



MADE TO MEASURE **KPIs**

Online KPI Black Belt Programme Overview

Revision 1.7

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**KPI
BLACK
BELT**

KPI Black Belt Programme Content Guide

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KPI Black Belt: One Page Summary

 12 (max)  14 weeks, hybrid online

Overview

The KPI Black Belt Programme is a comprehensive 14-week online certification designed for professionals who want to master the art and science of performance measurement. Using the proven ROKS methodology (Results Orientated KPI System), participants develop the skills to design, implement, and maintain effective KPI systems that drive organisational performance.

Key facts

Format	Hybrid small-group online learning <ul style="list-style-type: none">• 13 weekly e-learning modules• 13 weekly individual assignments + personal feedback• 13 weekly live tutorials• Rapid tutor access through KPI community portal
Duration	14 weeks <ul style="list-style-type: none">• 4-5 hours per week commitment• 1 break/catchup week mid-course
Investment	See kpiblackbelt.com/checkout/ for pricing
Payment	Credit card, bank transfer. Installment options
Groups	Group discount of 25% for 4+ seats
Private course	Available, get in touch for details
Key Outcome	ROKS KPI Black Belt Pro certification with the skills to transform strategic objectives into measurable results

What's Included

- 35 hours of expert training and facilitation from Bernie Smith, creator of ROKS
- Comprehensive course materials including the KPI Checklists guide
- Custom-designed workbook and exercise materials
- One year of access to the KPI Black Belt online platform
- Personalised physical KPI Black Belt award for graduates
- Digital badge and certificate for your professional profile

Next steps

1. **Book a call** to discuss your questions, goals and objectives
2. **Select your cohort** (kpiblackbelt.com/checkout/ for latest dates)
3. **Reserve** your course space

Who the KPI Black Belt is for...

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

The KPI Black Belt is 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 team and 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 training is 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® approach gives a structured, repeatable and easy-to-follow method for choosing a sensible number of really effective KPIs to support your organisational goals.

Of course you get much more from the course - carefully structured case studies, a custom high-quality workshop manual and workbook, discussion and the opportunity to be coached by Bernie.

"I thought we were good at KPIs on our business because we track a lot of numbers, but this course really helped me to think about the true drivers of the business. Bernie's online videos are easy to understand and really help to structure the process."

Patrick Horton, Transformation Director Global Publishing, February 2024 Cohort

"If you're considering the Black Belt course, you probably have this uncomfortable feeling somewhere that, that you are not happy with how KPIs are currently. I would say, just do it because it will change how you will work with KPIs from the moment you finish the course."

Jeroen Volk, Finance Director, September 2022 Cohort

I must say that the learning to date and the knock-on to challenging and also complementing some of my thinking with 6-sigma work has been incredibly valuable. I think I will actually miss the sessions when we complete!

Leanne Baker, Analytics & Project Manager, September 2024 Cohort



Student Feedback

“ I found it incredibly useful and directly applicable to my job. The content was well structured and provided practical insights that I can implement in my work. The teaching style was engaging and flexible. ”



Jade Grainger

Senior Digital Business Analyst
Bauer Media Group



“ Before the course KPI's meant very little to me other than people 'guessing' what a good KPI looked like. Post course I am confident I can apply fit for purpose & meaningful KPI's to any scenario. ”



Glynn Fereday

Technical Support Services Manager
SSE Renewables



“ This should be part of a MBA module on strategy, process improvement, and leadership. ”



Theo Isaacs

Transformation Programme Director, Bauer Media Group



“ The KPI Black Belt course is an exceptional learning experience that brilliantly turned complex performance measurement concepts into easily applicable insights. ”



Amelie Roland-Gosselin

Head of Group Channels & Content
Bauer Media Group

Average course feedback score
2025: 92%

(to Feb 2025, 5 cohorts)

“ I think I will actually miss the sessions when we complete! ”



Leanne Baker

Analytics & Project Manager,
Bauer Media Group

KPI Black Belt Certification

Certification Requirements

The requirements for certification are...

1. Completion of all the ROKS Black Belt e-learning modules
2. Pass grade for all module tests
3. Submission and 'pass' grade for all module assignments

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).

Benefits for teams and organisations...

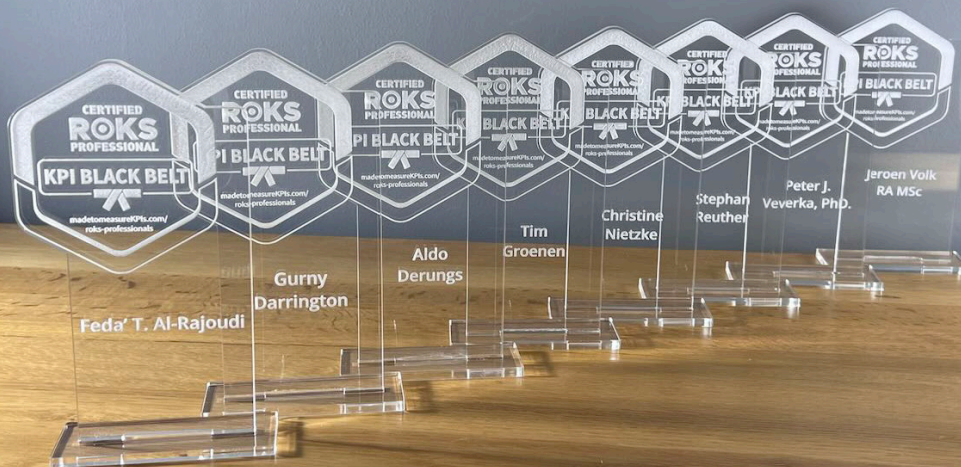
Delivering KPI results requires a consistent, high quality approach to KPI selection, design and implementation. Certified ROKS practitioners give your organisation clear advantages...

