



## CERTIFIED PERFORMANCE MANAGEMENT SYSTEMS AUDIT PROFESSIONAL



THE CPD STANDARDS OFFICE  
CPD PROVIDER: 22103  
2024-2026  
[www.cpdstandards.com](http://www.cpdstandards.com)

Learn how to assess the maturity level of Performance Management Systems

LIVE ONLINE CERTIFICATION

Strategy & Performance Management  
Maturity Assessment Toolkit  
included in the course fee!

### 2025 EDITIONS:

- > 03 - 07 FEBRUARY
- > 26 - 30 MAY
- > 22 - 26 JUNE (ARABIC)
- > EXPRESS INTEREST



The KPI Institute is an Accredited Provider of the CPD Standards Office, a Continuing Professional Development global assessor.

### Key business benefits:

- > Ensure you have the right tools, processes, and people, in the right place, for your Performance Management System.
- > Identify the weaknesses of your current Performance Management Framework and learn how to shift from one maturity level to the next one.
- > Maximize the added value generated by your Performance Management System, by elevating current practices to best practices.
- > Educate stakeholders to be oriented towards continuous learning and improvement.
- > Assess your organization's maturity level using the full audit methodology developed by The KPI Institute in collaboration with GPA Unit.
- > Eligible for Executive Program in Strategy & Performance Postgraduate Diploma.



# Course overview



The Certified Performance Management Systems Audit Professionals embeds over 10 years of research in the field of performance architecture development, employing the use of maturity models for capability maturity levels diagnosis. This educational program presents a rigorous approach to diagnosing and auditing the maturity of performance architectures across 5 capabilities: strategic planning, performance measurement, performance management, performance culture, and employee performance management. It involves the use of a proprietary Integrated Performance Maturity Model Framework, which seeks to map out maturity gaps and identify a set of follow-up actions that will ensure progression to the next maturity level.

## Participants' profile

### > Senior & middle management professionals

Professionals from different fields, such as audit, finance, human resources, production, logistics, information technology and others, working with performance management system architectures, will acquire the competencies needed to diagnose their entities performance systems capability maturity.

### > Internal or Independent Audit Professionals

Any audit expert, regardless of their current audit experience (financial, compliance, performance), interested in expanding their area of expertise towards assessing organizational performance systems, by employing the proprietary or customized versions of the Integrated Performance Maturity Model Framework, developed by the Global Performance Audit Unit.

### > Performance management system experts

For professionals like Strategy Managers, Performance Management Officers or Performance Architects, it is important to develop competencies that enable them to a performance management system's maturity and ensure continuous system improvements. The Certified Performance Management Systems Audit Professional Training Course offers the opportunity to learn the best practices used in this field, allowing professionals to enhance their current processes and tools related to strategy, performance measurement and management, performance culture, and employee performance management.

## Benefits

- > Receive relevant guidance on how to assess the maturity of a performance management system;
- > Understand the value added by a performance management system audit and improve your performance management capability;
- > Receive access to the full Strategy & Performance Management Maturity Framework Toolkit, allowing you to use it for one organizational performance management system audit, through the dedicated Global Performance Audit Unit assessment platform;
- > Obtain premium recognition and expand your business network by becoming a Certified Performance Management Systems Audit Professional.
- > Obtain 40 CPD credits to include in your CPD records for your professional body, institute, regulator or employer.

## Learning objectives

- > Understand how to deploy and conduct a performance audit process;
- > Learn how to use the Performance Maturity Model Framework as part of the audit methodology;
- > Develop the ability to interpret the data and perform statistical analysis based on the survey results received;
- > Gain clear understanding and insights for reviewing performance management documents produced by the organization assessed.

# Agenda



## Day 1 - 4h

### The role of the Performance Management System Audit

- › Challenges in auditing
- › Audit principles
- › Establishing audit objectives
- › Performance Audit Project Plan.

### The 5 Capabilities of an Integrated Performance Maturity Model Framework

- › Maturity Model
- › Strategic Planning Maturity Model
- › Performance Measurement Maturity Model
- › Performance Management Maturity Model
- › Performance Culture Maturity Model
- › Employee Performance Management Maturity Model.

