Certified KPI Professional and Practitioner

19 editions in 2015 **10 cities in 2015**

Getting KPIs right by implementing and maintaining a rigorous KPI measurement framework

Over the last 6 years, the team at The KPI Institute:

- Documented 8,000+ KPIs from 16 functional areas and 25 industries;
- Reviewed 1,000+ performance reports from 125 countries;
- Referenced 30,000+ resources (books, articles, performance reports) as part of the documentation process;
- Developed 250+ KPI Dashboards and Balanced Scorecards.

With the insights gained we:

- Delivered 130+ KPI Professional and Practitioner editions;
- Assisted 28,000+ organizations in finding solutions for their KPI needs;
- Trained 2,500+ participants in 40+ countries on how to work rigorously with KPIs.





3 Key Business Benefits

- Experience the real business applicability of theoretical concepts regarding KPIs;
- Improve the performance of your company by practicing a sound framework for KPI measurement;
- Obtain better business results by selecting the right KPIs to monitor for your company.

"I contacted The KPI Institute 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 and Drug Authority, Saudi Arabia

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Certification Program Overview



Selection and data gathering are considered by practitioners all around the world to be the most challenging aspects in working with Key Performance Indicators (KPIs). A way to address these challenges is to build a sound framework to measure KPIs, starting from the moment they are selected, until results are collected to be centralized in performance reports.

The KPI Institute has developed a rigorous KPI Measurement Framework that embeds 10 years of research in the field and relies on best practices applicable in the real business environment.

This learning program is structured on two levels of certifications:

- **The KPI Certified Professional** – a three days training course focused on developing know-how in working with KPIs. The certification can be obtained by taking a multiple question Certification Exam in the last day of the course.
- **The KPI Certified Practitioner** – a two days training course meant to improve the practical skills in working with KPIs and developing instruments like scorecards, dashboards and KPI documentation forms. The applied exercises of this course will enable participants to complete a trial run of all the steps required to complete the portfolio which is the basis of the KPI Practitioner certification. The exercises will reflect a complete KPI implementation case study, from project planning to KPI data visualization.

The training courses can be accessed individually. However, participants are eligible to receive the KPI Practitioner Certification only if they are KPI Certified Professionals.





Participants profile

Professionals interested in measuring performance

Professionals from different fields, such as finance, human resources, production, logistics, information technology and others, interested in Key Performance Indicators, will acquire the competencies needed to measure the performance of their team, department or organization.

Top/middle/lower management professionals

Executives or operational managers, regardless of their field of expertise, will gain the ability and knowledge to measure performance and maximize the value of using KPIs. The tools and resources offered as part of the certification program enable managers to apply the concepts learned in their organizations, immediately after the course.

Performance measurement experts

For professionals like Data Analysts, Strategy Managers, Performance Management Officers or Performance Architects, it is important to develop competencies in measuring performance, especially in terms of KPI selection and data gathering. Usually, this particular audience already has a performance measurement system set in place and the certification program offers the opportunity to learn best practices used in this field and identify how their current processes and approaches regarding KPIs can be improved.

Benefits

- Receive personalized feedback on your own KPI portfolio of instruments;
- Practice a sound framework to establish strategically aligned KPIs;
- Enhance the organizational decision making process by accessing data on previous and future performance;
- Expand your business network by becoming a member of the international Certified KPI Professionals Community;
- Access +15 templates that help you implement a KPI Measurement Framework in your organization. Learning objectives.

Learning objectives

- Understand KPI measurement challenges and how to address them;
- Differentiate between objectives, KPIs and initiatives;
- Understand KPI selection in different contexts;
- Select KPIs for scorecards and dashboards from the organizational to the departmental and individual level;
- Develop a KPI implementation project plan;
- Optimize the KPI activation and data gathering process.

