

KPIs, Scorecards & Dashboards Workshop

Effective KPIs & performance measures to drive strategy execution, performance & impactful scorecard/dashboard visualisations



EXPLORE

- Apply KPIs to planning and performance frameworks, transformational strategy development and execution
- Create linkages between strategic and operational performance reporting
- Explore how to cascade KPIs across your organisation
- Learn how KPIs can be utilised to measure, analyse and drive performance
- How to integrate improvement into your organisation and communicate the change to stakeholders
- Human centred design
- Learn effective and impactful visualisation
- Leverage existing performance management systems
- Optimise overall KPI systems for comprehensive performance impact
- How to influence stakeholders to gain buy-in for new tools and methodologies

EXPERT FACILITATOR



Murray Wu
Consultant
Murray Wu Consulting



22 & 23 January 2019

Cliftons Auckland

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KPIs, Scorecards & Dashboards Workshop

BACKGROUND

A well-developed scorecard and KPI system is the key to boosting performance and efficiency in your organisation. To optimise your performance system, you must ensure it addresses the key legislative requirements and remains in line with your agency's core purpose.

This critically acclaimed program has been redesigned from the ground up to deliver the tools you need to drive performance and strategy execution in your agency. You'll learn to create powerful linkages between strategic and operational performance reporting, enabling true value delivery from your KPI systems. You'll build impactful dashboard visualisations to get the buy-in you need to take the next step and drive change in your organisation.

You'll walk away with the tools and knowledge to take your KPI and performance management frameworks to the next level and fast-track the process of realising agency-wide performance impact.

INTRODUCING YOUR FACILITATOR



Murray Wu
Consultant
Murray Wu Consulting

Murray Wu is a management consultant with expertise in strategy execution and process improvement. He enhances presentations with lessons from practical business experiences, such as the implementation of Kiwibank's award-winning strategy execution system. Murray is a frequent presenter on strategy topics and has run many training programmes on Lean Six Sigma and the Balanced Scorecard.

Murray had over 20 years' experience in financial services and manufacturing in New Zealand and the USA, with senior roles in operations, engineering, R&D, strategy, continuous improvement and sustainability. Murray trained as a chemical engineer and is a Lean Six Sigma Master Black Belt.

Day One

8:30 - 4:30

An overview of performance management

- The benefits of a formal performance management system
- Common elements of performance management frameworks
- The human factors that affect performance management
- The key steps for developing and implementing a successful system

Crafting strategic and tactical objectives

- Understanding the important decisions that your organisation make
- Building effective strategy maps
- Linking cause and effect, inputs and outputs
- Identifying critical risks that will prevent the achievement of your objectives

Developing and selecting measures/KPIs

- Fundamentals of measures
- Methods for identifying and selecting the most important measures
- Setting performance targets and thresholds
- Managing risk indicators

Cascading KPIs across the organisation

- Distinguish between strategic, tactical and operational measures
- Ensure alignment, integration and consistency across the organisation
- Involving stakeholders in the cascade process
- Cascading team and individual KPIs

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Day Two

8:30 - 4:30

Presenting KPIs in useful ways

- Compelling ways to visualise KPIs
- Building dashboards and scorecards
- Best practices and not-so-good practices
- The role of technology to collect and organise data, ensure robustness and integrity and to simplify analysis

Analysing and interpreting KPIs

- The importance of statistical thinking for good analysis and evaluation
- How to distinguish real performance from noise
- Common ways of analysing KPIs to extract meaningful insights
- How to communicate insights effectively

Using dashboards and scorecards to manage performance

- Developing a management operating system based on scorecards and dashboards
- Having performance conversations based on data and insight
- Making decisions based on data (and when not to)
- Generating actions and tracking impact

Implementation of scorecards and dashboards

- Common challenges with implementation
- The role of leadership to generate organisational buy-in for performance planning, reporting and review
- Laying the groundwork with communications and training
- Roles and responsibilities to maintain the performance measurement infrastructure

WHO WILL ATTEND

Senior professionals, team leaders, managers and directors working in:

- Business analysis
- Strategy design and development
- Performance management
- Finance services
- Management and performance reporting
- Corporate services
- People and culture
- Management accounting
- Business planning and budgets
- Financial management systems
- Governance

TRAINING DELIVERY

This workshop will be delivered using a three tiered approach. The structure of each session is as follows:

1. Technical overview and review of research into the topic area under discussion
2. Practical application of management principles in the review of case studies, worked examples and interactive exercises
3. Discussion of outcomes and implementation issues

PRE-COURSE QUESTIONNAIRE

Workshop participants will have the opportunity to include comments and questions about issues outlined in the program by way of a pre-course questionnaire. This feedback will enable the course facilitator to adjust content accordingly. The workshop has limited places to allow for customisation, greater interactivity and for individual concerns to be addressed.

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