## Day 2 - 4h

### Performance Management Maturity Assessment Methodology

- › Assessment Methodology
- › Maturity levels
- › Scoring methodology.

### Evidence-based Assessment

- › Documentation assessment methodology
- › Documentation checklist
- › Sampling methodology
- › Assessment criteria
- › Case study: practice evidence-based assessment.

## Day 3 - 4h

### Perception-based Assessment

- › Key stakeholders identification
- › Survey audience segmentation
- › Data gathering process
- › Statistical analysis.

### Interview-based Assessment

- › Interview guide
- › Best practices in formulating questions
- › Key stakeholders identification
- › Interview preparation & scheduling
- › Case study: develop an interview guide.

## Day 4 - 4h

### Data Interpretation

- › Raw data interpretation
- › Score interpretation
- › Case study: practice data interpretation.

### Audit Report Consolidation

- › Findings & recommendations aggregation
- › Audit Report structure
- › Audit Report design & visualization
- › Case study: interpret audit results, formulate recommendations & conclusions.

## Day 5 - 4h

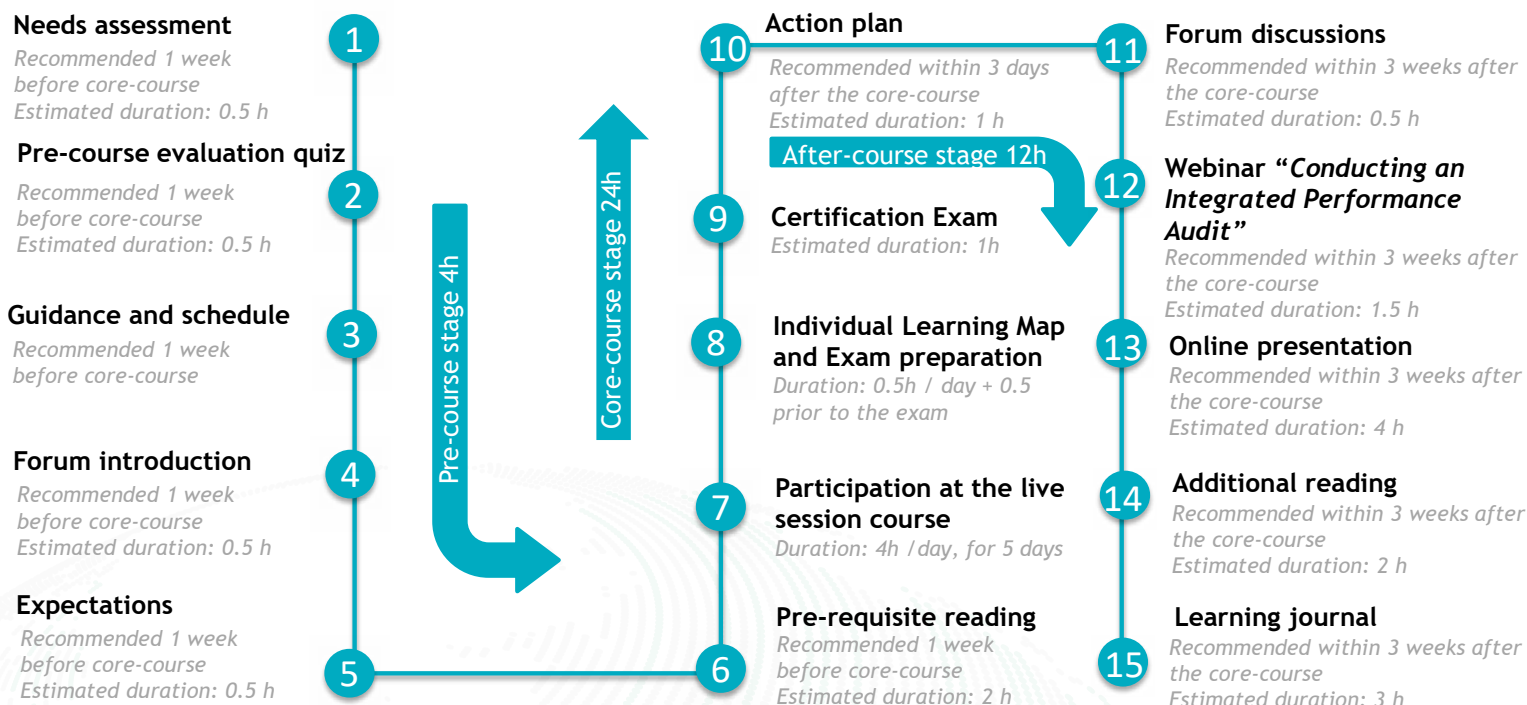
### Audit Deliverables

- › Audit Report
- › Executive Dashboard
- › Roadmap for Continuous Improvement Report
- › Roadmap for Continuous Improvement Infographic recommendations & conclusions.

### Review and Certification Exam

- › Course review, Q&A

# Certification Process



The certification process is finalized only when you complete all 3 stages of the learning experience. You will receive:

- Certificate of Completion (soft copy): after completing pre-course activities and passing the Certification Exam;
- Certificate of Attendance (soft copy): after taking part in the 5 days of the live session course;
- Certified Professional diploma (soft copy): after you have successfully completed all 3 stages of the learning experience and the contractor has received full payment.
- CPD Certificate of Attendance (soft copy): once you have successfully obtained the Professional status.



# Program Resources



## Course materials

- › Course slides;
- › Course notes;
- › Course quiz;

## Performance Management System Audit Reports Samples

- › Performance Management System Audit Report Sample;
- › Roadmap for Continuous Improvement Samples;
- › Executive Dashboard Infographic Sample;
- › Roadmap Infographic Sample;

## Videos

- › 11 Videos dedicated to Performance Management.

## Webinars

- › Free access to over 140+ Strategy & Performance Management related webinars delivered between 2014-2020;