Educational Resources

The KPI Infographic

The qualitative reports Performance Management in 2013 and Performance Management in 2012

Catalogues: KPI Documentation Forms, Negative Behaviors, Targets in Practice, Dashboards, Scorecards, Graphs in Practice;

Fact Sheets: KPI Definitions, KPIs in Practice, Terminology in Practice, KPI Selection Criteria;

Video doodles: "What is a KPI, a KRI and Metrics?", "What is a Dashboard?", "What is a Scorecard", "Understanding the KPI Documentation Form";

Webinars: Value added by Key Performance Indicators;

Other Resources: Consisting in videos, whitepapers or case studies relevant for KPI measurement;

KPI Practitioner Course Application Templates: KPI project plan, KPI selection workshop notification, Primary and secondary data sources list, KPI selection for expo, Value flow analysis, Balancing KPIs, KPI documentation form, Change log, KPI data gathering template, Data gathering communication, Organizational Scorecard, Organizational Dashboard, Departmental Scorecard, Departmental Dashboard, KPI reporting page.

Testimonials

"This is one of the best programs regarding performance management I have ever attended. I highly recommend this training for any manager who wants to manage his/her business in the right way."

Perviz Aslani, EMBAWOOD, Azerbaijan

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

Parsa Zoqaqi, Royal Univerisity for Women, Bahrain

"First of all, the course was well structured and focused on the important areas. The topics were well chosen by our facilitator and that helped everyone understand the world of KPI's. I really learned every aspect about KPIs, as a beginner. I recommend it to everyone who wants to be specialized in Performance Management and choosing the right KPIs."

Kerem Ulusoy T. Şişe Cam Fabrikaları A.Ş., Turkey

"The course content was incentivizing and very specific in the same time. I liked the practical part, it illustrated the information in a very clear way and helped for better understanding."

Rahma Al-Ismaili, Rural Areas Electricity Company (RAECO), Oman

Inclusions

Course materials that consist in:

- Course slides;
- Course notes.



Performance Management Toolkit, containing the following templates:

- Desired State of Evolution;
- Strategy Map;
- Performance Scorecard;
- Performance Dashboard;
- Performance Healthogram;
- Performance Maturity Model;
- KPI Documentation;
- Initiatives Portfolio;
- Initiatives Documentation;
- Performance Management System Architecture;
- Monthly Performance Management Process;
- Employee Scorecard.

Furthermore, the templates are accompanied by two manuals and two publications:

- Performance Dashboard Guide for Administrator;
- Performance Scorecard Guide for Administrator;
- KPIs for Call Center Dashboard
- KPIs for Call Center Scorecard.

smartKPIs.com
The *smart* choice in performance management

6 months subscription to smartKPIs.com, providing access to over 8000 KPI examples;

One research report from the Top 25 KPIs series.

One webinar from the 2014 Performance Management series.

Certified KPI Professional

By attending this course, you will gain both theoretical knowledge and practical skills in working with KPIs, which will enable you to start a KPI implementation project, or to review existing KPIs, as soon as you get back in your organization. This training course presents a rigorous KPI Measurement Framework that embeds 10 years of research in the field of key performance indicators and relies on best practices identified in the real business environment.

Evaluation

The Certification Exam will take place at the end of day 3 of training. It contains 75 questions and the necessary score to pass is minimum 50. Time to finalize the exam: 60 minutes.

Learning experience

Pre-course

- **Guidance and schedule** – analyze a document presenting guidelines on how to maximize your learning experience;
- **Introduction** – share an introduction message to present yourself to the other participants in an online group;
- **Pre-course evaluation** – fill in a need analysis, take a short quiz to establish the current level of knowledge and share your expectations.
- **Prerequisite reading** – review extra materials on topics such as performance measurement history or management theories and examine KPI definitions .

Core Course

The learning experience consists in:

- Applying concepts in practical exercises;
- Analyzing case studies and identifying solutions;
- Using templates to develop performance measurement instruments;
- Sharing experiences and best practices;
- Creating a network of KPI Professionals;
- Constantly evaluating the participants' knowledge, through short quizzes to support the certification exam.

