

# Perfecting Key Performance Indicators

Efficiency in finance, real time information and better decision making  
with the winning indicators through financial intelligence

Swissotel Merchant Court, Singapore 27th March – 28th March 2008

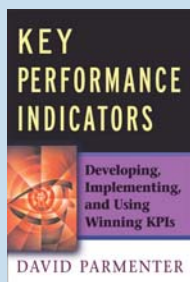


## Course Facilitator:

**David Parmenter,**  
CEO  
Waymark Solution

Author of “**KEY PERFORMANCE INDICATORS: DEVELOPING, IMPLEMENTING, AND USING WINNING KPIS**”

Has been in the top 10 Performance Management Books on Amazon for over a year.



**Plus Presentation From Cognos -**  
Cognos will be presenting a session on how financial intelligence can be implemented in an organization. Cognos will share case studies on best practices in the industry.

Proudly Organised by:



## Research Findings:

71% said they struggle to collect data from multiple sources and perform analyses needed to answer unanticipated financial performance question.

- Teradata Corporation Dec 2007 -

72% confirmed that their performance measures were not KPIs and 28% said they were struggling with over 50 KPIs.

- Bettermanagement.com, USA, April 2007 webcast -

## Testimonials on David Parmenter:

“The general consensus was that this was one of the most worthwhile professional development seminars that any of us had attended in quite a while. David’s passion for all of the subjects covered came across throughout the day, and was backed up by the substance of the subject matter expertise and practical experience. The friendly, interactive nature of the seminar was a big plus.”

- Planning and Analysis Manager, A Leading Firm from Building Industry -

“Our current practices and negativity were continually challenged and our minds were opened to believing that what seems impossible now is in fact possible. The training had a very practical and participatory feel. We walked out of the training with open minds, a practical plan and dedication to implementing the process improvement.”

- Financial Controller, A Leading Media Firm -

“Very inspiring & motivating speaker who offers some revolutionary ideas” and “Could not believe how relevant the content was”.

- Senior Management Analyst, A Leading Utilities Firm -

## Capitalize On The Expert Knowledge To Gain Maximum Value On These Vital Issues

- ❖ **GAIN** an in-depth understanding of cutting-edge knowledge and concepts of Key Performance Indicator development
- ❖ **EVALUATE** the integration of key result indicators, performance indicators and Key Performance Indicators
- ❖ **DEVELOP** Key Performance Indicators applicable to your organization
- ❖ **ENHANCE** under-performing balance scorecard
- ❖ **OPTIMISE** Winning Key Performance Indicators from the 12 Step model
- ❖ **MASTER** management models that have a profound impact on Key Performance Indicators
- ❖ **COMPREHEND** the requirements of setting up a Key Performance Indicator project team
- ❖ **ACQUIRE** best practices of integrating technology and Key Performance Indicators from industry practitioner
- ❖ **EXAMINE** the framework of integrating and developing a centralized financial system

**UNI** training courses are thoroughly researched and carefully structured to provide practical and exclusive training applicable to your organization.

Benefits include:

- Thorough and customized programmes to address current market concerns
- Illustrations of real life case studies
- Comprehensive course documentation
- Strictly limited numbers

## Workshop Overview

The course will bring together decision-makers keen on the latest method and developments of performance management and expert views on the current marketplace from the various industries such as banking and finance, oil and gas, manufacturing, telecommunications and regulatory bodies. The audience for the course is aimed at the CFO and their direct reports.

The focus of the workshop seeks to show how key performance indicators can work in best practice settings. Key performance indicators will show the highest and most efficient instance knowledge or intelligence about a company's operations and their impact on finances. By gaining access to their KPIs, decision makers will transform their operations.

