order to build organizational alignment;
- ▶ Analyze how the strategic, operational and individual level work together, common points, differences and how they can be integrated;
- ▶ Review best practices in balancing customer satisfaction both internally and externally;
- ▶ Understand how KPIs and initiatives differ and how they can be used together as tools to increase performance.

### Attendees

This course is designed for executives, operational managers and analysts from various departments.

*“I found the course very beneficial and informative in terms of standardizing terminologies, definitions, documentations and other aspects of performance measures in our organization, the course was a very good start to initiate a program for building a comprehensive performance measurement system in our bank. It’s highly recommended for startup initiatives and for those who want to brush up their systems.”*

**Faiqa Janahi, Bahrain Islamic Bank, Bahrain**

**Review best practices and exercises on how to link different elements of the performance management system and learn how to address key aspects from a performance management perspective.**

*“Aurel is a very detailed and organized person. This can be observed through the training materials and contents prepared during a training session conducted in Kuala Lumpur, Malaysia. In addition to it, Aurel is definitely is the subject matter expert in this particular field with great creativity, suggesting and guiding trainees with innovative and practical methodology which are easy to apply in the industry.”*

**Irene Beh Ai Ling, Telekom Malaysia, Malaysia**



## PM02 Integrated Performance Management

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### Day 1 - Performance Management foundations

#### Introduction - Key aspects of performance management

- ▶ Definition of performance management
- ▶ The relation between performance measurement and performance management
- ▶ Positioning at three levels: strategic, operational and individual
- ▶ The motivation of building performance management capabilities
- ▶ Pitfalls in Performance Management

**Discussion:** Challenges in performance management

#### Philosophy and theory underpinning performance management

- ▶ Differences between command and control and systems thinking
- ▶ Theories in performance management
- ▶ Key principles in performance management: recurrence, clarity, integration and learning
- ▶ 10 characteristics of a new world view in performance management

**Exercise:** Discovering systems thinking

#### Introduction to performance management architecture

**Clarification of key terms:** Objectives, KPI, performance measures, targets and initiatives

- ▶ Mapping knowledge - systems mapping
- ▶ Building of a glossary and measure catalogue
- ▶ Cultural aspects of performance management
- ▶ Performance management systems architecture

**Exercise:** Recognising key terms in performance management

#### Integrating performance management

- ▶ Recurrence across organizational levels
- ▶ Performance management and other disciplines: strategy, project and knowledge management
- ▶ Integration with other organisational processes
- ▶ Performance management systems and other methodologies: ITIL, Six Sigma and Lean/Quality Management

**Case study:** Building organizational alignment

### Day 2 - Integrating organisational performance

#### Performance Management at Strategic Level

**Exercise:** Linking the Desired State of Evolution to the Strategy Map

- ▶ Using a Performance Management Maturity Model
- ▶ Architecture of the strategic performance management system
- ▶ Implementing the strategic performance management system
- ▶ Using the strategic performance management system

**Group activity:** Using a Balanced Scorecard based performance management system

#### Performance Management at Operational Level

**Exercise:** From KPIs to initiatives

- ▶ Elements of the operational performance management system
- ▶ Designing and using operational dashboards: IT Scorecard, HR Scorecard, Marketing Scorecard and Supplier Scorecard
- ▶ Good practice in data visualization, analysis and reporting
- ▶ Tools and techniques for improving team performance

**Case study:** Balancing customer satisfaction both internally and externally

#### Performance Management at Individual Level

**Exercise:** Evaluating individual performance

- ▶ Using a Architecture of the individual performance management system
- ▶ Individual performance management system alignment to strategy
- ▶ The individual performance management system in practice
- ▶ Balanced Scorecard and Project Management

**Group activity:** Tools and techniques for improving individual performance

#### Applying the course learnings in organizations

- ▶ 10 Insights of implementing and using performance management systems
- ▶ Review of the course material
- ▶ Deploying key templates in practice
- ▶ How to apply the acquired knowledge in your organization
- ▶ Overview of learning and conclusions
- ▶ Questions & answers; open discussion





## Procurement & Logistics Management

Supplier Performance Management ▶

KPI, Dashboard & Scorecard for Purchasing / Logistics ▶

A Strategic Approach to Procurement & Logistics Processes ▶

These courses provide both theoretical understanding and practical experience in implementing and using supplier performance management systems, and help to develop performance management tools for the Purchasing/Logistics department.

