The KPI Institute

Celebrating 10 Years of PERFORMANCE

Training Courses Catalogue 2015









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"The KPI Institute has provided us with an excellent KPI program which was tailored to the needs of our organization. We highly recommend the Institute KPI educational programs."
Ahmed Alsaheel, Salehiya Medical, Saudi Arabia

Introduction

office@kpiinstitute.org
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About us

The KPI Institute is the global authority on performance through Key Performance Indicators(KPIs) research and education.

It developed the first KPI Management Framework and operates several research programs dedicated to performance management, strategy, Balanced Scorecard and Key Performance Indicators. 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.

We understand that business success starts with competent people and we have assessed thousands of businesses, so we can genuinely train professionals in developing new skills.

Why study with The KPI Institute?

We understand that business success starts with competent people and we have assessed thousands of businesses, so we can genuinely train professionals in developing new skills.

The training courses are structured to enable both the theoretical understanding and practical experience of using a variety of performance management tools and techniques for deploying KPIs correctly across industries and functional areas:

- Group discussions, exercises, simulations and case studies;
- Presentations of performance management templates as tools to support the integration of performance management practices in organizations;
- Access to over 30 templates used for KPI management;
- Customized feedback regarding the present use and the future plans for implementing performance management systems;
- Active involvement of all the participants in a collaborative learning environment where opinions and experiences are shared.





Our unique training approach

The training portfolio currently contains 39 training courses which provide a combination of practical solutions for improving organizational performance. The courses are informed by:

- Practical experience in implementing and using tens of Balanced Scorecard based performance management systems in organizations;
- Insights gained by researching and reviewing hundreds of organizational Balanced Scorecard systems, Performance Scorecards and Strategy Maps;
- Literature review of the most important publications and materials on this topic;
- Academic research on the key drivers of organizational performance.



"Thank you for the excellent training workshop on KPIs. It was an eye-opening experience and provided much needed guidance and clarification. The information gained has provided focus and depth. ***Hasniza Mohd Hassan, Multimedia Development Corporation, Malaysia***

Categories

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Certified and Specialized Courses

In an effort to improve the ways in which KPIs are understood and employed in organizations worldwide, The KPI Institute provides a broad set of education services.

The KPI Institute offers extended knowledge in the field of performance management through eleven certification courses designed to provide a strong foundation to deploying business management systems and BI software. These certification courses generate value by offering first class in depth business insights, from key concepts, methodologies, techniques and best practices to decision making, strategic planning and performance measurement tools.

The KPI Institute also offers specialized training courses customized to specific functional areas, industries or topics related to performance management.

The KPI Institute training courses are divided into the following categories:

- KPI Framework
- KPI by Industries
- KPI by Functional Area
- Balanced Scorecard
- Strategy and Performance
- Performance Through People
- Systems Thinking Business Simulations
- Procurement and Logistics

In-house Training Courses

The courses offered by The KPI Institute can also be accessed as in-house training solutions. Any of the topics and subjects covered in this catalogue can be adapted to suit your business needs. We will take the time to understand your company's learning needs so that we can develop a tailored training solution that satisfies your business objectives.

The in-house solutions combine The KPI Institute's expertise in training thousands of professionals with different backgrounds from a multitude of industries with the organizational customization needs as identified during the initial analysis stage of the process.

The certification programs are designed to provide a strong foundation to deploying business management systems and BI software.

New training programs on topics related to KPIs, performance management, business strategy, risk management and Business Intelligence can also be designed at your organization's request. We welcome the opportunity to discuss your company's training and business development initiatives.

Should you be interested in scheduling an in-house training course, email us at **office@kpiinstitute.org** and you will receive a customized offer.

"I contacted smartKPIs.com for an in-house training with my team. We found both the material and the way of explaining concepts by doing examples invaluable. I would also say that this is a great value for money if you want to build the competency within your organization."

Fahad A. AlFaadel, Strategy Planning Executive Director, Saudi Food & Drug Authority





"Thanks for a very informative and enlightening session. Would certainly assist me in the long run to further enhance our Corporate Performance Measurement and Management." *Hasniza Mohd Hassan, Multimedia Development Corporation, Malaysia*

Essential Resources

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Inclusions

At the end of each course, The KPI Institute offers at the end of each course a collection of valuable learning resources that bring added value and support to professionals working in the Performance Management area.

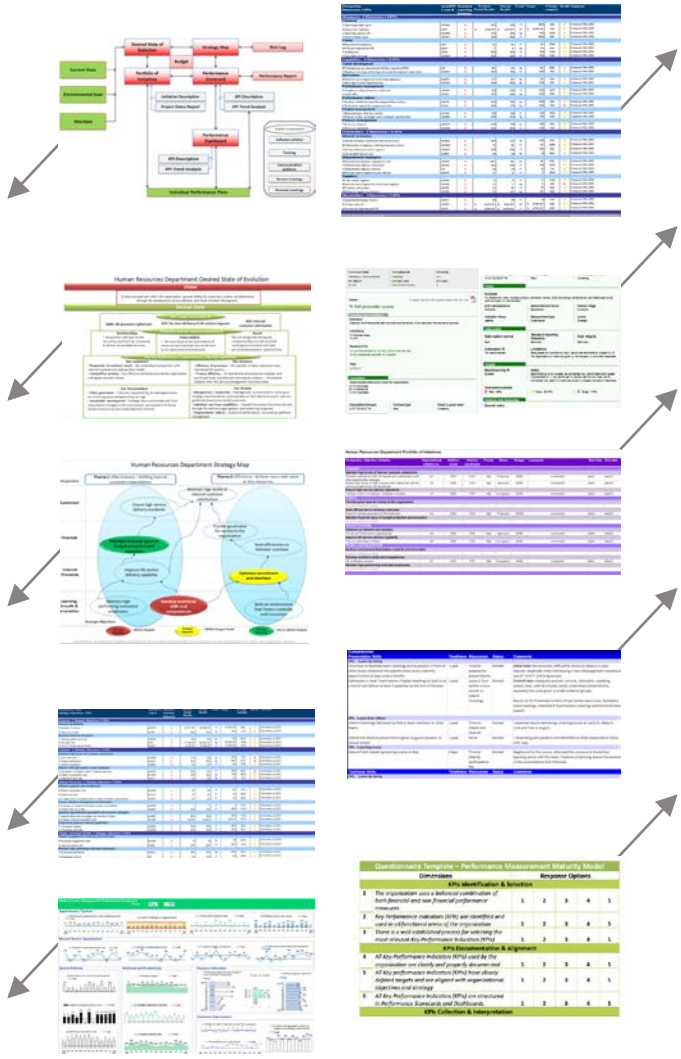
Performance Management System Architecture template
Visual representation of the performance management system and its processes, which outlines the interdependencies between the system's components.

Desired State of Evolution template
Performance management tool used to integrate all strategic statements of an organization. Having a pyramid structure, it closes the gap between mission and vision, by integrating the company's targeted progress in the center of the pyramid.

Strategy Map template
Powerful communication tool that translates the strategy into clear actions and enables employees to better understand their role in the organizational strategy.

Performance Scorecard template
Scorecard used to measure the performance of companies against established objectives, by assigning relevant KPIs for each strategic objective.

Performance Dashboard template
Dashboards are visual representations of the company's performance. As an operational tool, it displays the most important data in regards to everyday activities and processes and enables fast decision making.



Performance Healthogram template
Tool designed to measure the "health" of each organizational level entity. It can reveal the root causes of under-performance, being able to track important aspects related to an organizational entity's capabilities which are often excluded from scorecards and dashboards.

KPI Documentation template
Template that structures the most relevant information regarding a KPI.

Initiatives Portfolio template
Instrument used to monitor the progress of the organization's project portfolio.

Individual Performance Plan
Instrument used to establish performance expectations and to identify the competences that require improvement.

Performance Measurement Maturity Model Questionnaire
Primary tool used for Performance Management Maturity Model survey conducted among the employees of an organization, to support the analysis and the optimization of current organizational performance measurement processes.

Monthly Performance Management Process
Shows the main steps to be taken monthly in the Performance Management Process.

Premium Membership Access on smartKPIs.com
Associate membership valued at $249 which gives access to the world's largest database of documented KPIs. This membership allows you to browse over 7,000+ documented KPIs as well as view and export 500 documented KPIs.

"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***

Catalogue

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Category	Code	Course	Description
Certified Training Courses	C-SBP	Certified Strategy and Business Planning Professional	Comprehend the fundamentals of a strategic planning process.
	C-KPI	Certified KPI Professional	Acquire a rigorous standardized approach to using KPIs to achieve the organization's desired level of results.
	C-KPIP	Certified KPI Practitioner	Understand how KPIs can be used in practice by reviewing case studies, exercises and running simulations.
	C-PI	Certified Performance Improvement Professional	Learn how to efficiently use performance improvement pillars.
	C-EPM	Certified Employee Performance Management Professional	Understand the fundamentals of the performance management framework.
	C-DV	Certified Data Visualization Professional	Learn how to collect and design standardized data inputs and outputs.
	C-DA	Certified Data Analysis Professional	Analyze solutions for organizing, synthesizing and aggregating data.
	C-B	Certified Benchmarking Professional	Design a benchmarking plan to improve your organizational processes.
	C-SP	Certified Supplier Performance Professional	Apply the Value Chain Model in redesigning the supply chain network.
	C-PP	Certified Personal Performance Professional	Apply different tools and techniques to increase personal productivity and efficiency.
	C-CSP	Certified Customer Service Performance Professional	Understand how to implement a customer service performance culture, strategy and working system.
KPI Framework	KPI-PMA	KPI Performance Architecture	Attain performance excellence by adopting a sound performance management framework.
	KPI-M	KPI Masterclass	Obtain better organizational results by practicing and developing your skills in working with KPIs.
	KPI-ES	KPI Essentials	Attain a higher performance by deploying the best KPI measurement techniques and performance improvement initiatives.

"The KPI Institute has provided us with an excellent KPI program which was tailored to the needs of our organization. We highly recommend the Institute KPI educational programs." ***Ahmedx Alwosidi, Salehiya Medical, Saudi Arabia***

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Category	Code	Course	Description
KPI by Industry	KPI-CC	KPI, Dashboard & Scorecard in Call Centers	Experience a customized approach by practicing your skills in working with specific call center KPIs.
	KPI-FS	KPI, Dashboard & Scorecard for Financial Services	Obtain higher organizational results by developing your skills in working with specific financial services KPIs.
	KPI-H	KPI, Dashboard & Scorecard in Hospitality	Successfully implement a KPI Performance Management Architecture by analyzing best practices in the hospitality industry.
	KPI-MF	KPI, Dashboard & Scorecard in Manufacturing	Enhance your decision making process by appropriately using performance management tools.
	KPI-ED	KPI, Dashboard & Scorecard in Education	Access an innovative learning experience that helps you implement and use KPIs smartly.
KPI by Functional Area	KPI-HR	KPI, Dashboard & Scorecard for Human Resources	Experience a customized approach by practicing your skills in working with human resources KPIs.
	KPI-IT	KPI, Dashboard & Scorecard for Information Technology	Access rigorous tools that help you deploy and work with KPIs in the information technology field.
	KPI-MK	KPI, Dashboard & Scorecard for Marketing	Achieve outstanding results through a performance measurement framework in marketing.
	KPI-L	KPI, Dashboard & Scorecard for Logistics	Discover methods to improve the quality and efficiency of the data gathering process.
Balanced Scorecard	BSC-IU	Implementing and using a BSC based Performance Management System	Attain the desired state of organizational evolution by structuring the Balanced Scorecard implementation process.
	BSC-S	Balanced Scorecard Simulation	Work with "what-if " scenarios to explore the processes and elements of Balanced Scorecard perspectives.
Strategy and Performance	SP-ASBPI	Applied Strategy and Business Performance Improvement with KPIs	Ensure excellent strategy implementation, by accessing and using rigorous strategy planning tools.
	SP-IPM	Integrated Performance Management	Achieve a better integration process by analyzing how the strategic, operational and individual levels work together.

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Category	Code	Course	Description
Performance Through People	PP-BPC	Building a Performance Culture	Explore viable initiatives for a performance culture at all business level.
	PP-EE	Implementation and Optimization of Employee Engagement Programs	Identify methods and develop initiatives for increasing employee engagement.
	PP-CB	Compensation and Benefits	Learn how to structure a fair compensation and benefits system across the organization.
	PP-CM	Applied Change Management	Comprehend how to work with strengths and weaknesses regarding change management in your organization.
	PP-TMPO	Talent Management Process Optimization	Develop a critical and practical view on how to implement talent management as an integrated strategy.
	PP-TM	Team Management	Comprehend how teamwork affects your business and reinforce your team management by using positive appraisal.
	PP-CCM	Cross-Cultural Management	Explore best practices in cultural negotiation and conflict resolution processes.
	PP-MIEP	Managing and Improving Employee Performance	Practice the usage of specific tools needed to improve employee performance.
	PP-ISMP	Implementing Succession Management Programs	Structure the alignment process between employees' interests and organizational plans.
Systems Thinking Business Simulation	ST-FNER	Introduction to Systems Thinking: Friday Night at the ER Simulation	Learn about key tools of process improvement, reengineering and cross-functional team performance.
	ST-FB	Introduction to Systems Thinking: FishBanks Simulation	Learn about renewable resource management by analyzing patterns of complex, dynamic systems.
Procurement and Logistics	PL-SA	Strategic Approach to Procurement and Logistics Processes	Shape the strategy for increasing supply chains efficiency and optimizing warehousing and distribution.

"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***

Our Faculty

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Top-class International Expertise

All our faculty are certified professionals, with abundant experience as both practitioners and education providers. Altogether, our team possesses excellent PhD. and Master Degrees, as well as certifications in their respective fields.

Being extensively certified reaffirms our credibility as a training provider and also supports our goal of delivering consistent quality to our valued clients.

Having both professional and academic experience, our trainers are able to bring the depth and breadth of their knowledge to our courses.

"I found the course rather good as an introduction to the KPI world. I definitely benefited from it and already started to apply some of the key points in my daily work. I am glad that I participated in the training and met The KPI Institute team."

Isil Aras, EUROCONTROL, Belgium

Adrian Brudan



- Master in Business Administration
- PRINCE2 Practitioner
- Certified KPI Professional
- ASTD Master Trainer

Ahmed Samy



- PhD in Business Forecasting
- Certified Manager of Quality/ Organizational Excellence
- Kaplan & Norton BSC Certified Graduate

Mihai Toma



- Master in Business Administration
- Certified KPI Professional
- ASTD Master Trainer

Ahmed Gadelhak



- Master in Information Technology
- Project Management Professional
- Six Sigma Certified Green Belt

Teodora Gorski



- Master in Project Management
- Certified KPI Professional
- ASTD Master Trainer

Oana Florea



- Bachelor in Psychology
- Certified group activities moderator Institute of Classical Psychodrama
- Professional Coach certified by Noble Manhattan UK (in progress)
- Certified KPI Professional

Aurel Brudan



- PhD in Management (in progress)
- PRINCE2 Practitioner
- TOGAF 9 Certified
- Certified Trainer

Cristina Tarata



- Master in Organizational Management
- Certified KPI Professional
- ASTD Master Trainer

Radu Cocean



- PHD in Political Marketing
- Certified KPI Professional
- ASTD Master Trainer

"Professionalism, patience in explaining to stakeholders and passion was a major contributing factor to the success of the project." ***Jason Cutajar, National Australia Bank, Australia***

Our Faculty

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Raluca Vintila



- Master in Administration & Public Management
- Certified KPI Professional
- Certified Trainer

Andrada Iulia Ghete



- PhD Engineering and Management (in progress)
- Certified KPI Professional
- Certified Trainer

Iulia Visa



- Bachelor in Finance and Banking
- Certified KPI Professional
- Certified Trainer

Marius Mihai Boghian



- Master in Business Administration
- Certified Project Manager
- Certfied Trainer

Paul Albu



- Master in Business Administration Management
- Certified KPI Professional
- Certified Trainer

Manuel Hila



- Master in International Business Adminsistration
- Certified KPI Professional
- Certified Trainer

Radu Florea



- Master in Human Resources
- Certified KPI Trainer
- PHD in Organizational Change (in progress)

Adelina Chelniciuc



- Master in progress in Public Relations
- Certified KPI Professional
- Certified Trainer

Andreea Vecerdea



- Master in Finance
- Certified KPI Professional
- ASTD Master Trainer

Mihai Paculea



- Master in Banks
- Certified KPI Professional
- Certified Trainer

Maria Macrea



- Bachelor in Political Science
- Bachelor in Tourism, International Business & Services
- Certified Trainer

Cristina Bleoca



- Bachelor in International Business Transactions
- Certified KPI Professional
- Certified Trainer

'"Excellent instructor in terms of knowledge, course content and delivery. I will consider engaging his services again for in-house courses."
Kabirr Faal, Kuwait Institute for Scientific Research, Kuwait

Our Clients

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Training across five continents

Over the last 5 years, The KPI Institute has provided education and expertise to professionals looking to develop the skills required in deploying and using KPIs worldwide. To this effect, The KPI Institute has:

- Assisted over 28,000 organizations in finding solutions to their KPI needs;
- Delivered training courses in 25 countries on 6 continents;
- Trained over 3,400 participants from 40 countries on how to work rigorously with KPIs;
- Delivered over 4,400 training hours;
- In 2015 The KPI Institute makes available 150 courses in 24 countries.

More than 3,400 practitioners have taken part in The KPI Institute training courses.

