# Certified KPI Professional

## Australia, 2016 edition:

‣ **Melbourne: 9 - 11 March**
‣ **Perth: 18 - 20 May**

**CERTIFIED KEY PERFORMANCE INDICATORS**
The KPI Institute
Key Performance Indicators Framework v 2.0 2015
C-KPI
**PROFESSIONAL**

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

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## 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 220+ KPI Professional and Practitioner editions;
‣ Assisted 28,000+ organizations in finding solutions for their KPI needs;
‣ Trained 3,400+ participants in 40+ countries on how to work rigorously with KPIs.

## 3 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;

*"The course itself was really good. It reinforced a lot of things for me, and gave me some additional insights and valuable tools that I will use. I really liked the Objectives decomposed and the Value Flow Analysis. "*

**Sheriel Hughes, Director Quality Learning, Government, Melbourne**

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# 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.

## Previous participants

## 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**

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.

▶ **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 Certified KPI Professional Training 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;

▶ Obtain premium recognition as a Certified KPI Professional by completing a unique international learning program;

▶ 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 - A Standardized Approach to KPIs

**9:00 - 17:00**

**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 - KPI Selection and Target Setting

**9:00 - 17:00**

**KPI Selection**
▶ KPI selection for organizational scorecard;
▶ KPI selection sources;
▶ KPI selection techniques.

**KPI Alignment**
▶ KPI alignment approaches
▶ KPI selection for corporate scorecard;
▶ KPIs cascaded to functional area.

**KPI Documentation**
▶ KPI documentation form functions;
▶ KPI documentation form design;
▶ KPI documentation process;
▶ Organizational KPI libraries;

**Working with Targets**
▶ Target setting process;
▶ Challenges in working with targets;
▶ Negative behaviors when setting targets;
▶ Weights and indexes.

### Day 3 - Data Gathering and Visualization

**9:00 - 16:45**

**Data Gathering**
▶ Data quality dimensions;
▶ KPI reporting data sources;
▶ KPI activation tools;
▶ KPI activation techniques;
▶ Working with data custodians;
▶ Data collection methods.

**Data Visualization**
▶ Guidelines to designing efficient templates;
▶ Usability in terms of visual design;
▶ Scorecard and dashboard design.

**Review & Evaluation Test**
▶ Course review;
▶ Certification Exam.

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## ❝❝ Testimonials

*„Great! So glad I found this course. It gave me everything I need to do my job properly and with confidence."*
Leonne Jones, Brisbane City Council, Australia

*„Particularly adept at building and sharing knowledge… creativity, research and exemplary stakeholder management skills were essential to success."*
Gavin Haberfield, Department of Treasury and Finance, Australia

*„Due to the nature of my current job, in strategy and KPI setting, the content of the program is very detailed, excellent and useful in many ways, I returned to the workplace full of enthusiasm and ready to apply the knowledge that I got."*
Talal Alsahli, SAMA, Australia

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# ✏ 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;
▶ **Expectations** – share your expectations regarding the training course;
▶ **Pre-requisite reading** – go through a series of documents to better understand the core-course content.

## 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;
▶ 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.

# 📖 Educational Resources

### The KPI Infographic

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

**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; Performance Management Related Theories;

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

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

# 📑 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:** after participating at the 3 days of on-site training course;
▶ **Certified KPI Professional diploma:** after you have successfully completed all of the 3 stages of the learning experience.

We strongly recommend that you obtain the Certified KPI Professional title, as this endorses your skills and knowledge related to this field.

# 🧰 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 Form;
▶ Initiatives Portfolio;
▶ Initiatives Documentation Form;
▶ 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 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**

**One research report from the Top 25 KPIs series;**

**Free access to all webinars from the 2014 to 2015 Performance Management series.**

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## Facilitator

### Aurel Brudan
**CEO of The KPI Institute**

Aurel Brudan is the founder and CEO of The KPI Institute, the global authority on Key Performance Indicators research and education. Under his coordination the Institute research team documented over 7,800 KPI examples from 16 functional areas and 25 industries, reviewed 1,250+ performance reports from 125 countries and referenced 30,100+ resources, the result being www.smartKPIs.com, the premier destination for quality performance management and measurement resources. Other research programs resulted in the development of two maturity models for performance management and measurement, as well as the establishment of the KPI Management Framework to provide the theoretical base for the Certificate in Key Performance Indicators Management.

As a consultant, Aurel conducted numerous performance management system implementations using solutions such as the Balanced Scorecard, operational dashboards and functional performance scorecards. Among his most important clients are Australia Post, the Australian Federal Administration, the Victorian State Government, Brisbane City Council, National Australia Bank, Qatar Supreme Council Of Health and SABIS.