- 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

Benefits for consultants...

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

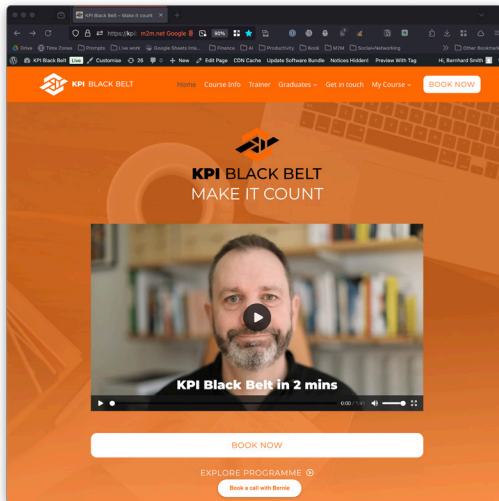
In a world where almost every organisation struggles to design and maintain meaningful KPIs, ROKS KPI Black Belt Certification can offer unique competitive advantage, recognition and rewards.



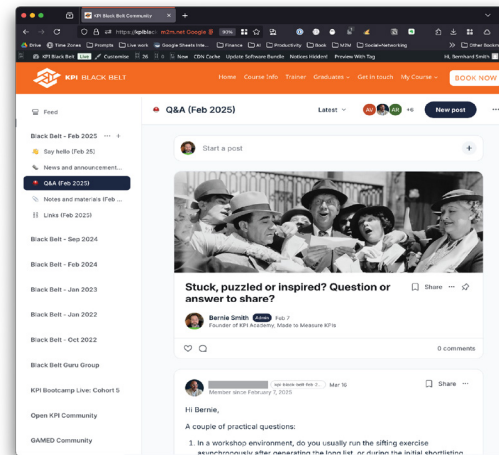
Johnny Appleseed
April 2022

Learning Environment

Access through kpiblackbelt.com



Private, secure community group forum

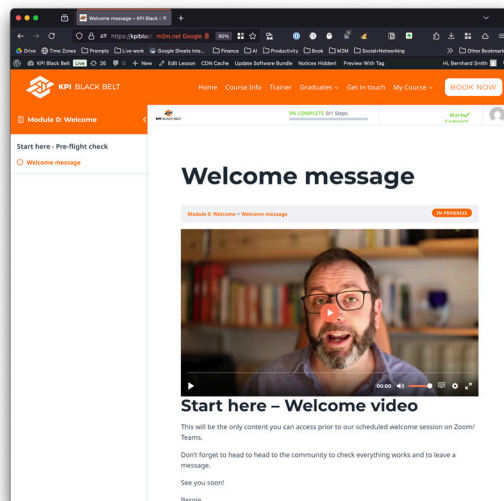


Weekly live group tutorial sessions

Tutorials are recorded (for group members viewing only), transcribed, summarised and shared on in the private course community.



Easy to use e-learning environment

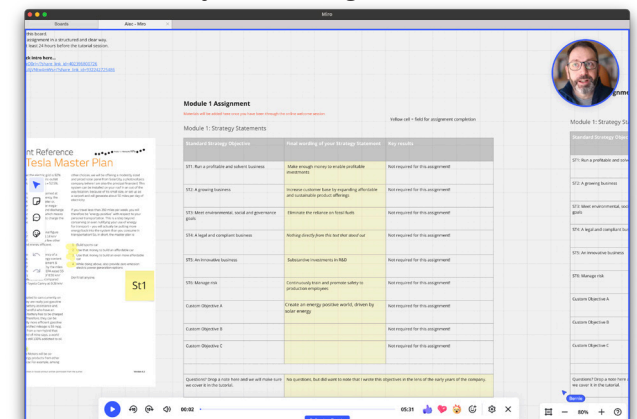


Module quizzes to reinforce learning



Personal student Miro assignment board

Carefully designed module assignments including tutor video feedback on every student assignment



Programme Content Overview: The ROKS Approach



The ROKS Method: Systematic KPI Design and Implementation

Most organisations struggle with their KPIs. They typically have too many measures, measure the wrong things, or become bogged down in implementation issues. The net result? Performance measurement systems that cost a fortune yet deliver very little value.

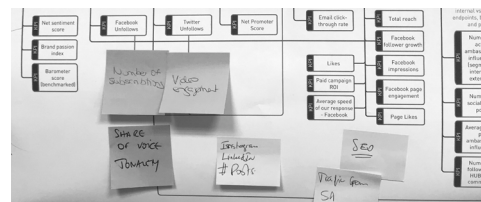
The KPI Black Belt programme is built around the ROKS approach - Results-Oriented KPI System. This seven-step methodology takes you from strategic clarity to successful implementation, ensuring your KPIs actually drive your business forward rather than simply

generating pretty reports that nobody uses.

Why the ROKS method works when other approaches fail

The ROKS method isn't just theory. It's been battle-tested across hundreds of organisations, from small charities to FTSE 100 companies. What makes ROKS different is its focus on outcomes rather than measures.

Most approaches start with the question "What should we measure?" - which leads to confusion, debate and ultimately a measurement system disconnected from your strategy. ROKS flips this on its head, starting with your strategic objectives and then systematically working backwards to identify the most impactful measures.



