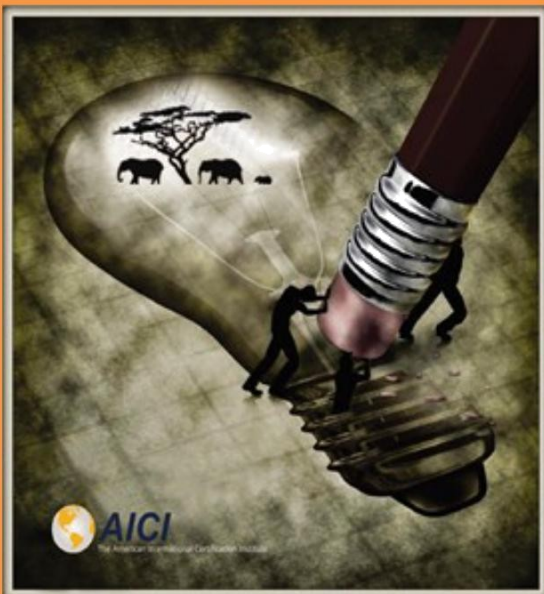


Anyone can create numbers!  
"Creating KPIs aligned to strategy is something else."

**International Certified CSF & KPI  
Professional CCSFKPIP**

Tarek Dessouki

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**International Certified CSF & KPI Professional**  
**ICCSEKPIP**  
&  
**Workshop on what are CSF's and KPI,s-**  
**WCKPI**

Anyone can create numbers! "Creating **KPIs aligned to strategy** is something else. **KPIs** are meant for management to move toward the mission and vision of the company. The KPIs are not an end, only a means to the end.

**Preamble**

This **Course/Workshop** shows you what are the **KPI 's** and **CSF,s** ? and how to tie them to the business & department and strategies?.

Personal

**Key Workshop Objectives and Workshop Content**

**Modules**

**Day one**

Origin of **CSF's** and **KPI's**- Historical overview

The Difference between Critical Success Factors and Key Performance Indicators

The difference between KPIs and CSFs is the difference between cause and effect

## **Understanding CSFs**

### **4 basic types of Critical Success Factors:**

1. Industry.
2. Strategy.
3. Environmental.
4. Temporal.

Some helpful questions for identifying your own CSF's

How many CSF's and KPI's should there be?

How does an organization know if the factors that have been identified are the right ones?

Steps in the CSF's and KPI's Process

The Difference between Critical Success

Factors and Key Performance Indicators

- o CSFs are the cause of your success,
- o Whereas **KPIs** are the effects of your actions.

Understanding Critical Success Factors and Indicators in Business

- o Definition and Examples of Critical Success Factors (CSFs)

Identifying Critical Success Factors:

Issues to consider when striving to identify CSFs includes:

Critical or Key Success Indicators (CSIs):

Developing Key Success Indicators (CSIs):

Critical Success Factors  
6 steps to establish a **CSF**

**Step One:** Establish the business's or project's mission and strategic goals

**Step Two:** For each strategic goal, ask "what area of business or project activity is essential to achieve this goal?"

**Step Three:** Evaluate the list of candidate **CSFs**

**Step Four:** Identify how we will monitor and measure each of the **CSFs**

**Step Five:** Communicate the **CSFs**

**Step Six:** Keep monitoring and reevaluating the **CSFs**

How To Identify Critical Success Factors in Project Management  
Project Management Success Criteria and Critical Success Factors

5 Major Reasons Why Projects Fail

The 8 Critical Success Factors in Project Management

What Are The Steps To Identifying Critical Success Factors?

**COV** and **CSF**, the 3 Goals of Any Business Activity

Do you know how to assess the value of potential business activities?

3 Goals of the business activity

1. Cashflow
2. Opportunities
3. Visibility

Trade-Offs and Sweet Spots

9 Success Factors For Personal

Growth: Moving Forward To Achieve

Your Best Life

1. Education
2. Skill
3. Contacts
4. Money
5. Good Work Habits
6. Positive Mental Attitude
7. Positive Image
8. Creativity
9. Character

## Day two

### Difference Between KPA, KRA, and KPI

#### **KPA, KRA and KPI correlation and integration (Objectives)**

##### **KPA, Key Performance Areas:**

Definition and Importance

##### **KRA's Key Result Areas**

Definition of Key Result Areas (KRA)

Importance of KRAs.

Conditions of KRAs

Types of KRAs:

Why KRAs?

KRAs are managed by?

Identifying KRAs and how it helps individuals

Core KRA's of the HR department

#### **KPA(Key Performance Areas)**

##### **KPIs: A Quick Overview**

Simple definition

##### **Difference Between KPI and KRA**

##### **KPI's Nature**

KPIs tend to be quantitative in nature,

Often using straightforward numbers, percentages or ratios to measure performance.