After-course

- **Action plan** – submit a plan to state the changes you intend to make in your department or organization in terms of KPI measurement;
- **Performance Improvement Essentials** – watch a 45 minutes webinar;
- **In-house presentation** – submit a PowerPoint presentation that you will deliver within your organization on key topics covered during the training course;
- **Additional reading** – access a list of resources (books, articles and videos) in order to continue your learning experience.

KPI Professional Agenda

Day 1 - A Standardized Approach to KPIs

The World of KPIs
- Challenges in performance measurement;
- The value added by KPIs;
- KPIs concept map;
- Governance;
- Organizational levels.

Understanding KPIs
- KPI related terminology;
- SMART objectives decomposed by specific criteria;
- KPI lifecycle.

KPI Typology
- Leading vs. lagging KPIs;
- Qualitative vs. quantitative KPIs;
- Efficiency vs. effectiveness KPIs.

KPI Taxonomy
- Interdisciplinary systemic worldview;
- KPI use case scenarios;
- KPI DNA map.

Day 2 - KPI Selection and Target Setting

KPI Selection
- KPI selection for organizational scorecard;
- KPI selection sources;
- KPI selection techniques.

KPIs in Context
- KPI selection for industry;
- KPIs cascaded to functional area.

KPI Documentation
- KPI documentation form functions;
- KPI documentation form design;
- KPI documentation process;
- Organizational KPI libraries development;
- Weights and indexes.

Working with Targets
- Target setting process;
- Targets in practice;
- Challenges in working with targets;
- Negative behaviors when setting targets.

Day 3 - Data Gathering and Visualization

Data Gathering
- Data quality dimensions;
- KPI reporting data sources;
- KPI activation tools;
- KPI activation techniques.

Working with Data Custodians
- Guidelines to improving communication with data custodians;
- Community of practice.

Data Visualization
- Guidelines to designing efficient templates;
- Usability in terms of visual design.

Scorecard and Dashboard Design
- Scorecard and dashboard examples;
- Best practices in scorecard design;
- Best practices in dashboard design.

Review & Evaluation Test
- Course review;
- Certification Exam.

Certified KPI Practitioner

The Certified KPI Practitioner Training Course is a learning program dedicated to individuals who are already Certified KPI Professionals and are interested in further improving their practical competencies in measuring performance.

The training course is structured in guiding sessions in which participants are able to practice the development of the KPI Practitioner Portfolio. This face-to-face program is not mandatory in the process of obtaining the KPI Practitioner Certification, however it provides valuable feedback to enhance the quality of the participants' portfolios.

Evaluation

The Learning Assessment Quiz will take place at the end of the second day of training. The purpose of this evaluation is to assess the knowledge and skills gained during the training.

Learning experience

Pre-course

This part of the learning experience is meant to ensure a smooth transition to the face to face training. Participants are required to take the following steps:

- **Guidance and schedule** – analyze a document presenting guidelines on how to maximize your learning experience;
- **Introduction** - share an introduction message to present themselves to the other participants in an online group;
- **Share expectations** – participants post their expectations regarding the training course in the dedicated online group;
- **Prerequisite reading** – review key concepts discussed during the KPI Professional Certification Training Course, for refreshing the knowledge and facilitating the practical deployment of theoretical concepts.

Core Course

The 2 days of training are characterized by high interactivity and group activities, combined with individual work. The learning experience is designed to help participants develop the final portfolio necessary to obtain the KPI Practitioner Certificate. During this stage, you are:

- Dedicating 90% of the time to KPIs related practical exercises;
- Completing exercises that are designed based on real life examples, following a KPI implementation case study, from project planning to KPI data visualization;
- Receiving tips and tricks for overcoming the most common challenges of performance measurement;
- Sharing experiences and forming a community of practice;
- Receiving assistance and constant feedback on your work.

After-course

- **Additional reading** – check a list of resources (books, articles and videos), in order to encourage a continuous learning experience.





KPI Practitioner Agenda

Day 1 - Establishing KPIs

KPI Project Coordination
- The business case for KPI implementation;
- KPI project plan;
- KPI workshop preparation (data sources, email notification, KPI selection workshop).

