The KPI Institute

Celebrating 10 Years of PERFORMANCE

KPI Practitioner Certification

Application Guide









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Introduction

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About the KPI Certification Program

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 business intelligence software by developing the next generation of KPI professionals and practitioners.

The KPI Practitioner Certification Criteria

- Possess a KPI Professional Certification;
- Obtain a minimum of 360 out of 450 points on the evaluation of the Application Portfolio.

How to use this guide

This guide was designed by The KPI Institute's subject matter experts to communicate the requirements for obtaining the KPI Practitioner Certification. Certified KPI Practitioner is the second level of the KPI Certification Program, following the Certified KPI Professional recognition.



5 steps to KPI Practitioner Certification

Pre-requisite for certification: KPI Professional Certification obtained
Optional: Attend Certified KPI Practitioner Course for preparation

1. *Send Application Form, Delegate Evaluation Voucher* to certified@kpiinstitute.org*
2. *Receive Application Portfolio Templates for the assignments of the Application Portfolio*
3. *Send Application Portfolio to certified@kpiinstitute.org*
4. *Assessors evaluate the Application Portfolio within two weeks from the submission date*
5. *Receive the result**, KPI Practitioner Certificate and optional Letter of Acknowledgement*

** Delegate Evaluation Voucher is applicable for participants from Informa (formerly known as IIR Middle East)*

*** If evaluation criteria is not met, application for reassessment will be required in order to obtain the KPI Practitioner Certificate*

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Introduction

Application Portfolio Templates

In order to facilitate your learning and certification process, The KPI Institute provides you with Application Portfolio Templates, composed by 15 templates, one for each assignment you have to complete for your Application Portfolio. It is your choice to fill the given templates, to modify them as you consider to be necessary or to structure your own working documents for each assignment.

Application Portfolio checklist

1 KPI project plan
2 KPI selection workshop notification
3 Primary and secondary data sources list
4 KPI selection for expo
5 Value flow analysis
6 Balancing KPIs
7 KPI documentation form
8 Change log
9 KPI data gathering template
10 Data gathering communication
11 Organizational Scorecard
12 Organizational Dashboard
13 Departmental Scorecard
14 Departmental Dashboard
15 KPI reporting page

How to prepare your application

- The certification process requires the submission of an Application Portfolio containing a set of 15 documents;
- For each document, this guide provides a general description of what the document represents, lists the requirements of the assignment, the criteria for evaluation and the points value that will be allocated for each criterion fulfilled;
- All documents should refer to the same project and should be developed in an aligned manner, so that information provided in one document does not conflict with the information provided in another. The required documents follow the flow of a typical KPI project and so should the documents that you are including in the Application Portfolio;
- All application documents must be submitted in English.

Evaluation Criteria

In order to obtain the Certified KPI Practitioner status, an applicant must accumulate a minimum of 360 out of 450 points on the evaluation of the Application Portfolio, representing 80% of the total. These points should be obtained from each of the documents submitted, the minimum per document being 25.

Optional preparatory course

Overview
The two-day course Certified KPI Practitioner trains participants in how to deploy and use the KPI Management Framework, according with the institute KPI Practitioner Certification standards. It focuses on practical exercises, which accounts 90% of the course's time, the remaining time being dedicated to review relevant theoretical concepts.

Evaluation
Independent from the course, participants can opt in to obtain their KPI Practitioner Certification by following the steps highlighted in the KPI Practitioner Certification process section.

Summary

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Application Portfolio

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1 KPI project plan

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General description

Document highlighting the different steps of implementation for the KPI project you choose to include in the Application Portfolio. Preparing your KPI project plan, please make sure to stay in line with learning points and examples provided during your KPI Professional Certification.

Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 3 pages.
- Include the project sections and subsections exhibited during the KPI Professional Certification course (Sections: Communication and stakeholder engagement, KPI selection, KPI documentation and activation, KPI reporting, KPI value generation, KPI maintenance).
- For each section, fill in with information that you deem relevant. For instance, ask yourself if the information provided is succinct yet detailed enough to guide another person in implementing the project.
- Include 3 arguments for why a project plan for KPI implementation is useful to be created.

Name of the document: 01-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
Structure (3 pages, complete, clearly organized and in a logical flow order, in line with the structure proposed in the KPI Professional Certification course)	15
3 clearly stated, convincing arguments for the utility of a KPI project plan	10
Design (clear and easy to read)	5
Total	**30**

Phase	Planning and initiating the implementation project
A1	**The analysis of the organizational environment**
A1.1	Establishing the key factors list and preparing the documentation
A1.2	Developing the key factors interview guide
A1.3	Conducting interviews with key factors to assess the current state and the desired state
A1.4	Developing RACI matrix
A1.5	Documenting the project team structure (including champions from departments)
A1.6	Clarifying the work packages for team members
A2	**Initiating the project**
A2.1	Completing the detailed project plan, well-timed
A2.2	Presenting the preliminary analysis results and the next steps
A2.3	Establishing the project management tools (communications, reporting, locations)

2 KPI selection workshop notification

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General description

Document presenting an example of e-mail notification to inform participants about the KPI selection workshop, as part of the performance management system implementation.

Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 2 pages.
- Structure an e-mail notification for the KPI selection workshop.
- Mention a list of documents to be attached, that would include the relevant materials to be reviewed by participants in preparation for the workshop.
- Include 3 arguments for why a KPI selection workshop is useful.

Name of the document: 02-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
Critical information included in the email; Appropriate writing style for email	15
List of relevant documents to be sent with the notification	10
3 clearly stated, convincing arguments for the utility of a KPI selection workshop	3
Design (clear and easy to read)	2
Total	**30**

Dear All,

As communicated earlier this month by our Chief Operating Officer, we are initiating the process of improving our performance management system. The future system will include more frequent reports, clearly structured around key performance indicators (KPIs).

We want to make sure that we select the KPIs that will best help us in achieving our strategic objectives. We also aim to find the right balance between reporting on those KPIs that will best inform out future decisions and being efficient in allocating the our reporting efforts and costs. Given your expertise, you have been recommended by our leadership team to participate in the selection of relevant KPIs for our organization.

Please confirm your participation by responding to this Microsoft Outlook invitation and please review the attached materials before the meeting.

Meeting details:

Time: 10:00 AM
Date: January 15, 2013
Location: Room Quartz

I look very much forward to our discussion and do not hesitate to contact me at tom.jones@quartzhotels.com for questions or clarifications!

Kind regards,

Tom Jones

Project Manager

List of attached files:
Workshop agenda
List of relevant KPIs for Hotels as an industry
List of relevant KPIs by functional area
Criteria for KPI selection
Glossary of terms
Agenda of the workshop
Project scope and context
List of examples of KPIs
Glossary of terms
Examples of industry/functional area specific scorecards/dashboards

3 Primary and secondary data sources list

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General description

Document presenting both primary and secondary data sources for relevant KPIs. It is used in the KPI Selection stage of the implementation project.

Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 2 pages.
- List primary and secondary sources of data available in the organization and relevant for a KPI project.
- Describe each source and specify the data collection method.
- Include 3 arguments for why a list with primary and secondary data sources is useful.

Name of the document: 03-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
List filled in with relevant information and description of each data source	15
Appropriate data collection method specified for all data sources identified	10
3 clearly stated, convincing arguments for the utility of a data sources list	3
Design (clear and easy to read)	2
Total	**30**

Source	Description	Data collection method
Front-line employees input	They are at the core of the value generation chain and know what matters for operational success;	Focus groups
Input from managers	Due to their perspective across the value generation process, role in shaping strategy and their relationship with various stakeholders;	Workshops or one-on-one meetings
Board input	In many instances they mandate the use of specific KPIs and their selection in strategic / operational is non-negotiable;	In-depth interviews or meeting
Input from suppliers	Their insight in the supply chain is valuable as they can bring an external perspective to what needs to be measured and improved;	Surveys or one-on-one meetings
Customer input	They also bring an external perspective and their opinions can assist in identifying priorities in performance measurement and management.	Observations or focus groups

4 KPI selection for expo

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General description

Document presenting a list of general KPIs identified to be initially taken into consideration and discussed by subject matter experts before selecting the KPIs to be tracked for a department or team.

Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 2 pages.
- Select 1 department or team for which KPIs are going to be identified and clearly state the name of that department/team and a two lines description of its role in the organization.
- Prepare an initial list of 15 general KPIs that you identified as potentially relevant for that department/team and that you would present to subject matter experts for further discussion.
- For each KPI, specify the data source (minimum 1) used for identifying it.
- Include a list of minimum 5 probing questions that you would use in facilitating the KPI selection discussion among subject matter experts.

Name of the document: 04-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
15 general KPIs identified which are relevant for the selected department/team	15
Minimum 1 source mentioned for each KPI	5
Minimum 5 relevant probing questions clearly stated, presented in a logical order	5
Structure (maximum 2 pages, clearly organized)	3
Design (clear and easy to read)	2
Total	**30**



5 Value flow analysis

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General description

Document outlining the KPI selection process conducted by employing the Value Flow Analysis method, as discussed during the KPI Professional Certification course.

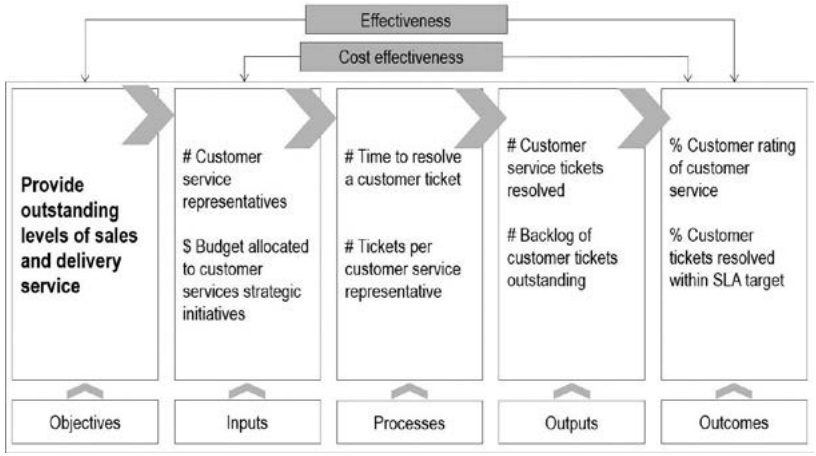
Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 3 pages.
- Name 3 objectives for which KPIs are being selected, in line with The KPI Institute standards.
- For each objective, clearly frame the four steps of the Value Flow Analysis.
- Assign minimum 1 KPI to the appropriate objective and step in the Value Flow Analysis.
- Include 3 arguments for why a Value Flow Analysis is useful method in KPI selection process.

