

Training & Consulting Catalogue

Revision 5.4

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Product Guide

Training and Workshop Offers

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KPI Training and Workshops: Why Us?

Do you feel KPIs should be easier?

There are plenty of dry academic theory books on KPIs and measures, but few properly structured methods that help you start at the beginning and support you all the way through to effective performance measures that enable your organisation to deliver on its strategic goals.

Do these symptoms sound familiar?

- Confusing reports and dashboards
- Difficulty in knowing how your organisation is actually performing
- Lone-hero attempts to improve measures, that are not adopted or used by the wider organisation
- Poorly designed measures which make end-to-end measurements difficult or impossible
- KPI, dashboard and report overload
- Meetings based on opinion rather than solid data



Our workshops are for anyone who...

- Needs to translate their strategic objectives into a sensible number of practical and effective KPIs
- Is looking for a structured, clear and straightforward-to-follow method for selecting and implementing performance measures
- Is looking for practical "In this situation, here's what you need to do next" advice, supported by step-by-step checklists
- Wants to create a common 'way we do KPIs' across their organisation
- Is looking for a 'ready to use' tool kit, including workshop guides, templates and reference manual
- Doesn't like 'death by PowerPoint' and benefits from hands-on examples

Core to our workshops - the ROKS™ method...

The workshops are based around the ROKS® - Results Orientated KPI System - developed by Bernie from years of practical hands-on experience and featured in his top-selling book KPI Checklists. The ROKS® gives a structured, repeatable and easy-to-follow method for choosing a sensible number of really effective KPIs to support your organisational goals.

ROKS

Of course you get much more from the course - carefully structured case studies, a custom high-quality workshop manual and workbook, discussion and the chance to be coached by Bernie, but you can read the book reviews

below for yourself and feel comfortable that the approach is sensible and accessible.

The basics of the ROKS® method are in Bernie's book, KPI Checklists, and here's what readers thought of that...

"I loved this book. Very clear, simple and easy way to fully implement a KPI system. The book applied lean principles and didn't leave out the need to assess, improve and manage the data that comprises the KPIs. Simply outstanding!"

By Marcus Jennings on November 28, 2015

"The author picked a brilliant format for this book using checklists. Not a single word of waste, just jam packed with exactly what you need to do, how and when you should do it in order to launch or improve a system of continual improvement in your business. ... I especially appreciated the attention to detail regarding data gathering steps and the typical issues of getting data for your KPIs (and how to solve them). ..This book has spoiled me in that I will now expect other "how to" books to be as easy to follow and condensed as this one. Job well done."

By James B. on November 20, 2014

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Recent Workshop Feedback...

“ This is the best new methodology I’ve seen in years. Can’t wait to apply it.”



David Norton
HighCoordination GmbH



“ Fantastic workshop that was easy to follow despite challenging topics with lots of practical exercises built in. Thank you!”



Sabrina Sebens
Jedox AG



“ Inspiring.”



Paul Boekhoorn
JUGO



“ A really interesting masterclass that creates a lot of new ideas.”



Loes Reijnders
Trespa

Average course feedback score
2019: 91%

(year-to-date, May 2019, 5 courses)

“ This will really help improve the quality of consulting services that my team offers to our clients.”



Paul Bijleveld
delaware Netherlands

Leadership and Executive Workshops

Turning Strategy into Effective KPIs

👥 12 📅 3 x 2-hour workshops

Summary

Learn the simple, repeatable KPI Tree approach to turn strategic objectives into effective KPIs.

Type of course

Practical, for senior managers and executives who want to translate their strategy into a set of effective KPIs.

Who is it for?

Senior managers and executives.

Course outline

The workshop

- Introduces KPI Trees, an advanced but simple-to-learn strategy mapping method developed by Made to Measure KPIs.
- A rapid, practical, introduction to the KPI Tree approach and benefits
- Multiple hands-on case studies and examples to develop the basic skills to build KPI Trees
- Guided creation and revision of KPI Tree for your organisation
- Introduction and use of the KPI Selection Matrix for your KPIs, for effective KPI shortlisting
- An executive guide to common KPI implementation problems and their mitigation

Why use KPI Trees?

- Sum up a complex situation with just a few indicators
- Help build agreement
- Explain your strategic approach to the wider organisation
- Keep in step with changes in strategy
- Understand how measures interact



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Data as your Secret Weapon

👥 24 📅 2 hours

Summary

Most leadership teams know that performance measurement is a critical element in maximising organisational performance, but struggle on a daily basis with management information that is incomplete, not trusted or difficult to understand. This workshop explores how these issues can be quickly and effectively addressed, turning data into an unfair competitive advantage.

Who is it for?

Senior managers and executives.

Course outline

- Confusing reports? It's not you, and here's why...
- How to regain trust in management information
- Common KPI pitfalls and their organisational solutions
- Big data, hype or saviour?
- Drowning in data? How to cut back the jungle
- Implementing a repeatable, teachable KPI method for consistently great reporting and dashboards across your whole organisation

Certified KPI Training

The benefits of ROKS certified KPI training

For organisations...

Delivering KPI results requires a consistent, high quality approach to KPI selection, design and implementation. Certified ROKS practitioners give your organisation clear advantages...