## PL01 Supplier Performance Management

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### Overview

This course will discuss key aspects of supplier performance and will help you learn how to use specific tools for maximizing supplier performance. The course is informed by both practical experience in implementing and using supplier performance management systems, as well as insights gained from reviewing relevant academic literature and over 1000 performance reports.

### Benefits

- ▶ Understand the theoretical foundations for supplier performance improvement;
- ▶ Learn how to select suppliers and manage supplier panels for value generation;
- ▶ Practice the design of a supplier performance management system;
- ▶ Learn and practice the development of a Service Level Agreement (SLA) architecture;
- ▶ Review examples of ways in which measurement supports improvement in supplier performance.

### Attendees

This course is particularly designed for professionals that are working with suppliers or act as a supplier to other organizations.

*“It is with great pleasure and enthusiasm to recommend Mr. Adrian Brudan as an expert in Performance Management Area. The training course that I have participated in was an example of competence and professionalism based on a global understanding of the Performance Management System with all its components. Adrian has proven that he has an excellent knowledge and experience in KPIs lifecycle, practice and also consulting in Performance Management, which are the benefits that I have earned for achieving this training.”*

**Nicoleta Pulbere, OMV Petrom, Romania**

**Review key aspects of supplier performance and learn how to use specific tools for maximizing supplier performance.**

*“I really enjoyed going through the topics and examples. The quizzes were a really good way to check that you’ve understood and digested everything. This is a great learning and revision tool. I feel that going through this course was a very useful and I will share what I have learned in this course with my colleagues.”*

**Meshal Almotairi, Saudi Food & Drug Authority, Saudi Arabia**



## PL01 Supplier Performance Management

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### Day 1 - Founding of supplier performance

#### General Performance Management Concepts

- ▶ The relation between performance measurement and management
- ▶ The motivation for supply chain performance management
- ▶ Theoretical foundations for supplier performance improvement

**Discussion:** Challenges in performance measurement

#### Selecting suppliers / establishing and managing of supplier panels

- ▶ Success factors in supplier selection
- ▶ Characteristics and benefits of supplier panels
- ▶ Establishment process of supplier panel
- ▶ Management of supplier panels for value generation

**Case study:** The case for a supplier panel

#### Designing the supplier performance management system

**Exercise:** Building a system

- ▶ Supplier performance management system components
- ▶ System mapping / Introduction to the Viable System Model
- ▶ Integration of the system within and outside the organization

**Group activity:** Introduction to systems thinking

#### Introduction to KPIs used for monitoring supplier performance

**Exercise:** Recognising KPIs

- ▶ Supplier performance metrics
- ▶ KPIs and metrics selection
- ▶ KPI documentation as a key success factor

**Case study:** Ethics and performance measurement

### Day 2 - Tools for maximizing performance

#### Performance management in Service Level Agreements (SLAs)

- ▶ Key success factors to driving SLA performance
- ▶ Conducting performance reviews
- ▶ Data quality and visualization in supplier performance management

**Exercise:** Developing an SLA architecture

#### Developing and using supplier scorecards and dashboards

- ▶ Specifics of supplier scorecards
- ▶ Development process
- ▶ Using supplier scorecards for monitoring performance
- ▶ Best practice examples

**Exercise:** Evaluating supplier performance

#### From measurement to learning and improvement in supplier performance

- ▶ Innovation and improvement in supplier performance management
- ▶ Initiative management
- ▶ Pitfalls in Supplier Performance Management

**Exercise:** Working with improvement initiatives

#### Applying the course learnings in organizations

- ▶ 10 insights into implementing and using the Balanced Scorecard smartly
- ▶ How to implement within your organization what you've learned in this course
- ▶ Overview of learning and conclusions
- ▶ Questions & answers; open discussion



## PL02 KPI, Dashboard & Scorecard for Purchasing/ Logistics

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### Overview

This course will help you improve the performance of the Purchasing/Logistics department through practical solutions. It provides an overview of key performance management, KPI management concepts and tools adapted to the specific needs of a Purchasing/Logistics function.

