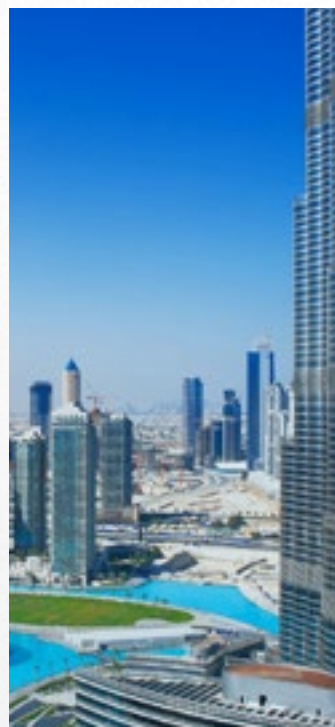


# STRATEGY AND PERFORMANCE EXCELLENCE CONFERENCE

20-22 March 2018 · DUBAI

We empower you to achieve performance excellence!



INTERNATIONAL AND REGIONAL THOUGHT LEADERS SHARING  
BEST PRACTICES AT THE CONFERENCE



**AUREL BRUDAN**  
Chief Executive Officer,  
The KPI Institute,  
Australia



**HEMANG DAVE**  
Chief Innovation Officer,  
Global Technology Services,  
IBM, USA



**DR. ENG. ALI  
MOHAMED AL  
KHOURI**  
General Director,  
Emirates Identity Authority,  
UAE



**STEVE THOMPSON**  
Senior Performance  
Excellence Leader,  
Mallinckrodt  
Pharmaceuticals,  
UK



# OVERVIEW

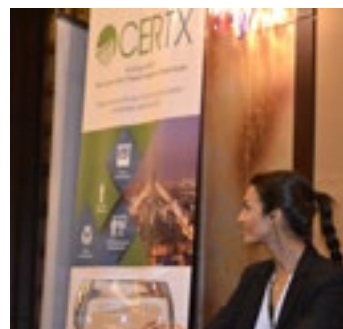


The **Strategy and Performance Excellence Conference** represents an insightful three-day event designed for leaders and strategy professionals interested in developing an optimal organizational strategy and directing the necessary steps of achieving excellence in today's challenging, uncertain business environment. This is the **2<sup>nd</sup> conference in the region**, ranging from a series of international events organised.

On the first two days, industry leaders will present case studies, tools and best practices on critical aspects related to how organizations can improve their systems, people and results. The KPI Institute is going to dedicate the last day of the conference to a series of workshops on strategy planning techniques, business simulations, advanced strategy execution techniques.

Our aim is to engage participants in hands-on exercises and expository case studies designed to offer a more comprehensive learning experience and allow participants to fully grasp the theoretical aspects of strategy translation, monitoring & controlling. The conference focuses on approaching strategy in a multilateral perspective, starting with the insights, solutions and best practices of developing and implementing strategies, extending to the most advanced techniques of formulation and execution and empowering professionals to choose a long-term direction.

**Come onboard to find the answers you need to build high performance organisations!**



# KEY BENEFITS



- DRIVE** long-term business strategy across every organizational department;
- UNDERSTAND** strategy planning and execution;
- BUILD** the right strategic plan and learn how to monitor and manage risk;
- ADAPT** to a changing business environment and acquire competitive advantage;
- IMPROVE** strategy translation, monitoring and control within organizations.

## WHY YOU CANNOT MISS THIS EVENT?

<b>20+</b>	Speakers, Panelists and Trainers	<b>20</b>	Insightful Presentations	<b>3</b>	Hands-on Workshops
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## MAXIMIZE YOUR EXPERIENCE



**Leverage innovation** and how to build an agile strategy



**Overcome challenges** in building a performance culture across organization



**Benchmark** with regional leaders and learn best practices on strategy and performance



**New insights** on using technology and tools to increase performance

## WHO SHOULD ATTEND?

THIS CONFERENCE IS DESIGNED FOR:	FROM THE FOLLOWING FUNCTIONAL AREAS:
Chief Officers	Strategy & Corporate Planning
Directors	Performance
VPs, SVPs, AVPs	Human Resources
Heads	Transformation
Managers	Quality
Senior Officers	Innovation
Advisors & Analysts	Project Management Office

# SPEAKERS



## Aurel Brudan

**Chief Executive Office**  
The KPI Institute, Australia

Aurel Brudan is an expert in Performance Management, Measurement and the implementation / use of Balanced Scorecard based performance management systems. Aurel has 15+ years of international work experience in Europe, North America and Australia, specializing in organizational performance management in industries such as financial services, real estate, operations, services, as well as the federal, state government and non-profit sectors.

