KPI Selection and Design: Mastering Performance Metrics

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Orlando, Florida (USA)

UK Traininig
PARTNER



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Why This Course

Key Performance Indicators help organizations understand whether their strategy is being translated into real progress and measurable results. When KPIs are selected carefully and designed well, they guide decision-making, improve accountability, highlight performance gaps, and support continuous improvement.

However, many organizations struggle with too many indicators, unclear definitions, weak data sources, or KPIs that do not truly reflect strategic priorities. Effective KPI management requires a structured approach to selection, design, documentation, visualization, and ongoing review.

This intensive 1-week course equips participants with the knowledge and practical skills needed to select, design, and implement KPIs that drive organizational success. Through applied exercises, KPI design workshops, documentation templates, and dashboard development activities, participants will learn how to build meaningful performance measurement systems aligned with strategic objectives.

What You'll Learn and Practice

By joining this program, you will:

- Understand the role of KPIs in strategic management and performance measurement.
- Differentiate between KPIs, metrics, targets, measures, and indicators.
- Align KPIs with organizational strategy, objectives, and priorities.
- Apply KPI architecture and performance measurement frameworks.
- Select relevant and impactful KPIs using structured criteria.
- Identify reliable data sources and measurement requirements.
- Develop KPI clusters, hierarchies, and cascaded measures.
- Balance leading and lagging indicators.
- Design KPIs that accurately measure organizational performance.
- Set targets, thresholds, baselines, and performance ranges.
- Avoid common KPI design and implementation pitfalls.
- Create KPI documentation, definitions, libraries, and catalogs.
- Design dashboards and scorecards that communicate performance clearly.
- Use KPI insights to support action planning and performance improvement.



The Program Flow

Day 1: Introduction to KPIs and Strategic Alignment

- Understanding KPIs and their importance.
- The role of KPIs in strategy execution and performance management.
- Types of KPIs and performance measures.
- Leading, lagging, financial, operational, strategic, and behavioral indicators.
- Aligning KPIs with organizational strategy.
- KPI architecture and performance measurement frameworks.
- Practical exercise: Mapping strategic objectives to potential KPIs.

Day 2: KPI Selection Techniques

- KPI selection process and criteria.
- Identifying critical success factors and key result areas.
- Selecting KPIs based on relevance, measurability, value, and decision usefulness.
- Identifying relevant data sources.
- Developing KPI clusters and hierarchies.
- Balancing leading and lagging indicators.
- Workshop: Developing a customized KPI selection framework for an organization or department.

Day 3: Designing Effective KPIs

- KPI design principles and best practices.
- Writing clear KPI names, definitions, formulas, and calculation rules.
- Setting targets, thresholds, and performance ranges.
- Developing composite indices where appropriate.
- Testing KPIs for clarity, reliability, and usefulness.
- Avoiding common KPI design pitfalls.
- Practical exercise: Creating a set of well-designed KPIs aligned with strategic objectives.

Day 4: KPI Implementation and Management

- KPI documentation and definition.
- Creating KPI libraries and catalogs.
- Defining KPI owners, data custodians, reporting frequency, and review routines.
- Implementing KPI measurement systems.
- Managing and reviewing KPI performance.
- Updating KPIs as strategy, priorities, and business conditions evolve.
- Workshop: Building a KPI documentation template and library structure.



Day 5: KPI Reporting and Visualization

- Data visualization techniques for KPIs.
- Designing effective dashboards and scorecards.
- Selecting visual formats for different KPI types and audiences.
- Communicating KPI results to executives, managers, teams, and stakeholders.
- Turning KPI results into insights, decisions, and improvement actions.
- Action planning based on KPI insights.
- Final activity: Designing and presenting an impactful KPI dashboard.

Individual Impact

- Strengthen your ability to select meaningful KPIs aligned with strategy.
- Improve confidence in designing clear, measurable, and useful indicators.
- Build practical skills in KPI documentation, libraries, and catalogs.
- Enhance your ability to communicate performance through dashboards and scorecards.
- Improve your understanding of targets, thresholds, and KPI review practices.
- Gain tools for using KPI insights to support better decisions and actions.

Work Impact

- Improve alignment between strategy, objectives, KPIs, and performance actions.
- Reduce KPI overload by focusing on indicators that truly matter.
- Strengthen accountability through clear KPI ownership and definitions.
- Improve consistency in KPI measurement and reporting.
- Support better management decisions through clearer performance visibility.
- Build a stronger performance measurement culture across the organization.

Training Methodology

This program uses a practical and hands-on approach to help participants build KPI systems that are clear, relevant, and useful. Learning methods include:

- Interactive discussions and guided facilitation.
- KPI selection and design case studies.
- Strategic alignment and objective-mapping exercises.
- KPI selection framework workshops.
- KPI design, target-setting, and threshold exercises.
- KPI documentation and library development activities.
- Dashboard and scorecard visualization practice.
- Group work, peer feedback, and practical action planning.



Beyond the Course

Upon completion, participants will be prepared to select, design, and implement KPIs with greater structure and confidence. They will return ready to:

- Develop a customized KPI selection framework.
- Create well-designed KPIs aligned with strategic objectives.
- Build KPI documentation templates and KPI libraries.
- Define targets, owners, data sources, and review routines.
- Design impactful KPI dashboards for performance communication.
- Use KPI insights to support strategic decision-making and continuous improvement.