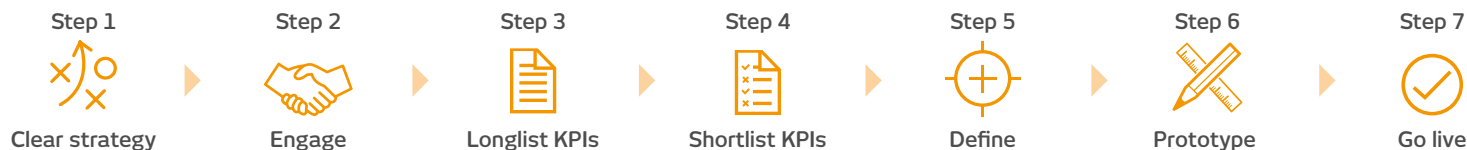
Beyond the basics: Specialist tools for specific challenges

The KPI Black Belt programme gives you much more than just the core ROKS methodology. You'll gain access to specialist tools designed to tackle specific measurement challenges:

- **Index KPI design:** Learn how to consolidate multiple related measures into a single, powerful indicator
- **Smart Charts:** Master techniques for separating meaningful signals from random noise in your data
- **The Holmes Method:** Discover how to measure things that seem impossible to quantify
- **KPI Trees:** Build visual maps that connect high-level outcomes to frontline measures
- **Brilliant Dashboard Design:** Transform raw data into decision-driving insights

Each specialist module branches from the central ROKS framework, creating a comprehensive toolkit for measurement excellence. Whether you're designing

KPIs from scratch or fixing a broken measurement system, the KPI Black Belt programme gives you the structured approach and practical tools to deliver results.



Content: ROKS method

The Complete ROKS Method: A Step-by-Step Journey

The programme teaches you the entire ROKS method from start to finish:

- 1. Strategy Clarification.** Cut through woolly language to define measurable strategic outcomes
- 2. Stakeholder Engagement.** Identify and involve the right people at each stage
- 3. KPI Tree Development.** Create visual maps of potential measures aligned to strategy
- 4. Shortlisting.** Apply a structured approach to select the most effective measures
- 5. Precise Definition:** Create crystal-clear definitions that prevent misunderstandings
- 6. Dashboard Design:** Apply evidence-based principles to create genuinely useful reports
- 7. Implementation:** Deploy strategies that overcome common obstacles and ensure sustainability

Throughout the programme, you'll apply each step to real-world scenarios, building your confidence and competence through practical application.

What You'll Take Away

By the end of the programme, you'll be able to:

- Transform vague strategic goals into measurable outcomes
- Build engagement through targeted stakeholder management
- Generate comprehensive lists of potential KPIs using KPI trees
- Apply a structured approach to selecting the right measures
- Write precise definitions that ensure consistent calculation
- Design dashboards that genuinely enhance decision-making
- Implement your KPIs successfully, avoiding common pitfalls
- Apply Lean Six Sigma concepts to streamline KPI production
- Ensure the long-term sustainability of your measurement system

Key Benefits of the ROKS Method

The ROKS method transforms performance measurement from a haphazard exercise into a systematic process that delivers real business value:

- **Strategic alignment:** Every measure connects directly to your strategic objectives
- **Balanced approach:** Satisfies both the "dreamers" who want comprehensive measurement and the "pragmatists" who focus on what's feasible
- **Stakeholder buy-in:** Builds engagement throughout the process, minimising resistance to implementation
- **Focused measurement:** Prevents KPI overload by systematically prioritising what truly matters
- **Clarity and precision:** Reduces disputes through crystal-clear KPI definitions
- **Evidence-based visualisation:** Accelerates understanding through scientifically-proven dashboard design principles

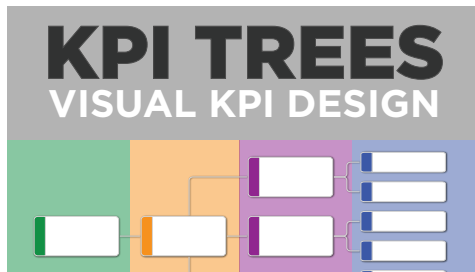
- **Implementation success:** Addresses common problems before they derail your measurement system
- **Universal application:** Works for any organisation regardless of size or industry

Whether you're implementing organisational scorecards, departmental dashboards, or process metrics, the ROKS method provides the structure, tools and techniques to ensure your performance measurement system delivers lasting value. With ROKS, you move beyond measuring for measurement's sake to creating a system that genuinely improves organisational performance.



Content: KPI Trees

KPI Tree Design: Building Performance Measurement from Strategy to Execution



KPI Tree Design

Organisations often struggle with choosing the right Key Performance Indicators. Without a structured approach, KPI selection becomes a battleground between “dreamers” who want to measure everything and “pragmatists” who focus only on what’s easily measurable. The result? Disconnected metrics that fail to drive strategic objectives, confuse stakeholders, and create measurement systems that collapse under their own weight. KPI trees solve this problem by providing a visual, logical framework that connects high-level strategic objectives to measurable KPIs through a hierarchy of increasingly granular outcomes, ensuring alignment, engagement, and relevance.

Module Overview

This module introduces KPI trees as the heart of the ROKS method, providing a systematic approach to developing meaningful performance measures. You’ll learn the structure and methodology of KPI trees through real-world examples and practical exercises. The module walks through the “4Cs” approach (Chunk, Chat, Check, Connect) for building effective KPI trees, demonstrates how to use different drawing tools, and explains how KPI trees can enhance Objectives and Key Results (OKRs). Through guided practice and interactive exercises, you’ll master the skill of breaking down strategic outcomes into measurable KPIs that drive organisational alignment and performance.