Name of the document: 05-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
3 objectives named for the Value Flow Analysis method	10
Minimum 1 KPI per each step of the Value Flow Analysis (minimum 12 KPIs overall), correctly assigned for each objective	10
Structure (maximum 3 pages, clearly organized)	5
3 clearly stated, convincing arguments for the utility of Value Flow Analysis	3
Design (clear and easy to read)	2
Total	**30**



6 Balancing KPIs

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General description

Document presenting the KPI selection technique which offers a balanced approach of KPIs using the criteria of quantity-quality, subjectivity-objectivity, efficiency-effectiveness and leading-lagging, as discussed during the KPI Professional Certification course.

Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 2 pages.
- Name 3 objectives, formulated in line with The KPI Institute standards (can be used the objectives from the Value Flow Analysis assignment).
- For each objective, allocate 2 balanced KPIs and mention the balancing criteria used.
- Include 3 arguments for why is useful to balance KPIs.

Name of the document: 06-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
6 balanced KPIs, according to the balancing criteria	15
3 objectives named for balancing KPIs	10
3 clearly stated, convincing arguments for the utility of balancing KPIs	3
Design (clear and easy to read)	2
Total	**30**

Objectives
A. Reduce the number of defects
Defects
$ Cost of poor quality (COPQ)
B. Improve employees' skills
% Employees reaching desired competences after training
# Training hours per full time equivalent (FTE)
C. Optimize liquidity
% Liquidity ratio
# Days in accounts receivable
D. Improve delivery capabilities
% Supplier on-time delivery
# Safety stock
E. Improve network quality
% Data network utilization
# Critical time outage
F. Increase customers pool
New customers
% Profitable customers

7 KPI documentation form

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General description

Document designed so that each KPI can be easily understood and communicated across the organization, in a clear, structured, standardized manner. Once a KPI Documentation Form template is designed, all the KPIs employed by the organization should be documented based on it.

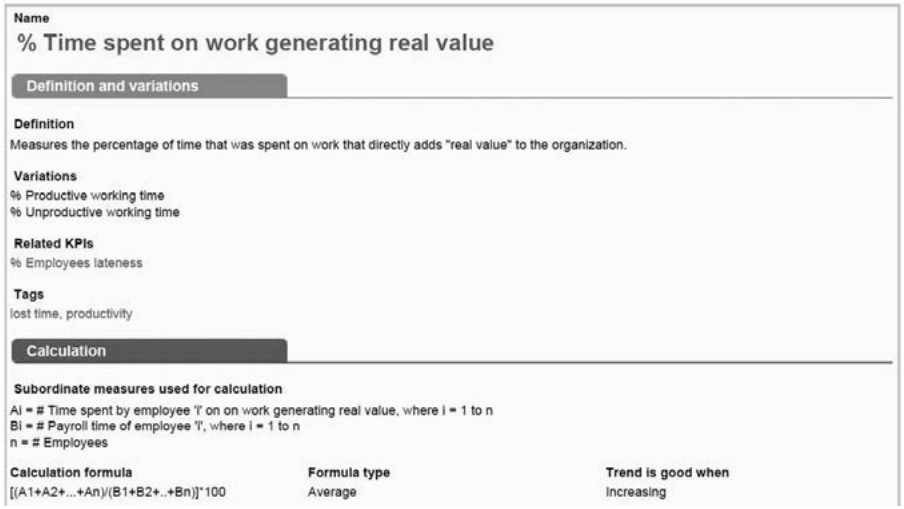
Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 1 page.
- Choose a content structure that is in line with both your organization's resources and The KPI Institute's best practices for KPI documentation.
- Design the form so that minimum 20 important fields are included and feel free to add optional fields (clarifying which are the key ones though).
- Fill in the form for a KPI of your choice; specify the KPI name at the top of the form. The design used should facilitate the reading of the template. Use suggestive colors, fonts, graphical representations, aligned to your organizational identity policy.
- Include 3 arguments for why a KPI Documentation Form is useful to be created.

Name of the document: 07-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
1 KPI documented in a relevant and rigorous manner	13
20 KPI fields are easily noticeable	10
Structure (maximum 2 pages; clearly organized; concepts respect taxonomy and best practices promoted by The KPI Institute)	3
3 clearly stated, convincing arguments for the utility of a KPI Documentation Form	2
Design (clear and easy to read)	2
Total	**30**



Name
% Time spent on work generating real value

Definition and variations

Definition
Measures the percentage of time that was spent on work that directly adds "real value" to the organization.

Variations
% Productive working time
% Unproductive working time

Related KPIs
% Employees lateness

Tags
lost time, productivity

Calculation

Subordinate measures used for calculation
Ai = # Time spent by employee 'i' on on work generating real value, where i = 1 to n
Bi = # Payroll time of employee 'i', where i = 1 to n
n = # Employees

Calculation formula	Formula type	Trend is good when
[(A1+A2+...+An)/(B1+B2+..+Bn)]*100	Average	Increasing

8 Change log

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General description

Document presenting the changes registered during performance reviews. Usually it includes modifications made in terms of balanced scorecard perspectives, strategic objectives, dashboard clusters, KPIs.

Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 2 pages.
- Choose a content structure that includes representative fields for the changes made in the context of performance review.
- Fill in the log with minimum 5 examples of changes registered at your choice. The design should facilitate the reading of the document and make it easy for the reader to visualize the changes registered.
- Include 3 arguments for why a change log is useful to be created.

Name of the document: 08-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
Structure (maximum 2 pages; relevant fields of the change log)	10
Minimum 5 examples of changes registered	10
3 clearly stated, convincing arguments for the utility of a change log	5
Design (clear and easy to read)	5
Total	**30**

Item	Initial	Change	Comment	Date of change
KPI	% Planned revenue sources activated - Biannually reporting frequency	Reporting frequency changed from B to YTD	In order to see at each meeting how much was achieved from the yearly target	24/07/2014
KPI	% Research materials not meeting quality standards	Set on inactive	This KPI is replaced by # Research materials quality index	24/07/2014
KPI	# Courses with customized content	Set on inactive	This activity is no longer significant for the department	24/07/2014

9 KPI data gathering template

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General description

Document representing a tool for KPI data collection as part of the performance management system. It supports KPI activation, ongoing data gathering and reporting.

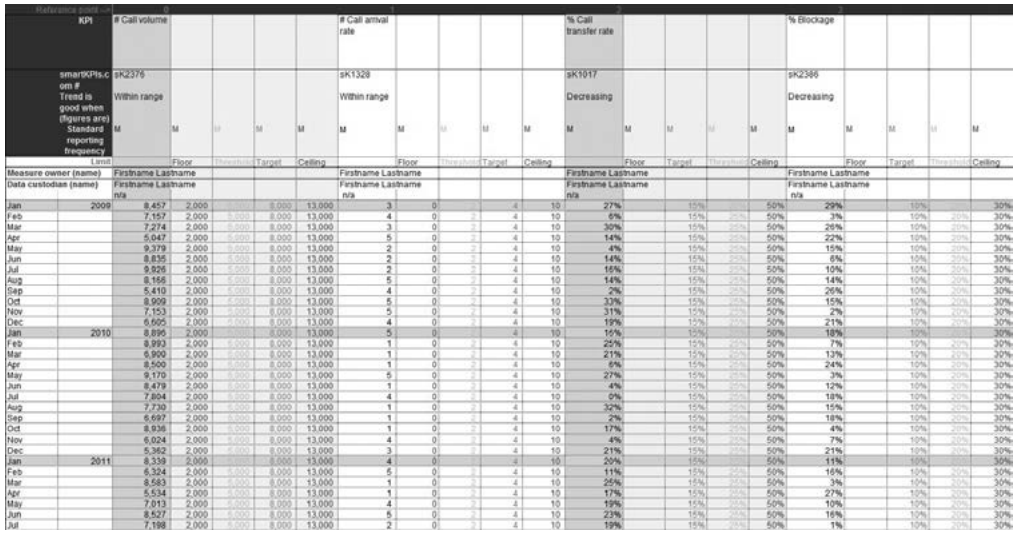
Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 2 pages.
- Create a KPI data gathering template including relevant fields, in line with the structure proposed in the KPI Professional Certification course.
- Fill in the table to give an example of KPI data collected.
- Make sure it tracks adherence to data collection timeline during various reporting cycles.
- Include 3 arguments for why a KPI data gathering template is useful to be created.

Name of the document: 09-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
Relevant field of the template	10
Structure (2 pages, organized and in a logical flow order)	10
3 clearly stated, convincing arguments for the utility of a KPI data gathering template	5
Design (clear and easy to read)	5
Total	**30**