Aviation

TAROM, South African Airways, السعودية SAUDIA

Banking

ANZ, ING, BISB, samba سامبا World Class Banking, DBS

Chemicals

سابك sabic, QAFCO قافكو Qatar Fertiliser Company, Qatar Fuel Additives Company Limited

Construction

CRH, مجموعة بن لادن السعودية Saudi Binladin Group

Energy

RAWEC, 澳電 cem, هيئة كهرباء ومياه دبي Dubai Electricity & Water Authority, Eskom, sarawak energy

Government Administration

Ministry of Labor Kingdom of Saudi Arabia, Brisbane City, European Data Protection Supervisor, City of Melbourne

Healthcare

Saudi German Hospitals Group, كليفلاند كلينك أبوظبي Cleveland Clinic Abu Dhabi, هيئة الصحة بدبي Dubai Health Authority

Manufacturing

ŞİŞECAM, PepsiCo, Honda, Nestlé, Toyota

Oil and Gas

Zarco, RasGas, OXY, مجموعة الخرّيف Alkhorayef Group, قطر للبترول Qatar Petroleum, ارامكو السعودية Saudi Aramco, bp

Pharmaceuticals

bioFarma, Bayer, Takeda, Merck Serono

Professional Services

SAP, KPMG cutting through complexity, EY Building a better working world

Telecommunications

ববি, du, Cellcard Cambodia's No.1, STC الاتصالات السعودية, vodafone

"The KPI Institute has provided us with an excellent KPI program which was tailored to the needs of our organization. We highly recommend the Institute KPI educational programs." ***Ahmedx Alwosidi, Salehiya Medical, Saudi Arabia***



Certified Training Courses

- Certified Strategy and Business Planning Professional
- Certified KPI Professional
- Certified KPI Practitioner
- Certified Performance Improvement Professional
- Certified Employee Performance Management Professional
- Certified Data Visualization Professional
- Certified Data Analysis Professional
- Certified Benchmarking Professional
- Certified Supplier Performance Professional
- Certified Personal Performance Professional
- Certified Customer Service Performance Professional

The Certification Programs were designed to improve performance at individual, departmental and organizational level by using a variety of tools and techniques grouped in a rigorous framework. These courses can be accessed as open or in-house training solutions.

For dates and locations of our upcoming certification courses, visit:
http://kpiinstitute.org/education/upcoming-courses/

C-SBP Certified Strategy and Business Planning Professional

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Overview

This course will help improve long-term organizational performance through the use of strategic planning tools. Participants will explore the framework that provides the foundation of a successful business strategy, focusing on the main components of a strategy and practicing the development of an efficient strategic plan. By acknowledging the factors and implications involved in designing a strategy, participants can develop and execute smarter and quicker strategic decisions.
Clear strategic thinking should form the support of every business decision. The course will also provide insights on the fundamental principles and methods for communicating strategy across the organization.



Attendees

Professionals from different fields, such as finance, human resources, production, logistics, information technology and others, who are interested in strategic planning, will acquire the competencies needed to design a strategy for their organization or department.

Assessment

The Certification Exam will take place at the end of day 5 of training. It contains 75 questions and the necessary score to pass is minimum 50.

Benefits

- Get a deeper understanding of the connections between organizational strategy and the business environment;
- Improve the way you communicate your strategy by discovering relevant internal and external communication tools;
- Attain a standardized approach to developing and implementing an organizational and departmental strategy in a successful manner;
- Access an innovative learning experience based on a 3 stage educational process;
- Obtain a premium recognition as a Certified Strategy and Business Planning Professional by completing a unique international learning program.

Day 1

Strategy concepts and strategic thinking

- Strategy and business planning: overlapping and specific areas;
- Reasons, philosophy, principles and rules of strategic planning;
- Organizational dimensions of strategic planning: governance, cascading and value chains;
- *Activity: Address the strategic planning governance challenges.*

Strategy and available resources

- The strategy or the resources - What comes first?
- Types of needed resources;
- Resources and the check for feasibility.

Vision and mission statements

- Vision and mission statement;
- *Activity: Define your 3S straight (statements): vision and mission, success, values.*

Values and value drivers

- Values and drivers;
- *Activity: Draft the Desired State of Evolution.*

Day 2

Company presentations based on day 1

- Vision;
- Mission;
- Values;
- Drivers.

Environmental scanning: the external macro-environment

- PESTEL analysis;
- *Activity: Apply PESTEL analysis.*

Environmental scanning: the external micro-environment

- The PORTER's Model of 5 Forces;
- *Activity: Apply Porter's Model.*

Environmental scanning: the internal environment

- Internal systems and capabilities audit;
- The management mandate;
- *Activity: Practice the internal systems and capabilities audit.*

The SWOT synthesis

- SWOT as an assessment-of-fit tool;
- SWOT as a springboard for strategy;
- *Activity: Draft a SWOT Analysis.*

"Aurel has extensive knowledge in this topic and he is able to arrange the training in a very efficient way, covering even history and research. He is definitely an expert and worth the 2 days training." Sarah Mubarak, 1 Malaysia Development Berhad, Malaysia

C-SBP Certified Strategy and Business Planning Professional

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Day 3

Sector presentations based on Day 2

- The external environment.

Setting objectives and KPIs – part 1

- The correlation with the SWOT: problem and objective trees.
- *Activity: Apply objective trees.*

Setting objectives and KPIs - part 2

- KPI selection;
- KPI documentation;
- *Activity: Work with KPIs.*

The portfolio of initiatives

- Programs;
- Projects;
- Procedures.

Risk factors and risk management

- Risk factors identification;
- Risk management tools;
- *Activity: Identify projects and improve day-to-day operations.*

Day 4

Company presentations based on Day 3

- Objectives as listed in 2014 Annual Reports.

Marketing and strategic management

- Connection between marketing and strategic management.

Operations and strategic management

- Connection between operations and strategic management.

Human resources and strategic management

- Connection between human resources and strategic management.

Financial resources and strategic management

- Connection between resources and strategic management.

Day 5

Company presentations based on Day 4

- A management function of choice.

Strategy visualization

- Desired State of Evolution;
- Performance Scorecard;
- Performance Dashboard;
- Strategy Map;
- *Activity: Use performance scorecards and dashboards.*

Strategy communication and launch

- Internal and external communication of the strategy;
- *Activity: Set up a communication strategy.*

Strategy implementation, monitoring and control

- Annual reviews;
- Strategy realignment;
- Strategy and crisis management;
- *Activity: Structure management systems.*

Review and Certification Exam

- Course review;
- Certification Exam.

"Due to the nature of my current job in the strategy and setting the KPIs, 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***

C-KPI Certified KPI Professional

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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.

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.

Attendees

Professionals interested in measuring performance
Professionals from different fields, such as finance, human resources, production, logistics, information technology and others, interested in KPIs, 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.

Performance measurement experts
Professionals like Data Analyst, Strategy Manager, Performance Management Officer or Performance Architect will learn best practices used in this field and identify how their current processes and approaches regarding KPIs can be improved.

Assessment

The Certification Exam will take place on the third day of the training course. It contains 75 questions and the necessary score to pass is minimum 50. Time allocated to finalize the exam: 60 minutes.

"I really enjoyed going through the topics and examples. The quizzes were a really good way to check that you've understood and digested everything. This is a great learning and revision tool. I feel that going through this course was a very useful and I will share what I have learned in this course with my colleagues."

Meshal Almotairi, Saudi Food and Drug Authority, Saudi Arabia







"This is one of the best programs regarding performance management I have ever attended. I highly recommend this training for any manager who wants to manage his/her business in the right way." *Perviz Aslani, Chief Operating Officer, EMBAWOOD, Azerbaijan*

C-KPI

Certified KPI Professional

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Day 1 - A standardized approach to KPIs

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 taxonomoy

- Interdisciplinary systemic worldview;
- KPI use case scenarios;
- KPI DNA map.

Day 2 - KPI selection and target setting

KPI selection

- KPI selection for organizational scorecard;
- KPI selection sources;
- KPI selection techniques.

KPIs 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;
- Weights and indexes;
- Negative behaviors when setting targets.

Day 3 - Data gathering and visualization

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.

"Mr Aurel's methodology of lecturing by giving the big picture before getting into details had resulted in an effective and excellent course." ***Wael Hassan, Sales Manager, Hidada, Saudi Arabia***

C-KPIP Certified KPI Practitioner

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Overview

Selection and data gathering are considered by practitioners all around the world to be the most challenging aspects in working with Key Performance Indicators (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.

Certified KPI Practitioner is a two days training course meant to improve the practical skills in working with KPIs and developing instruments like scorecards, dashboards and KPI documentation forms.

Unlike the first training course that is available for all professionals regardless of their level of expertise in measuring performance, this is a learning program dedicated to individuals who are already Certified KPI Professionals and are interested in further improving their practical competencies in measuring performance.

The applied exercises of this course will enable participants to complete a trial run of the main steps required for a KPI implementation initiative, from project planning to KPI selection, data gathering and visualization.

The training course is structured in guiding sessions in which participants are able to practice the development of the KPI Practitioner Portfolio. This face-to-face program is not mandatory in the process of obtaining the KPI Practitioner Certification, however it provides valuable feedback to enhance the quality of the participants' portfolios.



Benefits

- Receive personalized feedback on your own KPI Practitioner Portfolio;
- Practice a sound framework to ensure KPIs are aligned to strategy;
- Practice the development of tools and take a step forward towards your KPI Practitioner Certification;
- Access +15 templates that help you implement a KPI Measurement Framework in your organization.

Attendees

This training course addresses a specific audience, the Certified KPI Professionals, given that the participants must be familiar with The KPI Institute's Key Performance Indicators Measurement Framework in order to successfully complete the learning program.

The participants' profiles include individuals oriented towards professional development and committed to achieving recognition for their competencies. Whether they are executives, managers or analysts, these professionals are seeking to continuously improve their skills and knowledge in this field.

Assessment

The Learning Assessment Quiz will take place at the end of the second day of training. The purpose of this evaluation is to assess the knowledge and skills gained during the training.







"We covered all the aspects to maintain and utilize the KPIs in relation with strategic objectives. I'm able now to analyze the way of creating any KPIs in regards to each department in my organization." ***Abdullah M. Algarra, Saudi Food and Drug Authority, Saudi Arabia***

C-KPIP Certified KPI Practitioner

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Day 1 - Establishing KPIs

KPI project coordination

- The business case for KPI implementation;
- KPI project plan;
- KPI workshop preparation
  (data sources, email notification, KPI selection workshop).

KPI selection

- Value driver concept mapping;
- Defining objectives;
- Value flow analysis;
- KPI balancing.

Day 2 - Monitoring KPIs

KPI measurement

- KPI documentation;
- KPI data gathering template;
- Data gathering communication.

KPIs in context

- Organizational Scorecard;
- Departmental Scorecard;
- Operational Dashboard.
- Change log.

Review and assessment quiz

- Course review;
- Learning Assessment Quiz.

"The training on KPIs gave me the right understanding about the process, starting with identification to alignment of KPI's towards strategy and performance measurement, which will really add the value to all organization."

Dhruv Goswami, Applied Corrossion Technology, UAE



"The content of the course was very rich and provided many sources and research relevant to the course and our needs. Most importantly, it was up-to-date! Most of the courses relating to performance indicators and scorecard I have attended contained old data. However, the KPI Institute course content wasn't! On the contrary, some recent samples were presented during discussions. I'd like to take this opportunity to thank The KPI Institute for this course and look forward to work with you in the near future."

Kaltham Al-Assam, Qatar International Petroleum Marketing Company Ltd. (Tasweeq), Qatar



"The course content was very valuable and excellent. We can effectively use the information and methods provided in this course in our job."

Mariam Abdullah Al Darmaki, AMMROC, UAE



"The course was very comprehensive and informative. It helped me have a clear understanding of KPIs and developed my skills around setting my own department KPIs. Thank you!" ***Maha Ayish, Abu Dhabi Capital Group, UAE***

C-PI Certified Performance Improvement Professional

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Overview

The course provides a strong foundation towards improving performance in different scenarios, by presenting relevant tools, processes and techniques meant at closing the performance gap.

This training course presents 6 pillars that need to be applied in order to ensure performance improvement, starting from data analysis and reporting, continuing with decision making and initiative management and ending with learning and building a performance culture.

These six pillars are then applied in 12 scenarios, starting from different levels across the company (organizational, divisional, departmental and employee performance improvement), to diverse capabilities (project, process, quality and customer service performance improvement), and different stakeholders (suppliers, Joint Ventures, Board and personal performance improvement).



"The course content is amazing, it presents powerful information and I really thank you for the professional way of delivering the course materials."

Yahya Mohammed Al Yafeai,
Savannah International Trading Co., Saudi Arabia

Benefits

- Improve performance at all levels, by identifying and addressing specific challenges;
- Develop and maintain a functional Performance Improvement System;
- Enhance the decision making process by using relevant data;
- Nurture a performance culture;
- Receive a premium recognition of your expertise in performance improvement granted by The KPI Institute.

Attendees

Individuals interested in performance improvement
Entrepreneurs, analysts and professionals from different fields, interested in performance improvement, will acquire the knowledge needed to better understand performance improvement.

Top/middle/lower management people
Individuals regardless of their field of expertise will discover the pillars, tools and resources required for an effective implementation of a Performance Improvement System within their organizations.

Performance management experts
Strategy Managers, Performance Managers or Performance Architects, who already use certain practices or have already implemented certain processes and tools, now have the opportunity to check whether the business activity lives up to the standards, and identify improvement opportunities.

Assessment

The Certification Exam will take place at the end of the third day of training. It contains 75 questions and the necessary score to pass is minimum 50. The time allocated to finalize the exam is 60 minutes.







"The course offers you essential tools towards better performance."
Meshal Abdulrhman Alamri, Saudi Food & Drug Authority, Saudi Arabia

C-PI Certified Performance Improvement Professional

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Day 1 - Performance improvement fundamentals

Performance management framework
- The Performance Management System Architecture;
- The importance of implementing a Performance Management System;
- The Performance Management System Governance;
- The Performance Management levels;
- The Performance Management tools.

Performance improvement scenarios
- Levels: organizational performance improvement, divisional performance improvement, departmental performance improvement, employee performance improvement;
- Capabilities: project performance improvement, process performance improvement, quality performance improvement, customer service performance improvement;
- Stakeholders: supplier performance improvement, Joint Ventures performance improvement, Board performance improvement, personal performance improvement.

Data analysis
- Data quality dimensions
- Levels of KPI analysis;
- Business analysis techniques.

Data reporting
- Report compilation;
- Data visualization rules for well-structured reports;
- Performance report communication channels.

Day 2 - Performance improvement pillars

Decision making
- Performance review meetings;
- Effective follow up of performance review meetings;
- Business analysis techniques;
- Corrective actions for KPIs.

Initiative management
- Portfolio of Initiatives development;
- Initiatives documentation form functions;
- Initiatives documentation process;
- Monitoring the initiatives implemented.

Learning and improvement
- KPI Lifecycle Evolution;
- Strategy review;
- Performance Management System recalibration;
- Organizational Capability Maturity Models;
- Performance Management Maturity Model;

Building a performance culture
- Change management;
- Employee performance management;
- Employee engagement;
- Bonus systems examples;
- Gamification.

Day 3 - Performance improvement in practice

Performance improvement: organization - employee
- Organizational strategy management;
- Departmental strategy management;
- Employee management.

Performance improvement: stakeholders
- Joint Ventures management;
- Supplier management;
- Personal management.

Performance improvement: operations
- Process management;
- Project management;
- Quality management.

Review & certification exam
- Course review;
- Certification Exam.

"It was very educational and for sure it will help a lot in my profession."
Jun Panilawon, AMMROC, UAE

C-EPM Certified Employee Performance Management Professional

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Overview

This course will clarify key, specific, detailed concepts and will provide practical tools and techniques for implementing, improving or maintaining the company's employee performance management system. Attendees will gain exposure to best practices in the field of performance management and will learn how to establish and use criteria for evaluating performance.

Benefits

- Nurture core competencies in order to design, implement, monitor, evaluate and update an employee performance management system in a successful manner;
- Improve organizational performance by implementing employee performance management system;
- Roll-out new individual performance management tools by designing key planning documents;
- Access a set of performance management tools and relevant templates to help you put into practice the knowledge acquired during the training course;
- Obtain a certified professional recognition in the field of Employee Performance Management, by attaining both knowledge and skills through the learning experience granted by The KPI Institute.

Attendees

People interested in employee performance management
Entrepreneurs, analysts and professionals interested in employee performance management will acquire different methods that will help improve the employee engagement levels within their companies.

Top/middle/lower management people
Individuals regardless of their field of expertise interested in measuring and evaluating employee performance will discover a structured approach to the implementation of an employee performance management system.

HR Experts
This course offers HR professionals a rigorous approach to individual performance management and evaluation, through the implementation of an integrated employee performance measurement system based on KPIs, behaviors and competencies.

Assessment

The Certification Exam will take place at the end of day 3 of training. It contains 75 questions and the necessary score to pass is minimum 50.

"The course content was excellent and especially valuable. We can effectively use the information and methods provided in this course at our job."

Mariam Abdullah, AMMROC, UAE







"An excellent course to organize and improve quality of life and work."
Anwar Hobrom, Institute of Public Administration, Saudi Arabia

C-EPM Certified Employee Performance Management Professional

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Day 1 - Introduction to the world of employee performance management system

EPM parameters

- Reasons to use an EPM System;
- Rules for using an EPM System;
- Governance of the EPM System;
- Impact areas of an EPM System;
- Timeline for implementing and EPM System;
- *Activity: Explore principles of a successful EPM System.*

EPM system architecture

- Inside perspective: including core elements and employee assessment;
- Outside perspective: including the elements constructing the shell and the levers;
- *Activity: Integration of an EPM System within the organizational system.*

EPM system implementation project

- Implementation prerequisites;
- EPM System project steps;
- *Activity: Discover the needed follow-up and implementation actions.*

Day 2 - Alignment from individual level to conversations

Performance alignment

- The process of cascading KPIs from organizational to individual level;
- *Activity: Define competencies;*
- *Activity: Select competencies;*
- *Activity: Define behaviors;*
- *Activity: Select behaviors;*

Developing performance plans

- *Activity: design careers paths;*
- Launching new performance plans for current employees;
- Launching new performance plans for new employees;
- *Activity: Practice the communication and promotion of new performance plans;*
- Change management.