**Panel:** State of National Vision achievement in GCC - Vision 2030 KSA, Dubai Plan 2021, Bahrain Vision 2030, UAE Vision 2021



## Hassan Al-Asaad

**Strategist & Business Developer**  
GCC Interconnection Authority, KSA

Hassan Al-Asaad has a bachelor degree from the University of Manitoba in Canada, and a Masters of Business Administration from Sheffield Hallam University in United Kingdom. Previously, he worked as a business consultant for Arthur Andersen & Co. in the GCC region where he engaged in providing a range of consultancy services from organization re-structuring to IT systems implementation. Currently he is working for GCC Interconnection Authority holding the position of strategist & business developer.

**Topic:** Implementing Strategy & Creating a Corporate Culture  
Case study: GCC Interconnection Authority



## Mihai Toma

**Head of Professional Services MENA**  
The KPI Institute, Dubai

Mihai Toma has gained a solid background in implementing performance management systems while facilitating The KPI Institute's system establishment. In the last years, Mihai has advised and worked with a variety of international clients from industries such as petrochemicals, utilities, healthcare, construction materials production, pension funds, food production and professional services. As a facilitator, Mihai has developed and delivered training courses on KPIs, performance improvement and managing individual performance.

**Workshop B:** Key Techniques for Successfully Implementing a Balanced Scorecard



## Dr. Eng. Ali Mohamed Al Khouri

**General Director**  
Emirates Identity Authority, UAE

Dr. Engineer Ali Mohammed Al-Khouri is the Director General of the Emirates Identity Authority (Emirates ID) since 2009. As a Director General, Dr. Al-Khouri plays a vital role in leading the Emirates ID team towards achieving the Authority's strategic goals in:

- the development and implementation of modern national identity management infrastructure for the government of the UAE;
- the development and implementation of an infrastructure to integrate with key government agencies to promote joined-up government, and support decision making with respect to population demographics.

**Topic:** Correlating organizational learning with soft systems thinking and performance management



## Hemang Dave

**Chief Innovation Officer - Global Technology Services**  
IBM, USA

Hemang joined IBM as a professional hire in June 2000. Prior to joining IBM, Hemang worked as a consultant to IBM and various other private and public sector organizations. In the last 7 years, Hemang has held several leadership positions at various Outsourcing accounts ranging from lead architect to manager of architects in enablement of leading-edge technologies. Hemang is tasked to drive pro-active innovation to GTS NA clients. Since 2014, he worked with over 100 GTS clients in enablement of Innovation for and with the client.

**Topic:** Why Innovation Matters?

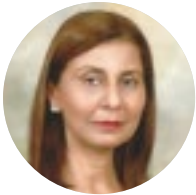


## Raja Segaran

**Head of Consulting, Projects & Strategy**  
Malaysia Digital Economy Corporation

Raja is currently the Head of Consulting & Projects Department in the Malaysia Digital Economy Corporation (MDeC), an agency tasked by the Government to develop the digital economy via its various initiatives in relation to industry development, digital transformation and creation of the enabling environment. He is involved in the development of macro-strategies for the country's digital economy as well as facilitating the alignment with enterprise-wide tactical strategies with internal and external stakeholders for execution.

**Topic:** Future trends - future of work and performance



**Dr. Sarinder Kumari**  
**Executive Vice President & Partner**  
 PEMANDU Associates, Malaysia

Dr Sarinder Kumari currently manages business strategy and project management in the company to ensure cohesive offerings to clients. She is also a Subject Matter Expert for Tourism having experience in overseeing the implementation of Tourism-related projects and initiatives under Malaysia's National Transformation Programme (NTP). Under the NTP, she also successfully developed a performance assessment and management system used by the Prime Minister for his bi-annual review of all the Ministers.

**Topic:** Agile Strategy Management - from Planning to Execution



**Steve Thompson**  
**Senior Performance Excellence Leader**  
 Mallinckrodt Pharmaceuticals. UK

Dr. Steve Thompson has over 23 years experience in Continuous Improvement, Operations and Project management. A mechanical engineer by education, Steve has relentlessly sought to understand how to improve results by operating in a better way while bringing people along. The journey has involved working in different industries, Automotive, FMCG and Healthcare, and challenging himself through education culminating in the attainment of a Doctorate in Business Administration.