- › Free access to the Webinars Series dedicated to the presentation and use of the Maturity assessment toolkits for all 5 key capabilities: strategic planning, performance measurement, performance management, employee performance management and performance culture.

## Performance Management Toolkit

- › Templates: Desired State of Evolution, Strategy Map, Performance Scorecard, Performance Dashboard, Performance Healthogram, Initiatives Portfolio, Performance Management System Architecture, Monthly Performance Management Process, Employee Scorecard;
- › Publications: KPIs for Human Resources Dashboard, KPIs for Human Resources Scorecard.
- › Performance Management Reports Series;

## 1 time access to the Performance Management System Maturity Model

- › Participants can access the full maturity model assessment on the GPA Unit platform to conduct a one-time audit of all 5 capabilities.
- › The maturity assessment methodology is available only online, and the GPA Unit account is valid for 12 months from the course starting date.

## Premium subscription on [smartKPIs.com](https://www.smartKPIs.com)

- › Available for 6 months to explore the 20,000+ KPIs database and to view, save and download up to 500 KPIs.

# Performance Management Systems Audit Toolkit included

- › Access granted on the Global Performance Audit Unit assessment platform.
- › Opportunity to perform a one-time performance management system assessment on each of the 5 Key capabilities included in the assessment toolkit.
- › Implementation guidelines, samples output reports, and password-protected access on the platform, granted upon successfully completing the certification process and being awarded the Certified status.

## Strategic Planning Maturity Assessment



### 💡 Strategy Envisioning

Refers to corporate identity elements like vision, mission and values. Looks into how they relate to the entity's purpose and provide a sense of direction towards the desired state of evolution. Evaluates whether they were formulated in a simple, but comprehensive language and whether they are embedded in employees' behaviors.

### 📈 Strategy Formulation

Contains statements meant to reveal how the strategic planning process takes place, which stakeholders are engaged and what instruments are used to perform the external environmental scan and define the current state of the entity.

### 📊 Strategy Focus

Provides an overview on the practices used to convert strategy into simple actionable objectives, to assign KPIs to track objectives achievements and to connect plans (strategic objectives) and actions (initiatives).

### 🎯 Strategy Articulation

Indicates whether the strategy is aligned and integrated across all levels and functions of the entity. Looks at the tools and instruments used in the implementation process.