Performance feedback through performance conversations

- Purpose of performance conversation;
- *Activity: Identify the participants involved in a performance assessment conversation;*
- *Activity: Establish the actions and activities that follow the performance conversations.*

Conducting performance conversations

- *Activity: Engage in role-play on deploying performance conversations;*
- Duration of a performance conversation;
- *Activity: Explore topics relevant for performance conversations.*

Day 3 - Organizational culture for employee performance

Performance feedback through performance appraisals

- Performance assessments;
- *Activity: Differentiate between methods of assessment;*
- Purpose of performance assessment;
- *Activity: Identify the relevant persons for the performance assessment meeting;*
- *Activity: Simulate circumstances, deployment and topics within a performance assessment;*
- *Activity: Determine the actions and activities that follow the performance assessment.*

Managing employee performance with leadership, coaching and mentoring

- *Activity: Distinguish leadership elements that drive employee performance;*
- *Activity: Differentiate between coaching and mentoring;* Persons involved in the mentoring and coaching processes.

Gamification as reward and recognition

- Importance of rewards and recognitions;
- *Activity: Select the beneficiaries of rewards and recognitions;*
- Methodologies, tools and techniques;
- *Activity: Determine the resources allocated for rewards and recognitions;*
- *Activity: Establish policies for rewards and recognitions.*

Evaluation of EPM system

- *Activity: Apply the Maturity Model;*
- Review of an implemented EPM System;
- The update process of the EPM System.

Review and certification exam

- Course review;
- Certification exam.

"This course has changed the way I measure the performance of many elements in my everyday life."
Ihab Najeeb Abuziyad, Salehiya Medical, Saudi Arabia

C-DV Certified Data Visualization Professional

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Overview

Visual communication is effective only when it is aligned with the way people see and think. The course provides insights on the importance of data visualization, fundamental principles, as well as means to increase non-verbal communication skills through effective visualizations.

This course will help you improve communication within your company, through visual displays of quantitative data. You will learn, through practical applications, how to communicate visually in an effective way and how to increase reporting efficiency, leading to a better understanding of the presented data, and thus, to smarter and quicker strategic decisions.

Some of the main aspects addressed by the "Certified Data Visualization Professional" course are the need for a more rigorous approach to creating visual representations of vast information, techniques of standardization and tailored data visualization tools.



Attendees

Professionals from different fields, such as finance, human resources, production, logistics, information technology and design, interested in visual communication methods, will improve their efficiency in reporting information in a visual manner.

Benefits

- Receive relevant guidance for developing visual representations in order to discover, understand and communicate information;
- Create better and more relevant reports by understanding the fundamental concepts in data visualization;
- Offer intelligible data sets to decision-making parties through creating excellent graphical representations;
- Improve your performance in presenting data and enhance viewer experience by acknowledging the importance of communication through visual representation

.

Visual communication is effective only when it is aligned with the way people see and think. The course provides insights on the importance of data visualization, fundamental principles, as well as means to increase non-verbal communication skills through effective visualizations.

Assessment

During the three days, participants will develop a Dashboard and an Infographic which will be evaluated at the end of each day.

The Certification Exam will take place at the end of day 3 of training. It contains 75 questions and the necessary score to pass is minimum 50.







"Aurel has extensive knowledge in this topic and he is able to arrange the training in a very efficient way, covering even history and research. He is definitely an expert and worth the 2 days training." *Sarah Mubarak, 1 Malaysia Development Berhad, Malaysia*

C-DV Certified Data Visualization Professional

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Day 1 - Introduction into the world of data visualization

Data visualization parameters
- Presentation of the data visualization concept;
- The importance of data visualization;
- Precognitive attributes;
- Data visualization governance;
- Reporting and monitoring processes;
- Fundamental visualization principles;
- *Activity: Answering the "W" questions.*

Content standardization
- Data collection methods;
- Content administration;
- Data classification and coding;
- Standardized input/output reports;
- Content design;
- Designing tables;
- *Activity: Set the basis for a standardized table.*

Channel selection
- Maps;
- Interactive graphics;
- Infographics;
- PowerPoint;
- Prezi;
- Video doodle;
- Excel sheets;
- Comic strips;
- Animations;
- *Activity: Select the relevant channel for your target audience.*
- *Activity: Set the basis for a dashboard and an infographic.*

Day 2 - The SFERA model - part I

Structure
- Effective layouts;
- General principles;
- The use of space;
- Case studies: Excel, Word, PowerPoint, Website;
- *Activity: Avoid layout concepts without meaning.*

Format
- Text and shapes in visual representations;
- Visual sufficiency;
- Best practices in designing graphs;
- *Activity: Avoid format concepts without meaning.*

Express
- Font and size;
- The importance of colors;
- Background and shades;
- *Activity: Avoid aesthetics concepts without meaning.*

Report
- Reporting guidelines;
- Taxonomy of reports:
  - Scorecards;
  - Dashboards;
  - Animations;
  - Infographics;
- Performance reporting in focus.
- *Activity: Simplicity, clarity, efficiency for dashboards and infographics*

Day 3 - The SFERA model - part II

Reporting numbers
- Excel, add-ins and widgets;
- SAS Visual Analytics;
- Tableau;
- *Activity: Creating interactive charts in Excel.*

Reporting text
- Word;
- PowerPoint;
- Prezi.

Assess
- Competency assessment;
- *Activity: Self-evaluation;*
- Capability assessment:
  - Data governance;
  - Template structured based on guidelines;
  - Style management;
  - Corporate colors;
- *Activity: Peer evaluation;*
- Data visualization best practices;
- *Activity: Creating a checklist for self- and peer-evaluation.*

Review and certification exam
- Course review;
- Certification Exam.

"A very useful course for practitioners, as well as for the ones who are planning to develop a Performance Management System."
Claudia Haita, OMV Petrom, Romania

C-DA Certified Data Analysis Professional

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Overview

This course aims to improve the decision making process through a rigorous data analysis within the company, as well as to enable managers and analysts to draw insights from both quantitative and qualitative data. Participants will understand, through practical learning, how to effectively collect, analyze and interpret data for a better decision making process, based on historical data and trend analysis.

By attending this course, participants will gain both theoretical knowledge and practical skills in working with data. The information will enable them to better understand the meaning of data and the insights that it reveals.



Assessment

The Certification Exam will take place at the end of day 3 of training. It contains 75 questions and the necessary score to pass is minimum 50.

Benefits

- Receive guidance to improve your data collection process;
- Support organizational processes by developing a customized data analysis framework;
- Optimize the decision making process by exploring efficient ways to analyze data;
- Improve initiative management through insights generated from the use of data analysis tools;
- Obtain premium recognition as a Certified Data Analysis Professional by completing a unique learning program.

Attendees

Professionals interested in analyzing data
Professionals from different fields, interested in the subject of data analysis, data collection and the data reporting processes will improve their knowledge and competencies in these areas.

Top/middle/lower management professionals
Individuals regardless of their field of expertise will gain the ability and knowledge to better analyze and understand performance measurement data and will be able to maximize the meaning of data provided by KPIs and metrics.

Performance Management experts
Professionals like data analysts, strategy managers, performance management officers, project managers will learn to better organize, analyze, report and understand the meaning of the data provided through specific metrics or KPIs.







"You think you know about KPIs. Until you attend this course."
Mustafa Hamza El-Gorashi, Saudi Petroleum Services Polytechnic, Saudi Arabia

C-DA

Certified Data Analysis Professional

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Day 1 - Understanding data analysis

Common questions about performance analysis

- Comparing planned and actual performance;
- Significant variance - a drive for corrective actions?
- Data analysis process;
- Analysis based realignment;
- Data analysis governance.

Data collection

- Data collection process;
- Data quality dimensions;
- Data accuracy;
- Logical inconsistencies;
- Bias in the collection process;
- Sampling errors;
- Data comparison;
- Content analysis;

Activity: Demonstrate the importance of data quality.

Organizing, synthesizing and aggregating data

- Challenges in aggregating data;
- Scorecards and dashboards;
- Expert judgment;
- Meta-analysis and evaluation synthesis;
- Data normalization;
- Data Analysis Maturity Model;

Activity: Practice data normalization.

Day 2 - Data analysis

Data analysis tools and techniques

- Analysis tools;
- Tips for getting insights from the conducted analysis;
- Planned vs actual performance;
- Trends identification and analysis;
- Statistical process control;

Activity: Apply different analysis techniques on the same data.

Causes of the variance

- Common and special cause factors;
- Types of Business Intelligence solutions;
- Planning actions based on the prioritization of findings;
- Analysis based on histograms and Pareto Charts;
- Rules for interpreting data and formulating conclusions;

Activity: Create analyses using histograms and Pareto charts.

Single variable vs multivariate information

- Difference between single and multivariate information;
- Techniques used to analyze single variables;
- Techniques used to analyze relationships between variables;
- Influence of data type on the analysis techniques;
- Types of data and techniques used for analysis.

Day 3 - Indexes and presentation of data

Performance indexes

- Performance index overview;
- Performance index development;
- Performance index calculation;

Activity: Review examples of performance indexes.

Data presentation

- Effective data presentation;
- Data visualization tips;
- Data reporting process;
- Action-oriented reports;
- Briefings;
- Reporting methods;
- Report generation using simplified graphs.

Review and certification exam

- Course review;
- Certification exam.

"Very dynamic and interactive course; knowledgeable and approachable course facilitator."
Arturo Cruz, Abu Dhabi Aviation, UAE

C-B Certified Benchmarking Professional

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Overview

The benchmarking methodological uniqueness is represented by the identification of those processes that lead to superior performance, followed by the analysis of the best practices behind that success. Benchmarking offers the opportunity to compare an organization's performance against industry competitors, noting strengths, weaknesses, and different ways of executing projects.

As successful businesses constantly focus on improving the quality of their processes, products and services, benchmarking comes as one of the best approaches in achieving innovative ideas and superior procedures within the organization, through finding and implementing best practices.

In order to ensure a successful benchmarking study, professionals should not only become familiar with how to drive a good selection of the variables to be measured, but also how to determine the comparison compatibility of the measured processes and allocate the resources accordingly.



"This is a very interesting course and useful in practice. I would recommend it to everyone in my company."

Zeinab Hassan, Warda, Supreme Council of Health, Qatar

Benefits

- Improve your organizational processes by applying benchmarking best practices;
- Link benchmarked data to your organizational strategy and performance objectives;
- Set up and apply a benchmarking plan in your own organization, in order to increase competitiveness;
- Acquire strong competitive insights from benchmarking specialists' experience and best practices examples to suit your organization's reality;
- Gain professional recognition of your personal benchmarking knowledge and capabilities by obtaining the certification granted by The KPI Institute.

Attendees

Entrepreneurs, analysts and professionals from different fields interested in benchmarking practices, data analysis and comparison will acquiring the knowledge needed to improve organizational performance through setting up and applying a benchmarking plan.

Assessment

At the end of the training course, after successfully completing a certification exam, participants have the opportunity to obtain the Certified Benchmarking Professional status, a premier global certification dedicated to rigorous benchmarking practice.

Participants will take a final test that is composed out of 75 questions. In order to receive the diploma that acknowledges their competencies in the field, participants must obtain at least 50 points.







"All sessions were very well linked together. It was a great course, one of the best courses I attended in Performance Management."
Jasim Ali Amur Al Jabri, Occidental Petroleum Corporation, Oman

C-B Certified Benchmarking Professional

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Day 1 - Introduction to benchmarking

Benchmarking overview

- Definitions and terminology;
- The advantages of benchmarking;
- Types and styles of benchmarking;
- Governance;
- Cost-Benefits analysis;
- Stages and processes of benchmarking activities;
- *Activity: Design a benchmarking process.*

How to develop a benchmarking plan

- Scope establishment;
- Purpose statement development;
- Benchmarking team;
- Organization strategies and benchmarking targets;
- Benchmarks identification;
- Benchmarking partners;
- Project Management techniques;
- *Activity: Develop a benchmarking plan.*

Day 2 - Data collection and analysis

Data collection

- Data collection process;
- Data collection instruments;
- Secondary research;
- Questionnaire development;
- *Activity: Design a questionnaire.*

Data governance

- International data reporting standards;
- Data adjustment for benchmarking;
- Data quality;
- Value drivers and internal capabilities;
- *Activity: Determine data quality errors.*

Data analysis

- Logical framework for data analysis;
- Data comparison;
- Identification and analysis of performance gaps;
- *Activity: Conduct data analyses based on various methods.*

Day 3 - Value generation

Insight generation

- Initiatives proposal to close performance gaps;
- Develop action and implementation plan;
- Adapting improvements;
- Monitor and report process;
- *Activity: Develop implementation and reporting process.*

Best practices in benchmarking

- Illegal benchmarking practices;
- Guides, networks and resources;
- Examples of best practices;
- *Activity: Conduct data analyses based on various methods.*

Review and certification exam

- Course review;
- Certification Exam.

"This course is very important and useful for our organization. I would recommend your services to anyone who needs your expertise."
Ali Salim Al Shibli, Wadi Al Jizzi Power Company SAOC, Oman

C-SP Certified Supplier Performance Professional

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Overview

The training course is designed to develop the key competencies necessary to efficiently manage and growth the suppliers' performance and optimize the relationship with buyers and other procurement stakeholders. Moreover, participants will benefit from a powerful learning experience mixing practical information delivery with well-designed practical activities and study cases, constantly stimulating the interaction between participants and knowledge sharing.

As a key differentiator, the course provided by The KPI Institute focuses on a practice-related side of suppliers' management, using a comprehensive KPIs development and monitoring framework, backed up by a ready-to-use performance toolkit.



Attendees

Professionals working in departments such as procurement, logistics, retail, manufacturing and distribution or related to the entire supply chain management process, interested in improving the performance of their activities will acquiring the knowledge needed to generate business value by applying modern performance management frameworks.

Assesment

The Certification Exam will take place at the end of the third training day. It contains 75 questions and the necessary score to pass is minimum 50.

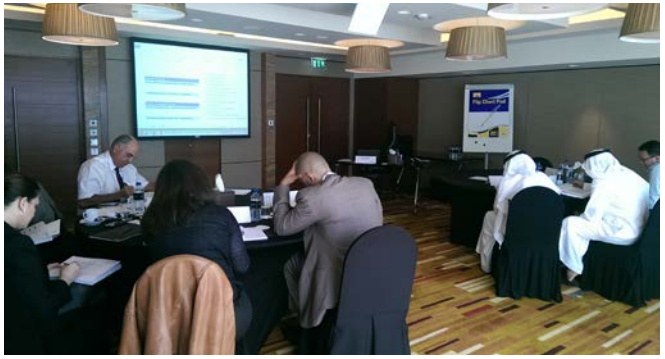
Benefits

- Efficiently manage the procurement activity area, based on an thorough understanding of the supplier relationship dynamics;
- Take adequate measures reflect the company competitive advantage in developing and proper usage of supplier selection and evaluation tools;
- Have a significant contribution as part of the team involved in procurement and strategic sourcing areas;
- Generate value for your business by applying a modern performance management framework;
- Enhance your practical learning experience by getting full access to a variety of relevant resources and ready-to use tools designed to help you attain outstanding results.

"It is with great pleasure and enthusiasm to recommend Mr. Adrian Brudan as an expert in Performance Management Area. The training course that I have participated in was an example of competence and professionalism based on a global understanding of the Performance Management System with all its components. Adrian has proven that he has an excellent knowledge and experience in KPIs lifecycle, practice and also consulting in Performance Management, which are the benefits that I have earned for achieving this training."

Nicoleta Pulbere, OMV Petrom, Romania







"Mr. Aurel Brudan is definitely an expert in this particular field with great creativity, suggesting and guiding trainees with innovative and practical methodology which are easy to apply in the industry." *Irene Beh Ai Ling, Telekom Malaysia, Malaysia*

C-SP Certified Supplier Performance Professional

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Day 1 - Supplier performance context

Course introduction
- Trainer's presentation
- Needs assessment and expectations
- Certification process presentation
- *Activity: Get to know each other*

Understanding supplier performance
- The importance of performance in managing suppliers;
- The purchasing life cycle;
- Suppliers performance toolkit;
- The role of procurement in the organizational context – Stakeholders buy-in process.

Supplier selection
- Supplier selection process;
- Suppliers selection requirements and criteria development;
- Supplier selection methods and tools;
- Supplier evaluation;
- Success factors in supplier selection process;
- *Activity: Apply systems thinking principles in the supplier relationship management context;*
- *Activity: Apply Segmentation Model in practice.*

Supplier relationship design
- Key elements of purchasing – procurement – strategic sourcing;
- Strategic sourcing approach of suppliers;
- Supplier panel development and management;
- Supplier segmentation models;
- *Activity: Apply supplier segmentation in practice.*

Day 2 - Contracting and performance monitoring

Supplier contracting
- Challenges in drafting contracts;
- Risk identification in the contracting process;
- Positioning strategies when negotiating with suppliers;
- Contract management: key tasks and responsibilities;
- Steps to set up successful contracts;
- *Activity: Apply in practice the contract development checklist.*

Performance through Service Level Agreements (SLAs)
- SLA success factors (service and management);
- SLAs requirements setting;
- SLAs objectives;
- Building the SLA based on company competitive advantage;
- *Activity: Develop a SLA architecture*

Sourcing KPIs to generate suppliers' performance
- Definition and usability of KPIs;
- KPIs and metrics selection;
- KPI selection sources;
- KPI selection techniques;
- KPI target setting;
- KPI documentation as a key success factor;
- *Activity: Apply a KPI documentation form in practice.*
- *Activity: Select the relevant KPIs for contracts and SLAs*

Supplier performance monitoring
- Scorecards and Dashboards development process;
- Data visualization best practices;
- Perfect Order Index and its impact over supplier performance
- *Activity: Creating a performance scorecard.*

Day 3 - Supplier performance management

Supplier Relationship Management (SRM)
- The reasons for supplier performance management
- Challenges in SRM: cost of poor quality
- Collaborative approach in developing strategic partnerships
- SRM Governance
- Krause and Handfield Model of SRM
- Assessing the SRM maturity level of an organization
- *Activity: SRM Best practice analysis*

Supplier performance evaluation
- Internal capability for managing supplier evaluation;
- Key aspects of supplier performance evaluation;
- Performance evaluation criteria development;
- Evaluation methods;
- Managing non-conformances;
- Supplier performance reviews
- *Activity: Developing a supplier performance evaluation form*
- *Activity: Using a supplier performance review checklist*

Risks and communication management with suppliers
- Risk management process;
- Risk analysis;
- Key Risk Indicators;
- Risk management plan;
- Supplier communication framework;
- *Activity: Develop a risk management plan for improving suppliers' performance.*

Review and certification exam
- Course review;
- Certification Exam.