- Accelerated results by using common design standards, KPI language and methods
- Confidence that your whole team is pulling in the same direction
- Formal development and recognition of your team's KPI design, selection and implementation skills

For consultants...

- External recognition of your KPI expertise
- Enhanced billing rates
- A unique competitive advantage

In a world where almost every organisation struggles to design and maintain meaningful KPIs, ROKS KPI Certification can offer unique competitive advantage, recognition and rewards.

Certification Levels Overview



ROKS YellowBelt

For those who expect to **participate in a KPI implementation project** but will not be *leading* the hands-on design and development process.

Certified to...

- Use the line 'ROKS Certified YellowBelt'
- Participate in ROKS projects as team members



ROKS GreenBelt

For those who will need to **lead or deliver KPI design, improvement or implementation projects** for their organisations or clients

Certified to...

- Use the title 'ROKS Certified Practitioner' or 'ROKS Certified GreenBelt'
- Deliver ROKS KPI projects using licensed M2M Materials



ROKS BlackBelt

For those who will **lead major KPI implementation programmes** and need access to the latest versions of the ROKS delivery materials.

Certified to...

- Use the title 'ROKS Certified Expert' or 'ROKS Certified BlackBelt'
- Coach and support GreenBelts and YellowBelts
- Deliver complex ROKS KPI projects using licensed M2M Materials
- Listing on the 'KPI professionals' register at made

Certified Training: ROKS YellowBelt

12 1 day

Summary

A one-day session applying the unique and powerful KPI design method, the 'Results Orientated KPI System' (ROKS) to KPI selection and design. The session covers all seven steps of the method (from Strategy to KPI Go-live). Each step is introduced, illustrated with real-world stories and anecdotes and supplemented with case studies and exercises.



Certified Training: ROKS YellowBelt

ROKS YellowBelt Overview

👥 12 📅 1 day

Who is it for?

Anyone who wants a solid end-to-end understanding of the ROKS method. This session is ideal for managers who expect to be closely involved in a KPI implementation project but will not be directly facilitating the hands-on design and development process. No previous KPI knowledge or experience is necessary.

Course outline

Each step of the Results-Orientated KPI System (ROKS) is given a high-level introduction, explained using real-world examples, then reinforced using simple case studies and exercises. The session is highly interactive, including

many group-exercises and discussions.

Here's a summary of the seven steps of the ROKS approach...

- **Step 1: Strategy**

How to simplify and streamline existing strategy documents into a suitable form for effective KPI selection. Learn about the most common strategy pitfalls and how to avoid them. We also cover the 'Big 6', an effective tool for organisations that are struggling with their strategy definition.

- **Step 2: Engagement**

Team engagement is the biggest single factor affecting KPI success. We review the three essential elements of engagement and the most common and effective tools for managing engagement.

- **Step 3: Longlisting (KPI Trees)**

The heart of the ROKS method is the KPI Tree methodology. KPI Trees are powerful, easy to understand and visual. They are also a learned skill. This session introduces the 4C method, which makes KPI Tree creation a structured and repeatable process. Software tools and practical design tips are covered as well. Learn how KPI Tree workshops can build engagement, agreement and highlight hidden KPI risks. Feedback shows that people derive huge insight from the KPI trees they build.

- **Step 4: Shortlisting**

The biggest practical issue organisations face with their KPIs is too many KPIs. The shortlisting step introduces a structured, repeatable and visual method for selecting only the most appropriate KPIs. This step also enables the organisation to identify high-value KPIs that are not yet practical but might be business-changing if implemented.

- **Step 5: Definition**

A crucial step for success, but one that is often skipped over. In this section, some of the risks are highlighted using hair-raising true stories and we introduce the ROKS KPI Canvas tool.

- **Step 6: Prototyping**

KPIs communicate through dashboards and reports. This step introduces the visual design principles developed by the likes of Edward Tufte and Stephen Few and shows how to apply them to your reporting documents. We also cover strategies for minimising the number of design revisions and changes to report designs.

- **Step 7: Go-live**

Nothing we do counts unless we implement. This step covers effective implementation tools and methods, the most common practical problems and strategies for tackling those issues.



Certified Training: ROKS YellowBelt

Duration

A full day.

What is included

- Seven hours of expert training and facilitation from the creator of the ROKS, Bernie Smith
- A copy of the concise guide to ROKS – 'KPI Checklists'
- Bound, custom-designed notes and exercise book

Course capacity

12

Certification

Each attendee to the full YellowBelt workshop session becomes a 'ROKS Certified YellowBelt'.

“Very nice course, with practical examples so you can start it with your company right away.”



Kevin Engelen
JUGO



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Certified Training: ROKS GreenBelt

12 3 days

Summary

The foundation of 'ROKS KPI Practitioner' certification, this is a three-day in-depth KPI training workshop. We cover the seven steps of the ROKS method in detail, using case studies, games and real-world stories. There is a strong focus on developing and refining the core skills required for successful implementation. In addition to the core ROKS steps, we explore process measures, 'Index KPIs' (using the EPIK approach) and 'Impossible to measure' KPIs (using proxies and Fermi decompositions).