**Topic:** Project Management as enabler of strategy execution



**Teodora Gorski**  
**Managing Director MENA**  
 The KPI Institute, Dubai

Teodora Gorski is the Managing Director MENA at The KPI Institute, as well as a Project Management Expert with extensive experience in Research, Organisational Development and Human Resources. Some of Teodora's most significant projects include the design and implementation of various corporate expansion projects, business development strategies for the Middle East, alignment of organisational Job Descriptions, evaluation and competence based recruitment.

**Workshop A:** KPI Essentials – Selection and Target Setting



**Nisha Varghese**  
**HR Consultant**  
 Sidra Medical and Research Center, UAE

Nisha Varghese is responsible for collaborating with Chiefs of Service and Executive Directors to attract key talent and realise Sidra's vision and values. She liaises closely with teams spanning Workforce planning, Compensation and Benefits; providing talent acquisition support to hiring managers across multiple verticals including Human Resources, Learning and Development and Medical Services.



**Abdulaziz Aldharrab**  
**Head of Strategy**  
 ARASCO, Saudi Arabia

Abdulaziz Aldharrab has 9 years of experience in implementing Change Management and Performance review through strategic management systems across a variety of industries including Aviation, Agriculture, Laboratory, Food, Logistics, and Manufacturing. Abdulaziz lead ARASCO attainment of Strategy Execution Hall of Fame Award –ARASCO is the first company in the Kingdom of Saudi Arabia to achieve this award.

**Topic:** Strategic Management in the Era of Big Data Analytics – Case Study ARASCO



**Dr. Mohamed M. Mahmoud**  
**Madinah Institute for Leadership and Entrepreneurship**

Dr. Mohamed M. Mahmoud (known as Dr. 3M) has 20 years of experience as university professor in Management Science in USA, Canada, Egypt and Kuwait. Followed by 23 years of experience in very senior positions in the private sector (Savoal Group, Saudi Arabia), Government (Director of Office of Strategy Management, City of Jeddah; and Adviser of 3 Saudi Ministers: Health, Labor and Economic and Planning). Currently the CEO of Madinah Institute for Leadership and Entrepreneurship and Chief Adviser at The newly-established National Center for Performance Measurement of Public Entities. Currently playing a key role in the formulation and implementation of the Saudi National Vision 2030. Dr. 3M has 23 years' experience in Strategic Planning and strategy deployment and monitoring using the Balanced Scorecard methodology. He lead more than 50 strategic planning projects at private, public and NGO organizations. He led a major project at City of Jeddah which was awarded the Kaplan-Norton Hall of Fame Award.

**Topic:** Using the Balanced Scorecard to articulate, operationalize, deploy and monitor strategy implementation in Government organization: The case of City of Jeddah


# AGENDA

## DAY 1


March 20, 2018

 8:00 **Registration & coffee**

 8:45 **Welcome Address by Chairperson**

 9:15 **Strategic Management in the Era of Big Data Analytics – Case Study ARASCO**

- › How to develop a strategy that links data and analysis to improved performance - ARASCO case study
- › How big data help in executing our strategies?
- › How big data help in predicting and optimizing business outcomes?

 **To be announced**


 9:45 **Agile Strategy Management - from planning to execution**

- › Developing the right strategies is a crucial step. Strategies must be clearly spelt out and aligned with definitive targets and objectives.
- › Detailed implementation plans are important to ensure objectives and deliverables of strategies
- › Accountability with a clear governance structure coupled with discipline of action are key to successful strategy management.





**Dr. Sarinder Kumari**

Executive Vice President & Partner, PEMANDU Associates, Malaysia

 10:15 **Strategic Agility and Corporate Innovation**


- › Disruption: risks and opportunities;
- › Strategic Agility: the future of strategy;
- › Corporate Innovation: aiming for real innovation inside the organization.




 **To be announced**


 10:45 **Coffee Break**  
Morning refreshments and networking session

 11:15 **Performance Review Meeting Performance – Saudi Telecom Company case study**



- › Performance Review Meeting Preparation;
- › How should organization conduct performance review meeting;
- › How the Saudi Telecom Company is doing its performance Review.