"Even before the training delivery, I appreciated Adrian's keen interest in tailoring the course's objectives and materials to the specific needs of our team." **Cristina Botea, OMV Petrom, Romania**

C-PP Certified Personal Performance Professional

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Overview

Nowadays, the importance and benefits of measuring and managing performance within an organization are broadly known and agreed upon. However, seeing beyond organizational limits, performance-related principles and tools can also be useful for improving one's personal performance, from physical activity to healthy lifestyle, from family life to leisure and from career planning to continuous learning.

This course is designed as a three-day interactive program that will help you understand personal performance. It focuses on explaining the benefits of having a structured approach to life, on clarifying the specific processes and tools, as well as on the implementation of a sound personal performance framework.



"It was an interesting course. I recommend it to people working in the performance management field and especially to those who would like to improve their performance system. Sometimes, we are dragged with what is being used in our organization, and we cannot tell it is wrong until we learn the right way."

Vera Rizk, Qatari Diar Real Estate Investment Company, Qatar

Benefits

- Obtain better personal and professional results by implementing a clear and integrated approach to personal performance;
- Develop your self-awareness and accountability by designing your own tools to monitor personal performance;
- Get motivated to implement life changes by experiencing the daily life applicability of theoretical concepts;
- Improve your productivity both at work and outside working hours;
- Develop your ability to measure personal performance in a standardized and effective manner.

Attendees

People interested in personal performance as well as individuals from top/middle/lower management, regardless of their field of expertise and their respective organizations, will be provided with the information and techniques needed for improving performance and productivity at a personal level, with great impact on performance within working hours.

Assessment

The Certification Exam will take place at the end of day 3 of training. It contains 75 questions and the necessary score to pass is minimum 50.







"One of the most interesting and useful trainings I have attended in my entire career."
Mona Abdul Jawad, Royal Univerisity for Women, Bahrain

C-PP Certified Personal Performance Professional

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Day 1 - Understanding personal performance

Performance measurement: from organizations to personal life

- Philosophy & principles of personal performance;
- Structured vs. unstructured approach to life;
- Terminology, tools and systems or reference points;
- Governance;
- Timing and cycles;
- Location.

Personal performance plan I

- Driving Personal Performance: the Self-Determination theory of motivation;
- *Activity: Apply supplier segmentation in practice.*
- Presentation of the Personal Performance Plan;
- Envisioning: personal life purpose;
- *Activity: Define your personal life purpose;*
- Envisioning: personal mission;
- *Activity: Define your personal mission;*
- Envisioning: personal vision;
- *Activity: Define your personal vision;*
- Envisioning: personal values;
- *Activity: Define your personal values;*
- Envisioning: the personal SWOT analysis;
- *Activity: Generate your SWOT analysis!*

The personal performance plan II

- Personal goals. The Goal Setting Theory;
- Personal KPIs;
- Target setting;
- *Activity: Choose the right KPIs for each objective!*
- Opportunity analysis and decision making;
- *Activity: Improve your decision making process.*

Day 2 - Developing the personal performance plan

Well-being. Physical and social performance

- Well-being essentials;
- Physical performance goals;
- Physical performance measurement;
- Physical performance enablers: gadgets and apps;
- *Activity: Generate your physical performance plan.*
- Social performance essentials;
- Social goals;
- Social KPIs measurement;
- *Activity: Generate your Social Performance Plan.*

Emotional and spiritual performance

- Emotional performance essentials;
- Emotional goals;
- Emotional KPIs measurement;
- Emotional performance enablers: apps;
- *Activity: Generate your Emotional Performance Plan.*
- Spiritual performance essentials;
- Spiritual goals;
- Spiritual KPIs measurement;
- Spiritual performance enablers: apps;
- *Activity: Generate your Spiritual Performance Plan.*

Professional and financial performance

- Professional performance essentials;
- Professional goals;
- Professional KPIs measurement;
- Professional performance enablers: gadgets and apps;
- *Activity: Generate your Professional Performance Plan.*
- Financial performance essentials;
- Financial goals;
- Financial KPIs measurement;
- Financial performance enablers: apps;
- *Activity: Generate your Financial Performance Plan.*

Work-life balance

- The Personal Performance Plan development;
- Personal and professional life balance;
- Stress management essentials;
- *Activity: coping methods.*

Day 1 - Improving personal performance

Time and energy management

- Daily connection with 10 yearly goals;
- *Activity: reconnecting with the personal goals;*
- Daily intention setting;
- *Activity: building the daily intention;*
- To do lists;
- *Activity: building efficient To do lists;*
- Prioritizing by value;
- *Activity: Prioritizing the To do lists;*
- The top 3 priorities technique;
- The Pomodoro technique;
- Daily evaluation;
- Multitasking;
- Procrastination;
- *Activity: Procrastination - reasons and solutions*

Performance and workflow efficiency

- Handling office clutter;
- Inbox 101: how to achieve email mastery;
- Improving your information management skills;
- *Activity: Working style case study.*

Efficient communication

- Principles of efficient communication;
- Assertiveness;
- Conflict resolution;
- *Activity: Finding solutions for different conflicts;*
- The importance of listening skills;
- *Activity: Active listening.*

Review and certification exam

- Course review;
- Certification Exam.

"I learnt to assess myself in the right way for the first time."
Ayesha Hussain, Supreme Council of Health, Qatar

C-CSP Certified Customer Service Performance Professional

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Overview

In a highly competitive market, the quality of the organization's customer service will determine customers' satisfaction, loyalty, increase the chances of them becoming advocates of the company and generate future revenue. This training course focuses on the entities, essentials, enablers and evaluation tools involved in a performant customer service.

The course's approach to customer service is unique, as it includes the performance management dimension. Participants will not only understand the important role played by all the entities involved in the process, but they will also become familiar with the implementation phases of a customer service performance management architecture. Furthermore, they will be provided with the necessary tools and channels to enhance performance and measure its impact, both internally and externally.



"It was a very informative course. Materials were very supportive, to the subject, explained in very nice and professional way, with many examples. Live questions and answers and the workshops were excellent."

Saleem Ahmed Qureshi, Salehiya Trading Est., Saudi Arabia

Benefits

- Attain a standardized approach for your services' by implementing a customer service performance strategy and system;
- Acquire a high level of versatility that enables you to react and deal with a vast range of scenarios when working with and for the customers;
- Gain competitive advantage by capitalizing on good case practices and learning from worldwide customer service best practices;
- Improve your ability to evaluate your external and internal customers' satisfaction and take into account their feedback, in order to ensure continuous improvement;
- Get professional recognition of your customer service knowledge and skills through a Certification granted by The KPI Institute.

Attendees

Customer service experts as well as individuals working with customers on a regular basis, regardless of their field of expertise or the organization's profile will discover the tools and resources required for the effective implementation, sustaining and evaluation of a customer service performance culture within their organization.

Assessment

At the end of the training course, participants have the opportunity to obtain the Certified Customer Service Performance Professional status, a premier global certification program dedicated to outstanding customer service performance practice, after successfully completing a certification exam. The Certification exam will take place at the end of the 3rd day of training. It contains 75 questions and the necessary score to pass is minimum 50.







"This is one of the best courses I have taken. Very well structured, informative and managed by a very skilled trainer."
Nahed Y. Alobaid, Gulf University for Science & Technology, Kuwait

C-CSP Certified Customer Service Performance Professional

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Day 1

Customer service performance overview and importance
- The importance of customer service for the company's image and future revenue streams;
- Entities, essentials, enablers and evaluation of the customer service performance;
- The customer service team and its members;
- The implementation, sustainment and evaluation of the customer service performance;
- *Activity: Analyze a good and a bad customer service - case practice;*
- *Activity: Share outstanding vs. terrible customer service experiences.*

The Customer: External vs. internal customer service
- Definition and profile of the customer;
- The difference between external and internal customer service;
- Customers' focus, needs and expectations;
- Difficult customers' typologies and solutions.

The Customer Service Professional
- Definition and profile of the customer service professional:
  - Desired attitude and mindset;
  - Excellent customer interaction skills;
  - Business acumen;
  - Cultural sensitivity;
  - Stress management.
- *Activity: Solve different practical exercises.*

Customer Service in Practice
- Handling complaints;
- Customer Service International standard: ISO 10002:2004;
- *Activity: Role-play different situational interactions.*
  - Face to face interactions;
  - Telephone interactions;

Day 2

Essentials

Customer Service Strategy
- Customer service direction, objectives, KPIs and projects;
- Alignment of the customer service with the organization's mission, vision and values;
- *Activity: Analyze Zappos' strategy in terms of customer service.*

Customer Service System
- Customer service performance tools:
  - Desired State of Evolution;
  - Strategy Map;
  - Scorecard;
  - Dashboard;
  - KPI documentation & report forms;
  - Portfolio of Initiatives.
- *Activity: Allocate the relevant Customer Service KPIs on a Scorecard;*
- *Activity: Match the items to the relevant customer service system tools and implementation techniques;*
- *Activity: Document the "% Customer satisfaction" KPI.*

Customer Service Performance Culture
- Pillars of a customer service performance culture:
  - Change management;
  - Communication;
  - Motivation;
  - Gamification;
  - Recognition.
- *Activity: Analyze different good case practices for the customer service employees' engagement*

Enablers

Channels
- Customer service performance interaction channels:
  - Face to face;
  - Online: web presence, e-mails, chats, social media;
  - Phone.
- *Activity: Realize a SWOT analysis on a communication channel.*

Enablers

Knowledge and Learning
- Knowledge base development and CRMs;
- Data gathering, storage and update;
- Learning and taking decisions based on experience.

Innovation
- The importance of encouraging and sustaining an innovative customer service;
- *Activity: Analyze Amazon's Dash innovation device.*

Technology
- Tools, software and technological enablers to sustain the
- customer service performance;
- *Activity: Analyze US Airways' automatic call distributor system & IVR system.*

Day 3

Evaluation

Audit of the Customer Service Performance Maturity
- Customer Service Performance Maturity Model;
- *Activity: Fill in the Customer Service Performance*
- Maturity Model questionnaire.

Customer Service Performance review
- Performance Management review meetings;
- Scorecard evaluation & decision making;
- Dashboard evaluation & decision making;
- *Activity: Practice real time decision making based on*
- Customer Service scorecard and dashboards examples.

Customer Feedback
- Tools and techniques for measuring the customer's satisfaction, loyalty and advocacy;
- Implementation of the feedback generated by the customers;
- NPS data collection and KPI calculation;
  Activity: Design a 5 question customer satisfaction survey.

Review and certification exam
- Course review;
- Certification exam.

"I just wanted to thank you for the great course that we had last week with. We all had a great time with you and learned a lot about building and choosing the right and suitable KPIs." Abdulaziz S. Alghafari, Saudi Telecom Company, Saudi Arabia



KPI Framework

- KPI Performance Management Architecture
- KPI Masterclass
- KPI Essentials

The cluster of "KPI Framework" courses provide a strong theoretical foundation and a multitude of practical examples, helping participants develop the skills required in deploying and using KPIs. These courses also offer useful guidance for developing a sound KPI Management Framework designed to support professionals in developing key competencies in performance management, with the aim of improving processes such as KPI selection, KPI documentation, KPI data gathering and reporting.

KPI-PMA KPI Performance Management Architecture

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Overview

The KPI Performance Management Architecture training course provides you with the knowledge needed to develop a sound KPI Management Framework that will eventually maximize the value of performance measurement within organizations.
The main aspects to be further developed are: relevant KPI selection, standardization of templates used and integration and alignment of performance management tools, such as Strategy Maps, Scorecards, Dashboards and Portfolio of Initiatives.

Benefits

- Obtain higher mastery in measuring and managing performance through practical KPI exercises;
- Access relevant best practices for developing a KPI Performance Management Architecture;
- Enhance performance management by using tools such as the KPI documentation form, scorecard and dashboard;
- Access rigorous tools that help you implement a KPI Management Framework by receiving 10+ templates used in working with KPIs;
- Access an innovative learning experience based on a 3 stage educational process.

Attendees

This course is designed for professionals from different functional areas interested in Key Performance Indicators, who seek to acquire competencies needed to develop a KPI Performance Management Architecture for their department or organization. Executives or operational managers, regardless of their field of expertise will learn how to better integrate the performance management system and how to achieve consistency by cascading objectives and KPIs to the operational and individual levels.

Day 1 - A KPI performance management architecture

Performance integration overview

- Performance management and integration;
- Performance management systems architecture;
- Value drivers, objectives, KPIs and initiatives;
- KPI naming standards and the use of terminology.

KPI selection

- KPI lifecycle;
- KPI selection process;
- Techniques for KPI selection;
- KPIs in practice.

Performance management tools in practice

- Scorecards, dashboards and heathogram;
- Organizational scorecard and dashboard design;
- Best practices in using industry specific performance management tools.

Day 2 - KPI performance management architecture cascading process

KPI performance management architecture at operational level

- Departmental scorecard and dashboard design;
- Departmental initiatives aligned to the strategy.

KPI performance management architecture at individual level

- Individual contribution mapped to strategy achievement;
- Performance criteria for employees;
- Individual scorecard.

Review and learning assessment quiz

- Benefits of using an integrated performance management system;
- 10 takeaways to put in practice;
- Learning assessment quiz.

"KPI course has changed the way to measure the performance of many elements in my everyday life.
Ihab N. Abuziyad, Salehiya Est., Saudi Arabia

KPI-M KPI Masterclass

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Overview

The KPI Masterclass provides participants with an in-depth synthesis of key performance management trends and practices. It focuses on the essential tools and techniques that must be implemented for a successful performance management architecture.

Benefits

- Develop an effective KPI Performance Management Architecture by accessing international best practices in the field;
- Adopt a rigorous approach by getting updated with the latest trends in working with KPIs;
- Improve your performance measurement efficiency by practicing a variety of techniques to ensure the best KPI selection process;
- Work with specific tools that will help you implement a KPI Management Framework, by receiving 10+ templates used in working with KPIs;
- Access an innovative learning experience based on a 3 stage educational process.

Attendees

This course is designed for professionals from different fields, interested in Key Performance Indicators, who seek to acquire competencies needed to develop a KPI Performance Management Architecture for their department or organization. Executives or operational managers, regardless of their field of expertise, will gain the ability and knowledge to manage performance in an integrated manner. The tools and resources offered as part of this training course enable managers to apply the concepts learned within their organizations, immediately after the course.

Day 1

Session 1: Understanding KPIs

- **Activity:** Define KPIs and the Balanced Scorecard;
- Performance management tools;
- Metrics, KPIs, KRIs and predictive analytics;
- The role and value added by KPIs;
- KPI naming standards;
- KPI typology;
- **Activity:** Use value flow analysis as a KPI selection technique.

Session 2: Selecting the right KPIs

- **Activity:** Discuss on the importance of setting objectives in
- KPI selection;
- KPI implementation project planning;
- KPI selection techniques;
- KPI selection criteria;
- KPI balancing;
- KPI selection workshop;
- **Activity:** Practice the KPI clustering process.

Session 3: KPIs in context

- **Activity:** Practice cascading objectives and KPIs to the employee level;
- Organizational, operational and employee KPIs;
- KPIs as part of process management;
- KPIs for Service Level Agreements;
- KPIs for Supplier Performance;
- **Activity:** Create a KPIs architecture.

Session 4: KPI selection in given contexts

- **Activity:** Practice KPI selection in functional areas;
- **Activity:** Practice KPI selection in industries;
- **Activity:** Practice KPIs selection according to timeliness;
- **Activity:** Practice KPIs selection according to quality;
- **Activity:** Practice KPIs selection according to effectiveness.

Day 2

Session 5: KPI documentation and target setting

- **Activity:** Practice target setting;
- Functions and design of the KPI documentation form;
- Organizational KPI libraries;
- Approaches to target setting;
- **Activity:** Analyze negative behaviors associated with linking bonuses to targets.

Session 6: Data visualization – scorecard and dashboard design

- **Activity:** Debate on best practices in data visualization;
- The role of scorecards, dashboards and healthograms;
- Rules for creating relevant performance reports, scorecards and dashboards;
- Graphs selection;
- Usability in terms of visual design;
- **Activity:** Analyze a scorecard and a dashboard from a visual perspective.

Session 7: KPI data gathering

- **Activity:** Explore relevant software and hardware solutions;
- Consistency in data quality and KPI measurement;
- Best practices in KPI measurement;
- The KPI data gathering process;
- KPI data source taxonomy;
- KPI activation tools and techniques;
- **Activity:** Evaluate the performance measurement capability and maturity.

Session 8: KPI analysis levels

- **Activity:** Interpret KPIs results analysis;
- **Activity:** Make decisions regarding KPIs renewal;
- **Activity:** Compare KPIs through benchmarking;
- **Activity:** Practice KPI modelling.

Review and learning assessment quiz

- Course review;
- Learning outcomes;
- Learning Assessment Quiz.

