The KPI Institute

Celebrating 12 Years of PERFORMANCE

Certified Balanced Scorecard Management System Professional Course

Targets in Practice Catalogue









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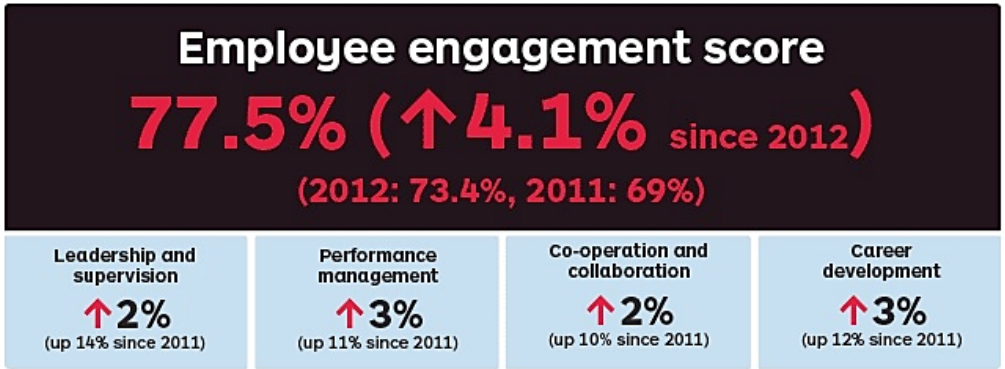
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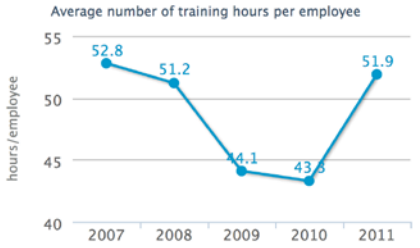
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Training hours



In 2011, the average training hours per employee reached 51.94 hours, about the same level as in 2007 and 2008. During the years 2009 and 2010 the training activity was lower, reflecting the lower activity levels at Umicore. A main driver for the level of training is the number of newly hired employees and the start of greenfield operations. The 6% increase of the workforce of fully consolidated companies and the start-up of new plants in Asia Pacific were the key factors in the increased level of training.

Data shows that managers receive a higher number of training hours (61.84 hours) compared to other employees (48.55 hours). An action plan is being put in place to build a global Learning Management System which will be open for all employees.

The higher training intensity for men (53.20 hours) compared to women (47.37 hours) can be linked to the observation that men have a higher representation in the new hires and in today's management population.

% Active projects on time and on budget

Melbourne Water

Performance Indicator	2011–2012		2012–13			
Financial Sustainability	Target	Result	Target	Result	Target Met	Notes
Efficient and effective delivery of the capital program;						
On time	80.0%	55.9%	80.0%	54.5%	N	[2]
On budget	95.0%	82.4%	95.0%	88.8%	N	[3]

[2] The target was not achieved due to optimistic forecasting of project duration. For Water Plan 3, Capital Delivery is investigating how it can prepare risk-adjusted schedules that recognise the inherent time risks of the project. The Water Plan 3 capital delivery strategy also includes back-to-back contractor KPIs to improve on-time delivery accountability.

[3] The target was not achieved due to a small number of projects realising greater risk costs than budgeted. The next capital delivery strategy includes back-to-back contractor KPIs to improve on-budget delivery accountability.

Source: http://www.melbournewater.com.au/aboutus/reportsandpublications/Annual-Report/Documents/Annual%20Report%202013%20Part%2011%20Performance%20reporting.pdf

Shell

Project delivery

2012 **90%** 2011 **79%**

Project delivery reflects Shell's capability to complete major projects on time and within budget on the basis of targets set in the annual Business Plan. The set of projects consists of at least 20 Shell-operated capital projects that are in the execution phase (post final investment decision).