 **To be announced**


-  11:45 **Balanced Scorecard vs OKRs for strategy execution** 
- › When to use BSC and when to use OKRs;
  - › Aligning strategy and employees using Objectives and Key Results methodology;
  - › Tips and challenges in using BSC framework.
-  **To be announced**



-  12:30 **Lunch Break**  
Lunch & networking



-  14:00 **Round table discussions**  
Role of talent in strategy implementation: competencies and engagement

-  14:30 **Nurturing a performance culture through Strategy Communication – case study**
- › Utilize Visual Tools for initiating stakeholders buy-in and strategy communication;
  - › Implement creative tactics for strategy embedding;
  - › How to implement a strategy reporting communication plan.
-  **To be announced**

-  15:00 **Project Management as enabler of strategy execution**
- › PMO tools to align execution with strategy;
  - › Best practices in using PM tactics to faster achieve your objectives and goals;
  - › How to align objectives, resources and execution, when projects are off-track.
-  **Steve Thompson**  
Senior Performance Excellence Leader, Mallinckrodt Pharmaceuticals, UK

-  15:30 **Coffee Break**  
Afternoon refreshments and networking session

-  16:00 **Why Innovation Matters**
- › Why Innovation is Critical;
  - › How large enterprises can drive pro-active and sustainable innovation;
  - › How IBM helps clients drive innovation.
-  **Hemang Dave**  
Chief Innovation Officer - Global Technology Services, IBM, USA

-  16:30 **Performance through analytics and big data insights**
- › Practical benefits of effectively measuring and managing KPIs using technology;
  - › Identify the key stakeholders within organisations in data management;
  - › Using analytics to gain competitive intelligence on future trends.
-  **To be announced**

# DAY 2

March 21, 2018

 8:45 **Welcome Address by Chairperson**

 9:00 **Correlating organizational learning with soft systems thinking and performance management**




**Dr. Eng. Ali Mohamed Al Khouri**  
General Director, Emirates Identity Authority, UAE

 9:45 **Agile Employee Performance Appraisals**

- › Help your employees grow by giving constant relevant feedback;
- › Nurture your talent processes to increase engagement and employee performance;
- › Transform your emphasis on development and forward looking performance.

 10:15 **Performance rewards systems: bonuses and nonfinancial rewards**

- › Bad behaviors in connecting rewards and performance;
- › Get employees involved and tie rewards to organisational goals;
- › Case study of designing a reward program.

 10:45 **Coffee Break**  
Morning refreshments and networking session

 11:15 **Implementing Strategy & Creating a Corporate Culture - GCC Interconnection Authority case study**


- › The importance of a BSC and cascading strategy.
- › How the creation and implementation of the strategy caused a positive on GCCIA corporate culture
- › Steps taken by GCCIA on formulating, translating and implanting its long-term strategy, which includes cascading the strategy to the functional level”



**Hassan Al-Asaad**  
Strategist & Business Developer, GCC Interconnection Authority, KSA

 11:45 **Aligning strategy to performance across business units and departments**

- › Implement and track your strategy to ensure that it is working;
- › Tips for cascading strategy across business units and departments and monitor implementation;
- › Drive the skill and capability requirements and ensure its alignment to the core values of the organisation.

 12:30 **Lunch Break**  
Lunch & networking

 14:00 **Panel discussion**

State of National Vision achievement in GCC

- Vision 2030 KSA, Dubai Plan 2021, Bahrain Vision 2030, UAE Vision 2021

**Moderator:**



**Aurel Brudan**

Chief Executive Officer - The KPI Institute, Australia

 14:30 **Organisational Excellence in practice - Case Study from Excellence Award Winner**

- › Focusing on your customers and engaging them;
- › Developing processes that can optimize resources and deliver better products and services to satisfy your stakeholders;
- › Best practices for improved Leadership practices and systems to drive change.

 15:00 **Benchmarking for success**

- › Plan your benchmarking and collect relevant data for analysis;
- › Identify gaps, efficiency opportunities and areas for improvement;
- › Develop an action plan to adapt and implement successful practices.

 15:30 **Coffee Break**

Afternoon refreshments and networking session

 16:00 **Organisational Sustainability reporting**

- › Global trends and challenges to sustainable development – how it affects your organisation?
- › Coordinate your capabilities to implement a strategy for sustainable development;
- › Reporting and the transition to a sustainable organisation.