"I just wanted to thank you for the great course that we had last week with. We all had a great time with you and learned a lot about building and choosing the right and suitable KPIs." Abdulaziz S. Alghafari, Saudi Telecom Company, Saudi Arabia

KPI-ES

KPI Essentials

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Overview

The KPI Essentials training course is designed to support you in developing key competencies in performance management, with the aim of improving processes such as KPI selection, KPI documentation, KPI data gathering and reporting.
During the 3 days of training, you will become familiar with the most important tools and techniques in working with KPIs, and you will learn how to build a performance management culture.

Benefits

- Access international best practices for developing a KPI Performance Management Architecture;
- Effectively measure performance by practicing a variety of techniques to ensure the best KPI selection process;
- Enhance your performance measurement framework by successfully integrating data in the decision making process;
- Access rigorous tools that help you implement a KPI Management Framework, by receiving 10+ templates used in working with KPIs;
- Access an innovative learning experience comprised of a 3 stage educational process.

Attendees

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 develop a KPI Performance Management Architecture for their department or organization and will learn how to achieve consistency through cascading objectives and KPIs to departmental and individual levels.

"Mr. Adrian Brudan is a talented instructor, and has a good experience in KPIs field. He handled the course very well, he answered all of our questions, he managed all discussions in a professional way, and he used a lot of real life examples which facilitated the course."

Ibrahim A. Neyaz, Saudi Food & Drug Authority, Saudi Arabia

Gain a thorough understanding of each stage involved in KPI Management Framework deployment and usage.

"I would like to thank you for this course. It was extremely useful. The material was presented in a highly intuitive way and it has helped me to recognize and work with KPIs in better way. Also, thanks to all my fellow participants who were just great and put up great Q&As. It is awesome when one is in a course where everyone is so enthusiastic and interested in learning. I think everyone in the course had a great time and this has been a most enjoyable 3 days."

Fayez Alshehri, Turkey







KPI-ES KPI Essentials

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Day 1 - KPI basics

Understanding KPIs
- The value added by KPIs;
- From metrics to KPIs, KRIs and Predictive Analytics;
- KPI typology;
- Indexes and weights;
- KPI use case scenarios.

KPI implementation context
- Performance Management System Architecture;
- KPI business case and project plan;
- Sponsorship acquisition;
- Approach to rolling-out KPIs;
- Building the case for KPI implementation.

KPI selection principles
- KPI lifecycle;
- Methodology, tools, techniques for KPI selection;
- Value Flow Analysis;
- KPI clustering.

KPI selection in practice
- KPI selection in context;
- KPIs by functional area;
- KPIs by industry.

Day 2 - KPI development and alignment

KPIs cascaded at operational and individual level
- KPIs cascaded from organizational to operational level;
- KPIs cascaded from operational to employee level;
- KPIs for processes, SLAs, suppliers and alliances.

KPI documentation and target setting
- KPI documentation form design;
- KPI documentation process;
- Functions of the organizational KPI library;
- Approaches to KPI target setting;
- Target setting process;
- Target setting in practice KPIs.

Data visualization
- Best practices in data visualization;
- Graph selection;
- Scorecards and dashboards design;
- New directions: The Performance Healthogram;
- KPI results in visual representations.

Data gathering
- Consistency in data quality and KPI measurement;
- Best practice in the KPI measurement process;
- The KPI data gathering process;
- KPI data sources taxonomy;
- KPI activation tools and techniques;
- Data custodian communication.

Day 3 - KPI based decision making

Data analysis and reporting
- Report compilation;
- Reporting meeting;
- Business analysis techniques;
- Benchmarking.

Decision making and communications
- Cognitive biases affecting decision making;
- Initiative management;
- Communication and transparency in KPI reporting;
- Performance communication.

Building a performance culture
- Performance leadership;
- Integrating KPIs to organizational systems;
- In focus: linking KPIs to incentives;
- Gamification and KPIs.

Measuring And learning with KPIs
- Relevant software and hardware;
- Performance Measurement Maturity Model;
- KPI capability building.

Review and learning assessment quiz
- Course review;
- Learning assessment quiz.

"Thank you so much for your effort and your contribution to this workshop. I'm very pleased to have you as facilitator of the topic."
Settha Yok, Vattanac Bank, Cambodia



KPIs by Industry

- KPI, Dashboard and Scorecard in Call Centers
- KPI, Dashboard and Scorecard for Financial Services
- KPI, Dashboard and Scorecard in Hospitality
- KPI, Dashboard and Scorecard in Manufacturing
- KPI, Dashboard and Scorecard for Education

The "KPI by Industry" section refers to a series of courses offered by The KPI Institute, which is designed to develop the key performance management competencies needed to improve specific processes, such as KPI selection, KPI documentation, KPI data gathering and reporting. The course's contents include customized solutions for various industries.

KPI-CC KPI, Dashboard and Scorecard in Call Centers

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Overview

The KPI Dashboard and Scorecard for Call Centers training course is designed to develop the key performance management competencies needed to improve specific processes, such as KPI selection, KPI documentation, KPI data gathering and reporting. The course content includes customized solutions for call centers, in order support the implementation of a KPI Performance Management Framework.

Benefits

- Efficiently measure performance by implementing the best KPI selection process;
- Experience a customized approach by practicing your skills in working with specific call center KPIs;
- Make more efficient decisions by learning not only how to measure performance, but also how to deploy data in the decision making process;
- Access rigorous tools that help you implement a KPI Management Framework by receiving 10+ templates used in working with KPIs;
- Access an innovative learning experience based on a 3 stage educational process.

Attendees

Professionals from call centers, who are interested in improving their activity and successfully overcoming business challenges, will acquire the competencies needed to develop a KPI Performance Management Framework for their area.

Day 1 - KPIs essentials and selection

KPIs basics

- Challenges and key aspects in improving performance;
- Major challenges in call centers;
- Performance management and measurement;
- KPIs terminology standards;
- The added value of using KPIs.

Performance management system architecture

- An integrated approach to performance management: from strategy to outcomes;
- The performance management architecture;
- KPIs implementation.

KPIs selection principles

- KPIs lifecycle;
- 5 most important KPIs for call centers;
- Tools and techniques for KPIs selection;
- Popular KPIs for call centers.

KPIs selection in practice

- KPIs selection for call centers Scorecard;
- KPIs selection for call centers Dashboard.

Day 2 - KPIs documentation and decision making process

KPI documentation and target setting

- KPI documentation form design;
- KPI documentation process;
- Approaches to KPI target setting;
- Target setting in practice.

Data gathering and visualization

- Best practices in data visualization;
- Data quality dimensions;
- Best practice in the KPI measurement process;
- The KPI data gathering process.

Reporting and decision making

- Report compilation;
- Business analysis techniques;
- Performance review meeting;
- Initiatives management.

Review and learning assessment quiz

- Course review;
- 10 takeaways to apply in your organization;
- Learning assessment quiz.

"The course was extremely useful. The material was presented in a highly intuitive way and it helped me recognize and work with KPIs in a better way." ***Fayez Alshehri, Saudi Arabia***

KPI-FS KPI, Dashboard and Scorecard for Financial Services

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Overview

The KPI, Dashboard and Scorecard for Financial Services Training Course is designed to develop the key performance management competencies needed to improve specific processes, such as KPI selection, KPI documentation, KPI data gathering and reporting. The course content includes customized solutions for financial services, in order to support the implementation of a KPI Performance Management Framework.

Benefits

- Efficiently measure performance by implementing the best KPI selection process;
- Experience a customized approach by practicing your skills in working with financial services KPIs;
- Make more efficient decisions by learning not only how to measure performance, but also how to deploy data in the decision making process;
- Access rigorous tools that help you implement a KPI Management Framework by receiving 10+ templates used in working with KPIs;
- Access an innovative learning experience based on a 3 stage educational process.

Attendees

Professionals from financial services, who are interested in improving their activity and successfully overcoming business challenges, will acquire the competencies needed to develop a KPI Performance Management Framework for their area.

Day 1 - KPIs essentials and selection

KPIs basics

- Challenges and key aspects in improving performance;
- Major challenges in financial services;
- Performance management and measurement;
- KPIs terminology standards;
- The added value of using KPIs.

Performance management system architecture

- An integrated approach to performance management: from strategy to outcomes;
- The performance management architecture;
- KPIs implementation.

KPIs selection principles

- KPIs lifecycle;
- 5 most important KPIs for financial services;
- Tools and techniques for KPIs selection;
- Popular KPIs for financial services.

KPIs selection in practice

- KPIs selection for financial services Scorecard;
- KPIs selection for financial services Dashboard.

Day 2 - KPIs documentation and decision making process

KPI documentation and target setting

- KPI documentation form design;
- KPI documentation process;
- Approaches to KPI target setting;
- Target setting in practice.

Data gathering and visualization

- Best practices in data visualization;
- Data quality dimensions;
- Best practice in the KPI measurement process;
- The KPI data gathering process.

Reporting and decision making

- Report compilation;
- Business analysis techniques;
- Performance review meeting;
- Initiatives management.

Review and learning assessment quiz

- Course review;
- 10 takeaways to apply in your organization;
- Learning assessment quiz.

"I found the course very helpful, and the content of the course was rich with information and knowledege. I'm able now to analyze the way of creating any KPIs in regards to each department in my organization." ***Ibrahim A. Neyaz, Saudi Food & Drug Authority, Saudi Arabia***

KPI-H KPI, Dashboard and Scorecard in Hospitality

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Overview

The KPI Dashboard and Scorecard for Hospitality training course is designed to develop the key performance management competencies needed to improve specific processes, such as KPI selection, KPI documentation, KPI data gathering and reporting. The course content includes customized solutions for hospitality industry in order to support the implementation of a KPI Performance Management Framework.

Benefits

- Efficiently measure performance by implementing the best KPI selection process;
- Experience a customized approach by practicing your skills in working with hospitality KPIs;
- Make more efficient decisions by learning not only how to measure performance, but also how to deploy data in the decision making process;
- Access rigorous tools that help you implement a KPI Management Framework by receiving 10+ templates used in working with KPIs;
- Access an innovative learning experience based on a 3 stage educational process.

Attendees

Professionals from the hospitality industry, who are interested in improving their activity and successfully overcoming business challenges, will acquire the competencies needed to develop a KPI Performance Management Framework for their area.

Day 1 - KPIs essentials and selection

KPIs basics

- Challenges and key aspects in improving performance;
- Major challenges in the hospitality industry;
- Performance management and measurement;
- KPIs terminology standards;
- The added value of using KPIs.

Performance management system architecture

- An integrated approach to performance management: from strategy to outcomes;
- The performance management architecture;
- KPIs implementation.

KPIs selection principles

- KPIs lifecycle;
- 5 most important KPIs hospitality;
- Tools and techniques for KPIs selection;
- Popular KPIs hospitality.

KPIs selection in practice

- KPIs selection for hospitality Scorecard;
- KPIs selection for hospitality Dashboard.

Day 2 - KPIs documentation and decision making process

KPI documentation and target setting

- KPI documentation form design;
- KPI documentation process;
- Approaches to KPI target setting;
- Target setting in practice.

Data gathering and visualization

- Best practices in data visualization;
- Data quality dimensions;
- Best practice in the KPI measurement process;
- The KPI data gathering process.

Reporting and decision making

- Report compilation;
- Business analysis techniques;
- Performance review meeting;
- Initiatives management.

Review and learning assessment quiz

- Course review;
- 10 takeaways to apply in your organization;
- Learning assessment quiz.

"We would like to place on record our deep appreciation of excellent efforts put by Mr. Aurel Brudan in making his instructional delivery highly effective with quizzes and case studies." *Yoosof V., Hidada, Saudi Arabia*

KPI-MF KPI, Dashboard and Scorecard in Manufacturing

office@kpiinstitute.org
+61 3 9028 2223

Overview

The KPI Dashboard and Scorecard for Manufacturing training course is designed to develop the key performance management competencies needed to improve specific processes, such as KPI selection, KPI documentation, KPI data gathering and reporting. The course content includes customized solutions for manufacturing in order to support the implementation of a KPI Performance Management Framework.

Benefits

- Efficiently measure performance by implementing the best KPI selection process;
- Experience a customized approach by practicing your skills in working with manufacturing KPIs;
- Make more efficient decisions by learning not only how to measure performance, but also how to deploy data in the decision making process;
- Access rigorous tools that help you implement a KPI Management Framework by receiving 10+ templates used in working with KPIs;
- Access an innovative learning experience based on a 3 stage educational process.

Attendees

Professionals from the manufacturing industry, who are interested in improving their activity and successfully overcoming business challenges, will acquire the competencies needed to develop a KPI Performance Management Framework for their area.

Day 1 - KPIs essentials and selection

KPIs basics

- Challenges and key aspects in improving performance;
- Major challenges in the manufacturing industry;
- Performance management and measurement;
- KPIs terminology standards;
- The added value of using KPIs.

Performance management system architecture

- An integrated approach to performance management: from strategy to outcomes;
- The performance management architecture;
- KPIs implementation.

KPIs selection principles

- KPIs lifecycle;
- 5 most important KPIs manufacturing;
- Tools and techniques for KPIs selection;
- Popular KPIs manufacturing.

KPIs selection in practice

- KPIs selection for manufacturing Scorecard;
- KPIs selection for manufacturing Dashboard.

Day 2 - KPIs documentation and decision making process

KPI documentation and target setting

- KPI documentation form design;
- KPI documentation process;
- Approaches to KPI target setting;
- Target setting in practice.

Data gathering and visualization

- Best practices in data visualization;
- Data quality dimensions;
- Best practice in the KPI measurement process;
- The KPI data gathering process.

Reporting and decision making

- Report compilation;
- Business analysis techniques;
- Performance review meeting;
- Initiatives management.

Review and learning assessment quiz

- Course review;
- 10 takeaways to apply in your organization;
- Learning assessment quiz.

"Mr Aurel's methodology of lecturing by giving the big picture before getting into details had resulted in an effective and excellent course." ***Wael Hassan, Sales Manager, Hidada, Saudi Arabia***

KPI-ED KPI, Dashboard and Scorecard for Education

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Overview

The KPI Dashboard and Scorecard for Education training course is designed to develop the key performance management competencies needed to improve specific processes, such as KPI selection, KPI documentation, KPI data gathering and reporting. The course content includes customized solutions for the education area, in order to support the implementation of a KPI Performance Management Framework.

Benefits

- Efficiently measure performance by implementing the best KPI selection process;
- Experience a customized approach by practicing your skills in working with specific Education KPIs;
- Make more efficient decisions by learning not only how to measure performance, but also how to deploy data in the decision making process;
- Access rigorous tools that help you implement a KPI Management Framework by receiving 10+ templates used in working with KPIs;
- Access an innovative learning experience based on a 3 stage educational process.

Attendees

Professionals from the academic environment, who are interested in improving their activity and successfully overcoming business challenges, will acquire the competencies needed to develop a KPI Performance Management Framework for their area.

Day 1 - KPIs essentials and selection

KPIs basics

- Challenges and key aspects in improving performance;
- Major challenges in the education field;
- Performance management and measurement;
- KPIs terminology standards;
- The added value of using KPIs.

Performance management system architecture

- An integrated approach to performance management: from strategy to outcomes;
- The performance management architecture;
- KPIs implementation.

KPIs selection principles

- KPIs lifecycle;
- 5 most important KPIs for education;
- Tools and techniques for KPIs selection;
- Popular KPIs for education.

KPIs selection in practice

- KPIs selection for education Scorecard;
- KPIs selection for education Dashboard.

Day 2 - KPIs documentation and decision making process

KPI documentation and target setting

- KPI documentation form design;
- KPI documentation process;
- Approaches to KPI target setting;
- Target setting in practice.

Data gathering and visualization

- Best practices in data visualization;
- Data quality dimensions;
- Best practice in the KPI measurement process;
- The KPI data gathering process.

Reporting and decision making

- Report compilation;
- Business analysis techniques;
- Performance review meeting;
- Initiatives management.

Review and learning assessment quiz

- Course review;
- 10 takeaways to apply in your organization;
- Learning assessment quiz.

"It was very educational and for sure it will help a lot in my profession."
Jun Panilawon, AMMROC, UAE



KPI by Functional Areas

- KPI, Dashboard and Scorecard for Human Resources
- KPI, Dashboard and Scorecard for Information Technology
- KPI, Dashboard and Scorecard for Marketing
- KPI, Dashboard and Scorecard for Logistics

This collection of courses is tailored to specific functional areas addressing major needs of the market. The two day training courses contain a unique combination of practical solutions and theoretical background for improving the departmental performance and supporting the implementation of a KPI Performance Management Framework.

KPI-HR KPI, Dashboard and Scorecard for Human Resources

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Overview

The KPI Dashboard and Scorecard for Human Resources training course is designed to develop the key performance management competencies needed to improve specific processes, such as KPI selection, KPI documentation, KPI data gathering and reporting. The course content includes customized solutions for the human resources functional area, in order to support the implementation of a KPI Performance Management Framework.

Benefits

- Efficiently measure performance by implementing the best KPI selection process;
- Experience a customized approach by practicing your skills in working with human resources KPIs;
- Make more efficient decisions by learning not only how to measure performance, but also how to deploy data in the decision making process;
- Access rigorous tools that help you implement a KPI Management Framework by receiving 10+ templates used in working with KPIs;
- Access an innovative learning experience based on a 3 state educational process.

Attendees

Professionals from human resources, who are interested in improving their activity and successfully overcoming business challenges, will acquire the competencies needed to develop a KPI Performance Management Framework for their area.

Day 1 - KPIs essentials and selection

KPIs basics

- Challenges and key aspects in improving performance;
- Major challenges in the human resources functional area;
- Performance management and measurement;
- KPIs terminology standards;
- The added value of using KPIs.

Performance management system architecture

- An integrated approach to performance management: from strategy to outcomes;
- The performance management architecture;
- KPIs implementation.