As an educator, Aurel has accumulated hundreds of hours of experience in a variety of settings, from open and in-house training delivery to tutoring management for the University of Melbourne. Aurel is a member of the Academy of Management, the Australian New Zealand Academy of Management, the Australian Marketing Institute and Fellow of the Australian Institute of Management.

### Adrian Brudan
**General Manager TKI EMEA**

Adrian Brudan is the General Manager of The KPI Institute EMEA Region, a research institute specialized in business performance which operates research programs in 12 practice domains ranging from strategy and KPIs to employee performance and from customer service to innovation performance. The KPI Institute is also considered today the global authority on Key Performance Indicators (KPIs) research and education.

Adrian is an expert researcher, consultant and practitioner with 7 years of experience in the deployment and implementation of KPI Management Frameworks. He has been involved in designing and delivering the Institute's KPI educational programs, aimed at competency development in the area of Performance Management and Measurement. He specialized in organizational performance measurement and management audit using internally researched and developed performance management capability maturity model frameworks.

As an educator, Adrian has facilitated hundreds of training courses and advisory programs on performance management subject matters in multiple industry settings ranging from oil & gas industry, utilities and healthcare to military, finance and airline industry.

As a consultant, he holds valuable experience both in Performance Management, and Project Management. His expertise and knowledge range from the implementation and review of performance management architecture, to KPI Scorecards and Dashboards design.

### ❝❝ Testimonials

*"Certificate of appreciation, presented to Aurel Brudan in recognition of invaluable contribution towards executing a performance management approach and Balanced Scorecard methodology to the Communication Division of Centrelink"*

Hank Jongen, Centrelink, Australia

*"Mr. Aurel was very helpful and expert in what he taught us about. He is a key learning experience."*

Talal Alsahli, SAMA, Australia

*„Trainer's ability to explain key performance management theory and practical concepts to staff at all levels of management was one of the key learning experiences in this area."*

Clifford Chaperon, Australia Post, Australia

*„Professionalism, patience in explaining to stakeholders and passion were major contributing factors to the success of the project."*

Jason Cutajar, National Australia Bank, Australia

### Training Courses Catalogue 2016

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

Access the Training Courses Catalogue below for the complete training offer.

THE KPI INSTITUTE

smartKPIs.com

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## $ Course Fees

| Course Date | General Fee | The KPI Institute Members | Early Bird 1 | Early Bird 2 | 2 or More Participants | Registration Deadline |
|---|---|---|---|---|---|---|
| 9 - 11 March | $3,400 USD | $3,100 USD | $2,700 USD by December 16th | $2,900 USD by February 16th | $2,550 USD | 11 March |
| 18 - 20 May | $3,400 USD | $3,100 USD | $2,700 USD by February 18th | $2,900 USD by April 18th | $2,550 USD | 13 May |

*The course fee includes course materials, lunch and coffee breaks.

### Venue

Karstens,
123 Queen Street,
Melbourne, Australia

Karstens Center,
Perth, Australia

### Accommodation

Accommodation is not covered by the attendance fee and it needs to be arranged separately by participants.

Our dedicated team can provide you with assistance, information and guidance to help you plan your next training course and ensure you enjoy the services and comfort at a first class hotel.

We invite you to contact the event manager to enquire about special rates from the venue.

### For more details visit:

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### Follow us on:

### 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.

### European Division
**Sibiu Office**

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No. 3 - 550003
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M: +40 7 4706 0997
office@kpiinstitute.org

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M: +60 11 3303 2135
office@kpiinstitute.org

### Headquarters
**Melbourne Office**

Life.lab Building
198 Harbour Esplanade,
Suite 606, Melbourne Docklands,
VIC 3008, Australia
T: +61 3 9028 2223
M: +61 4 2456 8088
office@kpiinstitute.org

# 📰 Registration

## 3 ways to register:

### 🌐 Online

### 👤 Direct contact

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

**Filip Cotfas**
filip.cotfas@kpiinstitute.com
M: +40 742 517 711

### 📋 Registration form

Use one of the following options:

▶ Complete this form and fax it to our Australian Office at:
+61 3 8395 6544

▶ Email us with your registration details

## Payment:

### 💳 Credit card

1. Fill in and submit the registration form available online at store.kpiinstitute.org

2. Pay by credit card using the online facility;

3. A tax invoice together with the registration confirmation will be sent to you via email (after the attendance fee payment is confirmed).

### 🔁 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).

## Registration form

*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.

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