What You’ll Learn

- How KPI trees visually connect strategic objectives to measurable KPIs through a logical hierarchy
- The critical difference between strategic, theme, tactical, and KPI levels in creating effective measurement structures
- The “4Cs” method to simplify KPI Tree design.
- Techniques for identifying and breaking down complex outcomes
- How to incorporate industry-specific traits and standard business processes into your KPI trees
- Practical approaches for visualising KPI trees using tools like Visio, OmniGraffle and PowerPoint
- Methods for running effective KPI tree workshops that maximise stakeholder engagement
- How to integrate KPI trees with OKRs to enhance strategic alignment and execution

Key Benefits

- Creates complete alignment between strategic objectives and day-to-day performance measures
- Builds engagement and buy-in through visual representation and collaborative development
- Provides a structured method to identify all relevant KPIs before prioritisation
- Establishes clear relationships between different outcomes, showing how metrics interact
- Helps identify potential conflicts between different performance objectives
- Creates a powerful communication tool that helps explain the “why” behind measurements
- Reduces the risk of measuring the wrong things or missing critical performance areas
- Provides a framework that can adapt to any organisation or business context

Content: Target and Incentive Design

Module: Target and Incentive Design using ROKET-DS system



Target and Incentive Design

When poorly designed, targets and incentives can lead to unintended consequences ranging from demotivated teams to organisational disasters. The Volkswagen emissions scandal, financial mis-selling that cost banks billions, and healthcare targets implicated in patient deaths all stem from well-intentioned but flawed performance management systems. Traditional approaches like SMART goal-setting often fail because they don't account for how targets and incentives function in the real world. The ROKET-DS method (Results Oriented KPI Effective Target Design System) offers a comprehensive framework to create robust targets and incentives that deliver intended outcomes while preventing dysfunctional behaviours.

Module Overview

This comprehensive programme consists of three integrated modules. The Target Diagnostics module introduces the 33 common failure modes of targets and incentives, helping you identify problems in existing systems. The Target Design module guides you through a 10-step process to create effective targets aligned with strategic outcomes, while avoiding common pitfalls. The Incentive Design module covers the psychology of motivation and provides a 5-step process to design rewards that drive positive behaviours without encouraging gaming or rule-breaking.

What You'll Learn

- How to identify 33 different target and incentive failure modes using the ROKET-DS diagnostic tool
- The distinction between KPIs, targets and incentives, and how each functions differently
- How to create KPI trees that link operational measures to strategic outcomes
- Techniques for "black hat testing" to identify ways targets might be gamed before implementation
- The crucial difference between intrinsic and extrinsic motivation and when to use each
- Eight evidence-based principles for effective incentive design, including tiered rewards and portfolio approach
- Why moral hazard and opportunism must be considered in target and incentive design
- Practical methods for implementing, communicating and maintaining effective performance systems

Key Benefits

- Prevent costly unintended consequences from poorly designed targets and incentives
- Increase engagement across all performance levels, not just top performers
- Reduce gaming, rule-bending and unethical behaviour in your performance systems
- Create alignment between individual actions and organisational objectives
- Develop more effective ways to motivate different types of performers within your teams
- Save costs by avoiding counterproductive incentive structures that waste resources
- Build credibility in your performance management approach through robust design
- Implement a proven systematic approach rather than relying on intuition or industry norms

Content: Dashboard and Report Design

Module: Clear, simple dashboard and report design



Brilliant Dashboard Design

Modern organisations drown in data but starve for insights. Despite investing heavily in measurement systems, many struggle to transform KPIs into actionable intelligence. The problem lies not in data quality or availability, but in presentation. Poorly designed dashboards overwhelm users with visual clutter, inconsistent layouts, and arbitrary design choices that actively impede decision-making. This cognitive overload leads to missed opportunities, wasted time debating interpretations rather than solutions, and decisions based on misunderstood data. This module addresses this fundamental challenge, providing science-based principles to transform your reports and dashboards into powerful decision-making tools.

Module Overview

This comprehensive module focuses on dashboard and report design as a critical link in the ROKS method chain. Building on the foundation of carefully selected and defined KPIs from previous modules, you'll learn how to create reports and dashboards that drive effective decision-making. The module covers both theoretical foundations of visual cognition and practical design principles, emphasising how the human brain processes visual information and how to optimise your reports accordingly. Rather than focusing on visual "bling," the course emphasises clarity, consistency, and comprehension through evidence-based design approaches.

What You'll Learn

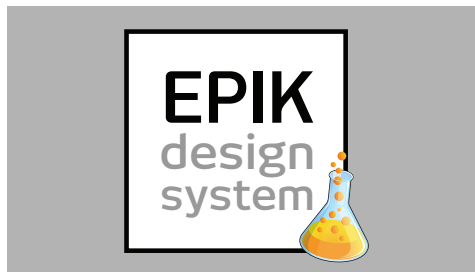
- The two crucial elements of effective report design: visual design and pattern recognition
- How to leverage iconic memory through effective visual encoding for rapid information processing
- The eight most common forms of visual encoding and their appropriate applications
- Working within short-term memory limitations to design intuitive dashboards
- Principles for selecting appropriate chart types for different data needs
- Techniques for creating compact, easy-to-read tables
- The 14 principles of effective commentary that drives action
- Using layout consistency to leverage long-term memory
- The Visual Design Checklist for evaluating and improving dashboards