KPI		# Call volume					# Call arrival rate					% Call transfer rate					% Blockage				
smart KPIs.com # Trend is good when (figures are)		sK2376 Within range					sK1328 Within range					sK1017 Decreasing					sK2386 Decreasing				
Standard reporting frequency		M					M					M					M				
		Limit		Floor	Threshold	Target	Ceiling		Floor	Threshold	Target	Ceiling		Floor	Target	Threshold	Ceiling		Floor	Target	Threshold	Ceiling
Measure owner (name)		Firstname Lastname						Firstname Lastname					Firstname Lastname					Firstname Lastname			
Data custodian (name)		Firstname Lastname n/a						Firstname Lastname n/a					Firstname Lastname n/a					Firstname Lastname n/a			
Jan	2009	8,457	2,000	5,000	8,000	13,000		3	0	2	4	10	27%	15%	20%	50%		29%	10%	20%	30%
Feb		7,157	2,000	5,000	8,000	13,000		4	0	2	4	10	6%	15%	20%	50%		3%	10%	20%	30%
Mar		7,274	2,000	5,000	8,000	13,000		3	0	2	4	10	30%	15%	20%	50%		26%	10%	20%	30%
Apr		5,047	2,000	5,000	8,000	13,000		5	0	2	4	10	14%	15%	20%	50%		22%	10%	20%	30%
May		9,379	2,000	5,000	8,000	13,000		2	0	2	4	10	4%	15%	20%	50%		15%	10%	20%	30%
Jun		8,835	2,000	5,000	8,000	13,000		2	0	2	4	10	14%	15%	20%	50%		6%	10%	20%	30%
Jul		9,826	2,000	5,000	8,000	13,000		2	0	2	4	10	16%	15%	20%	50%		10%	10%	20%	30%
Aug		8,156	2,000	5,000	8,000	13,000		5	0	2	4	10	14%	15%	20%	50%		14%	10%	20%	30%
Sep		5,410	2,000	5,000	8,000	13,000		4	0	2	4	10	2%	15%	20%	50%		26%	10%	20%	30%
Oct		8,909	2,000	5,000	8,000	13,000		5	0	2	4	10	33%	15%	20%	50%		15%	10%	20%	30%
Nov		7,153	2,000	5,000	8,000	13,000		5	0	2	4	10	31%	15%	20%	50%		2%	10%	20%	30%
Dec		6,505	2,000	5,000	8,000	13,000		4	0	2	4	10	19%	15%	20%	50%		21%	10%	20%	30%
Jan	2010	8,895	2,000	5,000	8,000	13,000		5	0	2	4	10	15%	15%	20%	50%		18%	10%	20%	30%
Feb		8,993	2,000	5,000	8,000	13,000		1	0	2	4	10	25%	15%	20%	50%		7%	10%	20%	30%
Mar		6,900	2,000	5,000	8,000	13,000		1	0	2	4	10	21%	15%	20%	50%		13%	10%	20%	30%
Apr		8,500	2,000	5,000	8,000	13,000		1	0	2	4	10	6%	15%	20%	50%		24%	10%	20%	30%
May		9,170	2,000	5,000	8,000	13,000		5	0	2	4	10	27%	15%	20%	50%		3%	10%	20%	30%
Jun		8,479	2,000	5,000	8,000	13,000		1	0	2	4	10	4%	15%	20%	50%		12%	10%	20%	30%
Jul		7,804	2,000	5,000	8,000	13,000		4	0	2	4	10	0%	15%	20%	50%		18%	10%	20%	30%
Aug		7,730	2,000	5,000	8,000	13,000		1	0	2	4	10	32%	15%	20%	50%		15%	10%	20%	30%
Sep		6,697	2,000	5,000	8,000	13,000		1	0	2	4	10	2%	15%	20%	50%		18%	10%	20%	30%
Oct		8,938	2,000	5,000	8,000	13,000		1	0	2	4	10	17%	15%	20%	50%		4%	10%	20%	30%
Nov		6,024	2,000	5,000	8,000	13,000		4	0	2	4	10	4%	15%	20%	50%		7%	10%	20%	30%
Dec		5,362	2,000	5,000	8,000	13,000		3	0	2	4	10	21%	15%	20%	50%		21%	10%	20%	30%
Jan	2011	8,339	2,000	5,000	8,000	13,000		4	0	2	4	10	20%	15%	20%	50%		11%	10%	20%	30%
Feb		6,324	2,000	5,000	8,000	13,000		5	0	2	4	10	11%	15%	20%	50%		16%	10%	20%	30%
Mar		8,583	2,000	5,000	8,000	13,000		1	0	2	4	10	25%	15%	20%	50%		3%	10%	20%	30%
Apr		5,534	2,000	5,000	8,000	13,000		1	0	2	4	10	17%	15%	20%	50%		27%	10%	20%	30%
May		7,013	2,000	5,000	8,000	13,000		4	0	2	4	10	19%	15%	20%	50%		10%	10%	20%	30%
Jun		8,527	2,000	5,000	8,000	13,000		5	0	2	4	10	23%	15%	20%	50%		16%	10%	20%	30%
Jul		7,198	2,000	5,000	8,000	13,000		2	0	2	4	10	19%	15%	20%	50%		1%	10%	20%	30%

10 Data gathering communication

office@kpiinstitute.org
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General description

Document presenting an example of e-mail notification to remind data custodians about the importance of submitting the data on time and the current status of data submission. It supports in monitoring the status of KPI data gathering.

Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 2 pages.
- Structure an e-mail that you would send to the KPI data custodians with information you deem relevant.
- Make sure you include the status of data submitted.
- Include 3 arguments for why data gathering communication is useful.

Name of the document: 10-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
Critical information included in the reminder e-mail; Appropriate writing style for e-mail	15
Structure (2 pages, clearly organized and in a logical flow order)	10
3 clearly stated, convincing arguments for the utility of data gathering communication	5
Total	**30**

Dear KPI data custodians,

A big thank you goes to those who have already completed the data gathering process.

For the rest of the team, please note that deadline for gathering KPI data for the current reporting cycle is soon approaching - end of day, January 10, 2013.

Please submit the data according to our specifications and project timeline (attached) and please let me know if there is any other information I could provide.

Thank you,

Tom Jones

Custodian name	# KPIs reporting on	KPIs already reported on	Delta	Outstanding	Due date	Status	Traffic light	Comment
John Doe	8	8	0	none	13-Jun-14	Submitted		Well done! Keep up the good work.
Ann Smith	9	8	1	% IT budget out of total operational budget	13-Jun-14	Outstanding		Almost there. Please submit the data for last one as ap.
Luis Ramirez	4	3	1	# Fuel consumption per flight	13-Jun-14	Outstanding		Almost there. Please submit the data for last one as ap.
Anthony Gleason	2	0	2	# Service quality rating, % Ticket price variance from market average	13-Jun-14	Outstanding		One leave. Please submit upon return.