 16:30 **Future trends - future of work and performance**

- › New technology trends are disrupting businesses and government and how we work and live, creating a robust global digital economy
- › Future jobs will be different with the new generation of citizens and technologies pushing the talent boundaries
- › The future of performance management in the digital economy”



**Raja Segaran**

Head of Consulting & Projects, Corporate Strategy, Malaysia Digital Economy Corporation

## EXCELLENCE AWARDS GALA

Supporting and celebrating performance excellence worldwide



**Receive industry-wide  
recognition**



**Help your business stand out  
from competitors**



**Highlight your dedication to  
excellence**

The KPI Institute recognizes professionals that have excelled in driving business value through several award categories.

## WORKSHOP A KPI ESSENTIALS – SELECTION AND TARGET SETTING

Selection is considered by practitioners all around the world to be one of the most challenging aspects in working with Key Performance Indicators (KPIs). Even the success of popular performance management systems such as the Balanced Scorecard relies on using relevant KPIs that actually mean something to the business and are presented in a readily intelligible form. 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.

### 09:00 **The world of KPIs**

- › Challenges in working with KPIs and value added by KPIs.
- › Performance Management System Architecture.
- › Exercise: Understanding performance management tools.
- › Case study: Performance Management tool in practice.

### 10:30 **Morning Refreshments**

### 10:45 **Understanding KPIs**

- › Terminology standards and Smart objectives decomposed.
- › KPI Typology.
- › Exercise: Identify Leading VS Lagging and Quality VS Quantity KPI.
- › Case study: KPI usage scenarios.

### 12:15 **Networking luncheon**

### 13:45 **KPI selection**

- › KPI selection techniques and criteria.
- › Exercise: Value Flow Analysis and KPI Balancing.
- › Case study: KPI selection for organizational Scorecard.

### 15:15 **Afternoon Refreshments**

### 15:30 **KPI target setting**

- › Role of targets.
- › Target setting approaches – Benchmarking.
- › Case study: KPI target setting in practice.
- › Exercise: KPI target setting by KPI type.



**Teodora Gorski**  
**Director of Business Development MENA**  
The KPI Institute, UAE

## BENEFITS

- › **Gain** a sharp understanding of the KPI management challenges and how to address them;
- › **Practice** the development of a sound framework to ensure KPIs are aligned to strategy;
- › **Differentiate** between objectives, KPIs and initiatives and understand different KPI typologies;
- › **Adopt** a rigorous business 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;
- › **Get clarity** into how to set useful targets for your business and how to use benchmarking in target setting.



*“It was a good platform that allowed me to network with professionals, share expectations and knowledge. I was able to have a clear overview about what will happen at all times and also the provided materials were very useful.”*

**Business Excellence Manager,  
Dubai Healthcare City**

# DAY 3

March 22, 2018

## WORKSHOP B KEY TECHNIQUES FOR SUCCESSFULLY IMPLEMENTING A BALANCED SCORECARD (BSC)

The Balanced Scorecard was developed as a tool for measuring the performance of an organization, in a balanced manner. It was based on understanding the interdependencies between the four key perspectives of every business: Financial, Customer, Internal Processes and People, Learning & Growth. In time, as the BSC continuously improved and refined, an entire Performance Management System was created around it, in order to maximize its benefits.



**Mihai Toma**  
Management Consultant  
The KPI Institute, UAE

- 🎧 09:00 **BSC in a Performance Management Context**
  - › What is Performance Management?
  - › The Role of the BSC in a Strategic Performance Management Context;
  - › The Evolution of the Balanced Scorecard.

### ☕ 10:30 Morning Refreshments

- 🎧 10:45 **Architecture of a BSC Management System**
  - › Desired State of Evolution (DSOE) – linking values, mission, value drivers and vision;
  - › Strategy Map – objectives as a performance road map;
  - › Performance Scorecard – alignment across all sector of the organization;
  - › Portfolio of Initiatives – translating priorities into action.

### 🍴 12:15 Networking luncheon

- 🎧 13:45 **Translating the strategy – Setting objectives and KPIs**
  - › SMART objectives decomposed;
  - › KPI selection techniques;
  - › Developing the Performance Scorecard – defining the most relevant KPIs.

### ☕ 15:15 Afternoon Refreshments

- 🎧 15:30 **Implementing and using a BSC Management System**
  - › Balanced Scorecard implementation process;
  - › Stages of the implementation process;
  - › Generating value with the Balanced Scorecard;
  - › Performance reporting with the Balanced Scorecard.

