The KPI Institute

Celebrating 10 Years of PERFORMANCE

KPI Practitioner Certification

Presentation









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Introduction

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About The KPI Institute

The KPI Institute is the global authority on Key Performance Indicators (KPIs) research and education, providing through its publications and training courses insights on how to measure and learn with KPIs. It developed the first KPI Management Framework and operates several research programs dedicated to performance management, strategy, Balanced Scorecard and Key Performance Indicators.



smartKPIs.com
The *smart* choice in performance management

It operates smartKPIs.com, the result of the research program dedicated to documenting and cataloguing how KPIs are used in practice, an online portal containing the largest collection of well documented KPI examples, supported by a community of tens of thousands of members.

Over the last ten years, the team has:

- Assisted over 28,000 organizations in finding solutions to their KPI needs;
- Documented 7,000+ KPIs from 15 functional areas and 24 industries;
- Reviewed 1,000+ performance reports from 125 countries;
- Referenced 20,000+ resources (books, articles, performance reports);
- Developed over 150 KPI Dashboards and Balanced Scorecards;
- Delivered training courses in 20 countries on 5 continents;
- Trained over 2,500 participants from 41 countries on how to work rigorously with KPIs.

Our pillars

Research and Publications
Contributing to the development of the performance management discipline by actively researching and publishing articles and reports on performance management topics in both academic and practitioner publications.



Education
Delivering performance management training to improve the understanding of performance at conceptual level and develop technical skills in related processes/systems, from KPI selection to Balanced Scorecard implementations.

Certification programs

KPI Professional Certification

- Recognizes a person's knowledge in deploying and using KPIs in accordance with The KPI Institute's KPIs Management Framework;
- Preparatory course attendance is mandatory;
- Examination at end of course;
- Pre-requisite for certification: course attendance.



KPI Practitioner Certification

- Recognizes a person's practical experience in deploying and using KPIs in accordance with The KPI Institute's KPIs Management Framework;
- Preparatory course attendance is optional;
- Online assessment of Application Portfolio;
- Pre-requisite for certification: KPI Professional Certification obtained.



About KPI Practitioner Certification

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KPI Practitioner Certification purpose

The KPI Practitioner Certification recognizes a person's practical experience in deploying and using KPIs in accordance with The KPI Institute's Key Performance Indicators Management Framework 1.0.

KPI Practitioner Certification aims

- Enhance professionals' knowledge, skills and competencies through the practical deployment of Performance Management related processes, tools and techniques;
- Acknowledge their best know-how, skills and competencies in working with KPIs;
- Bring long-term added value to the career of professionals in the Performance Management field.

Competencies developed

Applicants who have attained the KPI Practitioner Certification demonstrate the following:

- Practical knowledge and understanding of how to design performance management documents;
- Ability to develop and apply performance management tools;
- Argue the specific significance of performance management processes, tools and techniques;
- Correctly structure, analyze and evaluate information applied in organizational context, taking into consideration internal and external organizational factors that may influence it;
- Ability to construct a customized performance management architecture.

Benefits

Besides the official recognition that any certification brings, a certification in the field of performance management presents the advantage of being of relevance to a variety of roles, functions and industries. No matter where you see your career going, they provide excellent opportunity to both increase your competitiveness in the job market and gain a strong theoretical foundation and practical experience in applying the performance management framework.

- Formal recognition
- Customized feedback
- Professional portfolio
- Objective assessment
- Premium subscription to smartKPIs.com for 6 months
- KPI Practitioner Certificate

Applicant's profile

Certified KPI Professional

Pre-requisite for KPI Practitioner Certification is having the KPI Professional Certification obtained.

Oriented towards professional development

This certification is designed for executives, managers, planners and analysts who not only are seeking to complement their current certification as a Certified KPI Professional, but who are also interested in continuous professional development.

Committed

As the KPI Practitioner Certification aims to bring long-term added value to the career of professionals in the Performance Management field, commitment in demonstrating mastery in working with KPIs is expected.

' Available six months from the receipt of the Application Portfolio Templates*

KPI Practitioner Certification process

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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*

Certification fees

- $500: Standard certification fee
- $400: Fee for applicants who register within 3 months from the date of obtaining
- KPI Professional certification
- $300: Fee for applicants who have completed the Certified KPI Practitioner
- preparation course
- $200: Reassessment fee*

**Reassessment: review for the second time or more of the Application Portfolio*

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

KPI Practitioner Certification process

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Application categories

This section aims to provide clarity on the possible categories of application. These terms may be used during the certification process in the communication with an applicant, so applicants are expected to refer to this section if further clarifications are needed throughout the certification process.

