

# THE KPI INSTITUTE

## Live Online Training Catalogue 2025

WORLDWIDE

The KPI Institute has been bestowed official recognition from the CPD Standards Office for 9 of our training courses, as an accredited Continuing Professional Development (CPD) educational and training course provider. Moving forward, all of our courses will bear the mark of the CPD Standards Office.



[www.kpiinstitute.org](http://www.kpiinstitute.org)



[office@kpiinstitute.com](mailto:office@kpiinstitute.com)



+613 7050 2557

# Certification Programs

For more than 20 years, The KPI Institute has been making a difference in developing best practices in the performance management field and sustaining the rapid growth of hundreds of institutional and corporate clients. Achieving performance entails maintaining sustainable business results, raising your performance ceiling, and overcoming those hurdles that dampen your improvement.

As a result, we have granted our clients and partners unfettered access to our learning & training opportunities, by going online with many of our most popular courses. We're here to help you along your professionalization journey!



## CERTIFIED AI ENABLEMENT PROFESSIONAL

This training program helps enable professionals to harness the power of Artificial Intelligence (AI) to not only streamline tasks and save valuable time, but also enhance the quality of work and outputs. Learn at your own pace, (that is the recorded version, we introduced the live online delivery format as well) gaining valuable insights into the latest Natural Language Processing (NLP) AI tools and best practices for practical application in various contexts.



## CERTIFIED KPI PROFESSIONAL AND PRACTITIONER

This program is meant to improve the practical skills in working with KPIs and developing instruments like scorecards and dashboards. Participants will acquire a sound framework to measure KPIs, starting from the moment they are selected, until results are collected in performance reports.



## CERTIFIED OKR PROFESSIONAL

This course teaches participants how to set and work with OKRs and offers them the opportunity to get certified on the ability to deploy and use OKRs in accordance with The KPI Institute's standards, developed through extensive research and practical knowledge in the field of Performance Management and Objective Setting.



## CERTIFIED STRATEGY AND BUSINESS PLANNING PROFESSIONAL

The course will help improve an organization's business planning process and long-term organizational performance, through the use of strategic planning tools that will ultimately lead to smarter and quicker strategic decisions.



## CERTIFIED PERFORMANCE MANAGEMENT PROFESSIONAL

This course offers insights and best practices for improving performance in different scenarios, from data analysis and reporting, decision making and initiative management, to building a performance culture.



## CERTIFIED PERFORMANCE MANAGEMENT SYSTEMS AUDIT PROFESSIONAL

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.





## CERTIFIED EMPLOYEE PERFORMANCE MANAGEMENT PROFESSIONAL

Attendees will gain exposure to best practices and key concepts, and will learn how to establish and use criteria for performance evaluations, from the implementation stage, to the improvement and maintenance of the company's employee performance management system.



## CERTIFIED DATA ANALYSIS PROFESSIONAL

Attendants will understand through practical learning how to effectively collect, analyze, and interpret data by enabling managers/analysts to draw insights from both quantitative and qualitative data, based on historical statistics and trend analysis.



## CERTIFIED DATA VISUALIZATION PROFESSIONAL

An exclusive framework that provides insights on effective visual communication, through a rigorous approach to creating visual representations of vast information, techniques of standardization, and tailored data visualization tools.



## CERTIFIED BENCHMARKING PROFESSIONAL

Benchmarking's methodological uniqueness is represented by the identification and analysis of the processes that lead to a company achieving superior performance, offering the opportunity to compare an organization's performance against industry competitors.



## CERTIFIED BALANCED SCORECARD MANAGEMENT SYSTEM PROFESSIONAL

This course focuses on delivering all the information needed to fully comprehend the value of the Balanced Scorecard, as well as on developing the necessary skills for its successful implementation.



## CERTIFIED INNOVATION PROFESSIONAL

This course provides an interactive practice-based learning environment, focusing on best practices for developing and maintaining an innovation-oriented organizational culture within organizations.



## CERTIFIED SUPPLIER PERFORMANCE PROFESSIONAL

We will develop our participants' skills in managing supplier performance and crafting a strategic approach to procurement, by enabling the identification of performance gaps and implementing action agreements with suppliers.



## CERTIFIED AGILE STRATEGY EXECUTION PROFESSIONAL

The Certified Agile Strategy Execution Professional course reflects the best methodologies to leverage the benefits of deploying an integrated strategy and performance management framework within organizational settings.



## CERTIFIED CUSTOMER SERVICE PERFORMANCE PROFESSIONAL

Participants will not only understand the importance and implementation phases for the Customer Service Excellence standards, but they will be given the necessary tools to implement it internally and measure its impact externally.



# Faculty



## Aurel Brudan

CEO  
Expertise: Strategy & Performance Management, Innovation Management, and Operations Management



## Adrian Brudan

General Manager TKI EMEA  
Expertise: Performance Measurement & Management, Strategy Planning & Execution



## Teo Gorski

Managing Director MENA  
Expertise: Performance Measurement & Management, Balanced Scorecard, Employee Performance Management



## Mihai Toma

Managing Director of Consulting Services  
Expertise: Balanced Scorecard, Strategy Planning & Execution, Performance Measurement & Management



## Alina Miercioiu

Senior Management Consultant  
Expertise: OKRs, Performance Measurement & Management, Benchmarking



## Andrea Minelli

Management Consultant  
Expertise: Strategy Planning & Execution, Performance Measurement & Management, Balanced Scorecard



## Ahmed Al-Zahrani

Lead Management Consultant  
Expertise: Strategy Planning and Execution, Organizational Development, and People Management



## Alin Sonda

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



## Raluca Vintila

Management Consultant  
Expertise: Performance Measurement



## German Zelada

Management Consultant. Expertise: Performance Measurement, Project Management, Software Development, Business Intelligence (BI) and Enterprise Resource Planning (ERP)

**Cristina Mihailoiaie**

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

**Iulia Tutulan**

Management Consultant  
Expertise: Employee Performance Management

**Doina Popovici**

Management Consultant  
Expertise: Performance Audit

**Malek Ghazo**

Lead Management Consultant  
Expertise: Performance Measurement Management, Strategy Management, Data Visualization, Customer Service, Organizational Excellence, Innovation, Sustainability

**Manhal Dakhl-Allah**

Lead Management Consultant  
Expertise: Strategy Planning & Execution, Business Balanced Scorecards, Performance & KPIs Management, Employee Performance Management

**Sasqia R. Ramadhani**

Performance Management Consultant  
Expertise: Performance Measurement & Management

**Linh Do**

Head of Professional Services TKI Vietnam - Management Consultant  
Expertise: Performance Measurement, Performance Management, Strategy Planning

**Radu Coccan**

Lead Management Consultant  
Expertise: Strategy Planning and Execution

**Codruta Mare**

Data Analytics Consultant  
Expertise: Data Analysis and Statistics

**Cristina Bleoca**

Management Consultant  
Expertise: Operations Management, Performance Measurement, Procurement, and Supplier Management

**Islam Salahuddin**

Certified Data Analysis and Data Visualization Designer, with Experience in Insights Communication with Decision Makers and Public Audiences.

# Benefits of Online Live Formats

Enjoy all of the perks and quality of our usual learning experiences, now in a more accommodating and comfortable format:

► **Work continuity**

The learning never stops! With our new formats, we can programme daily sessions of up to 4 hours in length, which will ensure not only that our attendees can assimilate all of the information efficiently, but they can also tend to all of their work-related tasks as well.

► **Logistical versatility**

Given the structure of our live sessions, you will be able to join in from your office desks, meeting rooms or even the comfort of your home, if you so wish to choose!

► **Choice flexibility**

Since we're now delivering in an online format, you no longer have to be tied to travel costs & schedules. You are free to choose which session you attend. If you cannot make it to the first training course, you can always opt in to join a later one, at your convenience.

► **Saving costs**

The KPI Institute's new online live formats present both businesses and individuals with an unprecedented opportunity – saving up to almost 50% on your course costs, compared to our regular in-house or face-to-face formats, since many of the logistical burdens waive from both the client and contractor.

► **Practicing virtual cooperation**

Our new online courses enable you to gain experience in using virtual cooperation & communication environments, with the aid of specialized software tools like Microsoft Teams, Slack and others. These may serve as a reliable model for future work-related activities.

► **In-depth knowledge**

Considering the specific nature of these training sessions, all attendees will be able to gain much greater knowledge over any and all aspects of their chosen course, since each trainer will be able to customize the experience according to each client's needs, rate of learning and depth of information.