#### Benefits

- ▶ Understand how to overcome common challenges in improving performance of a Purchasing/Logistics department;
- ▶ Learn about the main theories regarding performance in Purchasing/Logistics;
- ▶ Practice deploying the performance management system and the design of a scorecard and dashboard specific to Purchasing/Logistics;
- ▶ Identify most important KPIs for a typical Purchasing/Logistics department;
- ▶ Analyze key areas of Purchasing/Logistics processes.

### Attendees

This course is particularly designed for Purchasing/Logistics professionals, as well as practitioners whose roles and responsibilities are closely intertwined with Purchasing/Logistics processes.

*“Throughout the course, I was impressed with Adrian’s unique ability to frame concepts such as performance dashboards, performance management systems and Balanced Scorecard into easy-to-grasp, practical examples.”*

Cristina Botea, OMV Petrom, Romania

### Day 1 - Developing and using performance management tools in Purchasing/Logistics

#### Introduction - Challenges and key aspects of improving performance in Purchasing / Logistics department

- Mind Mapping:** Major challenges for the activities of Purchasing / Logistics department (brainstorming)
- ▶ Understanding performance management and measurement
  - ▶ Performance management analysis at strategic, operational and individual level
  - ▶ Deployment of the main tools used in performance management for medical centers: SWOT Analysis and the survey to measure patient satisfaction

**Group exercise:** Identifying concepts and tools used in performance management

#### Developing a performance management system for Purchasing / Logistics department

- Simulation:** Deployment of a performance management system based on Balanced Scorecard
- ▶ Integrated approach of performance management in Purchasing / Logistics department: from strategy to outcomes
  - ▶ Performance management system architecture in Purchasing / Logistics department - the analysis of the system components and the association between them
  - ▶ Purchasing / Logistics Scorecard - an essential part of the performance management system in Purchasing / Logistics department

**Case study:** Performance review meeting in Purchasing / Logistics department and setting performance improvement

#### Key Performance Indicators (KPIs) and Purchasing / Logistics Dashboard

**Group exercise:** Identifying the 5 most important KPIs for Purchasing / Logistics

- ▶ KPIs - performance measurement tool
- ▶ Developing a KPIs catalog for Purchasing / Logistics: KPIs selection, documentation and communication
- ▶ Purchasing / Logistics Dashboard - an essential performance management tool at operational level

**Group activity:** The analysis of a completed Purchasing / Logistics Dashboard example

#### Insights for improving performance management in Purchasing / Logistics department using KPIs

- ▶ 9 insights for optimizing the performance of Purchasing / Logistics department
- ▶ Review of the course material
- ▶ Deploying key templates in practice for performance improvement in Purchasing / Logistics department
- ▶ How to take back in organizations what was learned during the course
- ▶ Questions & answers; open discussion



*“The KPI Institute has provided us with an excellent KPI program which was tailored to the needs of our organization. We highly recommend the Institute KPI educational programs.” Ahmed Alsaheel, Salehiya Medical, Saudi Arabia*

## PL03 A Strategic Approach to Procurement & Logistics Processes

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### Overview

The course contains a unique combination of practical solutions for enhancing performance in the Procurement & Logistics department. It provides an overview on the key performance management concepts and tools adapted to the specific needs of the Procurement and Logistics department. The topics covered focus on defining and implementing a strategic plan, as well as assessing the different types and models of supply chains.

### Benefits

- ▶ Gain insights into shaping the strategy for the Procurement & Logistics department;
- ▶ Understand how KPIs can be used in practice in the Procurement & Logistics department;
- ▶ Get familiar with how scorecards can be used to monitor suppliers' performance;
- ▶ Analyze methods of increasing supply chains efficiency;
- ▶ Review the best practices to optimize warehousing and distribution.