Key Benefits

- Transform cluttered dashboards into clear, actionable decision-making tools
- Reduce time spent interpreting data, allowing more focus on decisions
- Eliminate misinterpretation through consistent, science-based design
- Design reports that work with, not against, human cognitive processing
- Create consistent organisational standards for improved comprehension
- Develop skills to objectively evaluate any dashboard based on evidence
- Increase stakeholder confidence through professional, intuitive reporting
- Apply design techniques regardless of your technical platform

Content: Index KPI Design

EPIK-DS: Summarising the complex, simply



Index KPIs – Summarising the complex, simply

Information overload plagues modern performance measurement. Dashboards become cluttered with dozens of metrics, reports grow longer, and decision-makers struggle to extract meaningful insights from the noise. The paradox is clear: more data often leads to less clarity. When organisations try to track everything, they effectively focus on nothing. The consequences are severe - strategic paralysis, attention fragmentation, and poor decisions based on incomplete understanding. This module addresses this universal challenge, providing a systematic approach to condensing multiple related metrics into insightful index KPIs that provide both simplicity and depth without sacrificing critical information.

Module Overview

This comprehensive module addresses one of the most common challenges in performance measurement: KPI overload. Through the EPIK Design System (Express Performance Index KPI Design System), you'll learn a systematic seven-step approach to creating meaningful index KPIs that simplify complexity without sacrificing insight. The module covers both theoretical foundations and practical implementation, including hands-on experience with the EPIK toolkit for designing and testing your own index KPIs.

What You'll Learn

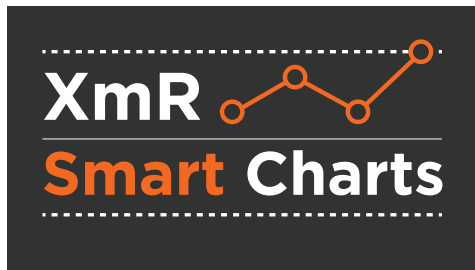
- The complete seven-step EPIK Design System for designing effective, balanced, and transparent index KPIs
- Techniques for identifying the right ingredient KPIs to include in your index through KPI tree analysis
- How to properly assess range, direction, and polarity of potential ingredient metrics to ensure compatibility
- Mini-index design methods for different types of metrics (ranged, open-ended, sweet-spot), including appropriate mathematical transformations
- Advanced techniques for properly weighting and combining multiple metrics into a single, meaningful index
- Comprehensive scenario testing and validation approaches to ensure your index behaves appropriately in all conditions
- How to gain stakeholder buy-in through transparent design and collaborative development

Key Benefits

- Dramatically reduce dashboard complexity while maintaining comprehensive performance insights
- Create at-a-glance indicators that allow quick understanding of complex multi-metric situations
- Design transparent, balanced index KPIs that prompt appropriate action rather than confusion
- Avoid dangerous pitfalls in index design that can lead to misleading metrics and poor decisions
- Effectively communicate complex performance situations to different stakeholder groups
- Implement a structured approach to index development that builds confidence and consensus
- Apply practical tools that allow you to create and test index KPIs with minimal technical challenges

Content: Smart Charts

Smart Charts: Separating signal from noise



Smart Charts: Separating signal from noise

Organisations waste enormous resources chasing “ghosts” in their performance data. When metrics fluctuate, teams scramble to explain and correct perceived problems that are often merely normal variation. Conversely, genuine performance shifts may be dismissed as random noise. Traditional trending methods - month-on-month comparisons, moving averages, trend lines - regularly lead to contradictory conclusions from the same dataset, causing confusion and misdirected efforts. This inability to distinguish meaningful signals from background noise undermines data-driven decision-making and creates organisational fatigue from addressing phantom issues. This module provides a statistically valid solution to this pervasive challenge.

Module Overview

This technical yet accessible module introduces XmR (Smart) Charts as a statistically valid approach to understanding when a process has genuinely changed versus experiencing natural variation. You’ll learn why commonly used trending methods often lead to false conclusions and how XmR charts provide a reliable alternative with 99.5% statistical confidence. The module includes step-by-step instruction on building, interpreting, and maintaining these powerful analytical tools.

What You’ll Learn

- The serious limitations and risks of commonly used trending methods with examples of how they can lead to contradictory conclusions
- The statistical foundations of XmR charts and why they provide superior reliability for process analysis
- A complete seven-step process for building XmR charts from your time-series data
- The four essential rules for analysing process stability and identifying genuine changes that require action
- Proper protocols for when and how to recalculate control limits after confirmed process changes
- Techniques for effectively communicating XmR chart insights to stakeholders who may be unfamiliar with the methodology
- Guidelines for appropriate data types and situations where XmR charts can and cannot be reliably applied

Key Benefits

- Make business decisions with 99.5% statistical confidence rather than reacting to normal process variation
- Avoid wasting valuable resources on “fixing” processes that aren’t actually broken
- Quickly identify when a meaningful change has occurred in your key metrics, allowing timely action
- Prevent organizational fatigue from constantly chasing “problems” that are actually normal variation
- Apply statistically sound methods that work across diverse business contexts and industries
- Build a data-driven culture that distinguishes between actionable signals and background noise
- Implement a consistent, reliable approach to trend analysis that eliminates subjective interpretation

Content: Measuring the Impossible

Holmes Method: Measuring the 'Impossible'

Holmes Method



for apparently Impossible Measures

The Holmes Method

Every organisation faces critical metrics that seem impossible to measure. These “unmeasurables” often represent your most strategic KPIs - customer intention, employee engagement, innovation capacity - yet traditional approaches leave you guessing rather than measuring. The frustration of knowing something matters deeply but being unable to quantify it leads to subjective decision-making and missed opportunities. When leaders claim “that can’t be measured,” they’re really saying they haven’t found the right approach yet. This module tackles this fundamental challenge, providing systematic techniques to transform your most valuable yet seemingly unmeasurable metrics into quantifiable KPIs that drive strategic advantage.