# Join as a Group

## Customized Live Online Group Training Programs

The KPI Institute is offering 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, together with next-generation online technology, our Group learning programs are unique, accessible anytime, anywhere learning experiences that deliver results for employees and the 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 it 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 convenient for the group.

### ► 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

Continuity of work with daily sessions scheduled for a maximum 4 hours to ensure both information assimilation efficiency and work-related task completion.

### ► 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

An estimated of up to 40% savings compared with traditional face-to-face in-house solutions, due to logistical burdens being waved from both customer and contractor.

Customized Live Online Group Courses	Online Live Format	Content details
Certification	5 Days - 4h/Day	Fully customized certification course
Masterclass	3 Days - 4h/Day	75% of the certification course content, selected based on group requirements
Essentials	2 Days - 4h/Day	50% of the certification course content, selected based on group requirements
Awareness Session	4 h	Selected 1 or 2 sessions from a certification content, depending on the length

Group sizes range from a minimum of 10, to a maximum of 25 participants.

Should you be interested in scheduling a live online Group training course, email us at [office@kpiinstitute.org](mailto:office@kpiinstitute.org) or contact one of the region representatives.

## Online Coaching (up to 4h)

- ▶ One of our consultants and facilitators will be dedicated to help customers individually achieve their business objectives, evaluate current systems or tools and provide feedback on how to improve current strategy, performance measurement and management practices.
- ▶ Our dedicated coaches are industry, capability and functional area experts who guide the participants in addressing their business needs and requirements.
- ▶ They will work closely with attendees and help them address their individual areas of improvement.
- ▶ We can assist in providing coaching on all the topics that we cover through our certification programs detailed in this brochure.

\*Live coaching will be provided via conference call. The session scheduling will be established either via email/conference call for all delegates or individually between each participant and the facilitator.

\*\*Hours to be accessed when required by scheduling as per customer preference and facilitator availability.

**Get in touch with us for a customized quotation**



# Benefits of Online Coaching

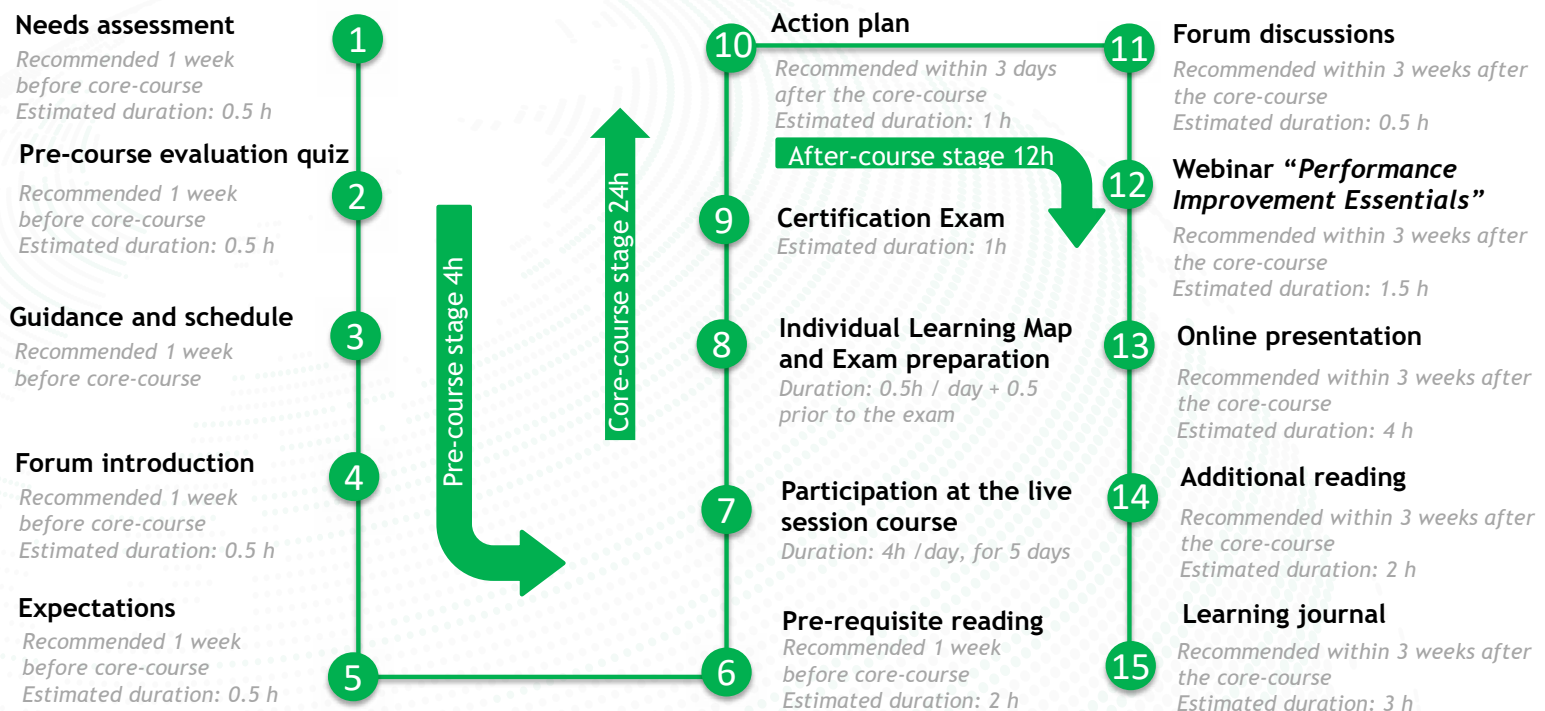
## ► Personal coach

Receive one-on-one coaching from one of our foremost experts, all of which boast several years of experience in their respective specializations. This format allows you to address some of your most granular questions and ensure you master each technique and theoretical notion.

## ► Schedule flexibility

The Coaching hours can be split and scheduled over several consecutive days, during one week, or planned out on specific days, over a 2+ week period. It's up to you and your availability!

# Certification Process



The certification process is finalized only when you complete all of the 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 participating at the 5 days of live session course;
- Certified Professional diploma (soft copy): after you have successfully completed all of the 3 stages of the learning experience and the full payment was received by contractor;
- CPD Certificate of Attendance (soft copy): once successfully obtained the Professional status.

NEW



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# CERTIFIED AI ENABLEMENT PROFESSIONAL

## Live - Online Certification

The Certified AI Enablement Professional is an official CPD-accredited training course, provided by The KPI Institute, for the purpose of continuing professional development.

As granted by the CPD Standards Office, this course has received international recognition as a best practice learning experience.

The Certified AI Enablement Professional course, created by maentae and based on the AI Enablement Framework developed by FAEI in partnership with The KPI Institute, is an advanced, comprehensive program designed to equip business leaders and professionals with the skills and knowledge required to successfully integrate AI technologies within their organisations.

This course is built around the cutting-edge AI Enablement Framework, offering a systematic approach to assessing AI readiness, developing AI strategies, deploying AI solutions, and managing AI performance across various industries. Participants will gain mastery in essential areas such as Natural Language Processing (NLP), prompt engineering, AI readiness assessments, strategic AI road mapping, and AI deployment. They will also learn how to maintain and continuously improve AI systems to ensure sustained performance and alignment with evolving business needs.

### + Benefits

- › Get access to a deeper understanding of the value added and functionality of the AI Enablement;
- › Develop and implement AI Enablement Architecture in a standardized manner;
- › Overcome challenges in strategy execution by implementing the AI Enablement;
- › Improve strategy communication by using AI Enablement.
- › Obtain 40 CPD credits to include in your CPD records for your professional body, institute, regulator or employer.

### + Learning objectives

- › Understand AI fundamentals, including NLP, prompt engineering, and readiness assessment.
- › Develop and implement AI strategies with clear roadmaps and governance.
- › Measure AI performance and ensure continuous improvement.
- › Foster an AI-ready culture and apply AI solutions across industries.