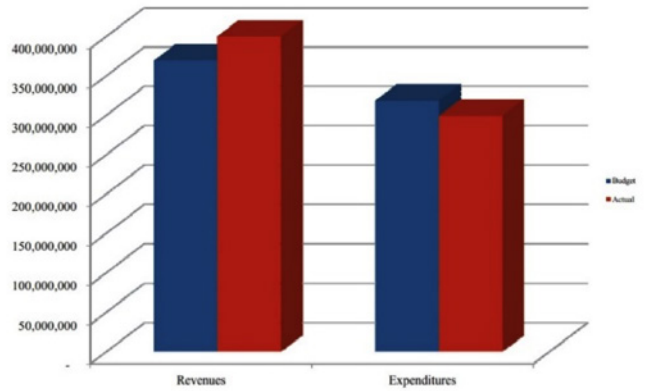
Source: http://reports.shell.com/annual-report/2012/servicepages/downloads/files/entire_shell_ar12.pdf

% Budget variance

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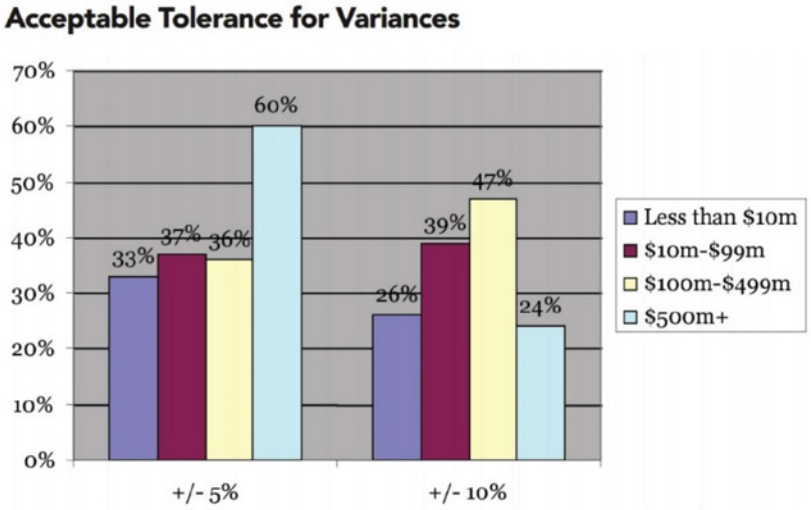
City of Atlanta

Category	Budget Jan-12	Actual Jan-12	Variance $	Variance %
Revenues	368,748,266	399,407,510	30,659,244	8%
Expenditures	318,064,198	298,850,462	(19,213,736)	-6%
Surplus (deficit) of revenues over expenditures	**50,684,068**	**100,557,048**	**49,872,980**	**N/A**



Source: http://www.atlantaga.gov/modules/showdocument.aspx?documentid=4863

Centage / IOMA budgeting survey: Benchmarks & Issues



Source: http://www.accountingweb.com/sites/default/files/centage_ioma.pdf

% Customer satisfaction

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Generic

Specidic

ENECO



KPI 2: Customer satisfaction Stedin. Target met.

Customers first

	Focus on and attention to the needs of our customers (short term and long term), through which we create sustainable value for all stakeholders	Realisation 2011	Target 2012 [6]	Realisation 2012 [6]	Target 2013
1	Eneco retail customers [€ * million]	2.2	≥ 2.2	2.2	≥ 2.2
2	Customer satisfaction Stedin (score > 7) [1, 2] [%]	73	≥ 75	76	≥ 75
3	Net Promoter Score Eneco [%]	-18	≥ -17	-14	≥ -13

Customer satisfaction with service provided by Stedin improved in 2012

Over the past years, Stedin also worked hard to achieve a higher level of customer satisfaction. Stedin measures customer satisfaction as the percentage of customers that award the service provided a score of 7 or higher. Since mid-2012, a different method of measurement is being applied that reflects the activities of Stedin more accurately. This has led to a change in the build up to a general customer satisfaction rating. According to the new system, the year-end score 2012 was 76% (2011: 73% according to the new system, originally 69%).