Certified Training: ROKS GreenBelt

ROKS GreenBelt Overview

👥 12 📅 3 days

Who is it for?

Designed for those who will need to lead or deliver KPI design, improvement or implementation projects for their organisations or clients.

No previous KPI knowledge or experience is assumed, although the session targets those involved in performance measurement, reporting or process improvement as their primary activity.

Course outline

Days 1 and 2

The first two days cover the same ROKS steps as the one-day YellowBelt session, but in much more depth, additional case studies, exercises and discussion.

- **Step 1: Strategy**



How to simplify and streamline existing strategy documents into a suitable form for effective KPI selection. Learn about the most common strategy pitfalls and how to avoid them. We also cover the 'Big 6', an effective tool for organisations that are struggling with their strategy definition.

- **Step 2: Engagement**

Team engagement is the biggest single factor affecting KPI success. We review the three essential elements of engagement and the most common and effective tools for managing engagement.

- **Step 3: Longlisting (KPI Trees)**

KPI Trees are powerful, easy to understand and visual. They are also a **learned skill**. This session introduces the 4C method, which makes KPI Tree creation a structured and repeatable process. Software tools and practical design tips are covered as well. Learn how KPI Tree workshops can build engagement, agreement and highlight hidden KPI risks.

- **Step 4: Shortlisting**

The biggest practical issue organisations face with their KPIs is too many KPIs. The shortlisting step introduces a structured, repeatable and visual method for selecting only the most appropriate KPIs. This step also enables the organisation to identify high-value KPIs that are not yet practical but might be business-changing if implemented.

- **Step 5: Definition**

A crucial step for success, but one that is often skipped over. In this section, some of the risks are highlighted using hair-raising true stories and we introduce the ROKS KPI Canvas tool.

- **Step 6: Prototyping**

KPIs communicate through dashboards and reports. This step introduces the visual design principles developed by the likes of Edward Tufte and Stephen Few and shows how to apply them to your reporting documents. We also cover strategies for minimising the number of design revisions and changes to report designs.

- **Step 7: Go-live**

Nothing we do counts unless we implement. This step covers effective implementation tools and methods, the most common practical problems and strategies for tackling those issues.

Day 3

- **Process measures**

Many KPIs are intended to measure processes. KPI Trees will help us identify the right measures, but we also need to understand how and where we should measure process performance. This module covers: how to set up and run a process KPI workshop, the right questions to ask and the best way to support process improvement work activity.

Certified Training: ROKS GreenBelt



• Index KPIs

A regular management request is to represent complex reporting situations as simply as possible. Index KPIs, can be a useful solution to this problem. 'Index KPIs' can be a fantastic solution, but they also come

with severe hidden risks. This module introduces the seven-step EPIK methodology for building reliable Index KPIs. Each step is illustrated with a worked example and a case study exercise for the delegates. Practical strategies for identifying and minimising the risks inherent with Index KPIs are covered.

• Measuring the 'Impossible'

Many of the most exciting potential KPIs may seem to be hard, or even impossible to measure. Using two effective strategies, almost anything becomes measurable. Learn the techniques that allowed a pension firm to predict when a customer was intending to leave, how much a Blue Whale eats and how a supermarket figured out if a family shops at more than one supermarket.

• OKRs, KPIs and KPI Trees and how to combine them

KPI Trees focus entirely on measuring strategic outcomes. OKRs are a powerful management tool for structuring objectives and key results. OKRs require strategic objectives be aligned throughout

the organisation, yet none of the available materials show the reader how to do this. This module shows you how to combine both methods for a hugely powerful hybrid approach - develop meaningful KPIs and integrate that approach with clear, structured objectives, milestones and actions.

Duration

Three full days.

What is included

- Twenty one hours of expert training and facilitation from the creator of the ROKS, Bernie Smith
- A copy of the concise guide to ROKS - 'KPI Checklists'
- Bound, custom-designed notes and exercise book

Course capacity

12

Certification

- Attendance of ROKS GreenBelt training
- One day of coaching, split into one/two hour coaching and mentoring sessions
- Produce three KPI Trees
- Deliver approved ROKS GreenBelt project and pass project review within six months
- Pass online GreenBelt exam

ROKS Certified Status

Once certified, maintenance of 'official ROKS certified' GreenBelt status requires a small annual licence fee, which entitles the holder to be listed publicly as a current GreenBelt practitioner, access to the latest versions of ROKS delivery materials and support advice via email. Recertification is required every five years (fees covered by annual licence fee).

“Great workshop to give insight in the road to a meaningful KPI set.”



Eduard Berteler
Axians

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Certified Training: ROKS BlackBelt

8

5 days

Summary

Our most in-depth KPI training. It's a comprehensive course for developing performance measurement experts. For many, this will be the launch point for a successful career as a KPI consultant or in-house subject-matter expert. This BlackBelt course is the foundation for 'ROKS KPI Professional' and 'ROKS Certified Master BlackBelt' certification.



Certified Training: ROKS BlackBelt

ROKS BlackBelt Training

 8  5 days

Who is it for?

This workshop is for those who lead or deliver large and complex KPI design, improvement or implementation projects for their organisations or for clients.

No previous KPI knowledge or experience is assumed, although the session targets those involved in KPIs, reporting or process improvement as their primary activity.