# Agenda

## Day 1 - 8h

### NLP AI Fundamentals

- › Introduction to AI Literacy
- › Introduction to Natural Language
- › Processing Knowledge Assessment

## Day 2 - 8h

### Artificial Intelligence Readiness Assessment

- › Operational Readiness
- › Technology Readiness
- › Skills Readiness

## Day 3 - 8h

### AI Integration Preparation

- › AI Implementation Requirements
- › AI Implementation Plan

### Prompt Engineering Fundamentals

- › Introduction to Prompt Engineering
- › Understanding Prompt Misuse and Bias

### Artificial Intelligence Strategy and Roadmap

- › AI Enablement Goals
- › Use Cases
- › AI Tools Catalogue
- › Integration Feasibility
- › AI Strategy Roadmap

### AI Integration Deployment

- › Testing Stage
- › AI Governance
- › AI Deployment

## Day 4 - 8h

### AI Performance Metrics and Analytics

- › Understanding AI Tool Performance
- › Understanding AI Business Impact Measurement

### AI Integration Maintenance and Improvement

- › Understanding AI Maintenance Mechanisms
- › AI Continuous Improvement

## Day 5 - 8h

### AI Integration Training and Capacity Building

- › AI Skills and Awareness
- › Application of AI Integration Training

### AI-Ready Culture for Business Integration

- › Organisation Change Management
- › AI Ready Culture
- › Application of AI-Ready Culture





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# CERTIFIED STRATEGY AND BUSINESS PLANNING PROFESSIONAL

## Live - Online Certification

Develop strategies to drive business performance

The Certified Strategy and Business Planning Professional is an official CPD-accredited training course, provided by The KPI Institute, for the purpose of continuing professional development.

As granted by the CPD Standards Office, this course has received international recognition as a best practice learning experience.

To be successful in the long-run, organizations need to define a mission and a vision, that can be cascaded down into SMART strategic and operational objectives, at all hierarchical levels. The course offers an algorithm on how this can be done, with a focus on creating strategies that are internally consistent and aligned for optimal performance. At the same time, the course offers tools for both internal and external environment scanning, that will allow companies to build strategies that are flexible and shock-absorbent, adapted to a business world that is rapidly changing. Last but not least, the course focuses on how departments can set their own strategies and action plans, that are ready-for-execution and support the overall corporate strategy.

### + Benefits

- › Receive structured knowledge, that can be transferred into all areas of their professional life;
- › Get access to a network of specialists, sharing business opportunities and innovative solutions to strategy planning dilemmas;
- › Receive a premium recognition as a Certified Strategy and Business Planning Professional;
- › Obtain 40 CPD credits to include in your CPD records for your professional body, institute, regulator or employer.

### + Learning objectives

- › Build up a strategic mind-frame;
- › Understand key strategy planning concepts;
- › Use strategy planning tools, in individual and team exercises;
- › Reflect on the best practices in the field, through case.

# Agenda

## Day 1 - 4h

### Key concepts

- › Strategy planning defined
- › Assumptions for strategy planning
- › The process of strategy planning – an overview

### Corporate Identity

- › Impact
- › Mission
- › Corporate values
- › Capabilities

## Day 2 - 4h

### Choice of a competitive strategy

- › Low cost, low price
- › Differentiation
- › Customer relationship
- › Network effect

### Strategic Internal Environmental Scanning

- › Assessing existing processes
- › Assessing existing resources
- › Assessing existing procedures
- › Competitive benchmarking

## Day 3 - 4h

### Strategic External Environmental Scanning

- › PESTEL analysis
- › Porter's 5 forces
- › SWOT Analysis
- › Scenario Planning

### Case Study

- › Definition of corporate identity
- › Internal environment scanning
- › External environment scanning
- › SWOT analysis

## Day 4 - 4h

### Vision & Choice of Growth Strategy

- › Defining the vision in the context of the chosen planning scenario
- › Intensive growth
- › Internationalization strategies
- › Integrative growth
- › Diversification strategies

### SMART Objectives at Corporate Level

- › Long-term vs. strategic objectives
- › SMART strategic objectives
- › The strategy tree

## Day 5 - 4h

### Case Study

- › Vision
- › Choice of a growth strategy
- › The strategy tree

### Planning at Departmental Level

- › An overview of the planning process at department level
- › The algorithm of cascading the corporate strategy
- › Planning "business as usual" vs. identifying new projects at department level

### Review and Q&A

- › Course review
- › Q&A



# CERTIFIED AGILE STRATEGY EXECUTION PROFESSIONAL

## Live - Online Certification

Ensure a successful strategy execution

A significant percentage of strategies fail in the execution phase and this is no novelty for most Executives. Strategy execution must effectively engage different organizational capabilities and a variety of resources. Reasons for failure vary from poor leadership to inability to secure budget or drive actual change in the organization. Regardless, of what lies behind every failed strategic initiative, it is essential for Executives to equip themselves with the right tools to design a proper framework to implement strategic decisions.

In today's high demanding and dynamic markets, an effective and efficient strategy execution capability can represent a key competitive advantage.

The Certified Agile Strategy Execution course is developed on a proprietary framework developed by The KPI Institute for strategy implementation. It not only presents best practices, but provides actual advice, process maps and instruments to ensure a successful strategy execution.

### + Benefits

- › Get access to a step-by-step model to improve the strategy execution framework;
- › Use pre-populated tools to facilitate the implementation of strategic initiatives;
- › Access an innovative learning experience based on a 3-stage educational process;
- › Expand your business network by becoming a member of the international Certified Agile Strategy Professional Community;
- › Obtain international recognitions for your skills as a Certified Agile Strategy Professional.

### + Learning objectives

- › Use strategy planning tools;
- › Deploy KPIs to monitor strategy implementation;
- › Engage the right stakeholders in strategy execution;
- › Monitor strategy implementation;
- › Drive organizational change.



# Agenda

## Day 1 - 4h

### Strategy Management Overview

- › Key concepts
- › Strategy Management Framework
- › Agile strategy execution.

### Strategy Execution Prerequisites - I

- › Talent
- › Corporate level core competencies
- › Key competencies at strategic initiative level
- › Staffing for strategy
- › Finances.

## Day 2 - 4h

### Strategy Execution Prerequisites - II

- › Strategy Execution System
- › Process management
- › System map
- › Governance.

### Initiatives Management

- › Translate strategy into initiatives
- › Portfolio management
- › Initiatives management
- › Benefits realization.

## Day 3 - 4h

### Performance Measurement

- › Data gathering
- › Data analysis.

### Performance Reporting

- › Reports development
- › Reporting process
- › Cross-functional alignment.

## Day 4 - 4h

### Adapting To Changes

- › Strategy management cycle
- › Strategy review meeting
- › Decision making.

## Day 5 - 4h

### Key Capabilities To Support Strategy Execution

- › Strengthening strategic agility
- › Change management
- › Culture
- › Technology.

### Review and Q&A

- › Course review
- › Q&A.



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# CERTIFIED KPI PROFESSIONAL

## Live - Online Certification

Getting Key Performance Indicators right by using a rigorous KPI measurement framework

The Certified KPI Professional is an official CPD-accredited training course, provided by The KPI Institute, for the purpose of continuing professional development.

As granted by the CPD Standards Office, this course has received international recognition as a best practice learning experience.

KPI selection and data gathering are considered by professionals all around the world to be the most challenging aspects in working with KPIs. 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. This training course presents a rigorous KPI Measurement Framework that embeds 10 years of research in the field of key performance indicators and relies on best practices identified in the real business environment.

### + Benefits

- › Support decision making by accessing relevant performance data;
- › Use pre-populated tools to facilitate the implementation of a KPI Measurement Framework in your organization by receiving 10+ templates used in working with KPIs;
- › Access an innovative learning experience based on a 3 stage educational process;
- › Expand your business network by becoming a member of the international Certified KPI Professionals Community;
- › Obtain 40 CPD credits to include in your CPD records for your professional body, institute, regulator or employer.

### + Learning objectives

- › Differentiate between objectives, KPIs and initiatives;
- › Understand KPI selection in different contexts;
- › Apply best practice techniques to KPI selection;
- › Document KPIs in a standardized template;
- › Learn when and how to use benchmarking in target setting;
- › Optimize the KPI activation and data gathering process.

# Agenda

## Day 1 - 4h

### The World of KPIs

- › Challenges in performance measurement
- › The value added by KPIs
- › Main roles of Business Performance Management systems
- › Integrating tools into a Performance Management System
- › Performance tools overview
- › KPIs Management Framework concept map
- › Governance
- › KPIs skills architecture

## Day 2 - 4h

### Understanding KPIs

- › KPI related terminology
- › SMART objectives decomposed
- › KPI lifecycle

### KPI typology

- › Leading vs lagging KPIs
- › Qualitative vs quantitative KPIs
- › Efficiency vs effectiveness KPIs

### KPI Taxonomy

- › Interdisciplinary systemic worldview
- › KPI use case scenarios
- › KPI DNA map

## Day 3 - 4h

### KPI Selection

- › KPI selection for org. scorecard
- › KPI selection sources
- › KPI selection techniques

### KPIs in Context

- › KPI selection for industry
- › KPIs cascaded to functional area

## Day 4 - 4h

### KPI Documentation

- › KPI documentation form functions
- › KPI documentation form design
- › KPI documentation process
- › Organizational KPI libraries development
- › Weights and Indexes

### Working with targets

- › KPI documentation processes
- › Targets in practice
- › Challenges in working with targets
- › Negative behaviors when setting targets

## Day 5 - 4h

### Data Gathering

- › Data quality dimensions
- › KPI reporting data sources
- › KPI activation tools
- › KPI activation techniques
- › Guidelines to improving communication with data custodians
- › Community of Practice

### Data Visualization

- › Guidelines to design efficient templates
- › Usability in terms of visual design
- › Scorecard and dashboard examples
- › Best practices in scorecard design
- › Best practices in dashboard design





## CERTIFIED KPI PRACTITIONER

### Live - Online Certification

Maximize the impact of KPIs on your organization's performance!