11 Organizational Scorecard

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General description

Document representing a key tool for tracking organizational performance management status and progress. It is structured based on the Balanced Scorecard framework, highlighting objectives and relevant KPIs, targets, trends and results for those KPIs.

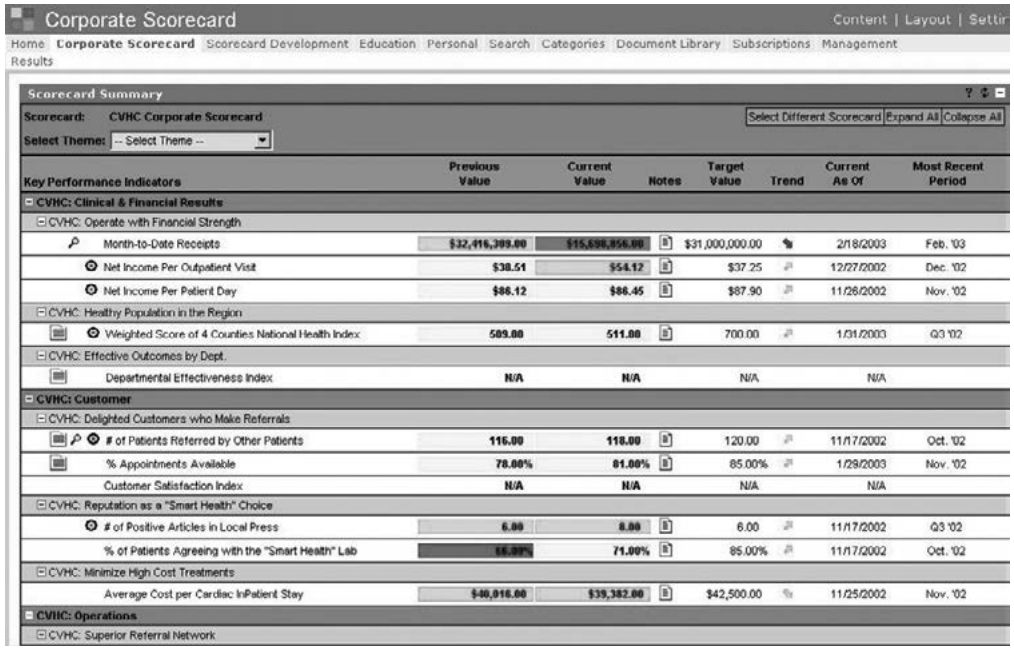
Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 2 pages.
- Formulate minimum 1 objective for each perspective of the Organizational Scorecard (minimum 4 objectives in total).
- Under each objective, identify minimum 2 relevant KPIs (minimum 8 KPIs in total). Make sure that:
  - The KPI names are formatted in line with The KPI Institute standards;
  - The KPIs selected reflect the objectives.
- List the fields you would like to be included in Organizational Scorecard, representing the aspects to be tracked for the identified KPIs.
- Include 3 arguments for why an Organizational Scorecard is useful to be created.

Name of the document: 11-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
Minimum 4 relevant objectives are formulated; Minimum 8 KPIs reflecting objectives	10
Relevant fields proposed to be included	10
Structure (maximum 2 pages; clearly organized; concepts respect taxonomy and best practices promoted by The KPI Institute)	5
3 clearly stated, convincing arguments for the utility of an Organizational Scorecard	5
Total	**30**



12 Organizational Dashboard

office@kpiinstitute.org
+61 3 9028 2223

General description

Document representing a key tool for tracking organizational performance management status and progress, in a detailed manner, relying on graphical representations that can be easily understood and employed in the organization's decision making processes.

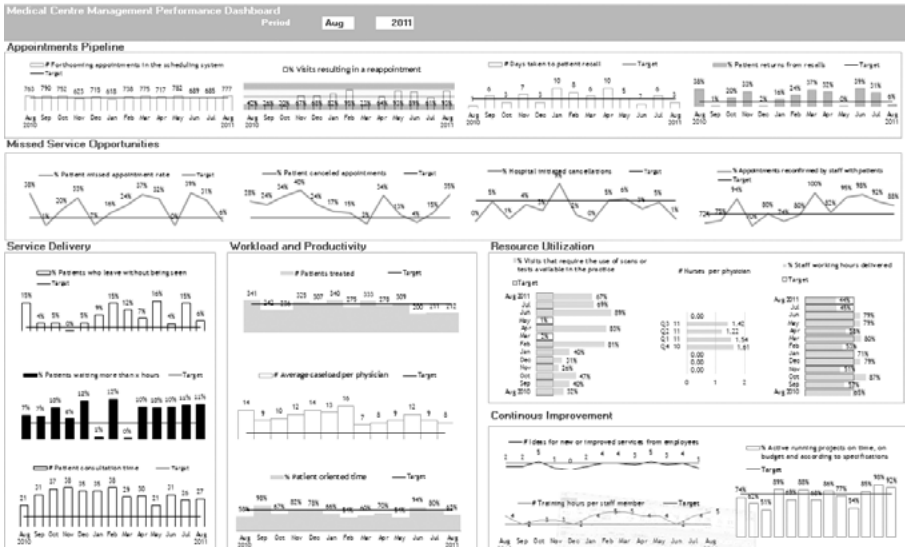
Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 2 pages.
- Identify 5 clusters with representative names for the KPIs you propose for the Organizational Dashboard.
- List minimum 3 KPIs under each cluster and mention the type of graph you would use for the graphical representation of each KPI.
- Make sure that the graphs you propose are in line with learning points and examples provided during your KPI Professional Certification.
- Include 3 arguments for why an Organizational Dashboard is useful to be created.