**DAY 1 | 27th March 2008**

### 9.00am - 3.30pm

#### What are Key Performance Indicators?

- ❖ Difference between the 3 types of performance measures
- ❖ The characteristics of a winning KPI
- ❖ The importance of ranging KPIs
- ❖ Lead and lag indicators revisited
- ❖ The 10, 80, 10, rule for performance measures

#### Important Management Models

- ❖ Balance scorecards
- ❖ Beyond budgeting
- ❖ Decision based reporting

#### Finding the Critical Success Factors (CSFs) in Your Organization

- ❖ Case study
- ❖ The three stage process
- ❖ Workshop: Brainstorm the CSFs in sector groups

#### Brainstorming Performance Measures

- ❖ Using mind-maps to brainstorm measures
- ❖ Understanding the need for past, present, and future measures
- ❖ Workshop: Performance Measures in a couple CSFs

#### 12 Step Model to Develop and Use Winning KPIs

- ❖ The four foundation blocks
- ❖ Outline and define the benefits for each step of implementation timeline
- ❖ Customize your own implementation plan
- ❖ Exercises:
  - Fact gathering questionnaires
  - Team worksheets and checklists
  - Workshops on each step
    - 1: SMT commitment
    - 2: Establishing a "winning KPI" team
    - 3: Establish a "just do it" culture for this project
    - 4: Setting-up a holistic KPI development strategy
    - 5: Marketing KPI system to all employees
    - 6: Identifying organisation-wide CSFs
    - 7: Recording of performance measures in a database
    - 8: Selecting team performance measures
    - 9: Selecting organisational "winning KPIs"

- 10: Developing the reporting frameworks at all levels
- 11: Facilitating the use of winning KPIs
- 12: Refining KPIs to maintain their relevance
- Tailor made a plan to better suit your organization
- Sharing of changes

### 4.00pm - 5.00pm

#### Presentation by Cognos

#### Improving Financial and Operational Performance Management

Finance and business managers need to make better decision faster in today's dynamic marketplace. They need to assess performance gaps with enough lead time to make course corrections. They need visibility into the drivers of the business, and control over the levers of financial and operational performance. In this presentation, Cognos will describe how to leverage information technology to automate and transform your performance management processes with proven-practices.

- ❖ A framework for linking Financial and Operational Performance
- ❖ Leverage technology to Improve Performance Management
- ❖ Evaluation of systems to include in developing a centralized financial system
- ❖ The benefits of having integrated financial intelligence
  - Real-time analysis of data
  - Better decision-making
- ❖ Transform your Performance Management with Proven Practices
  - Case studies of companies with a centralized financial system or who have implement integrated financial intelligence



**David Morton** is the Director of the Cognos Innovation Center for Performance Management, Asia Pacific. Prior to Joining Cognos, David was Singapore Country Manager for Business Planning Solutions – the Cognos Planning distributor for Asia.

David has over 20 years experience in the areas of Business Intelligence and Budgeting and Planning. He has worked with organisations in Australia, Asia and Canada advising on Budgeting and Planning, Balanced Scorecards and Business Intelligence Solutions and spent 10 years with EIS pioneer Pilot in Sydney, Australia.

## Program Schedule

### (Day 1 & Day 2)

08:30	Registration
09:00	Morning Session Begins
10:40 - 11:00	Refreshments & Networking Break
12:45	Luncheon
14:00	Afternoon Session begins
15:30 - 15:50	Refreshments & Networking Break
17:00	Course Ends

## PRE-COURSE QUESTIONNAIRE

To ensure that you gain maximum value from this course, a detailed questionnaire will be forwarded to you upon registration to establish your exact training needs and issues of concern. Your completed questionnaire will be analysed by the course trainer prior to the event and addressed during the event. You will receive a comprehensive set of course documentation to enable you to digest the subject matter in your own time.

9.00am - 5.00pm

### 12 Step Model to Develop and Use Winning KPIs Continued

#### Using Technology to Enhance Performance Management

- ❖ Overall view of technology available
- ❖ Freeware to be evaluated
- ❖ Maximize use of existing software
- ❖ The intranet as the backbone

#### Being a Facilitator of a KPI team

- ❖ The role of a facilitator in a KPI Team
- ❖ What makes a good facilitator

#### How to find your Winning KPIs

- ❖ Sifting through all the performance measures
- ❖ Applying the KPI checklist

#### How to Present your Performance Measures in a Decision Based Way, rather than as an Information Memorandum

- ❖ Better practice reporting techniques
- ❖ Develop reporting formats for the board and the senior management teams
- ❖ An opportunity to share with other participants
- ❖ Developing team balanced scorecards
- ❖ Exercises:
  - Design of 2 scorecards
  - Sharing of findings