The Certified KPI Professional is an official CPD-accredited training course, provided by The KPI Institute, for the purpose of continuing professional development.

As granted by the CPD Standards Office, this course has received international recognition as a best practice learning experience.

Selection and data gathering are considered by practitioners all around the world to be the most challenging aspects in working with Key Performance Indicators (KPIs). 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. The KPI Institute has developed a rigorous KPI Measurement Framework that embeds 10 years of research in the field and relies on best practices applicable in the real business environment. The KPI Measurement Framework represents the fundamentals for the educational program Certified KPI Professional and Practitioner.

#### + Benefits

- › Receive personalized feedback on your own KPI Practitioner Portfolio;
- › Practice a sound framework to ensure KPIs are aligned to strategy;
- › Practice the development of tools and take a step forward towards your KPI Practitioner Certification;
- › Access +15 templates that help you implement a KPI Measurement Framework in your organization.
- › Obtain 40 CPD credits to include in your CPD records for your professional body, institute, regulator or employer.

#### + Learning objectives

- › Differentiate between objectives, KPIs, and initiatives;
- › Understand KPI selection in different contexts;
- › Apply best practice techniques to KPI selection;
- › Document KPIs in a standardized template;
- › Learn when and how to use benchmarking in target-setting;
- › Optimize the KPI activation and data gathering process.

# Agenda

## Day 1 - 4h

### KPI Project Coordination

- › The business case for KPI implementation
- › KPI project plan
- › Primary and secondary data sources
- › KPI workshop briefing pack.

### KPI Selection at Organizational Level - I

- › Value driver concept mapping
- › Strategy map
- › KPI selection techniques (Expo, KPI Clustering).

## Day 2 - 4h

### KPI Selection at Organizational Level - II

- › KPI selection techniques (VFA, Balancing)
- › Organizational scorecard
- › Initiatives management.

### KPI Selection at Operational Level

- › Department scorecard
- › Operational dashboard.

## Day 3 - 4h

### KPI Measurement

- › Data gathering communication
- › KPI report
- › Change log.

### Review and Q&A

- › Course review
- › Q&A.



# CERTIFIED PERFORMANCE MANAGEMENT PROFESSIONAL

## Live - Online Certification

### Transform to perform and grow

The Certified Performance Management Professional is an official CPD-accredited training course, provided by The KPI Institute, for the purpose of continuing professional development.

As granted by the CPD Standards Office, this course has received international recognition as a best practice learning experience.

The course approaches performance management as a practice that enables structure and alignment to effectively deliver the organizational strategy. The purpose of the course is the harmonious growth of the organization and enhanced organizational results. It focuses on the design of performance management processes that support a high performing organizational culture and environment, as well as defines the framework, tools and techniques required to lead human empowerment. The course summits with a highly interactive and applicative session in which participants learn how to manage and improve organizational results. As part of this process participants are involved with rooting out operational issues based on underperforming KPIs, performing cause and effect analysis, managing/cascading initiatives and designing an overall action plan for organizational improvement.

### + Benefits

- › Make the case for a Performance Management System Implementation in your organization
- › Understand the role of the Performance Management Office in the Performance Management System Governance scheme of the organization
- › Identify the main stakeholders involved in the Performance Management Process
- › Discover the role of the manager in decision-making, communicating results, empowering and endorsing the performance culture and capabilities of the organization
- › Develop an action plan for the overall improvement of the performance management process in the organization and achieve high level maturity for your performance management system

### + Learning objectives

- › Build key competencies within Performance Management Office
- › Develop a Performance Management System Evaluation Scorecard
- › Identify the main problems associated with underperforming KPIs
- › Learn how to use the right tools for effective problem solving
- › Develop an action plan for the overall improvement of the reporting process in the organization



# Agenda

## Day 1 - 4h

### Introduction to Performance Management

- › Key Performance Management Concepts
- › Evolution of Performance Management
- › Performance Management Frameworks
- › Performance Management System Architecture

### Trends Shaping Performance Management Practices

- › Digital Transformation
- › Stakeholder Capitalism
- › ESG & Sustainability
- › Agility
- › Resilience

## Day 2 - 4h

### Performance Management System Governance

- › State of Performance Management Systems Worldwide
- › Benefits of Having a Performance Management Office in the Organization
- › Integration Performance Management Processes with Key Organizational Processes
- › Best Practice Profile of the Performance Management Function
- › Performance Management Implementation Business Case

### The Performance Management Process

- › Main Features of the Performance Management Process
- › Performance Management System Governance Models
- › Performance Reporting Requirements
- › Management Reporting Structure
- › Data Quality and Audit

## Day 3 - 4h

### Performance Management Tools

- › Desired State of Evolution
- › Strategy Map
- › Performance Scorecard
- › Performance Dashboard
- › Performance Management System Integration

### Performance Enablers

- › Leadership and Communication
- › People
- › Organizational Environment
- › Culture and Innovation
- › Technology

# Agenda

## Day 4 - 4h

### Learning and Improvement

- › Framework for Continuous Improvement
- › Performance Management System Optimization
- › Improving Performance Results
- › Learning and Improvement Techniques

### Corporate Performance Management

- › Performance Management System Evaluation
- › Departmental Scorecard Development Process Map
- › Departmental Scorecard Development RASCI Matrix
- › Performance Management Tools and Initiatives
- › Data Gathering and Reporting

## Day 5 - 4h

### Departmental Performance Management

- › Underperforming KPIs and associated problems
- › Cause and Effect Analysis
- › Drafting Improvement Initiatives
- › Cascading Initiatives
- › Key Initiative Performance Indicators
- › Action Plan for Improvement

### Individual Performance Management

- › Agile Employee Performance Management
- › Continuous Employee Performance Management Cycle
- › Meetings and Check In Discussions
- › Performance Matrix Analytics



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# CERTIFIED EMPLOYEE PERFORMANCE MANAGEMENT PROFESSIONAL

## Live - Online Certification

Implementing a successful employee performance management system by using a structured approach.

The Certified Employee Performance Management Professional is an official CPD-accredited training course, provided by The KPI Institute, for the purpose of continuing professional development.

As granted by the CPD Standards Office, this course has received international recognition as a best practice learning experience.

This course will clarify key, specific, detailed concepts and will provide practical tools and techniques for implementing, improving or maintaining the company's employee performance management system. Attendees will gain exposure to best practices in the field of performance management and will learn how to establish and use criteria for evaluating performance.

### + Benefits

- › Nurture core competencies in order to design, implement, monitor, evaluate and follow a performance management cycle in a successful manner;
- › Improve the visibility and clarify accountability related to performance expectations;
- › Implement the knowledge acquired during the training course, by accessing a set of performance management tools and relevant;
- › Identify the necessary corporate competencies and skills gaps to generate sustainable growth;
- › Obtain 40 CPD credits to include in your CPD records for your professional body, institute, regulator or employer.

### + Learning objectives

- › Understand the fundamentals of the performance management framework;
- › Learn how to track the employee performance during each phase of performance management cycle;
- › Apply key tools to measure employees' results in a fair and objective manner;
- › Learn how to conduct efficient performance appraisals;
- › Gain the knowledge of developing a Performance Management System business case.

# Agenda

## Day 1 - 4h

### Employee Performance Management context

- › Benefits of implementing an Employee Performance Management System
- › Prerequisites of an Employee Performance Management System
- › Governance for the Employee Performance Management
- › Impact areas of an Employee Performance Management System
- › Performance Management Cycle.

### Employee Performance Management Architecture

- › The link between business strategic objectives and day-to-day actions
- › Tools and techniques used in performance management
- › Visibility and accountability through employee performance management.