Name of the document: 12-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
KPIs grouped into 5 clusters with representative names; 3 KPIs per cluster	10
Appropriate graphs proposed for KPIs representation	10
Structure (maximum 2 pages; clearly organized; concepts respect taxonomy and best practices promoted by The KPI Institute)	5
3 clearly stated, convincing arguments for the utility of an Organizational Dashboard	5
Total	**30**



13 Departmental Scorecard

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+61 3 9028 2223

General description

Document representing a key tool for tracking departmental performance management status and progress. It is structured based on the Balanced Scorecard framework, highlighting objectives and relevant KPIs, targets, trends and results for those KPIs.

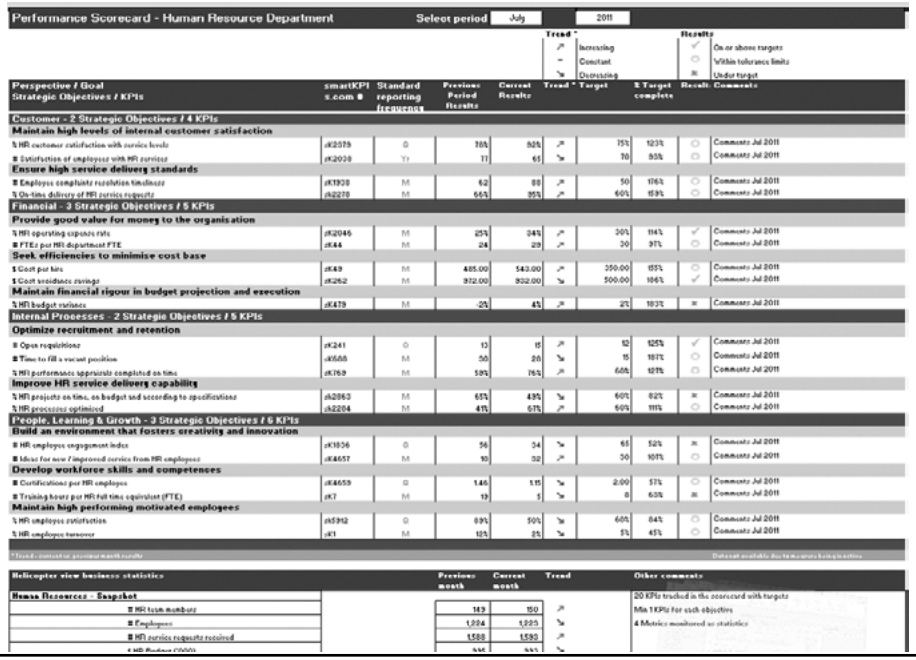
Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 2 pages.
- Choose a team or department and cascade the organizational objectives and KPIs from the Organizational Scorecard.
- Outline all objectives for which the department or team can be hold accountable and allocate minimum 1 objective for each perspective of the Departmental Scorecard (minimum 4 objectives in total).
- Allocate minimum 2 relevant KPIs for each objective (minimum 8 KPIs in total). Make sure that:
  - The KPI names are formatted in line with The KPI Institute standards;
  - The KPIs selected reflect departmental objectives.
- Include 3 arguments for why a Departmental Scorecard is useful to be created.

Name of the document: 13-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
Minimum 4 relevant objectives are cascaded; Minimum 8 KPIs cascaded reflecting objectives	15
Structure (maximum 2 pages; clearly organized; concepts respect taxonomy and best practices promoted by The KPI Institute)	10
3 clearly stated, convincing arguments for the utility of a Departmental Scorecard	5
Total	**30**



14 Departmental Dashboard

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+61 3 9028 2223

General description

Document representing a key tool for tracking departmental performance management status and progress, in a detailed manner, relying on graphical representations that can be easily understood and employed in the department's decision making processes.

