



KPI Mastery Training Course: Build, Implement, and Sustain Strategic Performance Indicators

14 - 18 Dec 2025
Cape town



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Ref.: 103600354_35842 **Date:** 14 - 18 Dec 2025 **Location:** Cape town **Fees:** 6000 **Euro**

Course Overview:

The course is a hands-on, results-driven program based on Bernie Smith's acclaimed KPI methodology outlined in KPI Checklists: Develop meaningful, trusted KPIs and reports. This training demystifies KPI development through structured steps including KPI trees, stakeholder engagement, dashboard prototyping, and sustainability strategies. Participants will learn how to develop KPIs tailored to organizational goals, avoid common pitfalls, and implement a transparent, data-informed performance management system. Real-world examples, stakeholder communication techniques, and tools such as the RACI matrix and FMEA for KPI risk management are covered.

Target Audience:

- Performance Analysts
- Business Intelligence Officers
- Strategy & Planning Managers
- Operations Managers
- HR and Finance Professionals
- Department Heads
- Continuous Improvement Consultants

Targeted Organizational Departments:

- Strategy and Planning
- Business Intelligence & Data Analytics
- HR and Workforce Planning
- Finance and Risk
- Operations & Service Delivery
- Executive and Senior Management

Targeted Industries:

- Financial Services
- Government & Public Sector
- Healthcare & Pharma
- Manufacturing & Supply Chain
- Telecommunications
- Utilities & Energy
- IT and Software Services

Course Offerings:

By the end of this course, participants will be able to:

- Build KPI trees that align performance indicators with strategic goals
- Develop meaningful KPIs using shortlisting techniques
- Create stakeholder-driven KPI systems using RACI and communication plans
- Prototype dashboards and improve KPI reporting accuracy
- Use SMED for efficient data collection and apply FMEA to mitigate KPI risk
- Sustain KPI systems through SLA agreements and business integration
- Avoid common KPI failures by applying checklist-based methods

Training Methodology:

This course utilizes adult learning principles combining interactive theory, application, and peer learning. Each session blends expert-led presentations, live group discussions, case studies, and real-time exercises. Emphasis is placed on using templates and checklists from the PDF to prototype dashboards, analyze data, and map KPI processes. Participants engage in hands-on group activities to build KPI Trees, conduct stakeholder analyses using RACI, and explore tools such as FMEA and SMED to improve KPI collection.

Course Toolbox:

- KPI Tree templates
- KPI Shortlisting Matrix
- Communications Planning Checklist
- FMEA Risk Worksheet
- RACI Stakeholder Matrix
- Dashboard Prototyping Examples
- KPI System Maturity Assessment Guide
- Real-world case studies

Course Agenda:

Day 1: Strategic Clarity & Objective Alignment

- **Topic 1:** Understanding What KPIs Are Definitions, Purpose, and Relevance
- **Topic 2:** Identifying the Strategic Purpose Behind KPI Development
- **Topic 3:** Differentiating Between Mission Statements and Strategic Objectives
- **Topic 4:** Evaluating Strategy Fitness Using Checklist Tools
- **Topic 5:** Linking KPIs to Vision and Core Business Goals
- **Topic 6:** Common Pitfalls of Misaligned KPIs
- **Reflection & Review:** Assess your own organization's strategy readiness for KPI deployment



Day 2: Stakeholder Engagement & KPI Tree Development

- **Topic 1:** Stakeholder Mapping and the RACI Matrix Approach
- **Topic 2:** Building a Communications Plan for KPI Rollout
- **Topic 3:** Running Effective Stakeholder Interviews and Workshops
- **Topic 4:** Visual Communication Principles Tufte & Few
- **Topic 5:** Designing and Facilitating Effective KPI Tree Workshops
- **Topic 6:** Linking KPIs to Tactical and Operational Metrics via KPI Trees
- **Reflection & Review:** Stakeholder dynamics and longlist creation using KPI Trees

