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THE KPI INSTITUTE

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Course

CERTIFIED
KEY PERFORMANCE INDICATORS
THE KPI INSTITUTE
C-KPI
Framework v 2.0 2024
PROFESSIONAL

CERTIFIED KPI PROFESSIONAL

Getting Key Performance Indicators right, by using a rigorous KPI measurement framework

WARSAW, POLAND

2024 EDITIONS:
> 11 - 13 SEPTEMBER

The KPI Institute is an Accredited Provider of the CPD Standards Office, a Continuing Professional Development global assessor.

Key business benefits:

› 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;

› Generate value from using KPIs by optimizing the data collection process.

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

› Documented 21,000+ KPIs from 16 functional areas and 25 industries;

› Reviewed 1,000+ performance reports from 125 countries;

› Referenced 30,000+ resources as part of the documentation process.

Course overview

KPI selection and data gathering are considered by professionals all around the world to be the most challenging aspects in working with 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. 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.

🄰 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 Certified KPI Professional Training Course enable managers to apply the concepts learned within their organizations, immediately after the course.

› **Performance measurement experts**

For professionals like Data Analyst, Strategy Manager, Performance Management Officer or Performance Architect, 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 Course offers them the opportunity to learn the best practices used in this field and identify how their current processes and approaches regarding KPIs can be improved.

➕ Benefits

› Support decision making by accessing relevant performance data;

› Use pre-populated tools to facilitate the implementation of a KPI Measurement Framework in your organization by receiving 10+ templates used in working with KPIs;

› Access an innovative learning experience based on a 3 stage educational process;

› Expand your business network by becoming a member of the international Certified KPI Professionals Community.

◎ Learning objectives

› Differentiate between objectives, KPIs and initiatives;

› Understand KPI selection in different contexts;

› Apply best practice techniques to KPI selection;

› Document KPIs in a standardized template;

› Learn when and how to use benchmarking in target setting;

› Optimize the KPI activation and data gathering process.

Agenda

Day 1 - 8h

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
> 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 - 8h

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

> KPI documentation processes
> Targets in practice
> Challenges in working with targets
> Negative behaviors when setting targets

Day 3 - 8h

Data gathering

> Data quality dimensions
> KPI reporting data sources
> KPI activation tools
> KPI activation techniques
> Guidelines to improving communication with data custodians
> Community of Practice

Data visualization

> Guidelines to design efficient templates
> Usability in terms of visual design
> Scorecard and dashboard examples
> Best practices in scorecard design
> Best practices in dashboard design

Review & evaluation test

> Course review
> Q&A

Certification Exam

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:

> **Needs assessment** – complete a questionnaire to determine a tailored and relevant learning experience;

> **Pre-course evaluation quiz** – take a short quiz to establish the current level of knowledge;

> **Guidance and schedule** – analyze a document presenting guidelines on how to maximize your learning experience;

> **Forum introduction –** share an introduction message to present yourself to the other course participants and share your expectations;

> **Pre-requisite reading** – go through a series of documents to better understand the core-course content;

> **Expectations** - share your expectations regarding the training course;

◉ Core course

During the three days of face to face training, the course is designed to facilitate experiential learning and ensure a high level of interactivity. Exercises used to enhance the development of competencies range from simple matching of concepts to extensive analysis of case studies. 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 and creating a network of KPI Professionals;

> Constantly evaluating the participants' knowledge, through short quizzes to support the certification exam.

◉ After-course

The learning process is not finalized when the core-course ends. Participants are required to take the following steps:

> **Forum discussions** – initiate a discussion and contribute in a discussion opened by another participant;

> **Action plan** – create a plan for the actions and initiatives you intend to implement after the training course;

> **Performance Improvement Essentials** – watch a 45 minutes webinar presenting the KPI measurement as part of a system that ensures performance improvements and achievement of objectives;

> **In-house presentation** – create and submit a short PowerPoint presentation to present your colleagues the knowledge you have accessed during the training course;

> **Additional reading** – go through a series of resources to expand your content related knowledge;

> **Learning journal** – reflect upon your 3 stages learning experience and complete a journal.

✓ Evaluation

The certification process is finalized only when you complete all of the 3 stages of the learning experience. Nonetheless, you will receive a:

> **Certificate of Attendance** (hard copy): after participating at the 3 days of on-site training course;

> **Certificate of Completion** (soft copy): after completing pre-course activities and passing the Certification Exam;

> **Certified KPI Professional diploma** (hard copy): after you have successfully completed all of the 3 stages of the learning experience.