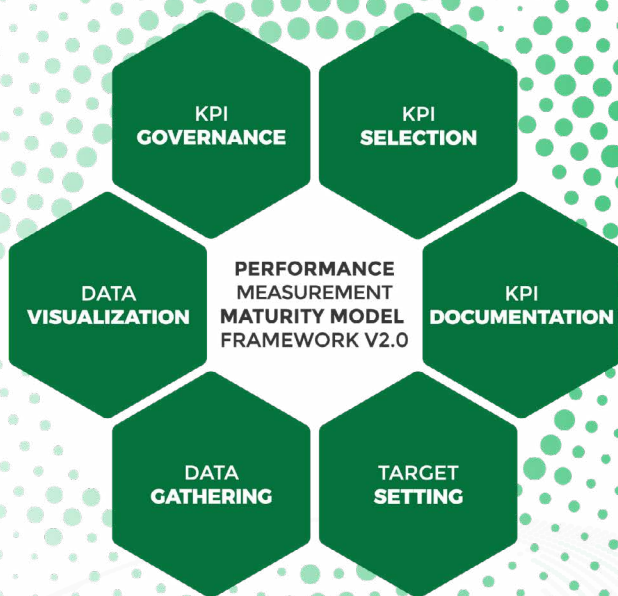
### 📋 Strategy Review

Presents the ability of the entity to adapt to changes and keep an updated strategy, through a thorough review process that involves all stakeholders.

### 📍 Strategy Governance & Communication

Reflects the efficiency of the strategy communication process, the level of awareness, transparency and understanding in regard to the roles and responsibilities for cascading and aligning the strategy across the organization.

## Performance Measurement Maturity Assessment



### KPI Selection

Consists in evaluating the processes, tools and techniques employed by the entity to select KPIs. Statements refer to the usage, the standardization of tools and practices, but also to the relevancy and alignment of KPIs to the strategy.

### KPI Documentation

Aims to identify whether KPIs are documented in the entity and how this process takes place in terms of tools used, people involved, governance and keeping information up to date.

### Target Setting

Assesses the extent to which target-setting relies on data and manages to create a stimulating environment to reach and exceed targets.

### Data Gathering

Refers to the data collection process in terms of data sources, data timeliness and accuracy. It also looks into the usage of software solutions to enable data gathering, modelling and reporting.

### Data Visualization

Provides an evaluation on the entity's approach in terms of visual design of data. Instruments assessed from the perspective of data visualization good practices are scorecards, dashboards and performance reports.

### KPI Governance

Incurs the assessment of internal accountability levels over performance measurement processes such as KPI Selection, KPI Documentation, Target-setting and Data Gathering. It refers to the overall process of owning and distributing responsibility for performance measurement.

## Performance Management Maturity Assessment



### Data Analysis

Assesses at what level is data analysis employed in the entity, identifying if special techniques or software are used.

### Reporting

Focuses on the efficiency of the reporting process, whether is supported by a software solution or not, if reports are ready on time and well structured.

### Decision Making

Evaluates how performance review meetings are approached from the preparation stage to the follow-up actions. It provides insight on the discussion focus and the decision-making process as an essential characteristic of such meetings.

### Initiative Management

Refers to the project management capability of the audited entity, on the framework used to implement initiatives. Assesses the delivery of projects on time, in budget and in accordance with the established quality standards.

### Learning & Improvement

Illustrates the ability of the performance management system to adapt to changes based on regular reviews of strategy. It analyzes the process of recording, reviewing and implementing improvement ideas.

### Performance System Governance

Identifies how the performance management system is coordinated, indicates accountability and governance. It assesses the clarity regarding the role of each internal stakeholder.



## Performance Culture Maturity Assessment



### Integrated Performance Capability

Reflects how well the performance management architecture is cascaded and integrated across the organization. Assesses the clarity regarding the role of each stakeholder, accountability and governance.

### Communication & Leadership Support

Indicates the efficiency of the communication process, the transparency of the entity towards internal stakeholders and the support of senior management for the development of performance management capabilities.