Source: http://annualreport2012.eneco.com/progress/strategic-kpis

Chunghwa Telecom

Key Performance Indicators for Customer Service Hotlines

	2009	2010	2011	
	Actual Value	Actual Value	Target Value	Actual Value
Rate of Response within 20 Seconds	82.61%	82.9%	81.5%	77.9%
Customer Satisfactio	4.74	4.59	4.37	4.57
First Call Resolution Rate	86.17%	79.6%	74.45%	79%

Customer Satisfaction Survey

	2009	2010	2011
Large Enterprises	4.67	4.77	9.45
Small and Medium Enterprises	4.34	4.36	8.68
Customer	3.73	3.81	7.17

Source: http://www.cht.com.tw/en/csr/rpt_down/upload/files/2011_Corporate_Social_Responsibility_Report_All.pdf

% Employee engagement index

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The Health and Safety Executive

Your engagement index

55%	Difference from previous survey	Difference from CS2011	Difference from CS High Performers
	-2 ✧	0	-7 ✧

See the appendix for further details

The three elements of engagement and their component questions are:			
Say: speaks positively of the organisation...	**% Positive**	Difference from previous survey	Difference from CS2011
B50. I am proud when I tell others I am part of HSE	**50%**	-3 ✧	-3 ✧
B51. I would recommend HSE as a great place to work	**43%**	-9 ✧	0
Stay: emotionally attached and committed to the organisation...			
B52. I feel a strong personal attachment to HSE	**47%**	-3 ✧	+2 ✧
Strive: motivated to do the best for the organisation...			
B53. HSE inspires me to do the best in my job	**36%**	-4 ✧	-2 ✧
B54. HSE motivates me to help it achieve its objectives	**32%**	-5 ✧	-4 ✧

✧ = *Statistically significant difference from comparison*
The results for the engagement questions are shown in detail on page 8

Drivers of engagement

Employee engagement is shaped by experiences at work, as measured by nine themes in the survey. The table below shows how you performed on each of these themes, ranked by the strength of association with engagement. The themes which have the strongest association with engagement should be the focus for action. See the appendix for further details.

	Strength of association with engagement	Theme score % positive	Difference from previous survey	Difference from CS2011	Difference from CS High Performers
Leadership and managing change		**33%**	-2 ✧	-5 ✧	-14 ✧
My work		**75%**	-2 ✧	+4 ✧	-1 ✧
My line manager		**67%**	0	+2 ✧	-1
Organisational objectives and purpose		**76%**	-5 ✧	-5 ✧	-11 ✧
Learning and development		**43%**	-3 ✧	+1	-7 ✧
Resources and workload		**71%**	-1	-2 ✧	-5 ✧
Pay and benefits		**36%**	-7 ✧	+4 ✧	-3 ✧
My team		**76%**	-1	-1	-4 ✧
Inclusion and fair treatment		**76%**	-1	+3 ✧	-2 ✧

✧ = *Statistically significant difference from comparison*

Source: http://www.hse.gov.uk/aboutus/reports/hse-people-survey-2011.pdf

Australia Post

Engaging our employees in the business

In May 2013 we invited employees to take part in our say2action pulse survey to measure engagement levels. This survey was a shortened version of our biennial employee engagement survey and was distributed to a representative random sample of employees. We conducted the pulse survey online and in the four primary languages spoken by our people – English, Vietnamese, Cantonese and Tagalog – making it accessible to our diverse workforce.

The results showed that overall our employees are more engaged than last year, increasing from 73.4 per cent to 77.5 per cent. Across the business we also saw an improvement against each of our four focus areas: leadership and supervision, performance management, co-operation and collaboration and career development.

The say2action survey helps us identify areas for improvement such as reward and recognition, workplace learning and leadership development.