## BENEFITS

- › **Get access** to a deeper understanding of the value added and functionality of the Balanced Scorecard Management System;
- › **Develop** and implement a BSC Management Architecture in a standardized manner;
- › **Maximize** the value of your KPIs with the use of the Balanced Scorecard;
- › **Align** your strategic direction to specific and relevant objectives.



*“I found the workshop topics very beneficial and informative in terms of standardizing terminologies, definition and documentations related to balanced scorecard. Since we have limited performance measures in our organization, this workshop was a very good start to initiate a program for implementing successfully a balanced scorecard. I highly recommend it for startup initiatives and for those who want to brush up their system.”*

**Manager Human Resources Planning,  
Bahrain Islamic Bank**

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## SOME OF OUR PREVIOUS PARTNERS



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## ATTENDEE DETAILS

Name, phone, email, job title: \_\_\_\_\_

## APPROVAL

NB: Signatory must be authorised on behalf of contracting organisation.

Name: \_\_\_\_\_  
Phone/Fax: \_\_\_\_\_  
Email: \_\_\_\_\_  
Job title: \_\_\_\_\_  
\_\_\_\_\_  
Authorising Signature

## REGISTRATION FEES

	Full Conference	Two Days	One Day	Workshop
Full Price	US\$ 2,650	US\$ 1,950	US\$ 950	US\$ 950
<b>TKI Member</b>	<b>US\$ 2,450</b>	<b>US\$ 1,850</b>	<b>US\$ 850</b>	<b>US\$ 850</b>
Early bird	US\$ 2,100	US\$ 1,550	US\$ 750	US\$ 750

Group discounts: **15% off** for of 2-5 registered participants, **20% off** for more than 6 registered participants

All above rates are subject to 6% of government tax. Contact us for more group discounts and sponsorship packages!

**Workshop Option:** Workshop A Workshop B

**\*Venue:** Strategy and Performance Excellence Conference will take place at one of the 5\* hotels in Dubai. In the heart of thriving Dubai, we'll be within walking distance of any event. In your free time, you'll find an array of museums, shopping centers, art galleries, exquisite landmarks and entertainment.

THE KPI INSTITUTE

**Alex Muntean**  
Head of Customer Engagement, MENA  
T: +61 391 115 705  
E: alex.muntean@kpiinstitute.com

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## TERMS & CONDITIONS

- Upon receipt of the complete registration form, invoice will be issued. The KPI Institute requests that all payments be made within 14 working days of the invoice being issued. Only delegates that have made full payment will be admitted to the event. Clients are responsible for their own banking fees and banking fees will not be absorbed into the booking price.
- Substitution and cancellation policy: If you are unable to attend, a substitute delegate is welcomed at no extra charge. Please provide the name and the title of the substitute delegate at least 5 working days prior to the Event. Non-payment does not constitute cancellation. The KPI Institute does not provide refunds for cancellations. When any cancellations are notified in writing to the KPI Institute 5 working days prior to the event, a credit voucher will be issued for use in future The KPI Institute events and courses.
- The organiser reserves the right to make any amendments and/or changes to the programme, venue, speaker replacements and/or topics if warranted by circumstances beyond its control.
- The personal information entered during your registration/order, or provided by you will be held on a database and may be shared. Occasionally, your details may be obtained from or shared with external companies who wish to communicate with you offers related to your business activities. If you do not wish your details to be used for this purpose, please contact our database department at email: office@kpiinstitute.org, T: + 60 (327) 421 357.

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# KEY PERFORMANCE INDICATORS INFOGRAPHIC