### Creativity & Innovation

The impact of effective communication is reflected in the employees' awareness on latest strategic decisions made and engagement towards achieving desired performance results. Clarity and motivation generally lead to proactivity, creativity and generate more ideas for performance improvement.

### Education & Knowledge

Assesses the entity's commitment to the continuous professional development of its employees. Refers to how the entity can grow by developing its human capital, using modern technology and building a performance culture.

### Benefits & Recognition

Evaluates the entity's approach towards measuring and rewarding employee performance. Refers to the established performance levels and the compensation & benefits schemes.

### Happiness & Well Being

Focuses on the working environment in terms of providing a positive attitude and mindset while nurturing feelings of happiness and wellbeing towards performance improvement.

## Employee Performance Management Maturity Assessment



### Employee Performance Planning

Indicates the best practices in terms of establishing performance standards for employees and clarifying expectations at the beginning of the appraisal cycle.

### Employee Performance Measurement

Focuses on the process of collecting performance data and the infrastructure used to support performance measurement and reporting.

### Employee Performance Review

Addresses the performance evaluation process and best practices that should ensure meaningful evaluations, effective feedback, on-time and objective assessments.

### Employee Performance Improvement

Refers to a set of key elements composing the post-evaluation period, the actions taken and the resources allocated to support employee professional development.

### Employee Performance Recognition

Analyzes the main features of a sustainable and motivating reward system. Whether it is about financial or non-financial rewards, acknowledging performance is important for raising employees' engagement.

### Employee Performance Governance

Highlights which are the responsibilities assigned for reviewing and supporting employee performance improvement. Focuses on clarifying the roles of all parties involved in the appraisal cycle and documenting all the tools and processes used.



# Faculty



The KPI Institute retains the authority to designate facilitators for each training course based on business requirements. The TKI Faculty continually expands by incorporating subject matter experts and experienced professionals to guarantee an exceptional experience for our trainees. Consequently, the facilitator assigned to the course may undergo changes prior to the actual delivery date. For information about the appointed facilitator for each session, kindly contact your sales representative or reach out to [office@kpiinstitute.org](mailto:office@kpiinstitute.org).



## Cristina Mihailoae

Business Unit Manager - Research Division  
Expertise: Strategic Planning and Execution, Performance Measurement, Employee Performance Management, Maturity Assessment, Operational Governance



## Alin Sonda

Management Consultant  
Expertise: Performance Measurement & Management, Balanced Scorecard, Performance Audit



## Doina Popovici

Management Consultant  
Expertise: Performance Measurement, Performance Management, Strategy Planning & Execution, Performance Audit

# About Executive Education in Strategy and Performance



The Executive Program in Strategy and Performance is the most complex educational program in The KPI Institute's portfolio. It is designed for business leaders who are interested in strengthening their skills in strategic planning, performance measurement, data analysis and reporting, and strategy execution in dynamic markets.

**Professionals interested in this program, can enroll to obtain one of the following diplomas:**

## Postgraduate Diploma in Strategy and Performance

Recommended for Executives and consultants interested in developing an in-depth understanding and experience in Strategy and Performance Management.

- › 3 semesters (18 months)
- › 6 mandatory courses
- › 2 elective courses
- › 1 final practitioner portfolio (36 assignments)
- › 1 Postgraduate Diploma in Strategy and Performance



## Graduate Certificate in Strategy and Performance

Recommended for professionals interested to explore the basic disciplines related to Strategy and Performance Management.

- › 2 semesters (12 months)
- › 4 courses
- › 1 final practitioner portfolio (20 assignments)
- › 1 Graduate Certificate in Strategy and Performance



*"NOTE: Certified Performance Management System Audit Professional is part of the Postgraduate Executive Education program."*

# Course Fees



Language	Date	Time zone 1	Time zone 2	Standard Fee
English	> 03 - 07 February	11:00-15:00 GST	15:00-19:00 GMT +8	USD \$ 1,500
	> 26 - 30 May	17:00-21:00 GST	08:00-12:00 CST (US)	USD \$ 1,500
Arabic	> 22 - 26 June	18:00-22:00 GST	09:00-13:00 CST (US)	USD \$ 1,500



# Join as a Group

## Customized Live Online Group Training Programs

The KPI Institute offers Customized Live Online Group Training Programs that provide a perfect blend of research, best-practice and best-in-class instructional design.