## Day 2 - 4h

### Employee Performance Management Implementation Project

- › Importance of a business case for an implementation project
- › Elements of a business case
- › Clarify organizational context
- › Design the system implementation project plan
- › Define the tools and templates to be used
- › Training sessions for management and employees
- › Launch and utilize the system
- › Monitoring and review implementation process.

## Day 4 - 4h

### Employee Performance Management Cycle

- › Employee performance planning
- › Mid-year performance review objectives
- › Point of contact and support for employees
- › Annual performance review.

### Employee performance appraisal meeting

- › Preparation for the appraisal meeting
- › Feedback techniques
- › Active listening
- › Performance conversations.

## Day 3 - 4h

### Establishing performance criteria

- › Cascading objectives and KPIs from organizational to departmental and individual level
- › Defining and selecting competencies
- › Defining and selecting behaviors.

### Evaluating Employee Performance

- › Employee performance evaluation form
- › Evaluating KPI results
- › Assessing competencies and behaviors
- › Rating overall performance.

## Day 5 - 4h

### Talent management

- › Linking performance evaluation to talent management
- › Employee performance plans career path, development plan
- › Compensation and benefits.

### Review and Q&A

- › Course review
- › Q&A.





# CERTIFIED BALANCED SCORECARD MANAGEMENT SYSTEM PROFESSIONAL

## Live - Online Certification

Implement a Balanced Scorecard Management System to drive business performance

The training course provides you with relevant knowledge on how to develop and implement a Balanced Scorecard System. This course offers a comprehensive overview on the many benefits any organization can extract from the Balanced Scorecard System implementation. A highly interactive learning experience will enable you to grasp the functionality of the Balanced Scorecard, and leverage on its benefits to advance strategy execution. The course focuses on delivering all the information needed to fully comprehend the value of the Balanced Scorecard, as well as on developing the necessary skills for a successful implementation.

### + Benefits

- › Get access to a deeper understanding of the value added and functionality of the Balanced Scorecard Management System;
- › Develop and implement a Balanced Scorecard Management Architecture in a standardized manner;
- › Overcome challenges in strategy execution by implementing the Balanced Scorecard Management System;
- › Improve strategy communication by using the Balanced Scorecard Management System.

### + Learning objectives

- › Comprehend fundamentals of a Performance Management System;
- › Transpose the organizational strategy into a Balanced Scorecard Management System;
- › Learn how to integrate the components of a Balanced Scorecard Architecture;
- › Differentiate between objectives, KPIs, and initiatives.

# Agenda

## Day 1 - 4h

### Balanced Scorecard - Performance Management Framework

- › What is Balanced Scorecard?
- › Balanced Scorecard structure and elements
- › The role of the Balanced Scorecard
- › BSC terminology
- › BSC system architecture.

### Balanced Scorecard Governance and Performance Leadership

- › Clarify mandate for improvement
- › Enlist leadership support
- › Balanced Scorecard governance framework
- › Build project competency.

## Day 2 - 4h

### Organizational assessment

- › Assessment and evaluation
- › Internal Assessment
- › Performance Management Maturity Model
- › Environmental scanning techniques.

### Strategy Formulation and Integration

- › Defining strategy
- › Vision, Mission Statement
- › Organizational values.

## Day 3 - 4h

### Setting organizational objectives

- › Value drivers
- › Goals and Objectives
- › SMART Objectives
- › Building the Strategy Map.

### Working with KPIs

- › KPI Balancing
- › KPI selection for organizational scorecard
- › Importance of KPI Documentation
- › Target setting recommendations.

## Day 4 - 4h

### Initiative management

- › Portfolio of Initiatives development
- › Initiatives documentation form functions
- › Initiatives documentation process.

### Aligning the BSC across organizational levels

- › Alignment approaches
- › Objectives and KPI cascading: Functional area.

## Day 5 - 4h

### Managing the BSC system

- › Data governance
- › Performance reporting
- › Performance review meetings
- › BSC system recalibration.

### Nurture a Performance Culture

- › Communication
- › Education
- › Engagement
- › Comprehensive Performance Management System
- › Compensation and Gamification.

### Review and Q&A

- › Course review
- › Q&A.



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# CERTIFIED OKR PROFESSIONAL

## Live - Online Certification

Getting Objectives and Key Results right by using a rigorous OKRs implementation and value generation framework

The Certified OKR Professional is an official CPD-accredited training course, provided by The KPI Institute, for the purpose of continuing professional development.

As granted by the CPD Standards Office, this course has received international recognition as a best practice learning experience.

This course trains participants in how to set and work with OKRs and offers them the opportunity to get certified on the ability to deploy and use OKRs in accordance with The KPI Institute's standards, developed through extensive research and practical knowledge in the field of Performance Management and Objective Setting.

### + Benefits

- › Support fast decision making by fostering constant feedback and communication;
- › Access an innovative learning experience based on a 3 stage educational process;
- › Obtain premium recognition as a Certified OKR
- › Professional by completing a unique international learning program;
- › Expand your business network by becoming a member of the international Certified OKR Professionals Community;
- › Champion the use of a rigorous OKRs process within organizations;
- › Obtain 40 CPD credits to include in your CPD records for your professional body, institute, regulator or employer.

### + Learning objectives

- › Differentiate between objectives, Key Results and Initiatives;
- › Recognize different types of OKRs;
- › Acknowledge the benefits of stretched goals;
- › Understand OKR setting in different contexts;
- › Apply best practice techniques to align OKRs across the organization;
- › Comprehend the review and decision making process;

# Agenda

## Day 1 - 4h

### Understanding OKRs

- › What are OKRs?
- › Stretched goals
- › Measurable Key Results
- › Action oriented initiatives

### OKRs and other PMS

- › OKRs vs KPIs
- › OKRs and KPIs integration
- › OKRS vs MBO

## Day 2 - 4h

### Performance management system based on OKRs

- › Challenges in working with OKRs
- › OKRs lifecycle
- › The value added by OKRs
- › Governance

### OKRs typology

- › Strategic vs tactical OKRs
- › Aspirational vs Committed OKRs

## Day 3 - 4h

### OKRs in different environments

- › OKRs in general organizations
- › OKRs in innovative/project-based companies
- › OKRs in governmental entities

### Setting OKRs

- › OKR setting process
- › Common mistakes in setting OKRs
- › OKR setting in practice

## Day 4 - 4h

### Aligning OKRs

- › OKR alignment approaches
- › OKR alignment in different types of organizations
- › OKRs alignment in practice

### OKRs review

- › OKRs review process
- › Types of OKRs review
- › OKRs review in practice

## Day 5 - 4h

### Learning from OKRs

- › Decision making process based on OKRs
- › Initiatives management
- › OKRs refinement

### Change management culture

- › Change management
- › Employee engagement
- › Gamification

### Review and Q&A

- › Course review
- › Q&A





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# CERTIFIED DATA ANALYSIS PROFESSIONAL

## Live - Online Certification

Providing the necessary analysis tools for obtaining operational excellence

The Certified Data Analysis Professional is an official CPD-accredited training course, provided by The KPI Institute, for the purpose of continuing professional development.

As granted by the CPD Standards Office, this course has received international recognition as a best practice learning experience.

The Data Analysis Professional is the first level of our Data Analysis Program. It is a hands-on training course aimed at equipping you with the necessary concepts and tools needed to perform basic statistical and analytical reporting activities, in order to generate value out of the existing data. The course provides you with the knowledge required for understanding distinct methods used in analyzing data, statistical interpretation of quantitative and qualitative data, and becoming proficient in using key Microsoft Excel features, by building frequency and conditional tables, creating different types of charts, finding correlations and relationships between variables, hypothesis testing and statistical modeling.

### + Benefits

- › Obtaining the most relevant data, by setting up a customized data analysis process;
- › Understanding the data analysis process, its methodology, and logical framework;
- › Obtaining the necessary knowledge to analyze complex data and to interpret results;
- › Improving the organization's decision-making process, by gaining knowledge on data analysis and interpretation;
- › Receiving the management team's buy-in, by sharing with them the utility of implementing a customized data analysis methodology in daily business activities;
- › Obtain 40 CPD credits to include in your CPD records for your professional body, institute, regulator or employer.

### + Learning objectives

- › Developing a hands-on, practical overview of data analysis and connected topics;
- › Integrating statistical concepts and analysis tools that are widely used in corporate analytics environments;
- › Analyzing examples of practical applications for statistical methods, used in solving real-life business issues;
- › Acquiring mastery of Microsoft Excel Data Analysis features, by learning to use statistical techniques through practical examples.

# Agenda

## Day 1 - 4h

### Understanding Data Analysis

#### Course context

- › Introduction of the participants
- › Expectations setting
- › Learning objectives formulation
- › Course agenda presentation.