Educational resources
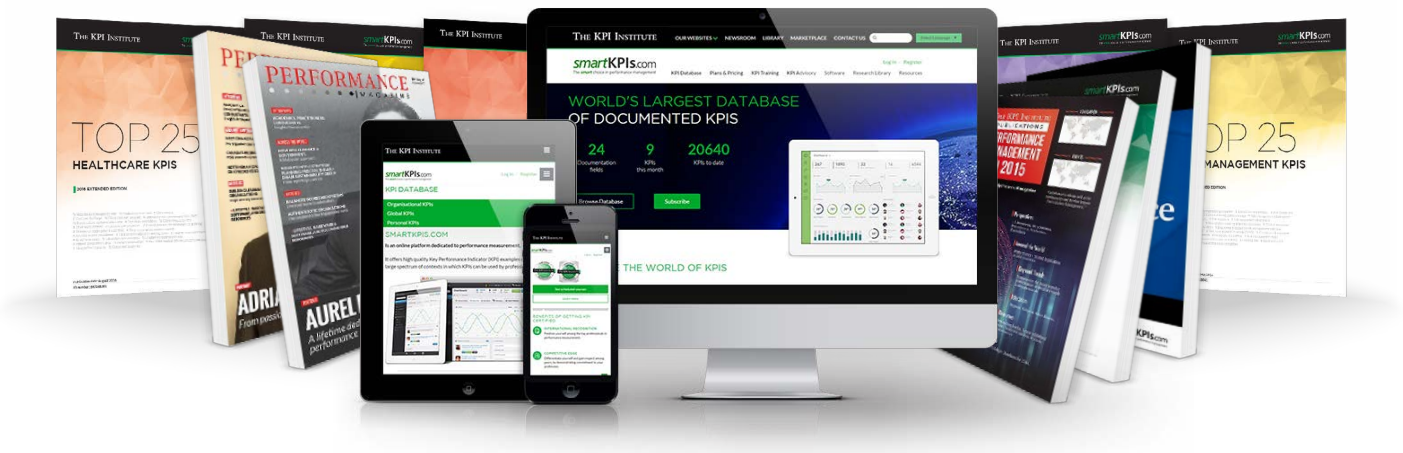
Course materials

> Course slides;
> Course notes;
> Course quiz;
> The KPI Infographic.

The qualitative reports

> Performance Management in 2014 and 2015.

Catalogues

> KPI Documentation Forms;
> Negative Behaviors;
> Targets in Practice;
> Dashboards;
> Scorecards;
> Hardware;
> Graphs in Practice;
> Glossary of terms.

Videos

> 11 Videos dedicated to Performance Management.

Fact sheets

> KPI Definitions, KPIs in Practice;
> Terminology in Practice;
> KPI Selection Criteria;
> Performance Management Related Theories.

Webinars

> Free access to all Performance Management webinars series from 2014 to 2016.

Performance Management Toolkit

> **Templates:** Desired State of Evolution, Strategy Map, Performance Scorecard, Performance Dashboard, Performance Healthogram, Initiatives Portfolio, Performance Management System Architecture, Monthly Performance Management Process, Employee Scorecard;

> **Manuals:** Performance Scorecard Guide for Administrator, Performance Dashboard Guide for Administrator;

> **Publications:** KPIs for Human Resources Dashboard, KPIs for Human Resources Scorecard.

Premium subscription on smartKPIs.com

> Available for 6 months, providing access to 500 fully documented KPIs and over 20.000 KPIs enlisted and one research report from the Top 25 KPIs series.

Educational resources

MICRO-CERTIFICATE IN PERFORMANCE MEASUREMENT MATURITY ASSESSMENT

This micro-certification course is an additional benefit provided to all participants to upskill professionals in assessing Performance Measurement Frameworks in organizations. The maturity assessment methodology presented during the course is the proprietary knowledge of The KPI Institute and Global Performance Audit Unit, built on 10+ years of research and practical experience in strategy formulation. Moreover, upon course completion participants can request access to one-time, free of charge, the entire evaluation methodology on the GPA Unit online platform.

Professionals will gain practical experience in identifying the strengths and weaknesses of organizational practices and formulating improvement recommendations in 6 key areas:

- › KPI Selection
- › KPI Documentation
- › Target Setting

- › Data Gathering
- › Data Visualization
- › KPI Governance

OTHER RELATED MICRO-CERTIFICATES

Micro-certificate in Strategy Planning Maturity Assessment

Micro-certificate in Performance Improvement Maturity Assessment

Micro-certificate in Employee Performance Maturity Assessment

NOTE: These three micro-certificates are not offered as part of the Certified KPI Professional Program, they can be purchased separately. For more information, CLICK HERE

Facilitator

Raluca Vintilă

**Instructional Design
& E-Learning Coordinator**

Raluca VintilÄf is a Management Consultant and the Instructional Design & E-Learning Coordinator at The KPI Institute.

