



Data-Driven SMART Goals and KPI Design Training Course

20 – 24 September 2027
San Diego



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Ref: 836_163328 **Date:** 20 – 24 September 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Data-Driven SMART Goals and KPI Design Training Course is a one-week course for performance, strategy, management, analytics, business-partnering, and reporting functions, who leave with a SMART Goals and KPI Evidence Pack. Participants connect strategic intent, SMART goal formulation, KPI design, data quality, exploratory data mining, pattern analysis, segmentation, driver analysis, target setting, performance dashboards, and indicator governance. The course tests measures against evidence without requiring coding or predictive modeling. Agile Leaders Training Center develops practical data-driven performance measurement capability.

Who Should Attend

- Strategy functions responsible for translating priorities into measurable outcomes
- Performance functions responsible for indicator definitions, targets, monitoring, and review
- Department management functions responsible for operational goals and corrective action
- Data and analytics functions responsible for sourcing, profiling, segmenting, and interpreting performance data
- Business-partnering and reporting functions responsible for evidence, dashboards, and performance conversations

The course assumes participants can interpret operational data and basic summaries at work, and leaves out software coding, advanced predictive modeling, employee appraisal design, and certification preparation.

Departments and Industries

The course supports departments and industries that manage outcomes through goals, indicators, and recurring evidence.

- Strategy, performance management, analytics, finance, operations, and human resources
- Quality, transformation, project management, customer experience, and internal audit
- Financial services, technology, telecommunications, and professional services
- Manufacturing, logistics, retail, energy, and construction
- Healthcare, education, hospitality, and public-service organizations

Learning Objectives

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



- Build SMART Goal Charters from strategic and operational intent
- Apply KPI logic, definitions, ownership, and data-source controls
- Analyze profiles, segments, associations, and performance drivers
- Evaluate indicator relevance, reliability, balance, and unintended behavior
- Use evidence to set baselines, targets, thresholds, and alerts
- Build a dashboard and KPI governance calendar

Course Agenda

Day 1: Formulate Measurable Goals

- Strategy-to-Outcome Alignment Map
- SMART Goal Criteria Review Sheet
- Outcome, Output, and Activity Logic Chain
- Goal Owner and Decision-Use Matrix
- SMART Goal Charter Template

Day 2: Design Defensible KPIs

- Critical Goal and KPI Linkage Map
- KPI Definition and Formula Card
- Leading, Lagging, Quality, and Efficiency Measure Matrix
- Data Source, Lineage, and Ownership Register
- Indicator Balance and Gaming-Risk Checklist

Day 3: Mine Performance Patterns

- Data Profiling and Quality Evidence Sheet
- Distribution, Trend, and Exception Analysis
- Operational Segment Comparison Table
- Association and Co-Occurrence Pattern Map
- Driver Hypothesis and Evidence Log

Day 4: Set Targets and Govern Indicators

- Baseline and Comparison-Period Selection
- Target Rationale and Threshold Matrix
- KPI Validation and Sensitivity Review
- Performance Dashboard Information Hierarchy
- Review Calendar, Escalation, and Change-Control Register



Day 5: Practice Data-Driven Performance Design

- Exercise: Rewrite Goals with SMART Criteria
- Exercise: Build and Challenge KPI Definition Cards
- Exercise: Interpret Segments, Associations, and Drivers
- Exercise: Test Targets, Thresholds, and Dashboard Signals
- Capstone: SMART Goals and KPI Evidence Pack

Practical Exercises

The course uses suggested activities based on performance situations in services, manufacturing, healthcare, education, logistics, and customer operations.

- Suggested activity: convert a strategic priority into outcome logic, SMART goals, owners, and decision uses.
- Suggested activity: draft KPI cards, test formulas and sources, and challenge balance and gaming risks.
- Suggested activity: profile data, compare segments, identify associations, and record driver hypotheses without claiming causation.
- Suggested activity: set evidence-based targets, configure dashboard signals, and assign review, escalation, and change controls.

FAQs

Who suits data-driven SMART goals and KPI design training, and what does it assume?

Strategy, performance, management, analytics, business-partnering, and reporting functions suit the training; it assumes familiarity with operational data and basic summaries without requiring coding or advanced predictive modeling.

How does data-driven KPI design differ from general performance management training?

Data-driven KPI design concentrates on goal logic, measure definitions, data evidence, pattern analysis, targets, dashboards, and indicator controls, while general performance management also addresses wider cycles of planning, review, feedback, and organizational accountability.

How can data mining improve KPI selection?

Data mining can improve KPI selection by revealing distributions, exceptions, segments, associations, and candidate drivers that help teams test whether a measure is relevant, interpretable, available, and useful for a defined decision.

What makes a KPI defensible?

A KPI is defensible when it links to a critical goal, has a clear formula and owner, uses controlled data, has an explained baseline and target, behaves consistently across relevant segments, and supports a specified decision or action.

How should SMART goals and KPIs be reviewed?

SMART goals and KPIs should be reviewed through a scheduled governance cycle that checks strategic relevance, data quality, target assumptions, unintended behavior, performance signals, ownership, actions, and the need for controlled change.

Conclusion

Participants take back a SMART Goals and KPI Evidence Pack containing goal charters, KPI cards, data controls, profile findings, segment comparisons, driver hypotheses, target rationales, dashboard designs, and a governance calendar. It changes opinion-led measurement into a traceable evidence cycle. The pack supports selection, validation, monitoring, challenge, action, and controlled revision.