Course outline

Days 1 and 2: In-depth introduction to ROKS

- **Step 1: Strategy**
How to simplify and streamline existing strategy documents into a suitable form for effective KPI selection. Learn about the most common strategy pitfalls and how to avoid them. We also cover the 'Big 6', an effective tool for organisations that are struggling with their strategy definition.
- **Step 2: Engagement**
Team engagement is the biggest single factor affecting KPI success. We review the three essential elements of engagement and the most common and effective tools for managing engagement.
- **Step 3: Longlisting (KPI Trees)**
The heart of the ROKS method is the KPI Tree methodology. KPI Trees are powerful, easy to understand and visual. They are also a learned skill. This session introduces the 4C method, which makes KPI Tree creation a structured and repeatable process. Software tools and practical design tips are covered as well. Learn how KPI Tree workshops can build engagement, agreement and highlight hidden KPI risks. Feedback shows that people derive huge insight from the KPI trees they build.
- **Step 4: Shortlisting**

The biggest practical issue organisations face with their KPIs is too many KPIs. The shortlisting step introduces a structured, repeatable and visual method for selecting only the most appropriate KPIs. This step also enables the organisation to identify high-value KPIs that are not yet practical but might be business-changing if implemented.

- **Step 5: Definition**
A crucial step for success, but one that is often skipped over. In this section, some of the risks are highlighted using hair-raising true stories and we introduce the ROKS KPI Canvas tool.
- **Step 6: Prototyping**
KPIs communicate through dashboards and reports. This step introduces the visual design principles developed by the likes of Edward Tufte and Stephen Few and shows how to apply them to your reporting documents. We also cover strategies for minimising the number of design revisions and changes to report designs.
- **Step 7: Go-live**
Nothing we do counts unless we implement. This step covers effective implementation tools and methods, the most common practical problems and strategies for tackling those issues.

Day 3

Certified Training: ROKS BlackBelt



• Process measures

Many KPIs are intended to measure processes. KPI Trees will help us identify the right measures, but we also need to understand how and where we should measure process performance. This module covers: how to set up and run a process KPI workshop, the right questions to ask and the best way to support process improvement work activity.

• Index KPIs

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KPIs' can be a fantastic solution, but they also come with severe hidden risks. This module introduces the seven-step EPIK methodology for building reliable Index KPIs. Each step is illustrated with a worked example and a case study exercise for the delegates. Practical strategies for identifying and minimising the risks inherent with Index KPIs are covered.

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pension firm to predict when a customer was intending to leave, how much a Blue Whale eats and how a supermarket figured out if a family shops at more than one supermarket.

• OKRs, KPIs and KPI Trees and how to combine them

KPI Trees focus entirely on measuring strategic outcomes. OKRs are a powerful management tool for structuring objectives and key results. OKRs require strategic objectives be aligned throughout the organisation, yet none of the available materials



Certified Training: ROKS BlackBelt

show the reader how to do this. This module shows you how to combine both methods for a hugely powerful hybrid approach - develop meaningful KPIs and integrate that approach with clear, structured objectives, milestones and actions.

Day 4

• Trending and Control Charts

All processes vary naturally. This is called 'process noise'. How do you know that a chart that increases is really showing improvement and isn't just showing natural variation? In this module we carefully dissect one shocking example. Control charts, specifically XMR/IMR charts, offer a mathematically valid solution to this problem. We cover both the theory of XMR/IMR charts and hands-on physical simulation.

Day 5

• Full end-to-end case study

KPI development is a practical field, not an academic one. The best way to master the ROKS process is to use it. In this module, we choose one of three carefully-designed case studies to walk through each step of the ROKS process in the best simulation, outside of applying it to a live business.

• Course recap and discussion session

What is included

- Thirty five hours of expert training and facilitation from the creator of the ROKS, Bernie Smith
- A copy of the concise guide to ROKS - 'KPI Checklists'
- Bound, custom-designed notes and exercise book

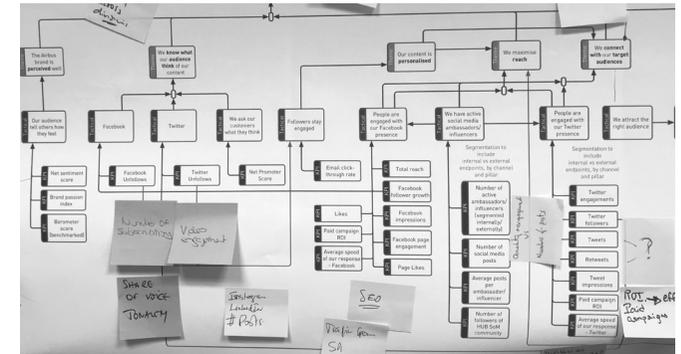
Certification

Certification is not essential, but does bring benefits; public listing as a 'ROKS qualified' professional, access to the latest delivery materials and a direct channel to Bernie for advice.

The requirement for certification are...