Employee engagement score

77.5% (↑4.1% since 2012)

(2012: 73.4%, 2011: 69%)

Leadership and supervision	Performance management	Co-operation and collaboration	Career development
↑2% (up 14% since 2011)	↑3% (up 11% since 2011)	↑2% (up 10% since 2011)	↑3% (up 12% since 2011)

Building our people's capability

As we progress our change agenda, it's important that we support and equip our workforce with the right skills to take our business into the future. This year we continued to offer our award employees a range of programs to build their capabilities through the Future Skills initiative.

A priority area in 2012–13 was our Sales and Service programs, which are targeted at improving the customer engagement skills of our retail and customer contact employees. Through our Sales Academy, 71 of our sales people gained a nationally recognised Certificate IV in Business Sales from Swinburne University of Technology in Melbourne.

We also introduced a range of initiatives to improve our frontline employees' English language skills and computer literacy. This involved establishing computer learning kiosks in some facilities to help with computer literacy and providing computer basics training courses for our people, at work and at home.

This year we built leadership capability through three tailored programs:

1. **Supervisor Development** – provided core leadership skills training for over 200 operational supervisors.
2. **Leadership Essentials** – equipped over 200 leaders with the tools to build effective teams, coach and lead through change.
3. **Peak Leadership and Operations** – a culture change program to help over 150 of our most senior business and operational leaders take collective accountability for driving the Future Ready strategy.

Source: http://auspost.com.au/annualreport2013/people.html

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Generic

Specific

% Employee turnover

Turnover Rates for Fortune Magazine's 100 Best Companies

These two charts represent the turnover for the "Best 100 Companies To Work For" according to Fortune Magazine issued January 8, 2001. The first chart shows the average turnover across the same geographic regions. Note: three companies from this list did not provide turnover rates, so their information is not included. The numbers in parentheses are the number of companies in that category.

Region	Annual Turnover Rate By Geographic Region
Northeast	18% (16)
Mid-Atlantic	12% (9)
Southeast	13% (14)
Great Lakes	12% (11)
Pacific	13% (28)
Mountain	11% (3)
Central	15% (5)
Southwest	15% (10)
Alaska/Hawaii	
Canada	22% (1)
Other	

This chart represents the average turnover for all companies across the same industries.

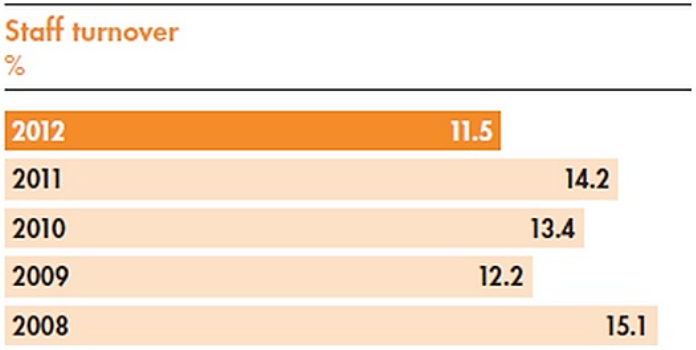
Industry	Annual Turnover Rate By Industry
Automotive	11% (2)
Business Svcs	23% (12)
Education	
Financial/Ins/RE	12% (19)
Government	
Health Services	9% (10)
Hi Tech/Telecom	10% (22)
Manufact/Constr	13% (7)
Publishing	16% (3)
Retail	22% (14)
Travel/Hotel	9% (6)
Util/Petro/Mines	5% (2)
Other	

Source: http://www.nobscot.com/survey/surveyresults.cfm?id=2

Aggreko Group

STAFF TURNOVER

In a service business such as Aggreko, it is the attitude, skill and motivation of our staff which makes the difference between mediocre and excellent performance. Staff retention therefore is a reasonable proxy for how employees feel about our Company. We monitor staff turnover which is measured as the number of employees who left the Group (other than through redundancy) during the period as a proportion of the total average employees during the period. Staff turnover has decreased this year and is at its lowest over the past five years, analysed as follows:



As well as measuring staff turnover, the Group carries out a regular global opinion survey, conducted by an independent third party, in which every employee is invited to say what they think about Aggreko. The results from the last global opinion survey conducted in 2011 put Aggreko in the top quartile of employee satisfaction when compared with peer-group companies. Despite over 1,000 new people coming into the business, the feedback from 3,600 responses received was overwhelmingly positive and an improvement in most areas on the previous survey. Aggreko continues to have a strong culture with highly committed people, demonstrated by:

- 91% of the respondents said they enjoyed their work;
- 90% were proud to work for Aggreko; and
- 84% found Aggreko an exciting place to work.