#### Business Understanding

- › Definition of Data Analysis
- › Types of Data Analysis
- › Data Analysis Process
- › Data Analysis Governance
- › Data Analysis in Business Capabilities.

#### Data Preparation

- › Types of Data Sets
- › Data Quality
- › Data Cleaning
- › Data Aggregating.

## Day 2 - 4h

### Understanding Data Analysis

#### Data Exploration

- › Frequency Tables
- › Qualitative Charts
- › Quantitative Charts
- › Structure Charts.

#### Descriptive Statistics

- › Univariate Analysis
- › Bivariate Analysis.

#### Sampling

- › Population and Sample
- › Sampling Techniques
- › Sampling Determinations.

## Day 3 - 4h

### Core of Data Analysis

#### Estimation of Population

- › Inferential Statistics Types
- › Sources of Estimation Errors
- › Central Limit Theorem
- › Normal Distribution and T-Distribution
- › Population Interval Estimation.

#### Hypothesis Testing

- › Hypothesis Testing Procedure
- › Type I and Type II Errors
- › Level of Significance and p-Value
- › Different Types of Hypothesis Testing.

#### Z-Test and T-Test

- › One Sample Analysis
- › Two Independent Samples Analysis
- › Two Dependent Samples Analysis.

## Day 4 - 4h

### Advanced Data Analysis

#### Analysis of Variance

- › F-Distribution
- › ANOVA Test procedure
- › Three or more Independent Samples Analysis.

#### Chi-Square Tests

- › Chi-Square Distribution
- › Goodness of fit Test
- › Test of Independence.

#### Linear Regression Analysis

- › Least Square Method
- › Coefficient of Determination and Correlation
- › Standardization; Homogeneity.

## Day 5 - 4h

### Advanced Data Analysis

#### Multiple Regression Analysis

- › Multiple Coefficient of Determination
- › Multicollinearity
- › Variance Inflation Factor.

#### Time Series

- › Trend Component
- › Cyclical Component
- › Seasonal Component
- › Irregular component
- › Moving Average.

#### Review and certification exam

- › Course Review
- › Certification Exam.



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# CERTIFIED DATA VISUALIZATION PROFESSIONAL

## Live - Online Certification

Transform complex information into clear, meaningful and visually appealing communication.

The Certified Data Visualization Professional is an official CPD-accredited training course, provided by The KPI Institute, for the purpose of continuing professional development.

As granted by the CPD Standards Office, this course has received international recognition as a best practice learning experience.

Visual communication is effective only when it is aligned with the way people see and think. The course provides insights on the importance of data visualization, fundamental principles, as well as means to increase non-verbal communication skills through effective visualizations. This course will improve communication within your company, through visual displays. You will learn, through practical applications, how to communicate visually in an effective way and how to increase reporting efficiency, leading to a better understanding of the presented data, and thus, to smarter and quicker strategic decisions.

### + Benefits

- › Receive relevant guidance for developing visual representations in order to discover, understand and communicate information;
- › Create better and more relevant reports by understanding the fundamental concepts in data visualization;
- › Offer intelligible data sets to decision-making parties through creating excellent graphical representations;
- › Improve your performance in presenting data and enhance viewer experience;
- › Obtain 40 CPD credits to include in your CPD records for your professional body, institute, regulator or employer.

### + Learning objectives

- › Understand the fundamentals of creating and designing a visual representation for your intended users;
- › Select the right communication channel in accordance with the target audience;

# Agenda

## Day 1 - 4h

### Day 1: Introduction into the world of data visualization

#### Parameters

- › Presentation of the data visualization concept
- › Origins of data visualization
- › The power of visual communication
- › The importance of data visualization
- › Pre-attentive visual attributes
- › Principles of graphical excellence

#### The data visualization process

- › Working with raw data: acquire, parse, filter, mine
- › Working with design: represent, refine, interact
- › Capabilities

## Day 2 - 4h

#### Visual communication aids: channel selection

- › Maps
- › Interactive graphics
- › Infographics
- › Presentation software
- › Video doodles
- › Spreadsheets
- › Comic strips
- › Animations

#### Structure

- › Gridlines
- › Layouts

## Day 3 - 4h

#### Diagrams

- › Heat maps
- › Principles of design

#### Format

- › Typography
- › Iconography: a visual language
- › Graphs

#### Express

- › Color theory
- › Color psychology
- › Color in graphs

## Day 4 - 4h

#### Report

- › Reporting principles
- › Taxonomy of reports:
  - Scorecards
  - Dashboards
  - Infographics
- › Reporting text
- › Reporting numbers

#### Assess

- › The Data Visualization checklist
- › Seven rules for getting it right
- › Disinformation Visualization

## Day 5 - 4h

#### Real-world data visualization

- › Data visualization software
- › Visual organizations
- › The future of data visualization

#### Review and Q&A

- › Course review
- › Q&A





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## CERTIFIED BENCHMARKING PROFESSIONAL

### Live - Online Certification

Driving superior business performance by embracing benchmarking methodologies.

The Certified Benchmarking Professional is an official CPD-accredited training course, provided by The KPI Institute, for the purpose of continuing professional development.

As granted by the CPD Standards Office, this course has received international recognition as a best practice learning experience.

The benchmarking methodological uniqueness is represented by the identification of those processes that lead to superior performance, followed by the analysis of the best practices behind that success. Benchmarking offers the opportunity to compare an organization's performance against industry competitors, noting strengths, weaknesses, and different ways of executing projects. As successful businesses constantly focus on improving the quality of their processes, products and services, benchmarking comes as one of the best approaches in achieving innovative ideas and superior procedures within the organization, through finding and implementing best practices.

### + Benefits

- › Improve your organizational processes by applying benchmarking best practices;
- › Link benchmarked data to your organizational strategy and performance objectives;
- › Set up and apply a benchmarking plan in your own organization, in order to increase competitiveness;
- › Acquire strong competitive insights from benchmarking specialists' experience and best practices examples to suit your organization's reality;
- › Obtain 40 CPD credits to include in your CPD records for your professional body, institute, regulator or employer.

### + Learning objectives

- › Associate benchmarking objectives with the organizational strategy;
- › Design a benchmarking plan for your organization;
- › Understand the fundamentals of benchmarking methodologies;
- › Assess performance gaps according to benchmarked data;
- › Select the relevant benchmarks and establish a monitoring process.

# Agenda

## Day 1 - 4h

### Benchmarking overview

- › What is benchmarking?
- › Definitions and terminology
- › The advantages of benchmarking
- › Governance

### Types of benchmarking

- › Formal vs informal benchmarking
- › Performance benchmarking
- › Process benchmarking
- › Strategic benchmarking
- › Benchmarking approaches

## Day 2 - 4h

### Benchmarking methodologies

- › Benchmarking stages
- › APQC Methodology
- › Camp R.C. Model
- › TRADE methodology
- › Motorola model
- › Kaiser Associates
- › AT&T
- › IBM methodology
- › Xerox methodology
- › TKI's methodology
- › Choosing the suitable methodology

## Day 3 - 4h

### Benchmarking project planning

- › Scoping
- › Cost-Benefits analysis
- › Benchmarking team
- › Benchmarking partners identification
- › Process documentation
- › Data collection plan

### Data collection

- › Data validation with quality standards
- › Data collection process
- › Data collection methods and tools
- › Data adjustment

## Day 4 - 4h

### Preparation for data analysis

- › Data preparation for analysis
- › Identification and analysis of performance gaps

### Insight generation

- › Formulate initiatives to close performance gaps
- › Initiatives formulation techniques
- › Develop a portfolio of initiatives

## Day 5 - 4h

### Improvement process

- › Implementation road plan
- › Factors influencing the implementation
- › Change management
- › Monitoring and reporting tools

### Ethics in Benchmarking

- › Legal issues in Benchmarking
- › Ethical issues in Benchmarking

### Review and Q&A

- › Course review
- › Q&A



# CERTIFIED INNOVATION PROFESSIONAL

## Live - Online Certification

Driving superior business performance by embracing innovation

Innovation offers the opportunity to enhance an organization's performance through creativity, idea management, and a complex innovation framework. Innovation management represents the creation of processes that aim at generating and exploiting new development opportunities. It outlines innovative ideas from two different perspectives: qualitative and quantitative, with emphasis on their efficiency and effectiveness levels, once they have been implemented.

As successful businesses constantly focus on innovative thinking, innovation performance comes as one of the best approaches in achieving highly qualitative procedures and in generating superior ideas, within the organization.