Application Portfolio submission deadline

There is no specific deadline for submitting the Application Portfolio. The KPI Institute recommends the completion of the Application Portfolio within a period of two months. It is encouraged to establish a working program for the KPI Practitioner Certification and to follow it by working at the applicant's own pace, but in a constant manner, not with pauses or interruptions of many days.
The KPI Institute will keep in contact with the applicant during the certification process. According to the expected submission date mentioned by a person in the Application Form, The KPI Institute will contact applicants for support at the middle and near the end of the period.

Application category	Description	Next step
Eligible	The AP comprises the 15 assignments' documents	The AP will be evaluated by The KPI Institute
	The AP documents are in English	The AP will be evaluated by The KPI Institute
Inteligible	The application is missing assignments in the AP	Complete and resend your AP
	The AP documents are not in English	Translate and send the AP documents in English
Under Review	Assessors review your AP within two weeks from the submission date.	Wait for the feedback and results
Closed	The AP meets the certification criteria**	Receive the KPI Practitioner Certificate and optional Letter of Acknowledgement by mail
	The AP does not meet the certification criteria	Analyze the customized feedback received. Implement the suggestions, apply for reassessment and submit the Application Portfolio

**AP = Application Portfolio*

*** Accumulate a minimum of 360 out of 450 points*

Evaluation and upgrade

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Evaluation criteria

The criteria for evaluation for each of the 15 assignments is detailed in the Application Guide. 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.

Assessors team description

The Assessors team is a previously established team of two specialists from The KPI Institute. The team remains constantly the same, responsible of processing and evaluating the applications for the KPI Practitioner Certification.

Evaluation description

- The two assessors separately analyze and evaluate the Application Portfolio.
- The score is determined by the average of the two evaluations.
- The two assessors discuss and generate together the customized feedback for the Application Portfolio.
- The Assessment Report is created and submitted.

Certification upgrade

The current certification is based on The KPI Institute's Key Performance Indicators Management Framework 1.0.

In order to stay updated with the latest developments and best practices in the Performance Management field and aligned to The KPI Institute standards, the KPI Practitioner Certification is recommended to be renewed at the time of availability of the Key Performance Indicators Management Framework 2.0.

Terms and conditions

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Privacy policy*

The KPI Institute Pty Ltd ("The KPI Institute") is committed to protecting your privacy. This policy outlines our personal information handling practices for both online and offline data. If you give us personal information, we will treat it according to this policy. This policy covers the kpiinstitute.org website and the materials** posted on it. We encourage you to read this privacy policy.

Collection of your personal information

The KPI Institute collects personally identifiable information during the registration process, such as your e-mail address, name, home or work address or telephone number.

Use of your personal information

We do not share personal information about you outside The KPI Institute unless you give us permission to do so or when the law requires it.

We do not use your email address or other personally identifiable information to send commercial or marketing messages without your consent or except as part of a specific program or feature for which you will have the ability to opt-in or opt-out. We may, however, use your email address without further consent for non-marketing or administrative purposes (such as notifying you of major kpiinstitute.org site changes or for customer service purposes).

**Complete Privacy policy statements of The KPI Institute is available at kpiinstitute.org/terms-and-conditions*

*** Includes the KPI Practitioner Certification Presentation and the KPI Practitioner Certification Application Guide*

Requirements

Submitted documents. Application status. Examination results. Feedback and Assessment Report

Confidentiality is strictly maintained and all submitted documents will be solely used for the purpose of assessing an applicant's ability to deploy and use KPIs in accordance with The KPI Institute's Key Performance Indicators Management Framework 1.0. The application status will not be shared to third parties, neither will be the examination results, the customized feedback for each applicant and the Assessment Report content generated after the evaluation period is completed. All these information will only be available to the Assessors Team of KPI Practitioner Certification.

Code of ethical and professional responsibility

- **Application Form information**
  By submitting the Application Form, the applicant declares that all of the information he did and will further provide is true and accurate. Also, he declares that he read, understood and agreed with the Privacy Policy statements.
- **Application Portfolio documents**
  By submitting for evaluation the 15 documents of the Application Portfolio, the applicant acknowledges that they are result of his own work.
- **Importance of being informed**
  An applicant is expected to read thoroughly the KPI Practitioner Certification Presentation and the KPI Practitioner Certification Application Guide, in order to assure he is informed and prepared to successfully complete the KPI Practitioner Certification.





The KPI Institute

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