Day 3: Shortlisting and Defining Effective KPIs

- **Topic 1:** Using the Importance vs. Availability Matrix to Prioritize KPIs
- **Topic 2:** Facilitating KPI Shortlisting Sessions with Teams
- **Topic 3:** Documenting KPI Definitions and Ownership
- **Topic 4:** Managing Risk of Data Inaccuracy and Political Interference
- **Topic 5:** Aligning Measures to Objectives with Logical Frameworks
- **Topic 6:** Data-Driven Decision Making and Metric Validity Checks
- **Reflection & Review:** Create and evaluate a KPI shortlist with real-world application

Day 4: Dashboard Prototyping and System Integration

- **Topic 1:** Prototyping KPI Dashboards and Report Templates
- **Topic 2:** Evaluating Tools for Dashboard Visualization Excel, Mind Maps, Wire Trees
- **Topic 3:** Visual Clarity vs. Data Density: How to Design Usable Reports
- **Topic 4:** Linking Dashboards to Stakeholder Expectations and SLA
- **Topic 5:** Validating Prototype Dashboards Through User Testing
- **Topic 6:** Creating KPI System Maps for Data Collection and Reporting Flow
- **Reflection & Review:** Build and critique a dashboard prototype and reporting model

Day 5: Sustaining, Reviewing, and Improving KPI Systems

- **Topic 1:** Implementing SLAs for KPI Reporting and Review
- **Topic 2:** Data Collection Optimization Using SMED and Lean Methods
- **Topic 3:** Applying FMEA to KPI Risk Management
- **Topic 4:** Root Cause Analysis and the KPI Improvement Cycle
- **Topic 5:** KPI Governance: Ownership, Maintenance, and Handovers
- **Topic 6:** Monitoring KPI System Health Over Time
- **Reflection & Review:** Final workshop on KPI lifecycle sustainability and action planning

FAQ:



What specific qualifications or prerequisites are needed for participants before enrolling in the course?

Participants should have at least 2-3 years of experience in business operations, analytics, or management. Familiarity with data-driven decision-making is helpful but not required.

How long is each day's session, and is there a total number of hours required for the entire course?

Each day's session is generally structured to last around 4-5 hours, with breaks and interactive activities included. The total course duration spans five days, approximately 20-25 hours of instruction.

How does the Importance vs. Availability Matrix help in KPI shortlisting?

The matrix allows teams to visually prioritise KPIs based on their business value importance and ease of access to reliable data availability. This ensures effort is focused on feasible and high-impact KPIs.

How This Course is Different from Other KPI Courses:

Unlike traditional courses that offer general theory or software-led KPI sessions, this course is built on the proven Results-Oriented KPI System ROKS framework developed by Bernie Smith in the book *KPI Checklists*. It incorporates structured checklists, hands-on stakeholder engagement, data risk mitigation using FMEA, and the use of SMED to streamline data processes. With an emphasis on building sustainable systems and avoiding common failures, this course empowers participants to apply KPI development step-by-step across departments. Practical templates, real business cases, and workshop-style sessions ensure immediate on-the-job application. No fluff, just actionable methods grounded in real-world challenges and solutions.

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WHO WE ARE

Agile Leaders is a renowned training center with a team of experienced experts in vocational training and development. With 20 years of industry experience, we are committed to helping executives and managers replace traditional practices with more effective and agile approaches.

OUR VISION

We aspire to be the top choice training provider for organizations seeking to embrace agile business practices. As we progress towards our vision, our focus becomes increasingly customer-centric and agile.

OUR MISSION

We are dedicated to developing value-adding, customer-centric agile training courses that deliver a clear return on investment. Guided by our core agile values, we ensure our training is actionable and impactful.

WHAT DO WE OFFER

At Agile Leaders, we offer agile, bite-sized training courses that provide a real-life return on investment. Our courses focus on enhancing knowledge, improving skills, and changing attitudes. We achieve this through engaging and interactive training techniques, including Q&As, live discussions, games, and puzzles.



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