### + Benefits

- › Develop and maintain an innovation-oriented organizational culture, by applying innovation best practices;
- › Improve internal processes and initiatives by managing the organizational innovation capability;
- › Receiving guidance and international innovation expertise on developing and implementing a successful innovation plan;
- › Gain strong competitive insights from innovation specialists' experience and best practices examples that suit your organization's needs;
- › Access professional recognition of innovation performance knowledge and capabilities, by obtaining the certification granted by The KPI Institute.

### + Learning objectives

- › Understand the fundamentals of innovation performance measurement;
- › Associate innovation objectives with the organizational strategy;
- › Learn how to design an organizational innovation framework;
- › Select the relevant KPIs and establish a monitoring process of your innovation performance;
- › Integrate innovation to other existing organizational systems;
- › Address initiatives to support innovation culture development.

# Agenda

## Day 1 - 4h

### Introduction to Innovation

- › Definition of innovation
- › Types of innovation
- › Importance of innovation
- › Innovation & creativity
- › Innovation & invention
- › Qualities of innovators
- › Myths of innovation
- › Reasons of innovation failure

### Innovation Capability & Management

- › Definitions of Innovation Capability
- › Building Blocks of Innovation Capability
- › Definitions of Innovation Management
- › Innovation Management Models

### Diagnosis

- › Assessment of the organization's current state and understanding of the overall market (Gap analysis, SWOT, PESTLE, BCG Matrix, Porter's model)

## Day 2 - 4h

### Planning for Innovation

- › Business Strategy versus Innovation Strategy
- › Develop your Innovation Strategy
- › Tests for assessing/creating your organizational structure

### Organizing for Innovation

- › Identify your Stakeholders
- › Identify your Resources
- › Prioritize Innovation according to your Resources
- › Form Team(s)

## Day 3 - 4h

### Aligning Leadership & Culture

- › Providing Innovative Managers
- › Providing Innovative Leaders
- › Creating Innovation Culture

### Implementing Your Innovation Process

- › Innovation Process: Stage Gate
- › Design Thinking Process and Tools
- › Agile & Innovation
- › Ideation Process & Tools
- › Idea Selection & Evaluation

## Day 4 - 4h

### Implementing Your Innovation Process

- › Communicate with Stakeholders
- › Develop your Business Case
- › Develop your Portfolio
- › Risk Management & Mitigation Strategies in Innovation
- › Intellectual Property Rights in Innovation

## Day 5 - 4h

### Innovation Performance and Improvement

- › Importance of Measuring Innovation
- › Measuring Innovation (Techniques, Metrics & KPIs)
- › Measuring Innovation: Understanding KPIs
- › Measuring Innovation: Difference between KPIs, Metrics, KRIs & Analytics
- › Learning for Better Innovation





# CERTIFIED PERFORMANCE MANAGEMENT SYSTEMS AUDIT PROFESSIONAL

## Live - Online Certification

Learn how to audit the maturity level of Performance Management Systems

The Certified Performance Management Systems Audit Professional is an official CPD-accredited training course, provided by The KPI Institute, for the purpose of continuing professional development.

As granted by the CPD Standards Office, this course has received international recognition as a best practice learning experience.

The Performance Maturity Model Framework embeds in its development over 8 years of research in the field of performance architecture development and 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 for 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 with the scope of mapping maturity gaps and identifying a set of next actions that will ensure the progression to the next maturity level.

### + Benefits

- › Receive relevant guidance on how to assess the maturity of a performance management system;
- › Understand the value added by a performance management systems' audit and improve your performance management capability;
- › Access an innovative learning experience based on a 3 stage educational process;
- › Obtain premium recognition and expand your business network by becoming a Certified Performance 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
- › Audit objectives establishment
- › 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
- › Documents checklist
- › Sampling methodology
- › Assessment criteria
- › Case study: practice evidence-based assessment

## Day 3 - 4h

### Perception-based Assessment

- › Key stakeholders identification
- › Survey audience segmentation
- › Gata 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 Constinuous Improvement Report
- › Roadmap for Constinuous Improvement Infographic recommendations & conclusions

### Review and Q&A

- › Course review
- › Q&A



# CERTIFIED SUPPLIER PERFORMANCE PROFESSIONAL

## Live - Online Certification

Identifying the right tools and methods to effectively manage supplier performance.

The training course is designed to develop the key competencies necessary to efficiently manage and growth the suppliers' performance and optimize the relationship with buyers and other procurement stakeholders. Moreover, participants will benefit from a powerful learning experience mixing practical information delivery with well-designed practical activities and study cases, constantly stimulating the interaction between participants and knowledge sharing.

As a key differentiator, the course provided by The KPI Institute focuses on a practice-related side of suppliers' management, using a comprehensive KPIs development and monitoring framework, backed up by a ready-to-use performance toolkit.

### + Benefits

- › Efficiently manage the procurement activity area, based on a thorough understanding of the supplier relationship dynamics;
- › Take adequate measures that reflect the company's competitive advantage in developing and proper usage of supplier selection and evaluation tools;
- › Have a significant contribution as part of the team involved in procurement and strategic sourcing areas;
- › Generate value for your business by applying a modern performance management framework;
- › Enhance your practical learning experience by getting full access to a variety of relevant resources and ready-to use tools designed to help you attain outstanding results.

### + Learning objectives

- › Develop and implement a supplier selection process;
- › Use different supplier segmentation models;
- › Identify risks and develop response strategies;
- › Select relevant KPIs to monitor and improve your supply chain performance;
- › Implement a rigorous supplier relationship strategy.

# Agenda

## Day 1 - 4h

### Understanding supplier performance

- › The importance of performance in managing suppliers
- › Elements of performance management architecture in supplier management
- › Stakeholders involved in supplier management
- › Supplier performance as an organizational process

### Supplier selection

- › Supplier selection process
- › Suppliers selection requirements and criteria development
- › Supplier selection methods & tools
- › Supplier evaluation
- › Success factors in supplier selection process

## Day 2 - 4h

### Supplier relationship design

- › Key elements of purchasing – procurement – strategic sourcing
- › Strategic sourcing approach of suppliers
- › Supplier panel development and management
- › Supplier segmentation models

### Supplier contracting

- › Challenges in drafting contracts
- › Risk identification in the contracting process
- › Positioning strategies when negotiating with suppliers
- › Contract management: key tasks and responsibilities
- › Steps to set up successful contracts

## Day 3 - 4h

### Performance Through Service Level Agreements (SLAs)

- › SLA success factors (service and management)
- › Building the SLA based on company competitive advantage

### Sourcing KPIs to generate suppliers' performance

- › Definition and usability of KPIs
- › KPIs and metrics selection
- › KPI selection sources
- › KPI selection techniques
- › KPI target setting
- › KPI documentation as a key success factor

## Day 4 - 4h

### Supplier Performance Monitoring

- › Scorecard and Dashboards development process
- › Setting objectives and clusters for a supplier scorecard

### Supplier Relationship Management

- › The reasons for supplier performance management
- › Challenges in SRM: cost of poor quality
- › Collaborative approach in developing strategic partnerships
- › SRM Governance
- › Assessing the SRM maturity level of an organization

## Day 5 - 4h

### Supplier performance evaluation

- › Internal capability for managing supplier evaluation
- › Key aspects of supplier performance evaluation
- › Performance evaluation criteria development
- › Evaluation methods
- › Managing non-conformances
- › Supplier performance reviews

### Risks and communication management with suppliers

- › Risk management process
- › Risk analysis
- › Key Risk Indicators
- › Risk intervention plans
- › Supplier communication framework

### Review and Q&A

- › Course review
- › Q&A





# CERTIFIED CUSTOMER SERVICE PERFORMANCE PROFESSIONAL

## Live - Online Certification

**Maximize your customers' satisfaction, loyalty and advocacy by enhancing your Customer Service Performance!**

In a highly competitive market, the quality of the organization's customer service will determine customers' satisfaction, loyalty, increase the chances of them becoming advocates of the company and generate future revenue. This training course focuses on the entities, essentials, enablers and evaluation tools involved in a performant customer service. The course's approach to customer service is unique, as it includes the performance management dimension. Participants will not only understand the important role played by all the entities involved in the process, but they will also become familiar with the implementation phases of a customer service performance management architecture.

### + Benefits

- › Attain a standardized approach for your services;
- › Acquire a high level of versatility that enables you to react and deal with a vast range of scenarios;
- › Gain competitive advantage by capitalizing on good case practices;
- › Improve your ability to evaluate your external and internal customers' satisfaction;
- › Get professional recognition of your customer service knowledge and skills through a Certification granted by The KPI Institute.