As an educator, Raluca has delivered training courses, workshops, conference presentations, business simulations and webinars related to the use of KPIs in the organizational context and performance measurement & improvement to professionals from a variety of domains, such as telecommunications, education, oil & gas, automotive and transportation. She has trained over 3000 individuals.

She has accumulated a high level of experience in guiding professionals and practitioners in their journey of Implementing Performance Management Systems based on KPIs. Some of the most significant consultancy projects: Organizational KPI Selection for Riphah International University (Pakistan) and Organizational Architecture Review for PetroVietnam Insurance (Vietnam). In terms of training, some of the significant projects are the in-country training program for Productivity & Quality Practitioners for Asian Productivity Organization (Mongolia) and the Certified KPI Professional training course for Valeo (Egypt).

She has conducted conference workshops and presentations on the following topics: Key Tools for Strategic Planning; Key Performance Indicators (KPIs): Measurement, learning, optimization; Performance measurement: From strategy to Key Performance Indicators (KPIs); KPI Selection Techniques; Challenges in Designing Performance Management Systems.

Raluca has a double Master's degree qualification, in Management and Education. Her studies are complemented by several projects in public and private organizations, dedicated to the evaluation, analysis and development of performance within these organizational entities.

Testimonials

" The KPI Professional Certification course is very well designed and the contents are all you need in order to help you not only to understand KPI's and the Performance Manager role in the organization, but also to design and implement a KPI's system in you company or organization."

**Luis Gargalo
Performance Manager
Refriango, Portugal**

"It has been my pleasure to attend the Certified KPI Professional course. It has reshaped my HR strategic approach and narrowed the focus on some datainformed KPIs which helped me to get to organize my work straight away. What has become clear, as I digested the talks, workshops, presentations is that in order to get the people making the difference and creating the real value within a business, you need a "persuasive", coherent and solid performance management system. This course helped me link the HR strategy with key performance indicators in a constructive way and directed the attention, the energy and resources towards the objectives to be fulfilled"

**Eleni Karela
Strategy and Policy Department of the HR Division
Alpha Bank, Greece**

About Executive Education in Strategy and Performance

The Executive Program in Strategy and Performance is the most complex educational program in The KPI Institute's portfolio. It is designed for business leaders who are interested in strengthening their skills in strategic planning, performance measurement, data analysis and reporting, and strategy execution in dynamic markets.

Professionals interested in this program, can enroll to obtain one of the following diplomas:

Postgraduate Diploma in Strategy and Performance

Recommended for Executives and consultants interested in developing an in-depth understanding and experience in Strategy and Performance Management.

> 3 semesters (18 months)
> 6 mandatory courses
> 2 elective courses
> 1 final practitioner portfolio (36 assignments)
> 1 Postgraduate Diploma in Strategy and Performance

Graduate Certificate in Strategy and Performance

Recommended for professionals interested to explore the basic disciplines related to Strategy and Performance Management.

> 2 semesters (12 months)
> 4 courses
> 1 final practitioner portfolio (20 assignments)
> 1 Graduate Certificate in Strategy and Performance

POSTGRADUATE DIPLOMA

STRATEGY & PERFORMANCE

THE KPI INSTITUTE

★ ★ ★

GRADUATE CERTIFICATE

STRATEGY & PERFORMANCE

THE KPI INSTITUTE

★ ★

"NOTE: The Certified KPI Professional is part of both Executive Education programs, Graduate and Postgraduate."