- Attendance of ROKS BlackBelt training
- Three days of coaching by a Master BlackBelt, split into one/two hour coaching and mentoring sessions
- Produce at least six complex KPI Trees
- Deliver approved ROKS BlackBelt project and pass project review within twelve months
- Pass online BlackBelt exam

Once certified, maintenance of 'official ROKS certified' status requires a €150 per annum licence fee, which entitles the holder to be listed publicly as a current BlackBelt practitioner, access to the latest versions of ROKS delivery materials and advice via email. Recertification is required every five years (fees covered by annual licence fee).



“ This is a great workshop to see the green within the forest. ROKS is gonna help us with driving our performance initiatives! ”



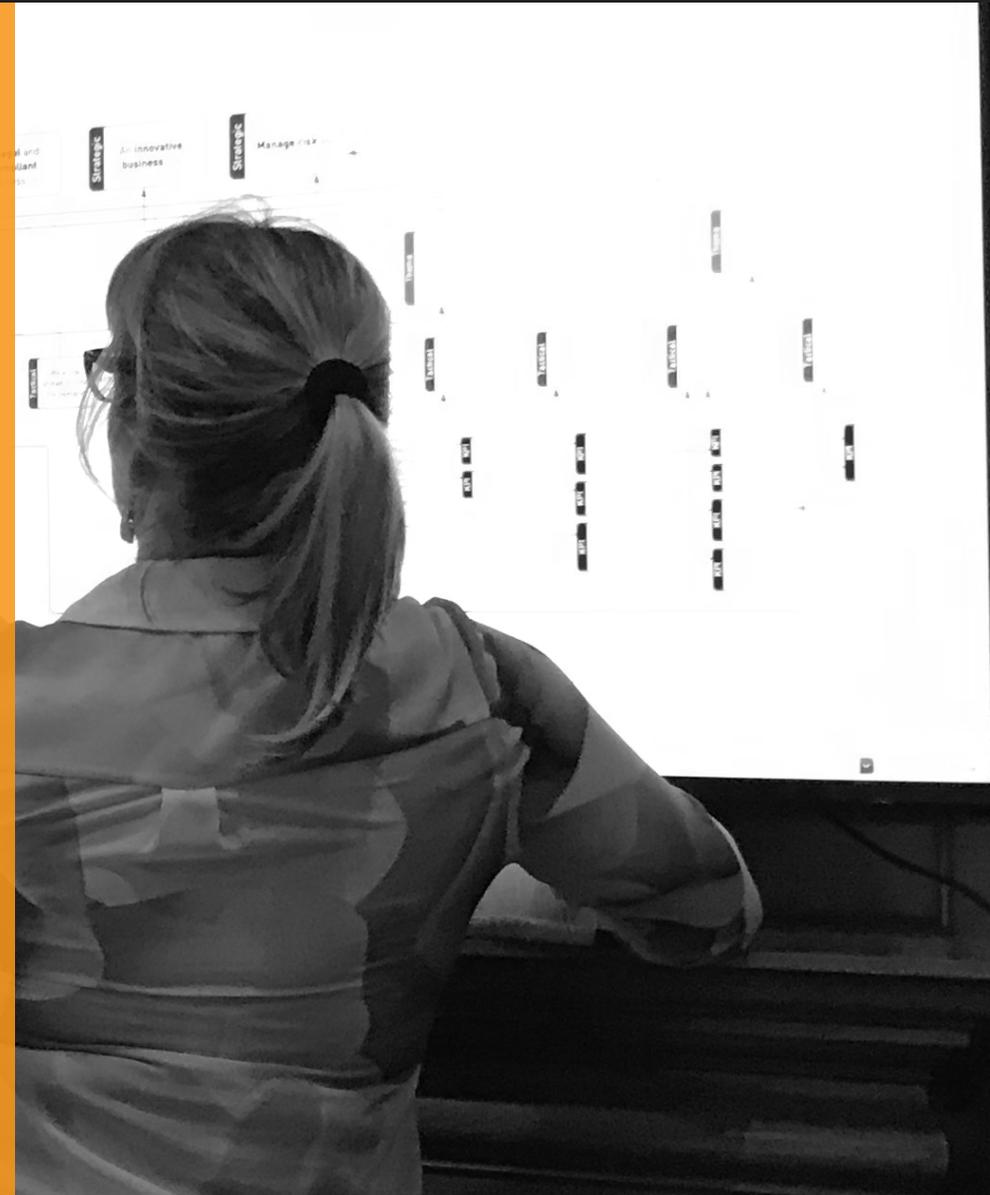
Bart Roelofs
Trespa

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Technical KPI Workshops

The ROKS approach provides the **structure** for KPI creation, but there are a number of specific technical challenges involved in implementing effective measures. These workshops are designed to provide stand-alone training to help with...

- Developing a clear, effective house style for reports and dashboards
- Using control charts to identify the real underlying trends in your data
- Designing KPI Trees (Step 3 of the ROKS approach)
- Creating Index KPIs to simply represent complex situations
- Supporting Lean Six Sigma implementation programmes
- Using the power of KPI Trees in OKR roll-outs



Technical KPI Workshops

Brilliant Report & Dashboard Design

12 4-6 hours

Who is it for?