##### **KPI Misconception**

standard KPIs don't do is tell you the why

KPIs don't do anything to improve performance

##### **The 3 Serious Mistakes Of KPIs And Performance Metrics**

##### **Combining KPIs and CSFs in practiceKPIs and Metrics**

##### **10 Biggest mistakes companies make with KPI's**

##### **KPI Key Performance Indicators**

Definition and Importance

## **Digging into KPIs**

## 6 Simple Steps To create great Key Performance Questions (**KPQ**)

1. Start with strategy
2. Engage people in the **KPQ** design
3. Make **KPQs** into open questions
4. Focus your **KPQs** on the present and future
5. Keep your **KPQs** short and clear
6. Refine your **KPQs** by using them

## 5 Steps to Actionable Key Performance Indicators

**Step 2:** Establish Critical Success Factors (**CSF**) from the Goals & Objectives

**Step 3:** Establish Key Performance Indicator (**KPI**) from (**CSF**)

**Step 5:** Calculate Metrics from Measures

A Sample **KPI** template for any Business

**KPI** that developed should cover the following sections:

### I. Basics of any KPI and help to put it in context.

1. Strategic goal
2. Key Performance Question (**KPQ**)
3. How will and won't this indicator be used?
4. Indicator name

### II. Technical aspects of the data collection and some tests

5. Data collection method
6. Assessment/formula/scale criteria
7. Targets and performance thresholds
8. Source of data
9. Data collection frequency
10. Data reporting frequency
11. Data entry (responsible person)

12. Expiry/revision date
13. How much will it cost?
14. How complete is this indicator?
15. Possible unintended consequences

## How Do You Develop Effective **KPIs**?

10 simple steps for any business

1. Start with strategy
2. Define the questions you need answers to KPQ
3. Identify your data needs
4. Evaluate all existing data
5. Find the right supporting data
6. Determine the right measurement methodology and frequency
7. Assign ownership for your KPIs
8. Ensure KPIs are understood by  
people within your organization
9. Review your KPIs to ensure they help  
improve performance
10. Find the best way to communicate  
your KPIs

### Day three

What Is A KPI Report, and How Do we Create One?  
What Is A KPI Report?

KPI Libraries

- a. Financial KPIs
- b. Customer KPIs
- c. Human Capital KPIs
- d. Local Government KPIs
- e. Healthcare KPIs

Summary-Level KPI Report Examples

Detail-Level KPI Report Example

- o Objective:
- o Measure:
- o Rationale/Definition
- o Frequency:
- o Source/Formula
- o Graph:

## The 10 Biggest Mistakes Companies Make With **KPIs**

1. Not linking **KPIs** to your strategy
2. Measuring everything that is easy to measure
3. Measuring everything that walks and moves
4. Collecting the same measures as everyone else
5. Not separating strategic **KPIs** from other data
6. Hardwiring KPIs to incentives
7. Not involving executives in **KPI** selection
8. Not analyzing your **KPIs** to extract insights
9. Not challenging and updating your **KPIs**
10. Not acting on your **KPIs**

Performance Management For Small Businesses (Quick overview and glimpses)

- o Goal
- o What To Expect?
- o Why Are Metrics Important?
- o Red flags

Are You Already Doing this?

Why Are Metrics Important?

Fact or Fiction?

Too Many Metrics is Harmful

- o Wrap Up: why metrics?
- o Creating metrics

A KPI must be...

The Process

- o The Small business Scorecard
- o Critical Success Factors (CSF)
- o CSF Examples

Metrics Examples

Review: Create Metrics



- o Monitoring
- o Implementation
- o Reporting
- o Abandonment
- o Create performance measures that actually help your business.

## Day four

### **Some samples of KRA's and KPI's**

Learning and Development Managers -KRAs and KPI's

HR Manager KRA

KRA for the management

General Management or Senior Executive KRA's

Finance and Accounting KRA's

Manufacturing KRA's

Marketing KRA's

Secretarial, Clerical and Administrative KRA's

Supply chain management KRA's and KPI's

KRA's and KPI's of Procurement

KRA's and KPI's of Raw-Inventory

KRA's and KPI's of Warehousing/Transportation

KRA's and KPI's of Order Service Management

KRA's and KPI's of Distribution Management

KRA's and KPI's of Customer Services

KRA's and KPI's Sales

KRA's for everyone in an organization

What should be the KPI's for various KRA's

How Do You Develop Effective KPIs? 10 Simple Steps for any Business

A Sample KPI Template For Any Business

### **KPI in a nutshell**

Understand the strategic management pyramid

Identify/link strategic areas & objectives to KRAs/KPIs

Use KRAs and KPIs as a performance management tool

Define relevant KRAs/KPIs within areas of accountability

Apply KPI writing process

Align individual and team goals with departmental goals using KPIs

Identify specific and measurable individual objectives using KPIs  
Prepare and use KPIs in the workplace

## Day five

### Workshop (Half day)

Form 3-4 groups each group will handle around 4 functions of what we learned in the whole course

### Online Exam 3 hours

## General Rules

Requirements for certification: The **ICCSFKPIP** (Organization International Certified CSF & KPI Professional) will be offered to Participants attended the full registered days with minimum 80% of the entire program, and a professional demonstration from the attendee during the course which include but not limited to an interactive group discussion and debate regarding the different dimension of the management live case studies and the applied methodology to solve each issue.

### Recertification

The certification should be renewed every 5 years unless a higher certificate has been obtained