Module Overview

This foundational module introduces a structured, powerful approach to measuring important KPIs that initially appear impossible or very difficult to measure. Building on the ROKS method’s Step 4 (shortlisting), you’ll learn how to transform high-importance, difficult-to-measure metrics into practical, actionable KPIs. Named after Sherlock Holmes’ deductive reasoning, this method provides systematic techniques for solving measurement challenges that often stump organizations.

What You’ll Learn

- The complete three-step Holmes method framework for tackling difficult-to-measure KPIs, providing a logical progression from simple to more complex approaches
- How to research and identify when an “impossible” measure has been measured before in other contexts or industries, saving significant time and resources
- Advanced techniques for identifying measurable “footprints” that indicate your impossible measure—observable consequences that happen before, during, or after the phenomenon you want to measure
- Fermi decomposition methods for breaking down complex measurements into constituent parts that can be estimated with reasonable accuracy
- Real-world case studies demonstrating successful applications across diverse industries

Key Benefits

- Transform seemingly unmeasurable KPIs into actionable metrics that drive strategic decision-making
- Gain significant competitive advantage by measuring what competitors believe is impossible to measure
- Apply proven measurement techniques from diverse industries to your unique business challenges
- Make data-driven decisions in previously unmeasurable areas of your business
- Develop a measurement mindset that looks beyond conventional approaches to find creative solutions
- Build confidence in tackling complex measurement challenges that previously seemed out of reach

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.

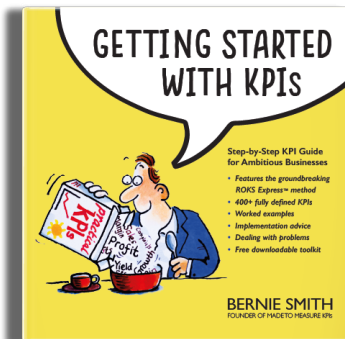
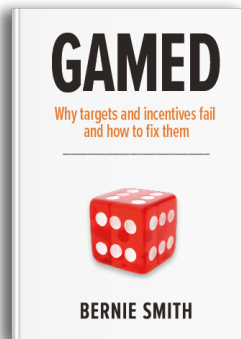
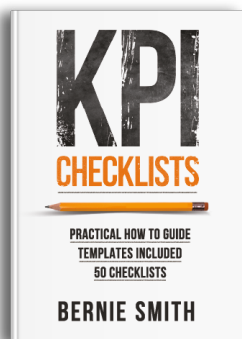
After ten successful years delivering step-changes in efficiency for these manufacturing organisations he transitioned to applying these tools to the banking sector, an unusual idea in the early 2000's. In the following ten years Bernie consulted with every major UK retail bank, many investment banks 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 25 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 aerospace as well as counting every major UK retail bank amongst his client list
- Check out [Bernie's LinkedIn profile](#)



Sample of our Clients...



Frequently Asked Questions

What are the admission requirements?

There are no formal enrolment requirements. You are welcome to set up a call to talk through the required commitment and expectation using this link

Participating in the programme is a major commitment for both parties so a call is a good idea if you have questions or reservations.

What is the workload and commitment required to graduate?

Here's a breakdown of typical effort.

- 13 modules over 14 weeks (one catch-up week midway)
- Each weekly module has between 1 and 2 hours of self-paced e-learning
- Assignments typically take 1-2 hours of independent student time
- Live group tutorial 45 mins each Wednesday

Although there is variation between the modules, a typical weekly module will require 4-5 hours of effort (e-learning and assignment) with a 45 minute live tutorial (no preparation required).

Are the videos subtitled (close captions)?

Yes, all video modules have English subtitles.

Do I get immediate access to all the modules upon sign up?

The course material is 'dripped' over the 13-week programme, with new material being made available each

week. This ensures that students get full value from each session by completing assignments and tutorials alongside the online learning modules.

What IT/technology do I need to take part in the programme?

To take part in the sessions you will need...

- Chrome web browser. Others may work, but Chrome is recommended.
- A computer (either a PC or Mac is fine)
- A reliable internet connection (good enough for a stable Zoom/Skype/Teams video call)
- A headset to talk on (avoids feedback and poor sound quality)
- Microsoft Teams (a free download)
- PDF viewing software (free download, for example Adobe's free Acrobat Reader, Apple's Preview or Window's PDF Reader)

Can I download the videos?

For copyright protection the videos can only be viewed through your kpiblackbelt.com account. Your initial access is valid for one year, but renews each year with your KPI Black Belt subscription.

What if I find the course is not for me?

If you decide, by the end of the first workshop session, that the course is not for you then you can contact us for a cheerful full refund of your course fees.

What if I can't make a session?

Recordings will be available for single missed tutorial sessions, on request. If two or more of the group cannot make a tutorial, we will discuss rescheduling the tutorial or running an extra session.

What is the cancellation policy?

You can request a full refund at any point up to the end of the first workshop session.

Do I need to do any preparation for the course?