Leveraging on our extensive research work, our highly skilled faculty, our expertise in providing customized learning solutions, and our next-generation online technology, our Group learning programs are unique, readily-available learning experiences that deliver results for both your employees and your organization.

This fully customized training solution supports organizations of all sizes, to provide their employees with development opportunities in an efficient, impactful, and cost-effective way.

## Benefits of customized live online sessions

### ► Flexibility and convenience

Participants can learn from anywhere and the course can be scheduled in consecutive days throughout one week or selected days over 2 or more weeks. Participants can access learning materials from anywhere, anytime.

### ► Customized course content

Course content, case studies, and exercises will be customized based on the group's industry or selected functional areas, as well as by assessing current needs and competency development requirements.

### ► Business continuity

You can continue your work, with daily sessions, scheduled for a maximum of 4 hours, to ensure both information assimilation and work-related task completion efficiency.

### ► Virtual collaborative learning

Facilitated inter-company learning is enabled, leading to Virtual Teams Cooperation and Communication, with the help of specialized E-Learning technology.

### ► Cost effectiveness

You will save approximately 40% of your investment when compared to traditional face-to-face in-house solutions, due to the logistical burdens being removed from both customer and contractor.

# Registration

## 3 ways to register

### Online

marketplace.kpiinstitute.org

### Direct contact

Call us and we will assist you with the registration process

#### Middle-East Delegate

**Teodora Gorski**  
**Managing Director MENA**  
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#### Worldwide Delegate

**Alexandru Muntean**  
**Head of Customer Engagement**  
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## Registration form

Email us with your registration details

## Payment

### Credit card

Pay by credit card using the online facility.

### Bank transfer

1. Send an email containing your contact details and registration request;
2. An email confirmation containing the tax invoice and bank account details will be sent to you;
3. Proceed with the attendance fee payment by bank transfer;
4. Send through email the proof of the payment transaction completion;
5. A tax receipt together with the registration confirmation will be sent to you via email (after the attendance fee payment is confirmed).

Kindly ensure that your payments reflect the Total Amount of the invoice that will be presented to you. It is your responsibility to cover all bank fees due to Telegraphic / Wire transfer.

## Registration form

By filling your contact data, you agree to receive further information about our events. Your privacy is very important to us. We will not sell, rent or share your personal information under any circumstances.

### Participant details:

Mr. ☐ Mrs. ☐

First name

Last name

Job title

Email

Phone

Organization

Department

Date of training course

Training course

City

Country

### Registration cancellation procedure

Any withdrawals have to be announced at least two weeks before the beginning of the course, through fax or e-mail. In this situation, the attendance fee will be refunded, minus \$400 retained for administrative expenditure. The attendance fee will not be refunded if the withdrawal from the course takes place less than 2 weeks before its start date. If you are unable to attend the course after the registration process has been completed, you may delegate another person to attend the course in your place, without paying any further fees. If you have confirmed and paid the attendance fee, but you didn't attend the course, the fee will not be refunded. If you only partially attend the course (one day or a limited number of sessions), you will not benefit from any attendance fee reduction or refund.

### Terms of Agreement

If there are no other standing agreements, this form represents a valid contract between the parties.

I agree to the above terms and conditions.

Signed

Date

Company stamp

The Customer acknowledges and agrees that all materials provided by The KPI Institute, including but not limited to the live presentations, any audio-visual presentations, and the handout materials distributed pre, during and after the training course, shall at all times remain the sole and exclusive property of The KPI Institute. They cannot be made public, and can only be used for the purpose of the individual course participant's benefit. In no event shall the Customer use the live presentations, any audio-visual presentations, and/or the handout materials for any other purpose, including but not limited to the offering of any course, training or seminar that in any manner competes with the course or any portion thereof. This provision shall survive the termination or expiration of this Agreement.



# THE KPI INSTITUTE

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## HEADQUARTERS

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