KPI Selection
- Value driver concept mapping;
- Defining objectives;
- Value flow analysis;
- KPI balancing.

Day 2 - Monitoring KPIs

KPI Measurement
- KPI documentation;
- KPI data gathering template;
- Data gathering communication.

KPIs in Context
- Organizational Scorecard;
- Departmental Scorecard;
- Operational Dashboard.
- Change log.

Review and Assessment Quiz
- Course review;
- Learning Assessment Quiz.



In-house Training Course

Organize this training course in-house

If you have a group of five or more to train you can save time and money by running this training course in-house. Use the contact details provided below to request a customized offer from one of our training solution specialists.

- **Embedded learning**
  Our aim is to do more than just deliver the course – we want to ensure that your people gain long-term benefits from their training and perform better in their jobs so that you see the return in your investment of your people.
- **Increased relevance**
  You can enhance the effectiveness of your training program by incorporating a real live audit with the assistance of the facilitator – making the course more relevant to you and your business.
- **Exclusivity**
  Each in-house training session is exclusive to your organization – you can introduce company sensitive or market competitive information into sessions, without commercial compromise.
- **Cost savings**
  There are clear cost savings to be made – you save on travel, accommodation expenses and employee's time.
- **Flexibility**
  The KPI Institute in-house training is flexible, adaptable and effective, ensuring that you get the best possible learning experience.

Training Courses Catalogue 2015

The KPI Institute offers a broad set of training courses customized to specific functional areas, industries or topics related to performance management.

Each of these courses is developed based on The KPI Institute's research and aims to provide practical solutions for improving business performance.

Access the Training Courses Catalogue for the complete training offer.

Testimonials

"The content of the course was very rich and provided many sources and research relevant to the course and our needs. Most importantly, it was up-to-date! Most of the courses relating to performance indicators and scorecards I have attended contained old data. However, the KPI Institute course content wasn't! On the contrary, some recent samples were presented during discussions. I'd like to take this opportunity to thank The KPI Institute for this course and look forward to work with you in the near future."

Kaltham Al-Assam, Qatar International Petroleum Marketing Company Ltd. (Tasweeq), Qatar

"I'm happy to be introduced in the world of KPI's. I gained knowledge about the terms of performance management tools that are very important for a company to achieve its goals. I will spend a great effort to integrate this methodology in my company."

Ayhan Aydoğmuş, Roketsan, Turkey

"This is one of the best courses I have taken. Very well structured, informative and managed by a very skillful trainer."

Nahed Y. Alobaid, Gulf University for Science & Technology, Kuwait





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Registration

3 ways to register:

Online

store.kpiinstitute.org

Direct contact

Call us and we will assist you through the registration process.

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Registration form

Use one of the following options:

- Complete this form and fax it to your nearest office:

  European office:
  +40 2 6441 4360

  Middle East office:
  +97 1 4332 8810

  Southeast Asia office:
  +97 1 4332 8810

  Australian Headquarters:
  +61 3 8395 6544

- Email us with your registration details

Expression of Interest

*Please fill out all the fields below

Title

First name | Last name

Telephone

Email

Training course

Date of training course

Job title

Department

Organization | Organization size

Industry

Address

City | State / Province

Country | Postal Code

How did you hear about us?

Registration cancellation procedure

Any withdrawals have to be announced at least two weeks before the beginning of the course, through fax or e-mail. In this situation, the attendance fee will be refunded, less $400 retained for administrative expenditure.

The attendance fee will not be refunded if the withdrawal from the course takes place less than 2 weeks before its start date. If you find yourself in the impossibility to attend the course after the registration process is already completed you may delegate another person to attend the course in your place without any further fees charged. If you have confirmed and made the attendance fee payment but you didn't attend the course, the course attendance fee will not be refunded.

If you attend the course only partially (one day or a limited number of sessions), you will not benefit from any attendance fee reduction or refund.