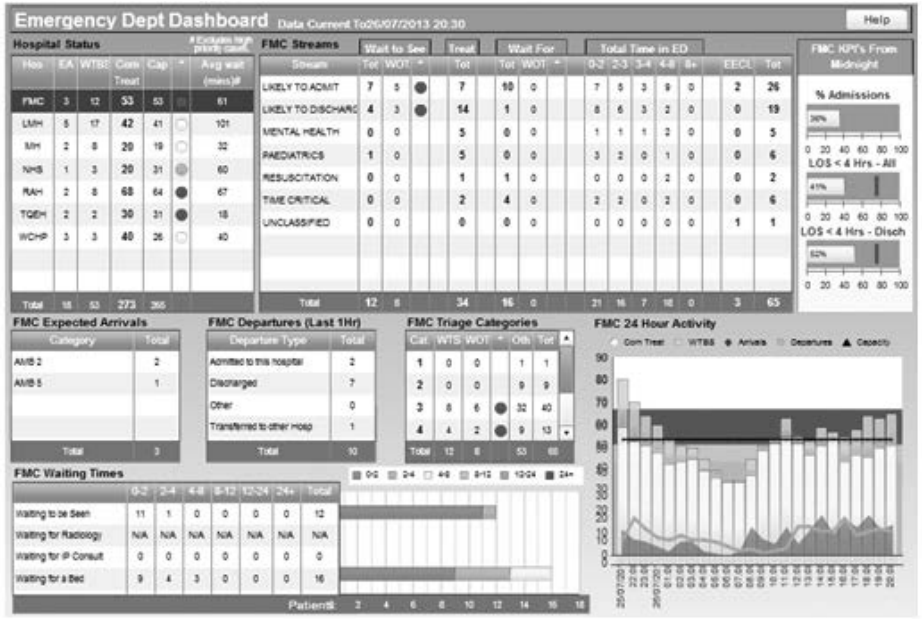
Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 2 pages.
- Identify 5 clusters with representative names for the KPIs you propose for the Departmental Dashboard.
- List minimum 3 KPIs under each cluster and mention the type of graph you would use for the graphical representation of each KPI.
- Make sure that the graphs you propose are in line with learning points and examples provided during your KPI Professional Certification.
- Include 3 arguments for why a Departmental Dashboard is useful to be created.

Name of the document: 14-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
KPIs grouped into 5 clusters with representative names; 3 KPIs per cluster	10
Appropriate graphs proposed for KPIs representation	10
Structure (maximum 2 pages; clearly organized; concepts respect taxonomy and best practices promoted by The KPI Institute)	5
3 clearly stated, convincing arguments for the utility of a Departmental Dashboard	5
Total	**30**



15 KPI reporting page

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General description

An instrument used to assess the evolution of an indicator from one period of time to another. KPI reports reflect how KPIs have performed against their targets. These reports are conducted with regularity within a clear time frame.

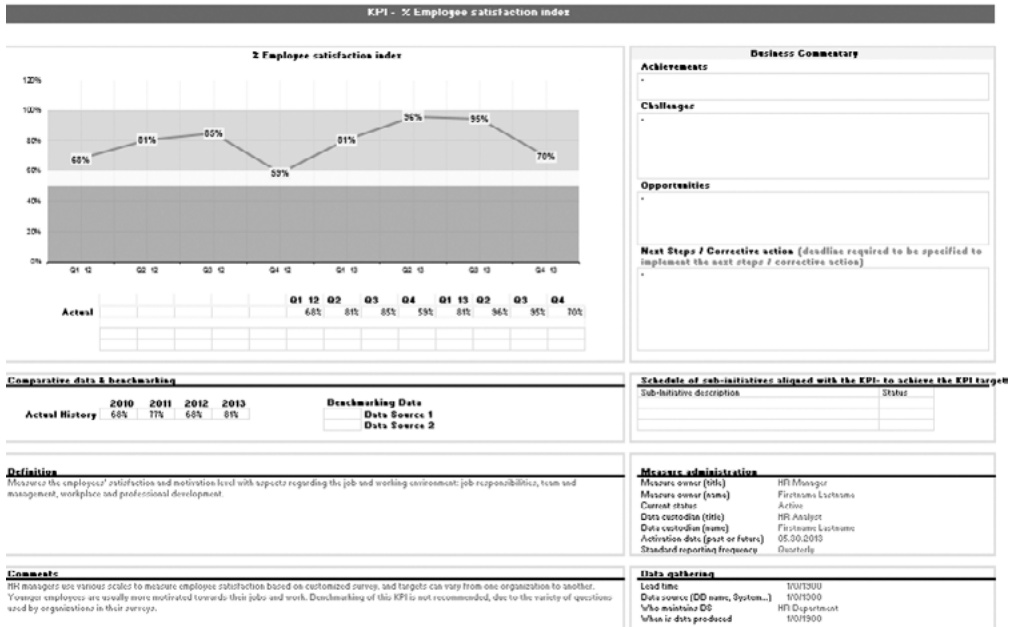
Assignment

- Recommendation: Prepare the document in Excel format and save it as PDF. Do not exceed 2 pages.
- Compile a KPI Report illustrating the trend of 1 KPI for a specific period of time. Choose the appropriate type of graphic to maximize data visualization for the KPI. Include comments on the trends, for a better understanding of its evolution (minimum 3 comments)
- Mention the decisions or actions (minimum 2 decisions/actions) to be taken for the KPIs future results to be improved.
- The design used should facilitate reading and make it easy for the viewer to understand the evolution of that particular KPI and the actions to be taken to improve it.
- Include 3 arguments for why a KPI Report is useful to be created.

Name of the document: 15-AP-FirstName-LastName

Assessment

Criteria for evaluation	Points value
1 KPI trend illustrated, minimum 3 comments, minimum 2 actions mentioned	15
Structure (maximum 2 pages; clearly organized, in a logical flow order)	10
3 clearly stated, convincing arguments for the utility of a KPI Report	5
Total	**30**







The KPI Institute

Celebrating 10 Years of PERFORMANCE

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