Source: http://ar2012-aggreko.html.investis.com/key-performance-indicators.html

% Net promoter score

Wolseley



http://www.wolseley.com/files/pdf/reports/annualreport/WOS-AR-2013.pdf

2011 Net Promoter Industry Reports for the US and the UK

NPS Leaders – US 2011		NPS Leaders – UK 2011	
Company	**NPS**	**Company**	**NPS**
USAA – Banking	87%	Apple – Computer Hardware	67%
Trader Joe's – Grocery	82%	First Direct – Banking	61%
Wegmans – Grocery	78%	LG – Television	39%
Costco – Dept Store and Wholesale	77%	Samsung – Television	35%
Apple – Computer Hardware	72%	Sony – Computer Hardware	30%

Source: Satmetrix

Source: http://my.safaribooksonline.com/book/management/9780273750116/19-net-promoter-score-nps/chapter-019-h3004

Recordable case frequency

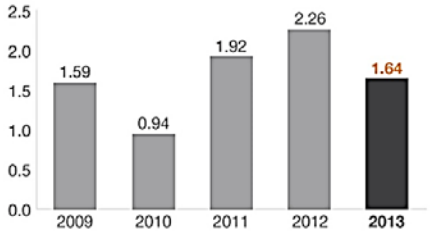
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BG Group

Excluding Australia, the Group TRCF of 0.83 compared favourably with our internal target of 1.00 and with the current International Association of Oil and Gas Producers (OGP) top quartile benchmark of 1.03[3].

[3] OGP Safety Performance Indicators report, May 2013.

Total recordable case frequency 2009-2013[a]



[a] Per million work hours. Includes employees and contractors working in operated assets. Data for the year ended 31 December 2013.

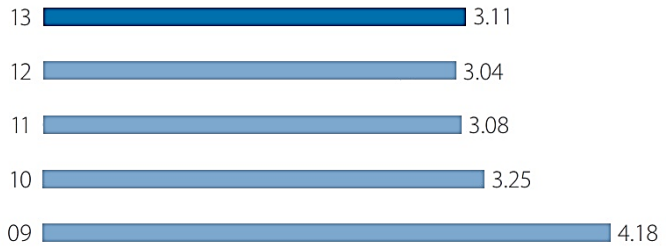
Sadly, there was one fatality in Tanzania in December. A maintenance supervisor, Emmanuel Juma, who was working for a local contractor, died of his injuries following a road traffic incident.

Source: http://www.bg-group.com/index.asp?pageid=452

BBA Aviation

Recordable Incident Rate (RIR): Each of our facilities uses RIR as its primary health and safety performance metric. RIR measures the number of full-time employees out of every 100 that sustain a recordable injury or illness.

2013 Performance: The Group-wide RIR has continued to fall over a six year period but plateaued in 2013 at 3.11.



Source: http://www.bbaaviation.com/media/490518/bba_annual_report_2013.pdf

Training hours per employee

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Generic

Specidic

Panama Canal Authority

Average hours of annual training per employee per job category

Average hours of annual training per employee per job category	2008	2009	2010
Administrative Support	32	42	31
Manual Support	20	20	19
Executive	94	45	15
Managerial	64	77	51
Professional	52	61	57
Supervisory	66	96	75
Technical	30	34	42
All	35	37	38

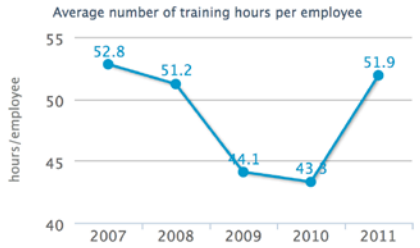
Project Administration Training Program

This program included basic training on Project Administration, Advanced Work Breakdown Structure, an Update Seminar on Changes to the PMBOOK, and Preparation for the Certification as PMP™ (Project Management Professional). The program was offered to 136 employees and 28 of them were certified as Project Administrators by the recognized PMI™ (Project Management Institute).