Fees and venue
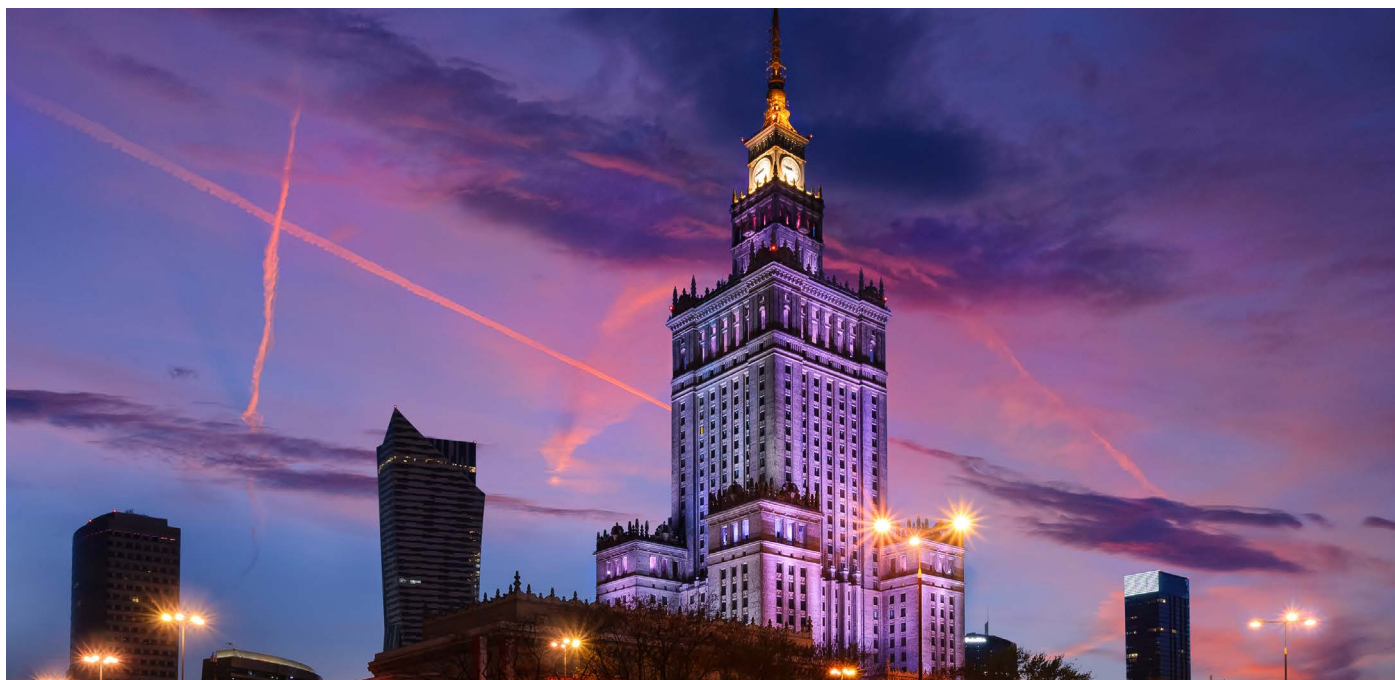
Course fees

Language	Date	Time frame
English	> 11 - 13 September	9:00 CEST

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.

Accommodation

Accommodation is not covered by the attendance fee and it needs to be arranged separately by participants. We invite you to contact the event manager to enquire about special rates from the venue.

For more details

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📞 + 48 22 823 42 83

✉ biuro@figpolska.pl

🌐 kpiinstitute.org

in Linkedin   f Facebook   🐦 Twitter

Registration

✍ 3 ways to register

Online

marketplace.kpiinstitute.org

Direct contact

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

Renata Zawadzka

Email: renata.zawadzka@figpolska.pl

Tadeusz Wozniak

Email: t.wozniak@figpolska.pl

Registration form

Email us with your registration details

▣ Payment

Credit card

Pay by credit card using the online facility.

Bank transfer

1. Send an email containing your contact details and registration request;
2. An email confirmation containing the tax invoice and bank account details will be sent to you;
3. Proceed with the attendance fee payment by bank transfer;
4. Send through email the proof of the payment transaction completion;
5. A tax receipt together with the registration confirmation will be sent to you via email (after the attendance fee payment is confirmed).

Kindly ensure that your payments reflect the Total Amount of the invoice that will be presented to you. It is your responsibility to cover all bank fees due to Telegraphic / Wire transfer.

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Registration form

By filling your contact data, you agree to receive further information about our events. Your privacy is very important to us. We will not sell, rent or share your personal information under any circumstances.

Participant details:

Mr. ☐   Mrs. ☐

....
First name   Last name

....
Job title

....
Email   Phone

....
Organization

....
Department   Date of training course

....
Training course

....
City   Country

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.

Term of Agreement

If there are no other standing agreements, this form represents a valid contract between the parties.

I agree to the above terms and conditions.

....
Signed   Date

Company stamp ....

The KPI Institute

Performance
Strategy Transformation
Innovation Systems People
Sustainability Productivity Capability

Measurement Benchmarking Analytics
Audit Evaluation Appraisal
Excellence Competence
Happiness

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