### Attendees

This course is relevant for executives, Procurement & Logistics managers and coordinators, as well as other performance management professionals.

*"It was an interesting course. I learned a lot of new things regarding KPIs. I recommend it for people working in performance section and especially those who would like to improve their performance system. Sometimes, we are dragged with what is being used in our organization, and we cannot tell it is wrong until we learn the right way."*

Vera Rizk, Qatari Diar Real Estate Investment Company, Qatar



### Learn how to implement a strategic plan and assess different types and models of supply chains.

*"I would rate the training 10 out of 10 and would highly recommend to others. The facilitator managed to get excellent group interaction right from the beginning, the KPI course was interesting, informative and very well presented."*

Mohamed Salah El-Dein, Salehiya Medical, Saudi Arabia



*"The course, in terms of structure and delivery, was very well adapted to the different needs of participants, offering relevant information both for practitioners experienced in working with Performance Management Systems, as for the ones who didn't work in this field before."*

Florentina Greger, Zitec, Romania



*"The course content was incentive and very specific in the same time. I liked the practical part, it illustrated the information in very clear way and helped for better understanding." Khulood Yahya Al Naabi, Oman Power and Water Procurement Company, Oman*

## PL03 A Strategic Approach to Procurement & Logistics Processes

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### Day 1 - Strategic development of Procurement & Logistics

#### Session 1: Procurement & Logistics at strategic level - definition, role and functions:

- ▶ Expectations in relation to addressing the problems met in practice
- ▶ The role of purchasing/ positioning activities
- ▶ Types and functions of activities in Procurement & Logistics
- ▶ Proactivity in purchasing and inter-departmental purchases

**Discussion:** Clarify the objective of purchases- needs, service and assets

#### Session 2: The organization and structure of the Procurement & Logistics:

- ▶ Organizing the activity of Procurement & Logistics department
- ▶ Centralize/ Decentralize activities
- ▶ Procurement & Logistics department – position within the organization and relations with other departments
- ▶ National/ International cooperation – inter-departmental purchases

**Discussion:** The analysis of participants own Procurement & Logistics department- structure and organization method

#### Session 3: Strategic development of the Procurement & Logistics:

**Group activity:** Introduction to systematic thinking:

- ▶ Developing the activity of Procurement & logistics
- ▶ Defining and implementing the strategic plan
- ▶ Strategy monitoring and evaluation

**Case study:** Best practices in Procurement & Logistics

#### Session 4: The strategy of Procurement & Logistics department:

**Exercise:** Creating the strategy of your own department:

- ▶ Elaborating the strategy
- ▶ Establishing the implementation method
- ▶ The use of operational templates

**Discussion:** Presenting the strategic plans

### Day 2 - Suppliers relationship and supply chain management

#### Session 5: Selecting and contracting suppliers:

- ▶ Selecting suppliers - establishing selection criteria
- ▶ Standardizing the supplier selection process
- ▶ Key terms in agreements and contracts: price versus cost, obligations and penalties
- ▶ Quality insurance system/ suppliers audit:

#### Session 6: Suppliers relationship management - work tools:

**Free discussion:** Suppliers performance evaluation:

- ▶ Defining the characteristics of “good supplier”/ own supplier
- ▶ Relational models: COX and BENSÃO
- ▶ Applying the relational models in practice
- ▶ Negotiation: who negotiates, how to negotiate, purpose of negotiation?

**Exercise:** Formulating a scorecard for monitoring suppliers’ performance.

#### Session 7: Procurement and distribution chains logistics:

- ▶ Assessing the different types and models of Procurement chains
- ▶ Increasing Procurement chains efficiency
- ▶ Distribution management and logistic optimization
- ▶ Monitoring and evaluating logistic activities using KPIs

**Exercise:** Defining a set of KPIs for Procurement & Logistics.

#### Session 8: Applying within organizations the knowledge accumulated during the course:

- ▶ 10 tips for improving the departments performance
- ▶ Key success factors in optimizing activities
- ▶ Using the essential templates in practice
- ▶ Re-evaluating course materials and conclusions
- ▶ Applying within organizations the knowledge accumulated during the course





## Performance Through People

Implementing Employee Engagement Programs ▶

Solutions for Managing Change in Organizations ▶

Implementing Succession Management Programs ▶

Integrating Talent Management Processes ▶

The training offer aims to provide the necessary knowledge and skills for achieving performance through one of the most important resources of an organization – its employees. The added value of the courses consists of practical solutions offered for employee engagement, managing change, succession programs and talent management processes.