Source: http://www.pancanal.com/eng/general/reporte-anual/2010/pdf/LIBROing.pdf

Umicore

Training hours

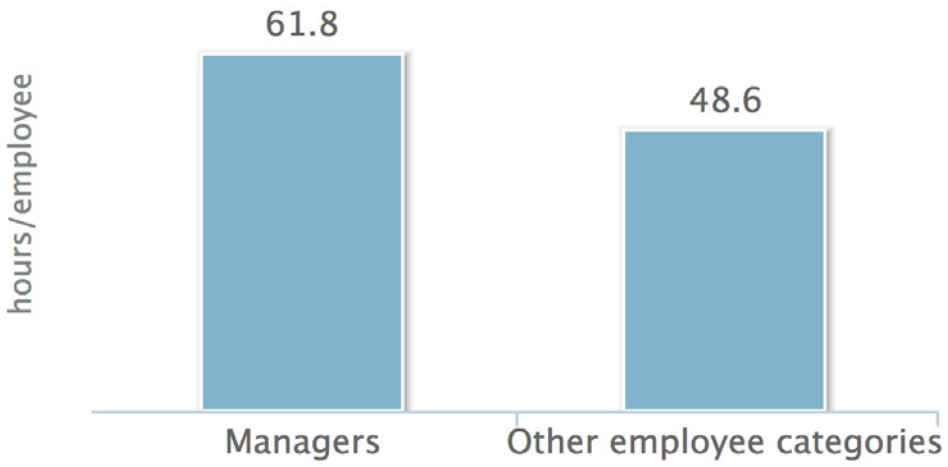


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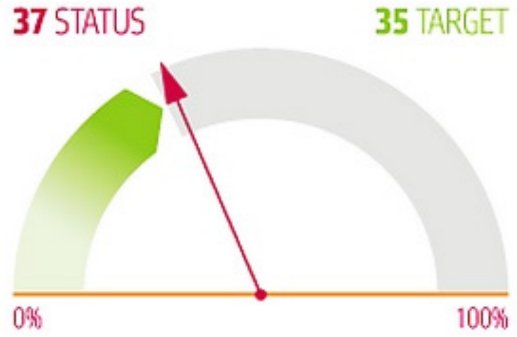
Average number of training hours per employee category



Source: http://www.umicore.com/reporting2011/social/notesSocialKeyFigures/S3.htm

CO_2 emissions

ENECO



KPI 10: CO2 emissions reduction per employee compared with 2007. Target met.

CO_2 emissions per employee - Eneco Group

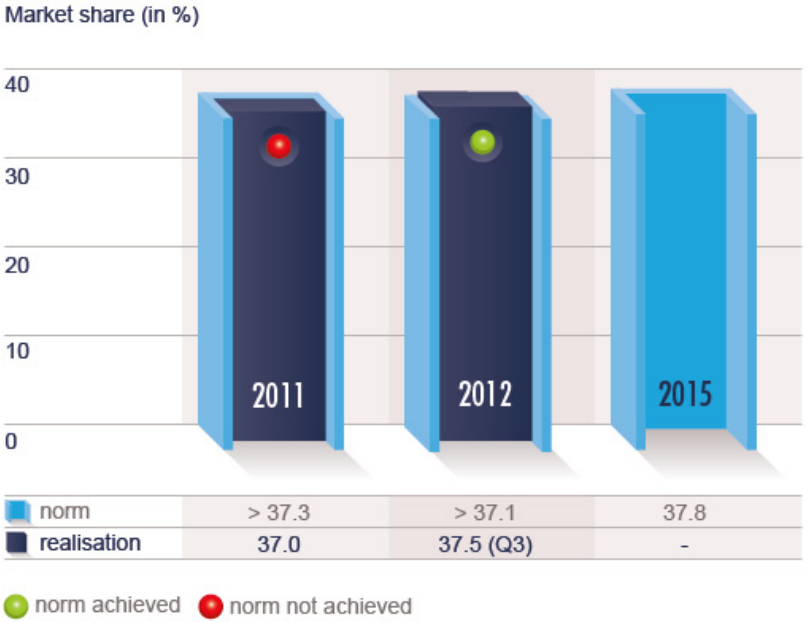
[tons CO_2/employee]	2007[1]	2012[1]
Mobility	2,8	2,7
Housing	1,8	0,3
Paper	0,1	0,0
CO_2 emissions/ employee	4,6	2,9