Line managers, SMEs and management information professionals who:

- Produce or revise dashboards and reports
- Find your current reports and dashboards confusing
- Are frustrated by the length, complexity and structure of your existing reports
- Have many different styles of dashboards and reports in use and want to simplify things
- Need to create a consistent "house style" that can be replicated by different teams
- Want to look like a star by creating reports and dashboards that your internal customers love

Course outline:

- The psychological principles underpinning good information design
- Examples of good and bad dashboard and report design, with interactive group exercises
- Group-based review and critique of samples, or client-specific samples and action plan development

Course duration

Four hours using generic case studies, six hours when including client materials review

Turning Data Into Knowledge: Control Charts for KPIs

12 6 hours

Summary

The most commonly used trending and curve fitting tools can give a completely misleading picture of actual performance. Using statistical techniques, learn how we can reliably separate real performance change from natural process variation. The XmR/ImR approach enables us to provide sound management advice based on statistical confidence, not gut feel or flawed trending tools. This course takes a potentially dry topic and brings it to life with down-to-earth case studies and plenty of practical activities.

Who is it for?

Measurement professionals who produce critical reports on which major decisions are based.

Course outline:

- The pitfalls of the most commonly used trending and fit tools for analysis
- A practical introduction to control charts, specifically ImR/XmR charts, and their application to management reporting with plenty of worked examples
- Two depth case-studies to apply XmR techniques



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Technical KPI Workshops

KPI Tree Masterclass

12 Full day

Summary

Choosing a small selection of meaningful KPIs can be difficult, time-consuming and very emotive. The KPI Tree approach, the 'heart of the ROKS method', was developed by Bernie to enable a structured, visual and repeatable method for developing a suite of KPIs that link directly and visually to your organisation's strategic objectives.

In this workshop you are taken through the fundamental principles of KPI Trees, the '4Cs' method for building them and the practicalities of building them.

Type of course

Mixture of theory and practice. Focus on practical skills and application throughout, using carefully graded case studies. Also includes custom-designed group exercises to reinforce the concepts.

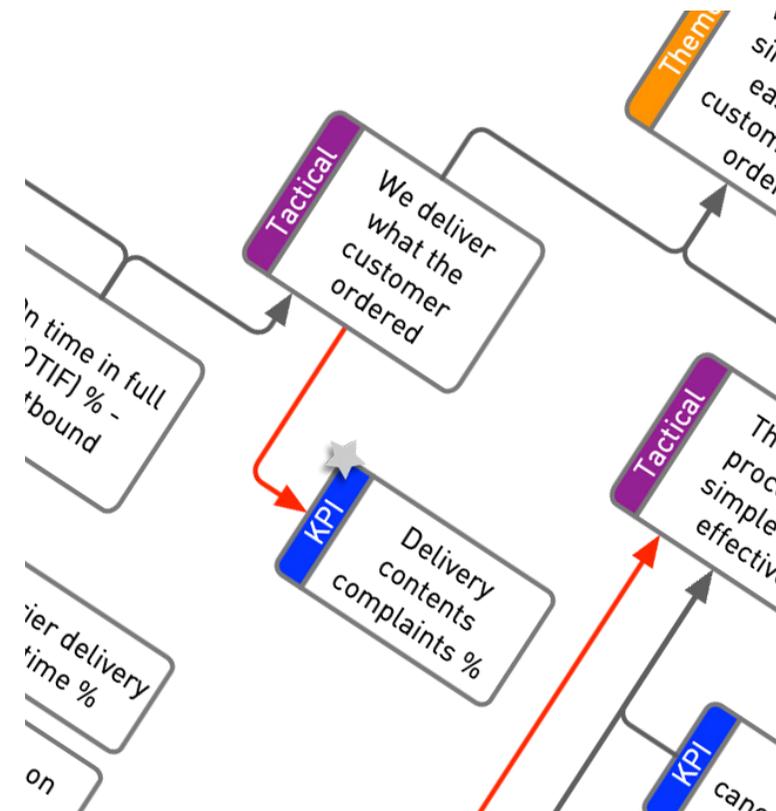
Who is it for?

Performance measurement, BI, MI or CI professionals who need to:

- Design and select KPIs
- Facilitate others in creating KPIs
- Link KPIs to strategic objectives

Course outline:

- The ROKS approach, and where KPI Trees fit
- Getting your strategy ready for KPI selection
- KPI Tree basics
- Pitfalls and how to use the '4Cs' to break your objectives down.
- Link types - which to use and how they can prevent a business catastrophe
- Getting the KPI Tree levels right (with card game) - so you don't go in circles
- Multiple interactive examples, building up gradually in complexity
- The practical tools and techniques for building your own KPI Trees - software and techniques
- The opportunity to make a start on your own KPI Tree, with input from Bernie
- Ten sample KPI Trees for reference and re-use (exclusive to this workshop)
- How to 'Shortlist' KPIs generated using KPI Trees
- How to build bullet-proof definitions for your final KPI selection
- Setting up and running KPI Tree workshops in your organisation - practical guide and checklists



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Technical KPI Workshops

Performance Index Design

12 6 hours



Step 1



Decide purpose

Step 2



Assemble ingredient KPIs

Step 3



Assess range & direction

Step 4



Design 'mini-indexes'

Step 5



Rate ingredient importance

Step 6



Weight & mix mini-indexes

Step 7



Test, tweak & deploy

Summary

It is common to need to distil a complex organisational situation down to a simple message or score. Performance indexes are an effective way to achieve this goal, but they need to be built in a structured way to ensure they are reliable and trustworthy.