## PP01 Implementing Employee Engagement Programs

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### Overview

This course will increase your understanding of both the benefits and the challenges of implementing an employee engagement program. Through simulations, best practices and planning templates and tools, you will get prepared for rolling out an employee engagement program.

### Benefits

- ▶ Understand key aspects of employee engagement and how it connects with other key concepts such as organizational performance and motivation;
- ▶ Get the pulse of current employee engagement best practices;
- ▶ Prepare for the most challenging stages of an employee engagement program implementation by participating in simulations;
- ▶ Receive a free employee engagement toolkit with relevant templates to support you in implementing or improving an employee engagement program;
- ▶ Review case studies of successful employee engagement program implementations.

### Attendees

This course is designed for Human Resources and Organizational Development professionals, as well as managers from various departments.

*“Great! So glad I found it. Gave me everything I need to do my job properly and with confidence.”*

Leonne Jones, Brisbane City Council, Australia

### Day 1 - Adding value with employee engagement

#### Introduction to employee engagement

- ▶ Understanding key concepts in employee engagement
- ▶ Pros and cons of employee engagement programs
- ▶ Employee engagement and performance management
- ▶ Employee engagement vs. job satisfaction
- ▶ Employee engagement vs. employee motivation

**Group activity:** Defining employee engagement

**Case study:** Campbell

#### Measuring employee engagement

- ▶ Methods for employee engagement measurement
- ▶ Employee engagement surveys and reports
- ▶ How to select an employee engagement supplier
- ▶ Numbers vs. behaviors in employee engagement

**In practice:** Selecting your employee engagement supplier

**Templates:** Questionnaire examples, report examples

#### Fostering employee engagement

- ▶ Putting your own engagement first
- ▶ Employee engagement is contagious
- ▶ Employee engagement at team level
- ▶ How to run meetings that foster employee engagement
- ▶ How to create employee engagement action plans

**Simulation:** Creating an employee engagement action plan

**Templates:** Action plan, meeting agenda

#### Planning employee engagement projects

- ▶ Employee engagement roadmap and calendar
- ▶ Employee engagement training and communications
- ▶ Employee engagement and related concepts (e.g. wellbeing)

**Exercise:** Communicating survey results

**Templates:** Roadmap, calendar



*“Mr. Aurel Brudan is a very detailed and organized person. This can be observed through the training materials and contents prepared for the training session” Irene Beh Ai Ling, Telekom Malaysia, Malaysia*

## PP02 Solutions for Managing Change in Organizations

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### Overview

This course will improve your understanding of factors that drive or hinder change, methods for addressing employee resistance and organizational inertia, and the steps to follow in managing successful change initiatives.

#### Benefits

- ▶ Learn about the causes of organizational change failures and how to avoid them;
- ▶ Understand models of organizational change and how to apply them in your projects/organizations;
- ▶ Practice the development of key documents involved in planning change initiatives (change management plan, project plan, training plan, communication plan etc.);
- ▶ Improve your understanding regarding stakeholder, roles and responsibilities in change management programs;
- ▶ Prepare for coordinating the efforts of the team working change management initiatives or projects with a change management component.

### Attendees

This course is designed for Human Resources and Organizational Development, Change Management and Internal Communications professionals, as well as executives and managers of various departments.

