KPI Measurement and Reporting: Driving Business Success

2027 □□□□□ 18 – 14
Edinburgh (UK)



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Ref: 20222674_238774 Duration: Edinburgh (UK) Fees: 5200 GBP

Why This Course

Key Performance Indicators are essential for understanding whether an organization is moving in the right direction. They help leaders and teams measure progress, identify performance gaps, make informed decisions, and focus attention on what matters most.

When KPIs are well designed, they connect strategy with action. They clarify expectations, strengthen accountability, and support continuous improvement. When they are poorly selected or weakly reported, they can create confusion, overload teams with unnecessary data, and lead to decisions based on incomplete or misleading information.

This comprehensive 1-week course equips participants with the knowledge and practical skills needed to develop, measure, analyze, and report on KPIs effectively. Through practical exercises, KPI design workshops, dashboard development, data collection planning, and performance improvement activities, participants will learn how to build KPI systems that support decision-making and business success.

What You'll Learn and Practice

By joining this program, you will:

- Understand the importance of KPIs in organizational performance management.
- Align KPIs with business objectives, strategy, and operational priorities.
- Differentiate between financial, operational, strategic, leading, and lagging KPIs.
- Apply KPI frameworks such as the Balanced Scorecard and OKRs.
- Develop relevant and measurable KPIs using SMART criteria.
- Prioritize KPIs and avoid measurement overload.
- Create KPI hierarchies and cascade KPIs across organizational levels.
- Establish baselines, targets, thresholds, and reporting frequencies.
- Select suitable data collection methods and tools.
- Ensure KPI data quality, consistency, and integrity.
- Design KPI dashboards, scorecards, and reports for different stakeholders.
- Use data visualization and storytelling to communicate performance clearly.
- Analyze KPI results, identify trends, and support continuous improvement.
- Build a KPI-driven culture focused on performance, learning, and accountability.



The Program Flow

Day 1: Introduction to KPIs and Performance Management

- Understanding KPIs and their role in business success.
- How KPIs support performance management and decision-making.
- Aligning KPIs with organizational strategy and objectives.
- Types of KPIs: financial, operational, strategic, leading, and lagging indicators.
- KPI frameworks and methodologies, including Balanced Scorecard and OKRs.
- Linking objectives, measures, targets, and initiatives.
- Practical exercise: Mapping business objectives to potential KPIs.

Day 2: Developing Effective KPIs

- Characteristics of good KPIs using SMART criteria.
- KPI selection process and prioritization.
- Identifying critical success factors.
- Creating KPI hierarchies and cascading KPIs across departments, teams, and roles.
- Avoiding common pitfalls in KPI development.
- Defining KPI owners, formulas, data sources, and measurement rules.
- Workshop: Developing a set of relevant KPIs aligned with organizational goals.

Day 3: KPI Measurement and Data Collection

- Establishing KPI baselines and targets.
- Setting thresholds, tolerances, and performance ranges.
- Data collection methods and tools.
- Assigning data ownership and reporting responsibilities.
- Ensuring data quality, integrity, consistency, and reliability.
- Frequency of measurement and reporting.
- Practical exercise: Building a KPI data collection and reporting process for key metrics.

Day 4: KPI Reporting and Visualization

- Designing effective KPI dashboards and scorecards.
- Selecting the right chart types and visual formats.
- Data visualization techniques for KPI reporting.
- Storytelling with KPI data to support decision-making.
- Tailoring reports for different audiences, including executives, managers, teams, and operational users.
- Communicating performance results clearly and actionably.
- Workshop: Creating an impactful KPI dashboard for a department or team.



Day 5: KPI Analysis and Continuous Improvement

- Interpreting KPI results and identifying trends.
- Understanding variance, patterns, root causes, and performance signals.
- Using KPIs for performance improvement and decision-making.
- Reviewing and refining KPIs over time.
- Connecting KPI insights with improvement actions.
- Implementing a KPI-driven culture in your organization.
- Final activity: Presenting a KPI-driven performance improvement plan to leadership.

Individual Impact

- Strengthen your ability to design relevant and practical KPIs.
- Improve confidence in measuring, analyzing, and reporting performance.
- Build skills in dashboard design, visualization, and performance storytelling.
- Gain tools for improving data quality and reporting consistency.
- Enhance your ability to connect KPI results with improvement actions.
- Develop a structured approach to KPI management across business functions.

Work Impact

- Improve alignment between strategy, objectives, performance measures, and actions.
- Strengthen accountability through clearer KPI ownership and reporting.
- Improve decision-making through reliable and well-presented performance data.
- Reduce KPI overload by focusing on meaningful indicators.
- Support continuous improvement through better analysis of performance trends.
- Build a stronger performance culture based on evidence, transparency, and action.

Training Methodology

This program uses a practical and application-focused approach to help participants develop KPI systems that are useful, measurable, and aligned with business needs. Learning methods include:

- Interactive discussions and guided facilitation.
- KPI and performance management case studies.
- Objective alignment and KPI selection exercises.
- SMART KPI and cascading workshops.
- Data collection and quality planning activities.
- Dashboard and scorecard design practice.
- KPI analysis and performance improvement exercises.
- Peer feedback, facilitator coaching, and practical action planning.



Beyond the Course

Upon completion, participants will be prepared to develop, measure, report, and improve KPIs with greater confidence and structure. They will return ready to:

- Develop relevant KPIs aligned with organizational goals.
- Create impactful KPI dashboards for departments or teams.
- Implement data collection and reporting processes for key metrics.
- Analyze KPI results and identify performance improvement opportunities.
- Present KPI-driven improvement plans to leadership.
- Support a culture of performance, accountability, and continuous improvement.