KPIs selection principles

- KPIs lifecycle;
- 5 most important KPIs for human resources;
- Tools and techniques for KPIs selection;
- Popular KPIs for human resources.

KPIs selection in practice

- KPIs selection for human resources Scorecard;
- KPIs selection for human resources Dashboard.

Day 2 - KPIs documentation and decision making process

KPI documentation and target setting

- KPI documentation form design;
- KPI documentation process;
- Approaches to KPI target setting;
- Target setting in practice.

Data gathering and visualization

- Best practices in data visualization;
- Data quality dimensions;
- Best practice in the KPI measurement process;
- The KPI data gathering process.

Reporting and decision making

- Report compilation;
- Business analysis techniques;
- Performance review meeting;
- Initiatives management.

Review and learning assessment quiz

- Course review;
- 10 takeaways to apply in your organization;
- Learning assessment quiz.

"The course is useful for companies which start to implement KPIs or look at improving the process to implement KPIs."
Fong San Nee, NCS Pte. Ltd, Singapore

KPI-IT KPI, Dashboard and Scorecard for Information Technology

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+61 3 9028 2223

Overview

The KPI Dashboard and Scorecard for Information Technology training course is designed to develop the key performance management competencies needed to improve specific processes, such as KPI selection, KPI documentation, KPI data gathering and reporting. The course content includes customized solutions for the information technology industry, in order to support the implementation of a KPI Performance Management Framework.

Benefits

- Efficiently measure performance by implementing the best KPI selection process;
- Experience a customized approach by practicing your skills in working with information technology KPIs;
- Make more efficient decisions by learning not only how to measure performance, but also how to deploy data in the decision making process;
- Access rigorous tools that help you implement a KPI Management Framework by receiving 10+ templates used in working with KPIs;
- Access an innovative learning experience based on a 3 stage educational process.

Attendees

Professionals from information technology industry, who are interested in improving their activity and successfully overcoming business challenges, will acquire the competencies needed to develop a KPI Performance Management Framework for their area.

Day 1 - KPIs essentials and selection

KPIs basics

- Challenges and key aspects in improving performance;
- Major challenges in the information technology industry;
- Performance management and measurement;
- KPIs terminology standards;
- The added value of using KPIs.

Performance management system architecture

- An integrated approach to performance management: from strategy to outcomes;
- The performance management architecture;
- KPIs implementation.

KPIs selection principles

- KPIs lifecycle;
- 5 most important KPIs for information technology;
- Tools and techniques for KPIs selection;
- Popular KPIs for information technology.

KPIs selection in practice

- KPIs selection for information technology Scorecard;
- KPIs selection for information technology Dashboard.

Day 2 - KPIs documentation and decision making process

KPI documentation and target setting

- KPI documentation form design;
- KPI documentation process;
- Approaches to KPI target setting;
- Target setting in practice.

Data gathering and visualization

- Best practices in data visualization;
- Data quality dimensions;
- Best practice in the KPI measurement process;
- The KPI data gathering process.

Reporting and decision making

- Report compilation;
- Business analysis techniques;
- Performance review meeting;
- Initiatives management.

Review and learning assessment quiz

- Course review;
- 10 takeaways to apply in your organization;
- Learning assessment quiz.

"We would like to place on record our deep appreciation of excellent efforts put by Mr. Aurel Brudan in making his instructional delivery highly effective with quizzes and case studies." *Yoosof V., Hidada, Saudi Arabia*

KPI-MK KPI, Dashboard and Scorecard for Marketing

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Overview

The KPI Dashboard and Scorecard for Marketing training course is designed to develop the key performance management competencies needed to improve specific processes, such as KPI selection, KPI documentation, KPI data gathering and reporting. The course content includes customized solutions for marketing, in order to support the implementation of a KPI Performance Management Framework.

Benefits

- Efficiently measure performance by implementing the best KPI selection process;
- Experience a customized approach by practicing your skills in working with marketing KPIs;
- Make more efficient decisions by learning not only how to measure performance, but also how to deploy data in the decision making process;
- Access rigorous tools that help you implement a KPI Management Framework by receiving 10+ templates used in working with KPIs;
- Access an innovative learning experience based on a 3 stage educational process.

Attendees

Marketing professionals, who are interested in improving their activity and successfully overcoming business challenges, will acquire the competencies needed to develop a KPI Performance Management Framework for their area.

Day 1 - KPIs essentials and selection

KPIs basics

- Challenges and key aspects in improving performance;
- Major challenges in marketing;
- Performance management and measurement;
- KPIs terminology standards;
- The added value of using KPIs.

Performance management system architecture

- An integrated approach to performance management: from strategy to outcomes;
- The performance management architecture;
- KPIs implementation.

KPIs selection principles

- KPIs lifecycle;
- 5 most important KPIs for marketing;
- Tools and techniques for KPIs selection;
- Popular KPIs for marketing.

KPIs selection in practice

- KPIs selection for marketing Scorecard.
- KPIs selection for marketing Dashboard;

Day 2 - KPIs documentation and decision making process

KPI documentation and target setting

- KPI documentation form design;
- KPI documentation process;
- Approaches to KPI target setting;
- Target setting in practice.

Data gathering and visualization

- Best practices in data visualization;
- Data quality dimensions;
- Best practice in the KPI measurement process;
- The KPI data gathering process.

Reporting and decision making

- Report compilation;
- Business analysis techniques;
- Performance review meeting;
- Initiatives management.

Review and learning assessment quiz

- Course review;
- 10 takeaways to apply in your organization;
- Learning assessment quiz.

"The course offers you essential tools towards better performance."
Meshal Abdulrhman Alamri, Saudi Food & Drug Authority, Saudi Arabia

KPI-L KPI, Dashboard and Scorecard for Logistics

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+61 3 9028 2223

Overview

The KPI Dashboard and Scorecard for Logistics training course is designed to develop the key performance management competencies needed to improve specific processes, such as KPI selection, KPI documentation, KPI data gathering and reporting. The course content includes customized solutions for logistics, in order to support the implementation of a KPI Performance Management Framework.

Benefits

- Efficiently measure performance by implementing the best KPI selection process;
- Experience a customized approach by practicing your skills in working with logistics KPIs;
- Make more efficient decisions by learning not only how to measure performance, but also how to deploy data in the decision making process;
- Access rigorous tools that help you implement a KPI Management Framework by receiving 10+ templates used in working with KPIs;
- Access an innovative learning experience based on a 3 stage educational process.

Attendees

Professionals from the logistics functional area, who are interested in improving their activity and successfully overcoming business challenges, will acquire the competencies needed to develop a KPI Performance Management Framework for their area.

Day 1 - KPIs essentials and selection

KPIs basics

- Challenges and key aspects in improving performance;
- Major challenges in logistics;
- Performance management and measurement;
- KPIs terminology standards;
- The added value of using KPIs.

Performance management system architecture

- An integrated approach to performance management: from strategy to outcomes;
- The performance management architecture;
- KPIs implementation.

KPIs selection principles

- KPIs lifecycle;
- 5 most important KPIs for logistics;
- Tools and techniques for KPIs selection;
- Popular KPIs for logistics.

KPIs selection in practice

- KPIs selection for logistics Scorecard;
- KPIs selection for logistics Dashboard.

Day 2 - KPIs documentation and decision making process

KPI documentation and target setting

- KPI documentation form design;
- KPI documentation process;
- Approaches to KPI target setting;
- Target setting in practice.

Data gathering and visualization

- Best practices in data visualization;
- Data quality dimensions;
- Best practice in the KPI measurement process;
- The KPI data gathering process.

Reporting and decision making

- Report compilation;
- Business analysis techniques;
- Performance review meeting;
- Initiatives management.

Review and learning assessment quiz

- Course review;
- 10 takeaways to apply in your organization;
- Learning assessment quiz.

"An excellent course to organize and improve quality of life and work."
Anwar Hobrom, Institute of Public Administration, Saudi Arabia



Balanced Scorecard

- Implementing and using a BSC based Performance Management System
- Balanced Scorecard Simulation

The training course and simulation of implementing and using a Balances Scorecard provide a systematic approach to understanding, setting up and enforcing a Balanced Scorecard Management System. In addition, a comprehensive overview of the benefits that a company can have by implementing the Balanced Scorecard, its functionality and its purpose for strategy execution are just some of the courses' highlights.

BSC-IU Implementing and using a BSC based Performance Management System

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Overview

The training course aims to provide you with relevant knowledge on the development and implementation of the Balanced Scorecard. This course offers a comprehensive overview on the benefits an organization can obtain by implementing the Balanced Scorecard.
The highly interactive learning experience will enable you to grasp the functionality of the Balanced Scorecard and secure its purpose for strategy execution. The course focuses on delivering all the information needed to fully comprehend the value of the Balanced Scorecard, as well as on developing the necessary skills for a successful implementation.

Benefits

- Understand the value and the functionality of the Balanced Scorecard;
- Overcome barriers in strategy execution by implementing the Balanced Scorecard;
- Improve strategy communication by using the Balanced Scorecard;
- Successfully develop and implement the Balanced Scorecard by adopting a standardized approach to the entire process;
- Optimize strategy execution by deploying a viable and supporting framework.

Attendees

This course is designed for professionals from different fields, interested in understanding the Balanced Scorecard concept, who seek to acquire competencies needed to develop a Balanced Scorecard for their organization or department.

Day 1

Performance management and the Balanced Scorecard

- Balanced Scorecard definition;
- The role of the Balanced Scorecard in a strategic performance management context;
- The evolution of the Balanced Scorecard, current state and emerging trends;
- Performance Management System Architecture.

Architecture of a Balanced Scorecard based performance management system

- Desired State of Evolution (DSOE) – linking, mission, value drivers and vision;
- Strategy Map – objectives as a performance road map;
- Performance Scorecard – balance and alignment;
- Portfolio of initiatives – translating priorities into action;
- KPIs as performance management enablers.

Balanced Scorecard performance architecture development

- Balanced Scorecard Architecture;
- Desired State of Evolution formulation;
- Strategy Map – grouping and linking objectives by perspectives and themes;
- Performance Scorecard development – defining most relevant KPIs;
- Setting up the initiatives portfolio – identifying and prioritizing strategic initiatives.

Day 2

Balanced Scorecard implementation process

- Stages of the implementation;
- The plan and deployment of the implementation process;
- Technology as an enabler.

Generating value with the Balanced Scorecard

- Data gathering and KPI activation;
- Performance reporting with the Balanced Scorecard;
- Performance review meetings;
- Initiatives management.

Balanced Scorecard in practice

- Integration with other organizational systems: budgeting, communication and performance assessment;
- Balanced Scorecard and leadership;
- Balanced Scorecard and risk management;
- Balanced Scorecard and project management.

Review and learning assessment quiz

- Course review;
- Learning Assessment Quiz.

"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***

BSC-S Balanced Scorecard Simulation

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Overview

This course is a business simulation leveraging the Balanced Scorecard tool and specialized software for running systems thinking-based models. You will have the chance to explore the linkages between the various processes and elements of the four Balanced Scorecard perspectives. You will also work with "what-if" scenarios and observe how each of your team's decisions is impacting the organization's performance results.

Benefits

- Understand the potential impact of your decisions on the larger system represented by your organization;
- Learn about systemic thinking and the BSC concept;
- Develop a more proactive approach to dealing with business problems;
- Improve your ability to work in teams and persuade your audience;
- Review best practices in implementing and using Balanced Scorecards.

Attendees

This course is designed for executives, operational managers and analysts from various departments.

"After undertaking this course I have many reasons to be thankful. Our company will benefit greatly from the training material in the organization process and restructuring of the KPIs."

Jason Cutajar, National Australia Bank, Australia

Day 1 - Emulating Balanced Scorecard Best Practices

Introduction to Balanced Scorecard isee PLAYER

- Concept and purpose of the simulation
- Assigning teams
- Communicating goals and success criterion
- Explaining steps of play

Performing the Balanced Scorecard isee PLAYER simulation

- Team discussions about resource allocation strategies and decision
- Introducing team decisions in software
- Receiving immediate feedback on the decision's impact on performance results
- Completing the simulation

Applying the knowledge acquired during the simulation to the organizational environment

- Teams and group discussions on the experiences offered by the simulation
- Discussing the scoring and the strategies applied during the simulation
- Exploring implications of team decisions
- Clarifying the concepts of systemic thinking

Understanding the Balanced Scorecard concept

- Debriefing on the Balanced Scorecard components
- Overview of the Balanced Scorecard's evolution
- Best practices in implementing and using Balanced Scorecards

Applying the knowledge within the organization context

- Ways of applying the knowledge gained in this workshop to your organizational environment
- Workshop overview and conclusions





"Mr. Adrian Brudan was successful in facilitating this course, as he allotted equal time for theory, case studies, and practical exercises, and made sure that all the participants were involved in the practical cases and that everybody's questions were answered." *Corina Slav, Star Storage, Romania*



Strategy and Performance

- Applied Strategy and Business Performance Improvement with KPIs
- Integrated Performance Management

The courses provide a roadmap to long-term organizational performance, offering key concepts and theoretical foundations for achieving the desired state of organizational evolution. Exploring the pillars of a successful business strategy and translating it into action by setting quantifiable objectives and selecting the right KPIs are just some of the core benefits provided by these courses.

SP-ASBPI Applied Strategy and Business Performance Improvement with KPIs

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Overview

This course provides a three days roadmap to improve your long-term organizational performance. You will explore the foundation of a successful business strategy and then translate it into actionable objectives.
The solution for a higher success rate is to set quantifiable objectives and accordingly, use the right KPIs. The course provides the needed Management Framework, from properly selecting the relevant KPIs and documenting them, to data analysis and reporting, decision making and initiative management, and ending with building a performance culture.

Benefits

- Ensure excellent strategy implementation, by accessing and using rigorous strategy planning tools;
  Access rigorous tools that help you implement a framework
- for KPI Measurement, by receiving 10+ templates used in working with KPIs;
- Improve performance at all levels, by identifying and addressing specific challenges;
- Develop and maintain a functional Performance Management System;
- Enhance the decision making process by using relevant data.

Attendees

Entrepreneurs, analysts and managers will be glad to discover that the course provides the pillars, tools and resources required for the effective implementation of a Performance Management System within their organizations. By sharing good practices in the field, the participants and the trainer can come up with solutions to the challenges that appear within organizations.

"It was an interesting course. I learned a lot of new things regarding KPIs. I recommend it for people working in performance section and especially those who would like to improve their performance system. Sometimes, we are dragged with what is being used in our organization, and we cannot tell it is wrong until we learn the right way."

Vera Rizk, Qatari Diar Real Estate Investment Company, Qatar



"I would rate the training 10 out of 10 and would highly recommend to others. The facilitator managed to get excellent group interaction right from the beginning, the KPI course was interesting, informative and very well presented."

Mohamed Salah El-Dein, Salehiya Medical, Saudi Arabia



"The course, in terms of structure and delivery, was very well adapted to the different needs of participants, offering relevant information both for practitioners experienced in working with Performance Management Systems, as for the ones who didn't work in this field before."

Florentina Greger, Zitec, Romania



"The course was very comprehensive and informative. It helped me have a clear understanding of KPIs and developed my skills around setting my own department KPIs. Thank you!" *Maha Ayish, Abu Dhabi Capital Group, UAE*

SP-ASBPI

Applied Strategy and Business Performance Improvement with KPIs

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Day 1 - Strategy development

Strategy and strategic thinking

- Strategy and business planning;
- Reasons, philosophy, principles and rules of strategic planning;
- Organizational dimensions of strategic planning.

Strategy formulation

- Vision and mission statement;
- Values and value drivers;
- Strategic tools;
- Desired State of Evolution development.

Strategy analysis

- External environment scanning – PESTEL analysis,
- Porter's Model of 5 forces;
- Internal environment scanning – SWOT analysis.

Strategy planning

- The correlation with the SWOT analysis: problem and objective trees;
- The correlation with the 3S: SMART objectives;
- Strategy map development.

Day 2 - Measuring performance

Understanding KPIs

- Challenges in Performance Measurement;
- The value added by KPIs;
- KPI concept map;
- KPI related terminology;
- KPI typology.

KPI selection

- KPI selection process;
- KPI selection sources;
- KPI selection techniques.

KPI documentation

- KPI documentation form functions;
- KPI documentation process;
- Target setting process;
- Challenges in working with targets.

Data visualization and gathering

- Guidelines for designing efficient templates;
- Usability in terms of visual design;
- KPI activation tools and techniques;
- Data gathering sources.

Day 3 - Managing performance

Data analysis and reporting

- Levels of KPI analysis;
- Quality assurance review;
- Report compilation;
- Performance reports in practice.

Decision making and initiative management

- Performance review meetings;
- Business analysis techniques;
- Portfolio of initiatives development;
- Initiatives documentation process.

Learning and improvement

- KPI lifecycle - evolution;
- Strategy review;
- Performance Management System recalibration;
- Organizational Capability Maturity Models;
- Performance Management Maturity Model.

Building a performance culture

- Change management;
- Employee performance management;
- Employee engagement;
- Bonus systems examples;
- Gamification.

Review and learning assessment quiz

- Course review;
- Learning Assessment Quiz.

"This is one of the best programs regarding performance management I have ever attended. I highly recommend this training for any manager who wants to manage his/her business in the right way." ***Perviz Aslani, Chief Operating Officer, EMBAWOOD, Azerbaijan***

SP-IPM Integrated Performance Management

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Overview

Integrated Performance Management is crucial to improving long-term performance and providing insights and solutions across the organization.

This course will clarify the key concepts and theoretical foundations of performance management and the importance of integrating it with the overall management efforts. It will also walk you through best practices and exercises on how to link different elements of the Performance Management System and how to address specific challenges from a performance management perspective.