If you want to start developing KPIs for your organisation for a client, then bring along the strategic objectives for that business. This will get you off to a good start and help you make the most of your workshop time. If you don't have a specific application in mind, or are not able to share this kind of thing, there's a 'backup' case study you can use. The choice is yours. You will be sent detailed guidance when you sign up and we are always happy to discuss this before you join the course.

Other than that, all you need to do is turn up to the session on time and with an open mind.

When are the tutorials held?

Each Wednesday at 16:30 UTC. The timing and day may be adjusted where it works better for the group.

Does Bernie do consulting, in-house training and custom training?

Absolutely! Get in touch for a no-pressure conversation to explore the options.



The KPI Tree Studio Advantage



**KPI
TREE
STUDIO**

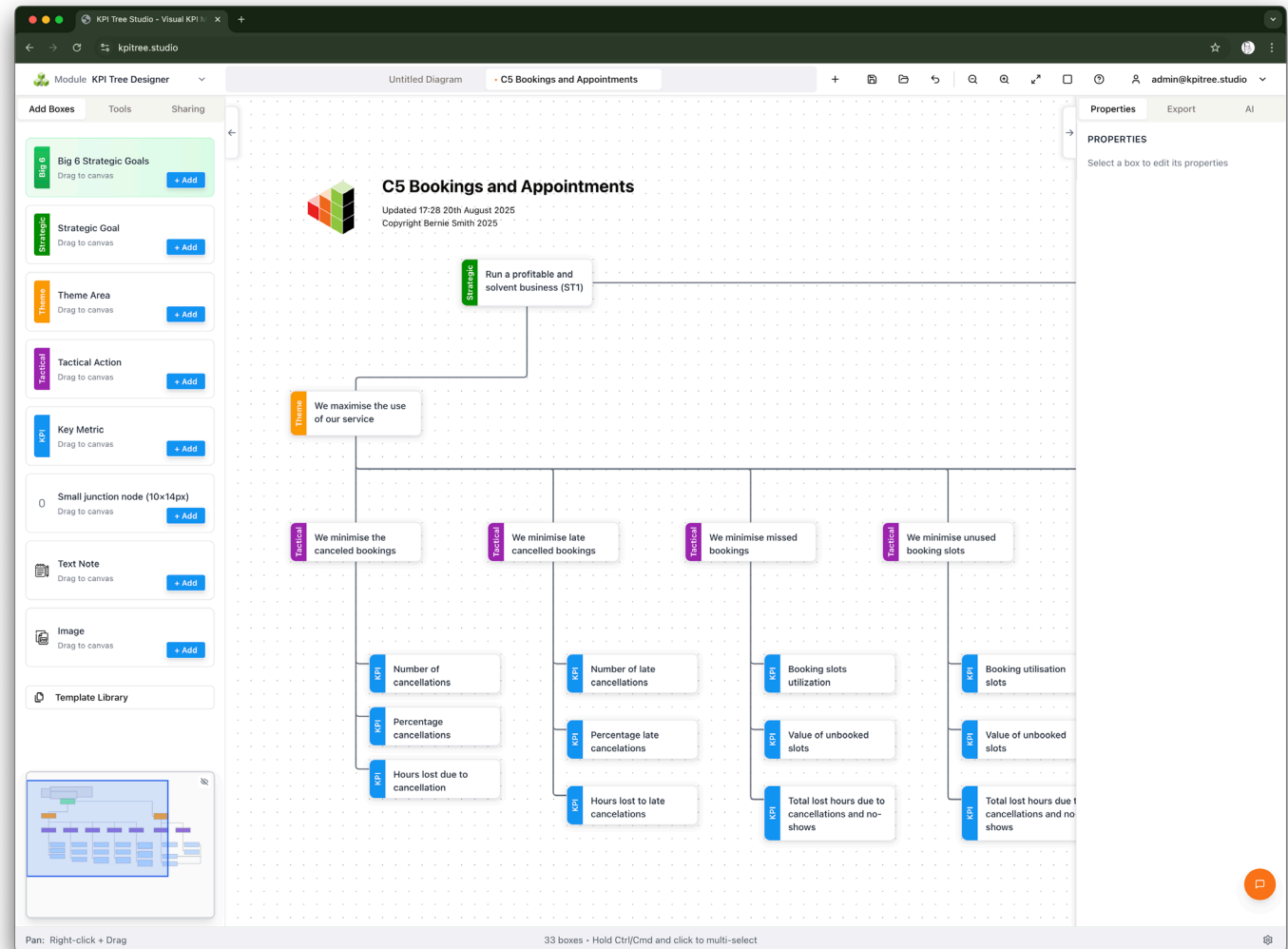
Exclusive Technology That Transforms Strategy Development

The KPI Black Belt student's effectiveness is amplified by access to our proprietary KPI Tree Studio—a custom-built digital environment designed specifically for rapid KPI development and stakeholder collaboration. This isn't generic diagramming software repurposed for strategy work. Every feature has been crafted to support the unique requirements of strategic KPI alignment.

Accelerated Development Through Intelligence

At the Studio's core lies AI trained exclusively on the ROKS methodology and thousands of real-world KPI Trees. This isn't generic artificial intelligence making educated guesses—it's specialised support that understands the nuances of strategic measurement.

The AI suggests logical connections between strategic objectives and operational metrics based on patterns from successful implementations. It identifies potential gaps in your measurement coverage and highlights where metrics might conflict. When you're building your tree, it's like having an expert consultant looking over your shoulder, offering suggestions grounded in proven practice rather than theory.