## Functional Areas

- Accounting**
  - % Billing accuracy
  - \$ Cost of goods sold
  - % Client cash net revenue
  - % Invoices under query
  - # Days in accounts receivable
- Compliance and Risk**
  - \$ Loss expectancy
  - % Operational risk
  - # Corporate governance index
  - # Frequency of inventory audit
  - # Turnaround time for audits
- Customer Service**
  - # Speed of answer
  - # Complaints received
  - # Call handling time
  - % Complaints resolved
  - % Call abandon rate
- Finance**
  - # Berry ratio
  - % Capital acquisition ratio
  - % Basic earning power ratio
  - # Labor multiplier
  - % Return on funds employed
- HSSE**
  - # Lost time injury frequency rate
  - \$ Energy consumption cost
  - # Hours of OHS training conducted
  - # Operational spills
  - # Lost workdays due to accidents
- Human Resources**
  - # Employee engagement index
  - # Time to fill a vacant position
  - % Employee turnover
  - % Employee satisfaction
  - # Training hours per FTE
- Information Technology**
  - % Defects removal efficiency
  - # SDLC exceptions granted
  - % LAN server availability
  - # Time to market
  - # Time for service request fulfillment
- Marketing & Communication**
  - % Brand awareness
  - % Net promoter score
  - % Customer retention
  - \$ Customer acquisition cost
  - \$ Lifetime value of a customer
- Procurement & Distribution**
  - # Inventory to sales ratio
  - % Slow moving stock
  - % On-time delivery
  - % Perfect purchase order rate
  - % Inventory carrying rate
- Production**
  - % Production schedule attainment
  - # Units per man-hour
  - # Maintenance backlog
  - % Production schedule adherence
  - % Production uptime
- Project Management**
  - # Earned man-hours
  - # Schedule performance index
  - \$ Cost avoidance savings
  - \$ Profit per project
  - % Delivery deadlines met
- Quality Management**
  - \$ Cost of poor quality
  - % Scrap rate
  - % Process efficiency ratio
  - % Production first time yield
  - % Rework cost
- Research & Development**
  - \$ Cost savings due to R&D
  - # Payback period of new products
  - % New product success rate
  - # Time to break-even
  - # First to market products
- Sales**
  - % Share of wallet
  - % Sales growth
  - % Sales quota attainment
  - % Lead conversion rate
  - \$ Sales per labor hour

## Terminology

**KPI**  
**Definition:**  
 A measurable expression for the achievement of a desired level of results in an area relevant to the entity's activity.

### SMART Objectives

**SMART Objective** =

- Objective → Increase customers base
- +KPI → % Market share
- +Target → 20%
- +Timeframe → By Financial Year End
- +Responsible → Sales Director

Increase customers base to reach 20% market share by FY end under Sales Director leadership

### KPI naming standards

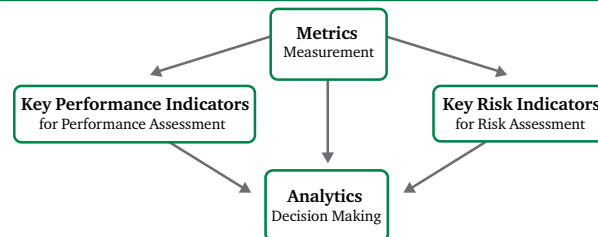
KPIs – start with symbols

- Value of \$ Net profit
- Number of # Defects
- Percentage of % Budget variance

### Value added by KPIs

- Clarity**  
Paint a clear picture of strategy
- Focus**  
Focus on what matters / requires attention
- Improvement**  
Monitor progress towards the desired state

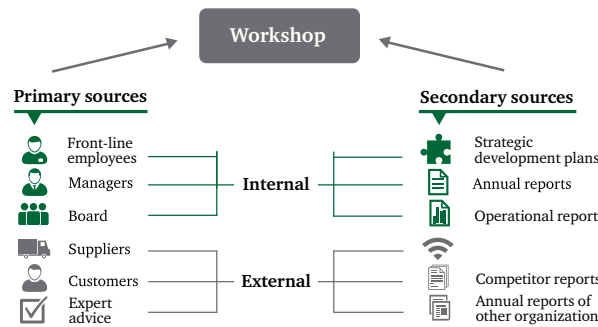
### Metrics - KPIs - KRIs - Analytics



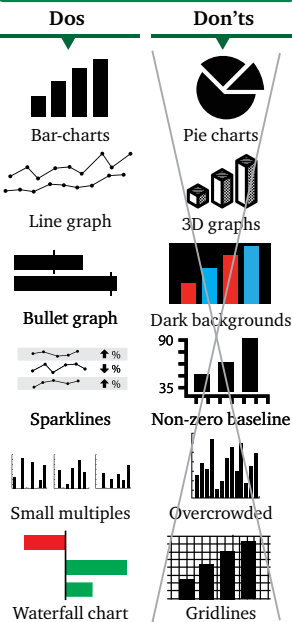
### KPI selection criteria

- Relevant**  
Aligned with organizational strategy; Significant for the specific domain of services
- Clearly defined**  
KPIs should be described by using clear and intelligible terms. Avoid the use of management jargon
- Balanced**  
Quality / Quantity; Efficiency / Effectiveness; Subjectivity / Objectivity