Benefits

- Attain organizational strategic alignment by understanding how to incorporate related disciplines such as strategy, project and knowledge management;
- Achieve a better integration process by analyzing how the strategic, operational and individual levels work together;
- Reach excellence in implementing a framework for Performance Management by accessing the right tools for your organization;
- Increase overall organizational results by developing and maintaining a functional Performance Management System;
- Successfully manage the implementation process by discovering best practices in performance management integration.

Attendees

Entrepreneurs, analysts and professionals from different fields, interested in performance management will acquire the knowledge needed to better understand it. The networking opportunity and the possibility of sharing knowledge and personal experiences create a unique learning experience that facilitates the acquisition and assimilation of performance management skills.

Day 1 - Performance management foundations

Introduction – Key aspects of performance management

- Definition of performance management;
- The relation between performance measurement and performance management;
- Positioning at three levels: strategic, operational and individual;
- The motivation of building performance management capabilities;
- Pitfalls in Performance Management;
- **Activity:** Debate on the performance management challenges.

Philosophy and theory underpinning performance management

- Differences between command and control and systems thinking;
- Theories in performance management;
- Key principles in performance management: recurrence, clarity, integration and learning;
- 10 characteristics of a new world view in performance management;
- **Activity:** Discuss on the applicability of the systems thinking concept.

Introduction to performance management architecture

- Clarification of key terms: objectives, KPIs, performance measures, targets and initiatives;
- Knowledge and systems mapping;
- Cultural aspects of performance management;
- Performance management systems architecture;
- **Activity:** Define key terms in performance management.

Integrating performance management

- Recurrence across organizational levels;
- Performance management and other disciplines: strategy, project and knowledge management;
- Integration with other organizational processes;
- Performance management systems and other methodologies: ITIL, Six Sigma and Lean/Quality Management;
- **Activity:** Identify the steps in achieving organizational alignment.

Day 2 - Integrating organizational performance

Performance management at strategic level

- **Activity:** Link the Desired State of Evolution to the Strategy Map;
- Performance Management Maturity Model in practice;
- Architecture of the strategic performance management system;
- Implementation of the strategic performance management system;
- Strategic performance management system implementation;
- **Activity:** Practice the Balanced Scorecard based performance management system.

Performance management at operational level

- **Activity:** Differentiate between KPIs and initiatives;
- Elements of the operational performance management system;
- Operational dashboards: IT Scorecard, HR Scorecard, Marketing Scorecard and Supplier Scorecard;
- Good practices in data visualization, analysis and reporting;
- Tools and techniques for improving team performance;
- **Activity:** Balance customer satisfaction both internally and externally.

Performance management at individual level

- **Activity:** Simulate the individual performance evaluation process;
- Architecture of the individual performance management system;
- Alignment of the individual performance management system to the strategy;
- The individual performance management system in practice;
- Balanced Scorecard and Project Management;
- **Activity:** Practice tools and techniques for improving individual performance.

Applying the course learnings in organizations

- 10 Insights of implementing and using performance management systems;
- Key templates in practice;
- Transfer of the acquired knowledge in your organization.

Review and learning assessment quiz

- Course review;
- Learning Assessment Quiz.

"Aurel has extensive knowledge in this topic and he is able to arrange the training in a very efficient way, covering even history and research. He is definitely an expert and worth the 2 days training." *Sarah Mubarak, 1 Malaysia Development Berhad, Malaysia*



Performance Through People

- Building a Performance Culture
- Implementation and Optimization of Employee Engagement Programs
- Compensation and Benefits
- Applied Change Management
- Talent Management Process Optimization
- Team Management
- Cross-Cultural Management
- Managing and Improving Employee Performance
- Implementing Succession Management Programs

These training programs will provide the necessary knowledge and skills for achieving performance through one of the most important resources of an organization – its employees. The added value of the courses consists in practical solutions offered for employee engagement, change management, succession programs and talent management processes.

PP-BPC Building a Performance Culture

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Overview

Given today's hyper-competitiveness and the growing technology adoption and diffusion, cultivating a dynamic and productive culture represents a key area in which leaders can generate long-term competitive advantage.

This course supports professionals in developing capabilities to build and maintain an effective performance-based culture. Assimilating key concepts, using practical tools, establishing viable initiatives, you will learn how to engage employees in driving and achieving proficient results.

To successfully reach the desired state of evolution, this course assists you in leading a culture of excellence by offering solutions to implementing a rigorous performance-based system.

Benefits

- Achieve a clear understanding of performance culture within your organization;
- Improve your organization's overall results by identifying the areas related to performance culture which need to be strengthened;
- Develop the existing culture towards performance by establishing specific actions and initiatives to be implemented;
- Acquire a structured approach for building a performance culture;
- Increase your employees' performance by highlighting the behaviors and actions that lead to a performance culture.

Attendees

Entrepreneur and analysts, interested in employee performance will understand the aspects that build up healthy and desired behaviors and will get exposure to rigorous techniques for managing and improving organizational culture, change employees' behaviors and direct them towards high and reliable performance.

Day 1 - Nurturing performance culture through the work environment

Performance culture in the organizational context

- Performance culture essentials;
- Importance of building a performance culture;
- Attributes of an organizational culture oriented towards performance.

Factors which impact performance culture

- Technology used in the daily working routine;
- Demographic factors;
- **Activity:** Identify physical components from the work environment which can enhance performance.

Steps in building a performance culture

- Engagement;
- Evaluation;
- Rewards and appraisal.

Performance culture reflected through systems and procedures

- Openness towards innovation;
- Policies and systems for lean flows;
- **Activity:** Select the right KPIs for generating performance.

Day 2 - Achieving a performance culture through continuous development

Organizational development

- Awareness of market placement;
- Realistic predictions based on organizational potential;
- **Activity:** Develop communication plans in order to enhance performance.

Departmental and team development

- Group results appraisal;
- Bounded working teams;
- **Activity:** Practice managing low proficient working groups.

Developing employees for performance

- Achieved performance vs. desired performance;
- **Activity:** Select employees and training based on performance;
- Leading employees towards performance.

Review and learning assessment quiz

- Course review;
- Learning assessment quiz.

"Mr. Aurel Brudan is a very detailed and organized person. This can be observed through the training materials and contents prepared for the training session" ***Irene Beh Ai Ling, Telekom Malaysia, Malaysia***

PP-EE Implementation and Optimization of Employee Engagement Programs

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Overview

This course will increase your understanding of both the benefits and the challenges of implementing an employee engagement program. Become qualified to roll out such a program through simulations, best practices, as well as planning templates and tools!

Benefits

- Develop a full understanding of engagement and its impact across all levels of an organization;
- Gain an overview of current international best practices in employee engagement;
- Successfully overcome the most challenging aspects of an employee engagement program implementation, by participating in simulations;
- Reach a high level of acceptance regarding the engagement initiatives, by adapting them to your organizational context;
- Achieve employee engagement continuity by maintaining and constantly enhancing ongoing engagement projects.

Attendees

Entrepreneurs, analysts and professionals from any field, interested in employee engagement, will understand the aspects that influence employee engagement and performance. Professionals who have already implemented such programs, the course will offer a more coherent perspective on how an employee engagement system should work and how they could improve their existing architecture.

Day 1 - Adding value with employee engagement

Introduction to employee engagement

- Understanding key concepts in employee engagement;
- **Activity:** Discuss pros and cons of employee engagement programs;
- Employee engagement and performance management.

Understanding employee engagement

- Employee engagement vs. job satisfaction;
- Employee engagement vs. employee motivation;
- **Activity:** Define employee engagement.

Measuring employee engagement

- Methods for measuring employee engagement;
- Employee engagement surveys and reports;
- **Activity:** Select suitable employee engagement suppliers.

Monitoring employee engagement

- Numbers vs. behaviors in employee engagement;
- Frequency in measuring engagement;
- **Activity:** Practice making decisions based on engagement surveys.

Day 2 - Employee engagement as main predictor in performance

Fostering employee engagement

- Foster employee engagement through specific meetings;
- Employee engagement seen as contagious;
- **Activity:** Analyze engagement at a team level.

Employee engagement initiatives

- Your own engagement comes first!
- **Activity:** Create employee engagement action plans;
- Big engagement in small details.

Planning employee engagement projects

- Employee engagement roadmap and calendar;
- Employee engagement training and communication;
- **Activity:** Practice communicating survey results.

Review and learning assessment quiz

- Course review;
- Learning assessment quiz.

"Based on the high quality of the course, I decided to enroll all members of our Management Team and also the members of our HR department. Mr. Adrian Brudan is a highly professional expert and trainer in the field of performance management." *Ferenc Gabor, Process Solutions S.R.L., Romania*

PP-CB Compensation and Benefits

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Overview

This course is designed around the compensation and benefits elements an organization needs in order to increase its employees' commitment. A well implemented compensation and benefits strategy can assure long term effectiveness, as well as efficiency for the organization's investments.

The training course offers a theoretical background, as well as useful tools and techniques to implement a successful compensation and benefits strategy. This translates into long term effectiveness and efficiency for the organization's investments and eventually increases the employees' commitment.

By participating in this training course, you will acquire the strategies and techniques needed to implement a successful compensation and benefits system.

Benefits

- Bring reliable concepts within your organization in order to successfully build a compensation and benefits system;
- Constantly keep your compensation and benefits system updated by accessing international best practices in the field;
- Ensure fairness and objectivity at all employees' levels through a compensation and benefits system;
- Opt for a rigorous approach in building and launching an effective compensation and benefits system;
- Increase employee performance by successfully rolling a compensation and benefits system.

Attendees

Entrepreneurs, analysts and professionals from top/middle/lower management, interested in employee satisfaction and performance, will gain access to different methods that could help them implement a Compensation and Benefits system within their companies.

Day 1 – Introduction to the concepts of compensations and benefits

- Integration in the organizational context;
- Impact of payment systems and facilities;
- Motivation models;
- Alignment of Compensation and Benefits to the business strategy.

Elements of a compensation and benefits system

- **Activity**: Differentiate between merits, bonuses, profit sharing and gifts;
- Compensation and benefits responsible;
- Compensation and benefits beneficiaries.

Building a work environment to sustain compensation and benefits

- Market research and decision making;
- **Activity:** Establish effective partnerships;
- Presentation and communication of compensation and benefits to employees.

Driving performance through compensation and benefits

- Compensation and Benefits system based on both the employees and the company's needs;
- Job evaluation and grading;
- **Activity:** Distinguish and choose between a variable, a diverse and a fixed system.

Day 2 - Acknowledgement of performance through compensations and benefits

Objectivity of a compensation and benefits system

- Monetary structure and ranges;
- Policies and flexibility within Compensation and Benefits systems;
- **Activity:** Practice the desired approach for exceptional cases.

Developing a competitive compensations and benefits system

- **Activity:** Apply market pricing based on market placement;
- Quantity vs. quality regarding Compensation and Benefits system;
- Financial vs. non-financial in Compensation and Benefits system.

Compensation and benefits system on-rolling.

- **Activity:** Designate team and individual compensation and benefits;
- Confidentiality vs. transparency of the Compensation and Benefits system;
- Bidirectional feedback in performance appraisal.

Compensation and benefits review

- Review frequency;
- Changes implementation.

Review and learning assessment quiz

- Course review;
- Learning assessment quiz.

"Even before the training delivery, I appreciated Adrian's keen interest in tailoring the course's objectives and materials to the specific needs of our team." ***Cristina Botea, OMV Petrom, Romania***

PP-CM Applied Change Management

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Overview

This course will provide you with a change management model, by featuring effective business approaches that executives and managers can use to help their organizations quickly and efficiently adapt to changes.

You will discover methods of helping your employees adapt to major market changes and events while also adjusting your organization's business models.

Benefits

- Adopt an agile approach oriented towards a successful change management;
- Thrive in a dynamic market, by understanding the impact of change before it emerges;
- Reinforce your change management system by determining both the available resources and the needs within your organization;
- Acquire a structured and logic approach to change management;
- Deal with change across your organization in an effective manner, by applying key communication techniques.

Attendees

Entrepreneurs, analysts and professionals from any field, interested in change management, will acquire understanding of dealing with rapidly changing business environments and will access different methods that could help them manage change in an effective manner. Professionals who have just started implementing change management, will gain the knowledge required in order to understand the steps to be followed in the implementation process.

Day 1 - Introduction to the concept of change management

Change management in the business context

- Impact of change inside and outside the organization;
- Resistance to change;
- Innovation culture.

Elements within a change management system

- **Activity:** Differentiate between change, innovation and regression;
- Change management governance;
- Change management concerned areas and parties.

Building a working environment to sustain change management

- Priorities synchronization within different teams;
- **Activity:** Develop motivating strategies for employees during rapid changes;
- Presentation and communication of change towards employees.

Lead for performance through change management

- Benefits of adapting to rapid changes;
- Obstacles in having lean change processes;
- **Activity:** Identify key support elements in change management.

Day 2 - Change management implementation

Resources of a change management system

- Evaluation of an organizations' tendencies and readiness/ intent to change;
- Responsibilities in a context of change;
- **Activity:** Create a list of top 5 must have resources in change management.

Developing an engaging change management system

- **Activity:** Establish rewards and recognition methods for top performers in conditions of change;
- Perspective of evolution instead of change;
- Change management in terms of costs and gains.

On-going change management

- **Activity:** Differentiate between major changes and updates;
- Change as a stage, rather than a long time process;
- Resistance to change: prevention vs combat.

Change management process flow review

- Review frequency;
- Updates implementation. Implement updates.

Review & learning assessment quiz

- Course review;
- Learning assessment quiz.

"The course helps you to know how you can achieve your goals for the job and it teaches you how you can use KPIs to improve your job and the employees." *Saad Mohammed A. Al Shried, Saudi Food & Drug Authority, Saudi Arabia*

PP-TMPO Talent Management Process Optimization

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Overview

Talent management defines, on the one hand, an organization's commitment to attracting and selecting potential individuals and, on the other hand,managing and retaining this talent. This functional area holds an important strategic role and needs to be fully integrated within all the employee management processes of an organization.
This course offers you the opportunity to adapt and develop the processes and systems that relate to recruiting, developing and retaining a superior workforce. By going through each system, you will get practical information and develop the necessary skills to successfully implement a Talent Management strategy in your organization.

Benefits

- Attract the talent your organization calls for, according to the talent needs assessment;
- Increase your retention rate and decrease your turnover rate by attracting the right employees;
- Develop a critical and practical view on how to implement talent management as an integrated strategy complementing the organizational objectives;
- Enhance the skills you need to coordinate the implementation of a talent management strategy;
- Consolidate your initiatives by getting a new perspective of how talent management is developed in other industries and companies and access good case practices ready to be implemented;
- Get valuable insights and ideas to further develop your talent management initiatives.

Attendees

Professionals interested in employee performance, human capital, human resources and talent management will definitely get new and valuable insights on how to develop their talent management, knowledge and skills.

Day 1

Introduction to talent management

- Talent management fundamentals;
- The talent wheel;
- Competency based recruitment process;
- Employee performance management;
- Rewards and recognition system;
- Succession planning and management;
- Employee engagement and retention;
- **Activity:** Create the talent wheel in your organization.

Competency based recruitment process

- Head hunting for talent;
- Competencies' documentation process;
- Self-assessment and 360° feedback;
- Talent planning based on competencies;
- Talent promotion based on competencies;
- Talent selection based on competencies;
- Talent induction based on competencies;
- **Activity:** Create the competency model basis.

Employee performance management (EPM) system

- Components of the EPM system and defining key terms;
- Key tools in EPM;
- Key performance indicators at individual level;
- The role of competencies and behaviors in EPM;
- **Activity:** Mind-map key tools and concepts in EPM;
- **Activity:** Fill in an individual performance plan.

Talent performance appraisal

- Tools for talent assessment: 9-Box;
- Methods for assessing performance;
- Methods for assessing potential;
- Preparation and roll-out of performance evaluation meetings;
- Individual development plans and the career path;
- **Activity:** Participate in a guided process for ideal career.

Day 2

Succession planning and management

- Matching of staffing needs with individual abilities;
- Succession management roadmap;
- Succession management calendar;
- Leadership development and education;
- Effective transition to new job role;
- Measuring the succession management efforts' impact;
- **Activity:** Identify suitable successors.

Employee engagement measurement

- The reason behind measuring employee engagement;
- Employee engagement surveys;
- Employee engagement reports;
- Selection of an employee engagement supplier;
- Numbers vs. behaviors in employee engagement;
- **Activity:** Select your employee engagement supplier.

Fostering employee engagement

- Potential engagement in organizations;
- Employee engagement at individual vs. team level;
- Development of employee engagement action plans;
- **Activity:** Create an employee engagement action plan.

Talent retention

- Retention in numbers and KPIs;
- Factors that influence talent retention;
- Exit interviews;
- Thank you economy and internal clients' perspective;
- Employer branding.

"The course is useful for companies which start to implement KPIs or look at improving the process to implement KPIs."
Fong San Nee, NCS Pte. Ltd, Singapore

PP-TM Team Management

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Overview

This training course will provide a wide understanding of team management strategies, by revealing the steps that should be followed by leaders and managers who seek to reach performance within their teams.

You will understand how a team functions and how its members can become determined to work together and achieve the same purpose: organizational performance.

Benefits

- Determine the existing fit between the current teams within your organization;
- Avoid conflicts by anticipating them through a rigorous analysis;
- Reinforce your team management by using positive appraisal and by focusing on the existing strong aspects;
- Identify difficult group dynamics and avoid conflicts
- Develop an effective communication based on constructive feedback within the teams.

Attendees

Entrepreneurs, analysts and professionals from any field will understand how to build and manage a team and how to deal with internal conflicts.
Participants who are already using specific strategies and methods will return to their organizations with a more coherent perspective and improved methods of team management.

Day 1 - Introduction to team management

The context of team management

- Team management within the organization;
- Importance of team management;
- Team work encouragement.

The role of team managements

- **Activity:** Identify your team's potential for performance and collaboration;
- Proficient teams within the organization;
- Difference between leadership and team management.