*“The trainer’s interaction with the group was very interesting. He made sure to answer all the queries of the participants and kept giving examples to give a better insights.”*

Vera Rizk, Qatari Diar Real Estate Investment Company, Qatar

### Day 1 - Change management principles and practices

#### Introduction to change management

- ▶ Change management and performance management
- ▶ Change management and project management
- ▶ Importance of change management
- ▶ Why change initiatives fail

**Discussion:** Change management challenges

**Case study:** NASA

#### Understanding change

- ▶ Change management at individual level
- ▶ Mental schemas and employee resistance to change
- ▶ Change management at organizational level
- ▶ Organizational inertia and the learning organization
- ▶ Models of organizational change (e.g. Lewin, Aldrich, Senge)

**Discussion:** Examples of change (personal, organizational)

**Case study:** LEGO

#### Implementing change

- ▶ Selecting a change management methodology
- ▶ Dimensions of organizational change
- ▶ Steps for organizational change
- ▶ Roles in change management
- ▶ Change management best practices; leaders’ sponsorship

**Exercise:** Planning change

**Case study:** Blockbuster

**Template:** Change management plan

#### Following up on change

- ▶ Change management tools (training plans, communication plans)
- ▶ Putting in place feedback systems
- ▶ Assessing impact of change efforts
- ▶ Celebrating successes
- ▶ Addressing identified gaps

**Templates:** Training and communication plans



## PP03 Implementing Succession Management Programs

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### Overview

This course will assist you in preparing to launch or improve succession management programs. The course provides practical advice, templates and simulations that will help you master the different implementation steps, from assessing performance and potential to measuring the impact of your succession management efforts.

### Benefits

- ▶ Clarify your understanding of key concepts such as succession management, workforce planning, talent pipeline;
- ▶ Learn how to select and employ the best methods and tools for assessing performance and potential;
- ▶ Prepare to address the needs of various succession management stakeholders and to make succession management a priority on their agendas;
- ▶ Participate in simulations such as identifying succession metrics and designing career paths;
- ▶ Practice the use of relevant templates that will support you in implementing or improving a succession management program.

### Attendees

This course is particularly designed for Human Resources and Organizational Development professionals, as well as executives and managers of various departments.

*"This is a very interesting course, useful in practice and which I would recommend for everyone who works in my company."*

Zeinab Hassan Warda, Qatar Supreme Council of Health, Qatar

### Day 1 - Developing lucrative succession management programs

#### Introduction to succession management

- ▶ Defining succession management
- ▶ Succession management and performance management
- ▶ Succession management vs. succession planning
- ▶ Succession management vs. workforce planning
- ▶ Defining talent pipeline

**Discussion:** Succession management challenges

#### Succession management from the employee's perspective

- ▶ Identifying interests and career goals
- ▶ Identifying and measuring competencies
- ▶ Creating a career and development plan
- ▶ Follow up on development opportunities

**Exercise:** How does this course align with your career goals?

**Templates:** Career plan, development plan

#### Talent assessments and talent reviews

- ▶ Tools for talent assessment: 9-Box
- ▶ Methods for assessing performance and potential
- ▶ Designing career paths
- ▶ Leadership development
- ▶ Case study/Exercise

**Template:** 9-Box, examples of suppliers and their tools

#### Planning succession management efforts

- ▶ Matching staffing needs with individual abilities
- ▶ Succession management stakeholders and their roles
- ▶ Succession management roadmap and calendar
- ▶ Measuring impact of succession management efforts

**Exercise:** Identifying successors

**Templates:** Roadmap, calendar, metrics



*"Even before the training delivery, I appreciated Adrian's keen interest in tailoring the course's objectives and materials to the specific needs of our team." Cristina Botea, OMV Petrom, Romania*

## PP04 Integrating Talent Management Processes

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### Overview

This course will help you design and implement talent management processes in an integrated manner. Following the different components of the talent wheel, the course will emphasize the linkage between concepts such as on-boarding, retention, performance management and employee engagement. By attending this course you will also learn how to use specific tools for attracting, developing and maintaining high potential, high performance and highly engaged employees.

### Benefits

- ▶ Understand how the various talent management processes are connected and how to integrate them in your organization;
- ▶ Practice the use of talent management tools in a safe learning environment;
- ▶ Learn how to make the case for talent management initiatives and how to gain leadership support;
- ▶ Understand different ways of measuring the impact of talent management initiatives;
- ▶ Review case studies of successful implementations of talent management programs and identify challenges and best practices.