Source: http://annualreport2012.eneco.com/progress/strategic-kpis

Recordable case frequency

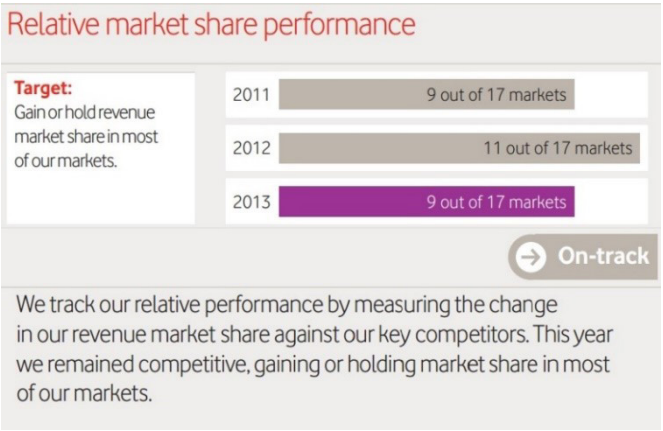
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Port of Rotterdam



Source:http://annualreport.portofrotterdam.com/en/key-figures/customer/kpi-s/1905?id=g219

Vodafone



Source: http://www.vodafone.com/content/annualreport/annual_report13/downloads/vodafone_annual_report_2013.pdf

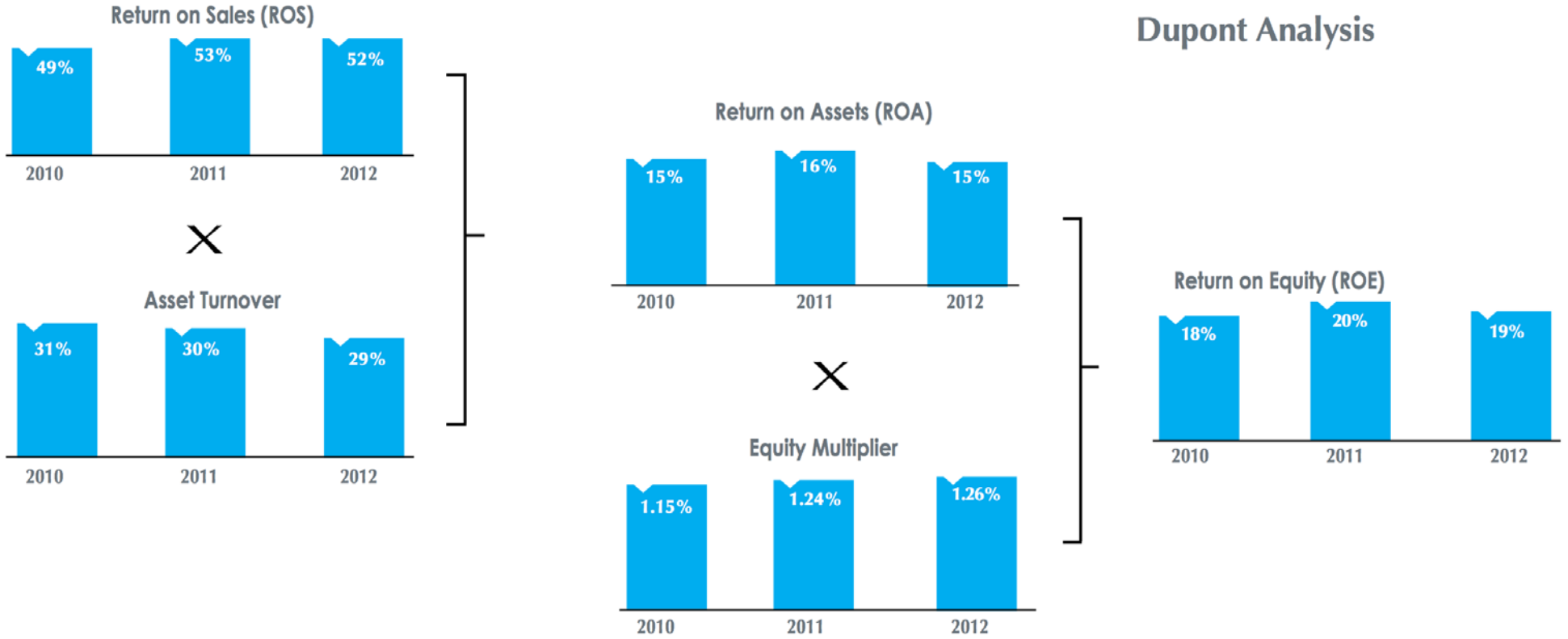
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Financial ratios