Team management skill set

- Synchronize priorities across the teams;
- **Activity:** Create the profile of a successful team manager;
- Team performance measurement tools.

Team management outcomes

- Team performance and results evaluation;
- Difference between proficient teams and functional teams;
- **Activity:** Identify key outcomes that can only be delivered within a team context.

Day 2 - Implementing team management

Building the team

- Efficient communication;
- Responsibilities within a team;
- **Activity:** Identify the characteristics of a proficient team.

Reaching a proficient team

- **Activity:** Practice various feedback techniques;
- Leadership typologies;
- Resolution of team conflicts.

Maintaining a proficient team

- **Activity:** Determine successful teambuilding activities;
- Motivation factors and activities for teams;
- Changes within the team.

Team management performance review

- Team performance review vs. team management review;
- Review frequency;
- Decision making and need improvements.

"It has been an excellent program. We trust your contributions would add enormous value to our efforts directed towards achieving optimized performance in our business." *Yoosof V., Hidada, Saudi Arabia*

PP-CCM Cross-Cultural Management

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Overview

The training course offers you the opportunity to become familiar with cultural dimensions and their impact on organizational performance. Diversity and cultural variables are key aspects that define and shape an international working environment, thus nurturing innovation and performance.

Structured as a two-day interactive program, the training course focuses on explaining cultural differences and encouraging development and creativity in environments defined by multicultural teams.

Benefits

- Improve productivity by analyzing the cultural variables at organizational level;
- Increase the quality of your working environment by understanding cultural aspects;
- Increase innovation and creativity through a proper diversity management;
- Take better decisions by understanding the culture's influence on the business environment;
- Enhance communication and professional relationships within multicultural teams.

Attendees

Professionals interested in cultural management and performance improvement through optimum cultural practices, as well as entrepreneurs interested in cross-cultural management. Experts in the fields of project management, human resources, sales, marketing, strategy/planning and operations working in multinationals can find in this course new opportunities for improving their cross-cultural management capabilities.

Day 1 - Introduction to cross-cultural management

Course context – cross-cultural management overview

- Definitions and terminology;
- The advantages of cultural management;
- Disadvantages of poor cultural-management;
- International cultural aspects. Traditional vs. secular-rational values and survival vs. self-expression values.
- **Activity:** Identify cultural values.

Cultural dimensions

- Best frameworks applied in business: Hofstede, Trompenaars and Schwartz models;
- Cultural characteristics analysis at global level;
- **Activity:** Analyze various cultural values.

Risk and time as cultural aspects

- Cross-cultural analysis of risk and time preferences;
- Implications of risk and time orientation for cross-cultural managers.
- **Activity:** Make your own risk assessment and time orientation test.

Implications of different types of cultures in business

- Partnerships and rules. Universalist vs. particularistic culture;
- The group and the individual. Individualist vs. collectivist culture;
- Feelings and relationships. Affective vs. neutral culture;
- Degree of involvement. Specific vs. diffuse culture;
- **Activity:** Participate in role play exercise on….

Day 2 - Corporate culture, diversity and negotiation

Corporate culture and typologies

- Corporate culture overview;
- Corporate culture typologies;
- **Activity:** Discuss on various culture typologies case studies.

Cultural dilemmas

- Exemplification of cultural differences;
- Reconciliation of cultural differences;
- **Activity:** Participate in an open discussion on South Africa case study.

Diversity, a key element of performance management

- Elements of diversity;
- Diversity management and strategies;
- Multicultural teams;
- **Activity:** Work in teams to design a diversity poster.

Negotiation and conflict resolution

- The negotiation process;
- The conflict resolution process;
- Workplace culture and communication improvement;
- **Activity:** Develop conflict resolution ideas for a certain situation.

Best practices in cross-cultural management

- Case studies, personal evaluations and advice for business performance;
- The importance of managing cultural differences;
- Guides, networks and resources;
- Examples of best practices worldwide;
- **Activity:** Evaluate yourself for increasing your personal performance.

Review and learning assessment quiz

- Course review;
- Learning assessment quiz.

"Thank you very much for a very productive and informative workshop. Your talent and professionalism were outstanding. Applying the general performance management process to Saudi Airlines specific environment has proven your capabilities to demonstrate the performance subject to any industry."
Nizar M. Ashour, Saudi Airlines, Saudi Arabia

PP-MIEP Managing and Improving Employee Performance

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Overview

This course clarifies key concepts and provides practical tools for establishing or improving your employee performance system. You will gain exposure to best practices in the field of performance management and you will learn how to establish and use performance evaluation criteria.

Benefits

- Increase awareness on the employee performance improvement's relevancy and impact on organizational results.
- Successfully roll out performance management initiatives by understanding the role of performance management at the employee level;
- Improve your employees' activities and overall results by using key employee performance management tools;
- Use key planning documents for managing employee performance;
- Acquire a structured and effective approach in order to improve employee performance.

Attendees

Entrepreneurs, analysts and individuals from all management levels, interested in this topic will acquire the expertise to deal with the aspects that influence employee productivity and will access different methods that could help them improve their employees' overall performance.
Participants will be glad to discover how to implement an employee performance management system and how they could improve the existing architecture.

Day 1 - Performance management foundations

Key aspects of performance management

- Definition of performance management;
- The correlation between performance management and performance measurement;
- **Activity:** Identify solutions for specific challenges in performance management.

Performance management architecture

- Elements of the performance management;
- Glossary and templates catalogue;
- **Activity:** Recognize key terms in performance management.

Performance management at employee level

- Tools and techniques for improving employee performance;
- Factors that influence individual performance;
- **Activity:** Establish the level of performance achieved by employees.

Integrating performance management

- Pitfalls in performance management integration;
- Cultural aspects of performance management;
- **Activity:** Build organizational alignment.

Day 2 - Measuring and improving performance

Methods for measuring individual performance

- Balanced Scorecard and Individual Performance Scorecard;
- **Activity:** Discuss about pros and cons of the 360º Appraisal System;
- Self-assessment and performance appraisals for senior managers and executives.

Performance assessment and appraisal

- Purpose and functions of performance assessment and diagnosis;
- Performance appraisal: process and framework;
- **Activity:** Analyze the impact of performance appraisal.

Performance appraisal meetings

- Appraisal interviews preparation: checklist and guidelines for appraisers;
- Employees' understanding of performance appraisal system and meetings;
- **Activity:** Practice appraisals follow up – feedback, career path, goals setting and improvement initiative portfolio.

Review and learning assessment quiz

- Course review;
- Learning assessment quiz.

"One of the most interesting and useful trainings I have attended in my entire career."
Mona Abdul Jawad, Royal Univerisity for Women, Bahrain

PP-ISMP Implementing Succession Management Programs

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Overview

This course will assist you in implementing or improving succession management programs. It provides practical recommendations, templates and simulations that will help you master the different implementation steps, from assessing performance and potential to measuring the impact of your succession management efforts.

Benefits

- Properly manage talent within your organization by implementing key concepts such as succession management, workforce planning, talent pipeline;
- Retain the best employees you have by successfully assessing performance and potential;
- Make succession management a priority for the stakeholders involved in this process, by addressing their needs in an efficient and timely manner;
- Develop the competencies needed for implementing succession management strategies by participating in simulations and practical exercises;
- Achieve visible progress in implementing or improving a succession management program by practicing the use of relevant templates.

Attendees

Entrepreneurs, analysts and professionals from any field, interested in succession management and nurturing talent in their organizations, will understand the aspects that lead to properly choosing employees to fill in leadership positions. They will also access different methods that could help them implement this process and improve the existing framework within their companies.

Day 1 - Developing lucrative succession management programs

Introduction to succession management

- Succession management essentials;
- Succession management and performance management;
- **Activity:** Identify the common ground between succession and performance management.

Understanding succession management

- Succession management vs. succession planning;
- Succession management vs. workforce planning;
- **Activity:** Structure the talent pipeline process.

Perspectives on succession management

- The perspective of identifying employees' interests and career goals;
- The perspective of identifying and measuring competencies;
- **Activity:** Create a career and development plan.

Succession management as a motivation element

- Development opportunities follow-up;
- Alignment between employees' interests and organizational plans;
- **Activity:** Practice decision making in cases of employee incongruence with organizational needs.

Day 2 -Succession management as the lead for performance

Talent assessment and review

- Tools for talent assessment;
- Methods for assessing performance and potential;
- Designing career paths processes.

Achievements based on succession management

- Leadership skills development;
- Activities following the assignment of leadership positions;
- **Activity:** Discuss the procedure of succession in exceptional cases.

Planning succession management efforts

- The process of matching staffing needs with individual abilities;
- Stakeholders in succession management and their specific roles;
- **Activity:** Establish how to measure the impact of succession management efforts.

"I learnt to assess myself in the right way for the first time."
Ayesha Hussain, Supreme Council of Health, Qatar



Systems Thinking Business Simulations

- Introduction to Systems Thinking: Friday Night at the ER Simulation
- Introduction to Systems Thinking: FishBanks Simulation

In addition to the training courses specialized in KPIs and performance management, The KPI Institute also provides forward-looking experiential learning courses, for an increased performance and improved decision making process. The realistic character of these simulations allow participants to gain valuable knowledge and develop important managerial skills.

ST-FNER Introduction to Systems Thinking: Friday Night at the ER Simulation

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Overview

Friday Night at the ER is a simulation-based team learning board game It is followed by an interactive debriefing discussion, which can be adapted to address specific learning needs. The challenge is to make the entire system work through the ups and downs of a frenetic Friday night in the Emergency Room, where individuals' actions can have a major impact on the quality and financial outcomes of their departments.
The hospital situation is universal and the learning points you obtain during the board game can be applied across different industries and cultures.

Benefits

- Realize the effect of your decisions on your colleagues' activity and their impact on the entire system;
- Obtain a high level collaboration and improve teamwork across functional areas and other contexts;
- Make better decisions by using sound data and facts;
- Improve your team's performance by getting valuable insights on process reengineering and cross-functional teams management;
- Enhance team effectiveness by observing the dynamics of team behavior and by acknowledging that various stakeholders represent diverse interests.

Attendees

This course is designed for professionals, interested in enhancing their decision making processes, as well as executives, operational managers and analysts from various departments that work and interact on a daily basis with various teams, capabilities and stakeholders.

Day 1 - Friday Night at the ER

Introducing the concept of Friday Night at the ER

- Concept and purpose of the FNER simulation;
- Presentation of the business simulation's basic rules;
- Teams allocation and simulation arrangements.

Performing the simulation Friday Night at the ER

- Outline of the simulation structure;
- Operational workflows;
- **Activity:** Actively participate in the simulation;
- End of the simulation and announcement of scores obtained.

Applying the knowledge acquired during the simulation to the organizational environment

- **Activity:** Discuss on the experience offered by the simulation;
- Concepts of Systems Thinking and Performance Management;
- **Activity:** Analyze the scoring in correlation with the strategies applied during the simulation.

Applying the knowledge within the organization context

- Ways of applying key learning points in the organizational environment;
- Workshop overview and conclusions.

Day 2 - Systems thinking

The concept of a system

- Hard systems;
- Soft systems;
- Evolutionary systems.

The key concepts of systems thinking

- Interdependence;
- Holism;
- Goal seeking;
- Hierarchy;
- Differentiation.

The levels of system thinking maturity

- System Thinking guidelines;
- System Thinking survey;
- Decisions based on a System Thinking.

"We would like to place on record our deep appreciation of excellent efforts put by Mr. Aurel Brudan in making his instructional delivery highly effective with quizzes and case studies." *Yoosof V., Hidada, Saudi Arabia*

ST-FB Introduction to Systems Thinking: FishBanks Simulation

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Overview

FishBanks is a business simulation, which has its roots in system dynamics, a pattern analysis technique used in complex and fast-changing systems. As part of the simulation, participants will impersonate the employees of a fishing company and will collaborate with coworkers to maximize the organization's assets.
The game will teach you valuable lessons on renewable resource management. The simulations' learning points can be applied to a variety of contexts such as business strategy, economy, decision making, sustainability, resource management, organizational development, teamwork, negotiations and competitive intelligence.

Benefits

- Understand the risks of focusing on delayed performance indicators and ignoring key information about the problem at hand;
- Develop your team members' communication skills and their ability to proactively engage in the team's projects;
- Solve the problems encountered in a timely manner by implementing marginal improvements at the right moment;
- Improve your ability to make data-based decisions in fast changing contexts;
- Plan your resources in an effective manner by formulating comprehensive strategies to follow.

Attendees

The course offers valuable information to professionals interested in economics, strategy, negotiations, sustainability and resource economics.
Executives, operational managers and analysts from different industries and functional areas interested in strategy building, data-based decisions and systems thinking.

Day 1

Introduction to FishBanks

- Concept and purpose of the simulation;
- Allocation of team roles;
- Communication of success criteria;
- Financial information provision;
- Presentation of the initial conditions;
- Distribution of materials;
- Simulation steps and instructions.

Performing the FishBanks simulation

- **Activity:** Discuss boat acquisition and allocation strategies within each team;
- **Activity:** Bid for auctioned ships;
- **Activity:** Buy or sell ships in trading session;
- **Activity:** Place orders for new ship construction;
- **Activity:** Make calculations and fleet allocation;
- **Activity:**Complete the simulation and calculate the scores obtained.

Applying the knowledge acquired during the simulation to the organizational environment

- **Activity:** Discuss the experiences offered by the simulation both within teams and with the whole group;
- Strategy, resource management and decision making implications;
- The concept of system dynamics as an analysis technique;
- **Activity:** Discuss the scoring and the strategies applied during the simulation;
- Ways of applying the workshop's key learning points to the organizational environment;
- Overview on the workshop and conclusions.

Day 2 - Systems thinking

The concept of a system

- Hard systems;
- Soft systems;
- Evolutionary systems.

The key concepts of systems thinking

- Interdependence;
- Holism;
- Goal seeking;
- Hierarchy;
- Differentiation.

The levels of system thinking maturity

- System Thinking guidelines;
- System Thinking survey;
- System Thinking in decision making.

"Course facilitator not only gave us a knowledge base, but he also provided a framework in which to use it, as well as hands-on practice. He offered all of this while providing a truly engaging, interactive learning environment." *Meshal Meshal Almotairi, Saudi Food & Drug Authority, Saudi Arabia*



Procurement and Logistics

- Strategic Approach to Procurement and Logistics Processes

The course "Strategic Approach to Procurement and Logistics Processes" presents best practices and an overview of the key performance management concepts and tools adapted to the specific needs of the Procurement and Logistics department. It develops skills for procurement implementation, logistics based strategies and effective management of the supply chain functions.

PL-SA Strategic Approach to Procurement and Logistics Processes

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Overview

This training course aims at helping you improve your skills in implementing procurement and logistics based strategies, supporting you in order to develop a strategic approach to performance in procurement and logistics activities and to expand your toolkit of practical procurement tools and techniques.
It also provides you with an overview of the key performance management concepts and tools adapted to the specific needs of the Procurement and Logistics department. The main topics focus on defining and implementing a strategic plan, as well as assessing the different types and models of supply chains.

Benefits

- Attain a higher performance by understanding the performance management system in the Procurement and Logistics department;
- Ensure the compliance of your procurement and logistics activity with high international standards;
- Establish better supplier's relationships by implementing a better process of selection and contracting;
- Enhance the quality of your warehousing and distribution processes by reviewing and implementing relevant best practices;
- Expand your business network by gaining access to a world-wide community of procurement and logistics professionals.

Attendees

This course is designed for professionals in the procurement and logistics department, in improving the performance of their activities and bringing strategic and sustainable value to their organizations.

Day 1

Procurement and logistics at strategic level - definition, role and functions

- Expectations regarding the problems met in practice;
- The role of purchasing or positioning activities;
- Types and functions of procurement and logistics activities;
- Proactivity in purchasing and inter-departmental purchases;
- **Activity:** Clarify the objective of purchases - needs, service and assets.

The organization and structure of the procurement and logistics department

- The activity of the Procurement and Logistics department;
- Centralized and decentralized activities;
- Position within the organization and relations with other departments;
- National and international cooperation – inter-departmental purchases;
- **Activity:** Analyze your own Procurement and Logistics department – structure and organization method.

Strategic development of procurement and logistics

- Introduction to systematic thinking;
- Procurement and logistics activity development;
- Implementation of the strategic plan;
- Strategy monitoring and evaluation;
- **Activity:** Discuss best practices in Procurement and Logistics.

The strategy of procurement and logistics departments

- **Activity:** Create the strategy of your own department;
- Strategy creation process;
- Implementation method;
- The use of operational templates;
- **Activity:** Present the strategic plans.

Day 2

Selecting and contracting suppliers

- Selection criteria for suppliers;
- Standardization of the supplier selection process;
- Key terms in agreements and contracts: price versus cost, obligations and penalties;
- Quality insurance system and suppliers' audit.

Suppliers' relationship management - work tools

- Suppliers performance evaluation;
- The characteristics of an "excellent supplier";
- Relational models: COX and BENSAO;
- The relational models in practice;
- Purpose, methods and persons involved in negotiation;
- **Activity:** Formulate a scorecard for monitoring suppliers' performance.

Procurement and distribution chains logistics

- Types and models of Procurement chains;
- Procurement chains' efficiency;
- Distribution management and logistic optimization;
- Evaluation and monitoring of logistic activities using KPIs;
- **Activity:** Define a set of KPIs for Procurement and Logistics.

Applying the knowledge accumulated during the course

- 10 tips for improving the department's performance;
- Key success factors in optimizing activities;
- Essential templates in practice;
- Re-evaluation of course materials and conclusions;
- Transfer of accumulated knowledge within organizations.

"This is one of the best courses I have taken. Very well structured, informative and managed by a very skilled trainer."
Nahed Y. Alobaid, Gulf University for Science & Technology, Kuwait





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