This course is based on the 7-step **EPIK Design System**, an approach specifically designed to guide you to robust, reliable and useful Performance Indexes as quickly as possible.

Type of course

Mixture of theory and practice. Focus on practical skills and application in second half of the workshop. Plenty of case study exercises to complete and keep as reference material when participants develop their own performance index KPIs.

Who is it for?

Analysts and management information professionals who

need to...

- Offer 'at a glance' insight of a complex situation
- Develop index measures that are transparent and balanced
- Implement performance indexes that are fully tested, documented and trusted

Course outline:

- Performance indexes - what they are and when to use them (and when not to!)
- Features of a good performance index
- Introduction to the EPIK Design System
- Building team engagement for your performance index
- Multiple, graded, exercises critiquing and designing performance indexes
- Group-based review and critique of samples, or client-specific samples and action plan development

“Very nice course, with practical examples so you can start it with your company right away.”



Hilde Lavrijsen
JUGO

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Technical KPI Workshops

Performance Measurement for Lean Six Sigma

24 6 hours

Summary

Efficiency, productivity, capacity, utilisation and yield are key concepts in Lean Six Sigma deployments. Whilst the measures themselves are fairly simple to explain, applying them can be much more complicated. In this course Bernie takes the group through each of the core measures that will be needed, giving very practical advice on how to implement them successfully and the pitfalls to be avoided.

Type of course

A technical and practical course. The course is based on case studies and practical skills.

Who is it for?

Line managers and SMEs who need a deep understanding of operational measurement methods. Familiarity with Lean Six Sigma is an advantage, basic numeracy essential, but no specific technical knowledge is required.



Course outline

- Process and labour efficiency (including OEE)
- Bottleneck theory, hands-on simulation and the implications for process measurement
- Measuring office-based process performance
- Capacity and utilisation
- Yield and waste measurement
- Quality measure

Duration

Six hours

Course capacity

24

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Technical KPI Workshops

The power of OKRs and KPI Trees

👥 12 📅 Full day

Summary

KPI Trees are the best way to choose your KPIs. OKRs are the powerful goal setting and measurement tool used by Google, Intel and the Gates Foundation. How do you harness the benefits of both to build logical KPIs **and** integrate OKRs into your business? They work together astonishingly well. This workshop shows you when to use each tool and how to integrate them.

Type of course

Mixture of theory and practice. Focus on practical skills and application throughout, using carefully graded case studies. Also includes custom-designed group exercises to reinforce the concepts.

The day is split into three sections: KPI Tree introduction, OKR introduction and, finally, integrating the methodologies for maximum benefit.

Who is it for?

Managers or management information professionals looking to build a performance measurement and management system using both OKRs and KPI Trees. By the end of the day you will have a good grounding in both approaches and should be able to develop implementation plans for your organisation.

Course outline:

Introduction to KPI trees

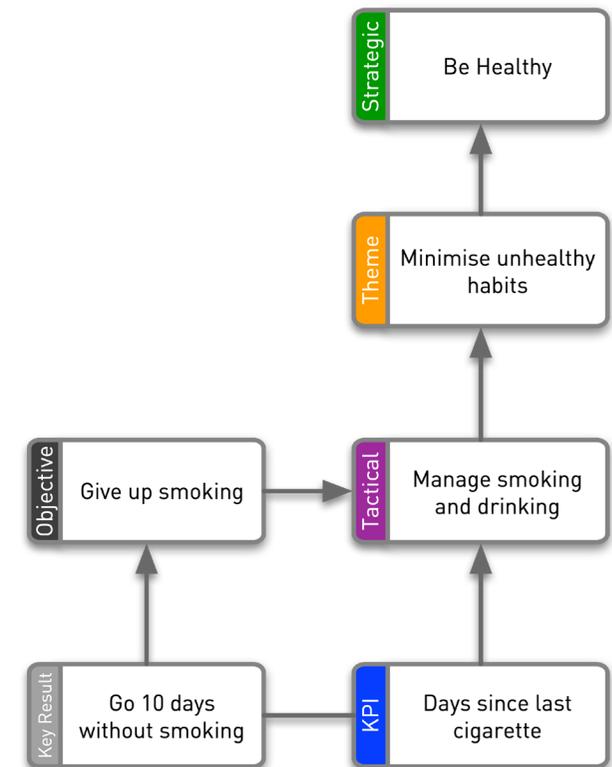
- KPI Tree basics
- Using the '4Cs' to break your objectives down
- Link types - which to use and how they can prevent a business catastrophe
- Getting the KPI Tree levels right (with card game) - so you don't go in circles
- Multiple interactive examples, building up gradually in complexity
- How to 'Shortlist' KPIs generated using KPI Trees

Introduction to OKRs

- How OKRs were created
- OKR principles (using plenty of examples)
- Creating alignment
- Case study OKR exercises
- Practical implementation advice & OKR software tools

Turbo-charging your business by using OKRs and KPI Trees together

- When to use each tool
- How to combine them
- How to get more than the sum-of-the-parts
- Building a performance measurement & management system using both tools.