#### Development of Specific Performance Measures

- ❖ Identification of performance indicators relevant to your sector
- ❖ Investigate the likelihood of performance indicators becoming winning KPIs
- ❖ Ascertain the better practice graphical displays for each KPI
- ❖ Likely issues of data collection and reporting
  - Exercise: Measures sharing with participants

#### Performance Measures and the Fit with Other HR Performance Measurement Initiatives

- ❖ Individual performance management (360 degree feedback, performance appraisals)
- ❖ Staff feedback and opinion
- ❖ Performance related pay

#### KPIs: The Road Ahead

- ❖ Marketing Strategies to promote KPI development to the SMT
- ❖ Completion of implementation plan for your organisation

## ABOUT YOUR COURSE FACILITATOR

**David Parmenter** is the CEO of Waymark Solutions, a performance management company. He is an international presenter who is known for his thought provoking and lively sessions, which have led to substantial change in many organisations. David is a leading expert in: the development of winning KPIs, replacing the annual planning process with quarterly rolling planning, quick month-end processes and converting reporting to a decision based tool.

His work on KPIs has received international recognition. His white paper on [www.bettermanagement.com](http://www.bettermanagement.com) was the most downloaded paper in 2005 on that site. He had spent **10 years** researching extensively into why KPIs do not work in most organizations. He has speaking engagements in Asia Pacific and Europe.

David has an in-depth understanding of better practices of corporate accountants across all sectors. David has also worked for Ernst & Young, BP Oil Ltd, Arthur Andersen, and Price Waterhouse. David is a fellow of the Institute of Chartered Accountants in England and Wales.

David's Parmenter's Book "**Key Performance Indicators – developing, implementing and using winning KPIs**" reached number 1 for performance management books on Amazon and is on its way to becoming a best seller. His recent webcast on [www.bettermanagement.com](http://www.bettermanagement.com) set a record with over 800 registrants.

When consulting, his clients included:

- ❖ Major banking corporations in London, Luxemburg, and New Zealand like **Swiss Banking Corporation, National Westminster Investment Bank**
- ❖ Major oil companies such as **BP Oil**
- ❖ Government Departments in many areas including, Treasury, Education, Health, Social Welfare
- ❖ Universities e.g. **Victoria University of Wellington**
- ❖ **Telecom New Zealand**
- ❖ Not for profit organizations such as, **NZ Fire Service**

Companies who have attended his courses include:

- ❖ Alliance Bank Malaysia
- ❖ AmAssurance
- ❖ AmBank
- ❖ AON Insurance Brokers
- ❖ Bank Negara
- ❖ Bumiputra-Commerce Bank
- ❖ DiGi Telecommunications
- ❖ DKSH Group
- ❖ Eastern Pacific Industrial Corporation
- ❖ EON Bank Group
- ❖ Ethylene Glycols (Singapore)
- ❖ Maybank
- ❖ Petronas
- ❖ Singapore Petroleum
- ❖ Tenaga National Berhad

## WHY YOU SHOULD ATTEND?

This workshop gives insights to achieving financial key performance indicators. It gives practical tools that make financial analysis much more efficient and effective. Practical step by step methodology will be demonstrated to rediscover your critical success factors and the underpinning winning key performance indicators. There will be real-life examples that demonstrate the success stories of how organizations can gain competitive advantage after the implementation of winning key performance indicators. It will become clear how this could offer you a chance to leave a lasting legacy in your organization.

## WHO SHOULD ATTEND?

- ❖ Chief Finance Officers (CFO)
- ❖ Vice Presidents and Directors of Finance
- ❖ Top level financial executives
- ❖ Managers responsible for organization-wide performance measurement
- ❖ General Managers who are dissatisfied with performance management in their organization
- ❖ Anyone involved in financial decision making, financial analysis and implementation of financial intelligence