### Attendees

This course is particularly designed for Human Resources and Organizational Development professionals.

*“It is the willingness of experts like yourself with the capability in the area of KPIs and your response to the interest and needs of the participants that makes this program effective and worthwhile for our organization. The way you run the last day and your ideas certainly sparked a lively dialogue among all of those in attendance and letting them know what and how to do next. The feedback from the participants was gratifying and positive, and we are glad that we took the time and effort to develop such a program to meet the need of our staff for extending their knowledge in the area of KPI and all related.”*

**Hanan Ahmed Abdelmajeed, Supreme Council of Health, Qatar**

**Learn how to use specific tools for attracting, developing and maintaining high potential, high performance and highly engaged employees.**

*“We see the ability to understand and monitor the vital numbers behind the strategies and capabilities of our investments as vital to our competitive edge. I am confident that the course will help us to both sharpen our internal tools and to provide further value in our strategic sparring with company management.”*

**Angus Steel, Delta Lloyd Asset Management, Netherlands**



## PP04 Integrating Talent Management Processes

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### Day 1 - Understanding talent management

#### Introduction to talent management and the talent wheel

- ▶ Defining talent management
- ▶ Using the talent wheel
- ▶ Defining individual performance management
- ▶ Defining succession management
- ▶ Defining employee engagement

**Exercise:** The talent wheel in your organization

#### Individual Performance Management (IPM) System

- ▶ Components of the IPM system
- ▶ Defining key terms: objectives, KPIs, evaluation criteria
- ▶ Using key tools in IPM

**Activity:** Mind-mapping key tools and concepts in IPM

**Group discussion:** Designing an IPM system

#### Rolling out the individual performance management (IPM) system

- ▶ Establishing key performance indicators at individual level
- ▶ The role of competencies and behaviors in IPM
- ▶ The development plan at individual level
- ▶ Preparing and running performance evaluation meetings

**Simulation:** Filling out an individual performance plan

**Templates:** Career plan, individual scorecard, development plan

#### Talent assessments and talent reviews

- ▶ Tools for talent assessment: 9-Box
- ▶ Methods for assessing performance
- ▶ Methods for assessing potential
- ▶ Designing career paths
- ▶ Leadership development
- ▶ Case study/Exercise

**Templates:** 9-Box, examples of suppliers and their tools

### Day 2 - Using the talent management system

#### Planning succession management efforts

- ▶ Matching staffing needs with individual abilities
- ▶ Succession management stakeholders and their roles
- ▶ Succession management roadmap
- ▶ Succession management calendar
- ▶ Measuring impact of succession management efforts

**Exercise:** Identifying successors

**Templates:** Roadmap, calendar, metrics

#### Measuring employee engagement

- ▶ Methods
- ▶ Employee engagement surveys
- ▶ Employee engagement reports
- ▶ How to select an employee engagement supplier
- ▶ Numbers vs. behaviors in employee engagement

**In practice:** Selecting your employee engagement supplier

**Templates:** Questionnaire examples, report examples

#### Fostering employee engagement

- ▶ Putting your own engagement first
- ▶ Employee engagement is contagious
- ▶ Employee engagement at team level
- ▶ How to run meetings that foster employee engagement
- ▶ How to create employee engagement action plans

**Simulation:** Creating an employee engagement action plan

**Templates:** Action plan, meeting agenda

#### Other talent management topics

- ▶ Talent Acquisition
- ▶ Employer Branding
- ▶ On-boarding
- ▶ Retention
- ▶ Q&A

**Discussion:** Deployment of course learning points in organizations





## Business Simulations

Friday Night at the ER ▶

Fishbanks ▶

In addition to courses specialized in performance management and KPIs, The KPI Institute also provides forward-looking experiential learning courses, applicable in areas such as increasing performance and improving decision making. The simulation character of these courses allows participants to gain knowledge and develop important managerial skills through first-hand experience.