KPI Tree Studio Software - Simple, intuitive and powerful



The KPI Tree Studio Advantage

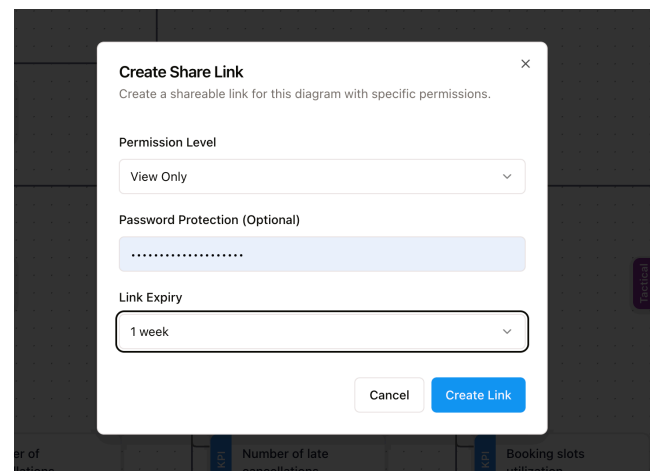


**KPI
TREE
STUDIO**

The ROKS Express Library: Start from Strength

Why begin from scratch when you can build on proven foundations? The ROKS Express KPI Tree Library contains over 100 pre-built trees spanning every major industry and functional area. These aren't simplistic templates - they're complete frameworks derived from successful implementations.

Select a tree that matches your industry and strategic context, then customise it to your specific needs.



Easy, secure, KPI Tree sharing

What typically takes days of workshop time can be accomplished in hours. The templates provide structure whilst allowing complete flexibility to reflect your unique strategic priorities. Finance teams can start with treasury or FP&A trees. Manufacturing operations can build from lean or quality frameworks. Digital transformations can leverage proven technology KPI structures.

Seamless Stakeholder Collaboration

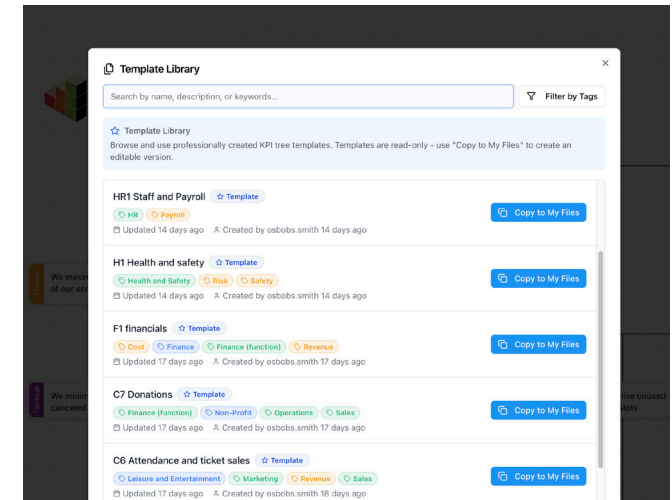
The Studio transforms stakeholder engagement through intelligent sharing capabilities.

- Generate secure, password-protected links that give stakeholders controlled access to specific views of your KPI Tree.
- Set expiration dates to maintain security.
- Track who's viewed what and when.
- Real-time updates mean everyone sees the latest version—no more email chains with conflicting attachments.
- Stakeholders can provide feedback directly within the platform, maintaining clear audit trails of decisions and rationale.

With the building tool plus pre-built KPI Trees, we'll move from blank page to fully developed KPI Tree in record time—cutting weeks of effort down to hours.

Purpose-Built for the KPI Design Process

Unlike generic tools forced into strategy work, every Studio feature supports the Sprint methodology.



A rich, searchable and growing library of over 100 expert-designed KPI Tree templates

- Rapid drag-and-drop building during workshops.
- Instant reorganisation as understanding develops.
- Sophisticated filtering for shortlisting sessions.
- Export capabilities that feed directly into implementation planning.

Every KPI Black Belt student has 12 months access to the KPI Tree Studio included in their course fee, and continued access as long as they are a subscribed KPI Black Belt.

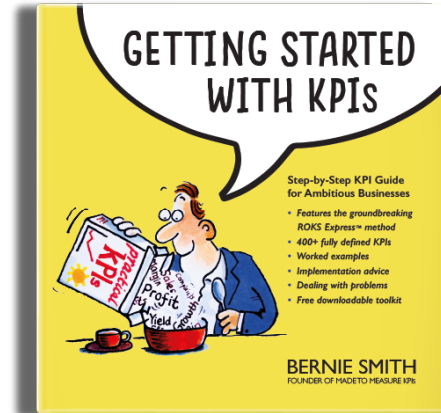
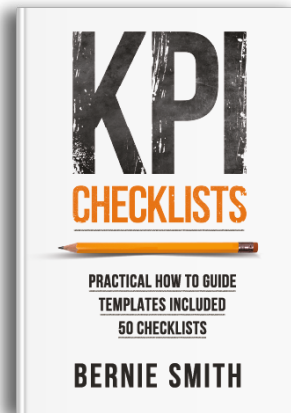
KPI Books by Bernie

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



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](#), Kobo and Draft2Digital

GAMED

Why targets & incentives go wrong and how to fix them

Most people have heard of SMART goals. It's a lovely clear, easy way to remember how to set effective goals. There's just one issue... they don't work. In GAMED we dig into twelve highly visible examples of targets and incentives backfiring. Based on careful reverse engineering of these failures, you will learn about the revolutionary ROKET-DS system for designing performance targets and incentives that actually deliver. People are complex, but this book gives you the confidence and methodology to develop robust and effective targets and incentives.

Available from [Amazon](#) and all good booksellers