### + Learning objectives

- › Understand how to implement a customer service performance culture, strategy and working system;
- › Develop the channels and tools needed to sustain customer service performance;
- › Learn how to fulfill your internal and external customers' needs and expectations;
- › Practice and improve the competencies required in different customer service settings.

# Agenda

## Day 1 - 4h

### Customer Service Essentials

#### Customer Service Operations (CSO)

- › Customer Relationship Management design and elements
- › Customer Service goals & Change management
- › Customer Services Types
- › Customer Service impact on organizational success

#### Customer Relationship Management

- › Managing different complaints types
- › Complaints sources and characteristics
- › Communication skills & techniques
- › Customer typology & behavior
- › Communication for improved customer experience

## Day 2 - 4h

### CRM performance

#### Performance Management in Customer Service

- › Performance Management Architecture
- › Desired State of Evolution
- › Developing of Strategy Map
- › Defining and setting objective

#### KPI definition and target setting

- › KPI Definition and Characteristics
- › KPI selection: sources and techniques
- › KPI target setting
- › Key success factors in Managing KPI's

## Day 3 - 4h

### CRM performance

#### Scorecard and dashboards

- › Balance Scorecard Model
- › Key elements of scorecards
- › Developing a scorecard for Customer Service Management
- › Scorecard vs Dashboards

#### Measuring Customer Service Performance

- › Customer Service Scorecards implementation
- › Portfolio of Initiatives
- › Data Visualization
- › Performance Management Excellence

## Day 4 - 4h

### Performance Enablers

#### Evaluation and continuous improvement

- › Performance evaluation process & Reviews
- › Compliance management
- › Using technology to enhance success in CRM- Data gathering systems
- › Customer Satisfaction Improvement Initiatives

#### Customer Service improvement Tools & techniques

- › Business acumen ( Product Know How)
- › Performance through Service Level Agreements (SLAs)
- › SLA success factors (service and management)
- › Knowledge and Learning - internal capabilities development - Root cause analysis

## Day 5 - 4h

### Performance Enablers

#### Customer Service Team Management

- › Customer Service Team Training and preparation
- › Improved coaching skills
- › Stress Management strategies
- › Rewards & Recognition Management

#### Customer Service Performance Maturity Model

- › Customer Relationship Management success factors
- › Excellent in customer interaction- Excellence Model in CSO
- › Course Review and implementation

# MICRO-CERTIFICATES

A micro-certification is a niche course, targeting the development of one skill or competency in a specific area of expertise. These training courses offered by the kpi institute are different from its certifications programs from several perspectives:

- No pre-course and post-course assignments;
- Shorter course duration;
- No Certification Exam;
- The micro-credentials obtained can be used when enrolling to a Certification Program in our portfolio.



## CERTIFICATE IN STRATEGY PLANNING MATURITY ASSESSMENT

This micro-certification course explores the essential elements of developing a strategy planning framework in organizations and assessing its complexity using a maturity model.

The maturity assessment methodology presented is the proprietary knowledge of The KPI Institute and Global Performance Audit Unit, built on 10+ years of research and practical experience in strategy formulation.



## CERTIFICATE IN PERFORMANCE MEASUREMENT MATURITY ASSESSMENT

The Certificate in Performance Measurement Maturity Assessment is a micro-certification training focused on enabling participants to audit the performance measurement practices of organizations, by providing not only a standard evaluation methodology, but also the fundamental best practices in measurement of organizational performance.

The maturity assessment methodology explored during the course is the proprietary knowledge of The KPI Institute and Global Performance Audit Unit, developed after 10 years of research and practitioner experiences in the area of performance measurement and KPI usage.



## CERTIFICATE IN PERFORMANCE IMPROVEMENT MATURITY ASSESSMENT

This micro-certification training aims to equip professionals with a maturity evaluation tool to identify with ease and objectivity the strengths and weaknesses of a performance improvement framework and to provide insights into the essential best practices needed for successful usage of KPIs in organizations.

The assessment model introduced is the proprietary knowledge of The KPI Institute and Global Performance Audit Unit, consolidated based on +10 years of research and practical experience in the area of performance improvement.



## CERTIFICATE IN EMPLOYEE PERFORMANCE MANAGEMENT MATURITY ASSESSMENT

This micro-certification course explores the essential elements to develop an employee performance management system in organizations and also assesses its complexity using a maturity model.

The maturity assessment methodology presented is the proprietary knowledge of The KPI Institute and Global Performance Audit Unit, build on +10 years of research and practical experience in the area of individual performance.

# 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



*Contact us for more details about enrollment to the Executive Education programs.*



# FAQ & Technical Requirements

## ► How do I register for the course?

Similar to our open face-to-face programs, we have an application and admission process in place for our online programs. You will be requested to fill in the application form and process the payment for the course, in order to be registered. You will receive a confirmation email that the registration has been completed.

## ► How much time should I expect to dedicate to complete all course requirements?

A total expected number of hours is 40. This includes:

- Pre-course requirements: 4 hours
- Live online sessions: 20 hours, 4 hours per day, for 5 consecutive days
- Individual Learning Map and exam preparation: 3 hours, 0.5 hours per day, after each live session, and 0.5 hours for final recap before the exam
- Certification Exam: 1 hour
- After-Course requirements: 12 hours

## ► What will I receive upon completion of the program?

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

Certificate of Completion: after completing pre-course activities and passing the Certification Exam;

Certificate of Attendance : after participating at the online training course;

Certified Professional diploma: after you have successfully completed all of the 3 stages of the learning experience.

## ► Will I be able to interact with the facilitator and other participants?

Yes. The learning experience is designed to encourage interaction. The facilitator will address participants questions and provide feedback during the sessions, regarding different exercises and case studies, as well as share best-practices on the topics discussed. Participants will also be encouraged to share own experiences, work and discuss in groups during the online course, as well as through the E-Learning platform, before and after the course.

### ► What support can I expect throughout the program?

You can expect full support during the program. Content related questions will be addressed by the facilitator, certification process will be address by the Education Team and any technical questions will be managed by our IT Specialists. Any challenges during the course, can be addressed through the E-Learning platform, E-mail, phone or throughout the live online sessions.

### ► What resources will I get access to?

To support participants in utilizing the knowledge back in their organisation, as well as enable further learning on the topic, the below resources will be made available:

- Premium Subscription on smartKPIs.com available for 6 months, providing access to 500 fully documented KPIs and over 20,000 KPIs enlisted;
- One research report from the Top 25 KPIs series;
- Free access to all webinars from 2014 to 2016 Performance Management series.
- Performance Management Toolkit containing Excel based templates for: Desired State of Evolution, Strategy Map, Scorecard, Dashboard, Portfolio of Initiatives, KPI Documentation Form, KPI Report Form, Initiative Description Form.
- The KPI Infographic
- The qualitative reports Performance Management in 2012, 2013, 2014,
- Catalogues and Fact Sheets
- Videodoodles
- Training slides and course notes

### ► What are the technical requirements in order to be able to join the course?

Joining the platform is simple, as you don't need to be a technical personal, you simply need to click on a link to open the app and join, after that you select use computer audio and you are done.

### ► If I already attended face to face training before, can I get the 1:1 session with consultant?

1:1 sessions with our subject matter experts can be organized on request, regardless if you have attended a past public or inhouse course or not.



# THE KPI INSTITUTE

## EUROPEAN DIVISION

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### SIBIU OFFICE

Sibiu City Center  
Somesului Street, No. 3, 550003  
Sibiu, Romania  
T: +40 774 698 693

## SE ASIA DIVISION

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### KUALA LUMPUR OFFICE

Wisma UOA II  
Unit 14-13, Jalan Pinang 21, POBOX 50450,  
Kuala Lumpur, Malaysia  
T: +60 327 421357, M: +60 12 591 1366

## MIDDLE EAST DIVISION

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### DUBAI OFFICE

Office 1004-01 10th floor Bay Square-01,  
P.O. Box 119724, Business Bay,  
Dubai, UAE  
M: +971 55 787 6427

### RIYADH OFFICE

Ans Ibn Malik  
Al Malqa District, 13521  
Riyadh, Kingdom of Saudi Arabia  
T: 966535735292  
M: +966555215868  
E: [office@kpiinstitute.org](mailto:office@kpiinstitute.org)

## HEADQUARTERS

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### MELBOURNE OFFICE

Life.lab Building  
198 Harbour Esplanade, Suite 606  
Melbourne Docklands, VIC 3008, AU  
T: +613 7050 2557