### KPI selection workshop input

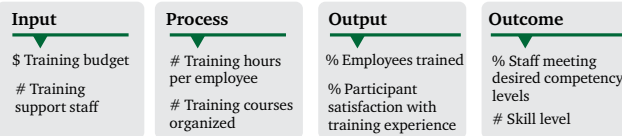


### Data visualization



### KPI selection technique: Value flow analysis

Objective: Continuously improve skills through learning experience



### KPI documentation

Name % Hospital bed occupancy rate

**Definition**  
 Measures the percentage of beds in the hospital that are occupied by patients, from overall number of hospital beds.

**Calculation**  
 Subordinate measures used for calculation  
 A = # Hospital beds occupied      B = # Hospital beds

Calculation formula (A/B)\*100      Formula type Rate      Trend is good when Within range

**Target**  
 Threshold example  
 Red: < 80% ; > 95%      Yellow: 80 - 85% ; 90 - 95%      Green: 85 - 90%

## Industries

- Call Center**
  - % Call setup success rate
  - % Agent utilization
  - % Call completion rate
  - % First call resolution rate
  - % Call drop rate
- Customs**
  - # Arrival processing time
  - # Entry clearance referrals
  - # Work permits issued
  - # Immigration refusals
  - # Hit rate on high risk cargoes
- Education & Training**
  - # National examination score
  - % Attendance rate per course
  - # Students to professor ratio
  - % Drop-out rate
  - # Student satisfaction rate
- Financial Institutions**
  - # Insurance underwriting time
  - # Insurance claim processing time
  - % Cash collection rate
  - % Risk coverage ratio
  - # Liquidity ratio
- Government - State/Federal**
  - \$ Gross National Product per capita
  - # Healthy life expectancy
  - % Unemployment rate
  - # Water scarcity index
  - % Health insurance coverage
- Healthcare**
  - % Hospital bed occupancy rate
  - # Daily census
  - % Medication error rate
  - \$ Cost per discharge
  - # Laboratory test turn-around time
- Hospitality & Tourism**
  - \$ Revenue per available seat hour
  - \$ Total revenue per available room
  - % Revenue per available customer
  - # Capture rate of hotel guests
  - # Length of stay in hotel
- Infrastructure Operations**
  - % Berth occupancy rate
  - # Container dwell time
  - # Turnaround time
  - # Container throughput
  - # Arrival processing time
- Real Estate/Property**
  - % Rent collection rate
  - % Cash-on-cash return
  - % Occupancy rate
  - % Repairs completed on time
  - % Capitalization rate
- Resources**
  - % Drilling rig utilization rate
  - % Non productive drilling time
  - % Drilling success rate
  - % Mining equipment availability
  - # Carbon dioxide vessel efficiency
- Retail**
  - % Same store sales growth
  - # Stock rotations
  - # Reorder point
  - # Safety stock
  - \$ Sales per unit area
- Telecommunications**
  - \$ Subscriber acquisition cost
  - % Answer seizure ratio
  - \$ Subscriber retention cost
  - % Data network availability
  - % Block error rate
- Transportation**
  - \$ Freight cost per tonne shipped
  - # In flight shutdown rate
  - # Revenue tonne kilometers
  - % Transport capacity utilization
  - # Transit time
- Utilities**
  - # Power plant load factor
  - # Water quality index
  - % Electricity demand growth
  - % Wastewater treated
  - % Capacity utilization factor

## ORGANIZATION

**2004** Year of establishment  
**27** # Certified trainers  
**4** # Offices around the globe. Australia, Malaysia, Romania, United Arab Emirates.

## RESEARCH

**50,556** # Organizations assisted through smartKPIs.com  
**20,645** # KPI examples published on smartKPIs.com  
**13** # Years spent on researching performance best practice

## EDUCATION

**7,904** # Training hours delivered  
**5,136** # Professionals trained  
**1,176** # Client organizations  
**998** # Education programs delivered  
**988** # Training days delivered  
**219** # Open training courses delivered

**177** # In-house training courses delivered  
**35** # Countries where we delivered educational programs  
**6** # Continents on which we delivered training



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