Generic

Specidic

Panama Canal Authority



Financial Indicators

The Panama Canal´s financial performance indicators remain at robust levels. In fiscal year 2012, 0.52 cents of net profit were generated for each balboa of income. This profit margin confirms the Canal´s wealth generating capacity, even while under weak upturn of world trade and the substantial capital investment being made.

A 28.6 percent turnover of assets demonstrates a 2 percentage points reduction in comparison with fiscal year 2011, mainly for the 29.3 percent increase of the fixed assets resulting from the construction works related to the Expansion Program.

The return on total assets had a 1 percentage point reduction in 2012, in line with a decrement in the asset turnover. This result was expected during the execution period of the Expansion Program once the Third Set of Locks is working, once the project is completed.

The equity multiplier or assets leverage demonstrates the Canal's capacity of financing investments mainly with its own resources. For fiscal year 2012, you can observe a 1 percentage point increase when compared with the previous year, as a result of the long term B/.100 million disbursement for the financing of the Expansion Program.
A return on equity of 18.7 percent demonstrates the efficient administration of ACP's capital investment, validating its capacity of generating income and value in a sustainable manner.

Source: http://www.pancanal.com/eng/general/reporte-anual/2012/pdf/ingles.pdf

Financial ratios

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Sakstel

Measure	2012 Target	2012 Actual	Results
Broadband Subscriber Growth	101,953	88,831	○
Fibre to the Premises *(Homes passed)*	40,000	41,705	●
Environmental Stewardship *(Greenhouse gas emission reduction)*	Direct greenhouse gas emissions <= 2011	7% below 2011	●

Measure	2012 Target	2012 Actual	Results
Revenue Growth *(Gross Revenues)*	$1,173.4M	$1,182.4M	●
Net Income	$91.1M	$129.6M	●
Efficiency Measure *(EBITDA Margin)*	24.8%	26.9%	●
ROE	11.9%	16.8%	●
Capital Intensity	33.9%	26.5%	●
Debt Ratio	47.9%	42.0%	●

Measure	2012 Target	2012 Actual	Results
Broadband Subscriber Growth	101,953	88,831	○
Fibre to the Premises *(Homes passed)*	40,000	41,705	●
Environmental Stewardship *(Greenhouse gas emission reduction)*	Direct greenhouse gas emissions <= 2011	7% below 2011	●

Source: http://www.sasktel.com/wps/wcm/connect/9089948c-d0eb-4b9e-a281-585bbf1b76c4/12-annual-report.pdf?MOD=AJPERES





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