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Engagement, Custom and Hybrid Workshops

Engagement Workshop: Simple Effective Performance Measures

12 3 hours

Summary

Introducing the basics of the Results Orientated KPI System to those that will be part of a roll-out of new, or improved, KPIs.

Type of course

Familiarisation, 'Hearts and Minds'. Some theory, but with plenty of practical examples, exercises and some humour.

Who is it for?

Line managers and subject matter experts who need to understand the principles behind good KPIs

Course outline

- Discussion of the problems with KPIs and Measures
- Introduction to ROKS – the Results Orientated KPI System – and an overview of the steps
- Practical exercises to reinforce the concepts and build engagement

Custom In-House Workshops

Summary

Every organisation is different. Often there are several programmes in flight at the same time, leading to a need to mesh things together.

If you need to integrate KPI training with an improvement programme, new ways of working or major organisational change, we can customise the training to meet your needs. As we own the rights to all of our methodology and materials, any level of customisation is possible.

If you would like any of material customising for your in-house needs, just get in touch to find out how we can help.

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Hybrid Workshops

Summary

Hybrid workshops are sessions where excellent training is mixed in with the development of **your** organisation's real-world KPIs.

In these sessions, we replace the standard case studies with exercises that are directly relevant to **your** business.



Not only does this increase the relevance of the sessions, but it also gives your team a flying start in the **application** of the ROKS tools and techniques.

The hybrid approach leads to exceptional levels of participant engagement and rapid progress towards your KPI goals.

Every hybrid workshop is different, tailored to your specific needs. Get in touch to discuss how we can build a plan that is perfect for your needs.

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Bernie, your trainer and facilitator

About Bernie

Learn directly from the creator of the ROKS® - Results Orientated KPI System - Bernie Smith.

Bernie has over twenty years experience in delivering performance improvement. He honed his Lean and Six Sigma delivery skills coaching consulting on performance improvement for global manufacturing organisations, such as Kimberly-Clark, Coca Cola and Guinness.

After ten successful years delivering step-changes in efficiency for these manufacturing organisations he transitioned to applying these tools to the banking sector, an unusual idea in the early 2000's. In the following ten years Bernie consulted with every major UK retail bank, many investment banks and multiple associated financial service clients - a background straddling two very different sectors, but with a consistent theme of delivering real-world improvement.

Through his varied consulting career, Bernie identified that all organisations seemed to struggle with the same critical core issue - performance measurement. Convinced that accessible KPIs can be reliably created using a structured and repeatable approach, Bernie set up Made to Measures KPIs in 2009. Bernie's approach is jargon-free and focuses on practical techniques that really work.

A facilitator who has 'done' as well as 'trained', Bernie has over 20 years hands-on experience...

- Delivering outstanding improvement projects for blue-chip organisations as a Master Black Belt
- Broad multi-sector experience ranging from cheese making, to petrochemical production as well as counting every major UK retail bank amongst his client list
- Check out Bernie's LinkedIn profile...

<https://uk.linkedin.com/in/berniesmith>

...to find out a bit more about him.

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KPI Books by Bernie Smith

KPI Checklists

A simple 7-step KPI approach for any situation

Your quick-read introducing the bulletproof KPI creation tool - the Results Orientated KPI System (ROKS). It's aimed at mid-large sized organisations. Written in a straight-forward and informal way, this book gets straight to the point and covers the steps you need to go through to go from strategy to completed KPIs. You can read it in an afternoon. If you need KPI definitions then Getting Started with KPIs is the book you need.

Available on Amazon as [paperback](#), [hardback](#) and on [Kindle](#)



Getting Started with KPIs

Instant KPIs for Smaller Businesses

Are you running a small or medium-sized business and looking for a handful of KPIs to help you improve performance? This book introduces the streamlined ROKS Express method and walks you through each of the six steps to take you from business goals through to implemented KPIs, reports and dashboards. The book includes 413 carefully chosen and defined KPIs and an easy-to-understand method to choose the right ones for your business.

Available on Amazon as [paperback](#) or [hardback](#)

Essential KPIs Series

When you know what you need

In an ideal world, we would all build our KPIs as a complete 'system', so that they work together to give you a balanced picture. In the real world, sometimes you just don't have the time and need a ready-defined KPIs to get up and running with measures on a particular aspect of your business or organisation.

These 'Essential KPI' guides are handy packages of ready-defined KPIs on a wide range of topics. Each KPI is from the ROKS Express™ System (the full ROKS Express™ system and all of the KPIs from the Essential KPI guides are included in Getting Started with KPIs).

Available on [Kindle](#) and [Smashwords](#)

Essential KPI Guides available...

- Essential Financial KPIs
- Essential Sales and Marketing KPIs
- Essential Retail KPIs
- Essential Recruitment, Staff and Payroll KPIs
- Essential Property Management KPIs
- Essential Fulfillment and Warehouse
- Essential Health and Safety
- Essential Procurement
- Essential Web Marketing
- Essential Charity
- Essential Innovation and New Product Development
- Essential Event and Performance
- Essential Service-Based Sole-Trader
- Essential Independent Consultant