## SI01 Friday Night at the ER

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### Overview

The Friday Night at the ER team-learning game is a board game based simulation. The simulation game play is followed by an interactive debrief that can be adapted to address specific learning needs. The challenge is to make the entire system work through the ups and downs of a frenetic Friday night, where the actions they take individually can have a major impact on the quality and financial outcomes of their fellow departments. The hospital situation is universal, and the lessons of the game are generic across industries and cultures.

#### Benefits

- ▶ See the effects of your decisions on colleagues' decisions and a larger system;
- ▶ Improve teamwork and collaboration across functional boundaries with an openness to redesign;
- ▶ Understand the importance of using sound data to base decisions on;
- ▶ Learn about key concepts or tools of process improvement, reengineering or cross-functional team performance;
- ▶ Observe dynamics of team behavior and learn ways to improve team effectiveness, often when stakeholders represent diverse interests.

### Attendees

This course is designed for executives, operational managers and analysts from various departments.

*"One of the most interesting and useful trainings I have attended over the course of my career."*

Jason Cutajar, National Australia Bank, Australia

### Day 1 - FNER

#### Introducing the concept of Friday Night at the ER

- ▶ Concept and the purpose of the FNER simulation outline
- ▶ Presentation of the basic rules of the business simulation
- ▶ Building the teams and completing the preparations for the simulation

#### Performing the simulation Friday Night at the ER

- ▶ Outlining the structure of the simulation
- ▶ Understanding the operational workflows under the facilitator's guidance
- ▶ Performing the simulation
- ▶ Completing the simulation and calculating scores obtained

#### Applying the knowledge acquired during the simulation to the organizational environment

- ▶ Team and group discussions on the experiences offered by the simulation
- ▶ Exploring the concept of Systems Thinking and Performance Management
- ▶ Discussing the scoring and the strategies applied during the simulation

#### Applying the knowledge within the organization context

- ▶ Ways of applying what was learned in the workshop to the organizational environment
- ▶ Overview on the workshop and conclusions



## SI02 FishBanks

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## Overview

FishBanks is a business simulation having its roots in system dynamics, which is an analysis technique of patterns in complex, dynamic systems. You will become immersed in a simulation in which you are working for a fishing company and work along coworkers to maximize its assets. The game will teach you valuable lessons in renewable resource management. The simulation learning points can be applied to a variety of topics in business strategy, economics, decision making, sustainability, resource management, organizational development, teamwork, negotiations and competitive intelligence.

### Benefits

- ▶ Helps you understand the risks of focusing on delayed performance indicators and ignoring key information about the problem at hand;
- ▶ Develop your team communication skills and focus on data-driven decisions;
- ▶ Learn the importance of understanding complex systems such as the markets in which their organizations operate;
- ▶ Understand the importance of systemic approaches by seeing how rational individual decisions can lead to irrational results for the systems in which those individuals operate;
- ▶ See how marginal improvements are sometimes irrelevant if they come too late and without taking into consideration the other players.

## Attendees

This course is designed for executives, operational managers and analysts from various departments.

## Day 1 - FishBanks

### Introduction to FishBanks

- ▶ Concept and the purpose of the simulation
- ▶ Assigning team roles
- ▶ Communicating criterion of success
- ▶ Providing financial Information
- ▶ Clarifying initial conditions and distributing materials
- ▶ Explaining steps of play

### Performing the FishBanks simulation

- ▶ Discussing in teams strategies for boat acquisition and allocation
- ▶ Bidding for auctioned ships
- ▶ Buying or selling ships in trading session
- ▶ Placing orders for new ship construction
- ▶ Calculations and fleet allocation
- ▶ Completing the simulation and calculating scores obtained

### Applying the knowledge acquired during the simulation to the organizational environment

- ▶ Teams and group discussions on the experiences offered by the simulation
- ▶ Exploring strategy, resource management and decision making implications
- ▶ Clarifying the concept of system dynamics as analysis technique
- ▶ Discussing the scoring and the strategies applied during the simulation

### Applying the knowledge within the organization context

- ▶ Ways of applying what was learned in the workshop to the organizational environment
- ▶ Overview on the workshop and conclusions





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