# Index

10/80/10 rule (exhibit), 14 10/80/10 rule, number of measures required, 13–14

## A

Abandonment, foundation stone of a KPI project, 52–53

Abandonment, Peter Ducker's advice, xxv, 52–53

Abandonment suggestions, 52–53

## В

Balanced scorecard (BSC), differences in methodologies, 268–270

Balanced scorecard, four supports to assist the BSC, 267–268

Balanced scorecard, Hoshin Kanri, the forerunner to the BSC, 30–31

Balanced scorecard, six perspectives (exhibit), 31

Barr, Stacey, 152, 182, 184, 271–273

Board dashboard (exhibit), 217 British Airways late planes KPI story, 7–9

## $\mathbf{C}$

Case studies, Asian conglomerate, 243–244

Case studies, Ballance Nutrients, 73–74

Case studies, car manufacturer, 247

Case studies, charity, 255–256

Case studies, financial institution, 237–241

Case studies, food distributor, 241–243

Case studies, forestry company, 245–247

Case studies, government departments, 253–254

Case studies, medical company, 244–245

Case studies, nonprofit membership organizations, 248–252

Case studies, professional accounting body, 255

Case studies, timber merchant, 248

Cause-and-effect, myth, 34-36

CEO, Commitment, 86-91

CEO, KPI team reporting directly to the CEO (exhibit), 98

CEO, letter from David Parmenter, xxxvii–xxxviii

CEO, recommended chapter reading, xli-xliii

CEO, measurement leadership, xxxvi–xxxix

Change, giving a burning platform presentation, 66

Change, impact of the default future, 75

Change, importance of a focus group, 71–73

Change, John Kotter's eight stage process, 65–67

Change, preselling the KPI pitch before you present, 74

Change, presentation tips, 79–82

Change, selling change to the organization's staff, 68

Change, selling the reinvented future, 64

Change, selling through the buyer's emotional drivers, 67–69

Change, the elevator pitch, 70–71

Change, the four faces of the Aha! Moment (exhibit), 65

Chau, Vinh Sum, 30

Churchill, Sir Winston, 64

Collins, Jim, 67

Covey, Stephen, 115

Critical success factors (CSFs), characteristics (exhibit), 122

Critical success factors, common

misunderstandings, 124–126

Critical success factors, definition, 115

Critical success factors, foundation stone, 51–52

Critical success factors, four main tasks, 127–145

Critical success factors, how CSFs drive the performance measures (exhibit), 124

Critical success factors, how strategy and the CSFs work together (exhibit), 121

Critical Success Factors, linkage to the strategic objectives (exhibit), xxiii

Critical success factors, operational, 115, 119

Critical success factors, displaying the CSFs (exhibit), 145

Critical success factors, sphere of influence (exhibits), 134–136

Critical success factors, external outcomes (exhibit), 122

Critical success factors, testing (exhibits), 140

Critical success factors, the three major benefits, xxii–xxv

Critical success factors, two-day workshop, 130–141

Critical success factors, what influences the CSFs (exhibit), 120

Critical success factors, why CSFs are so important, 118–123

## D

Data visualization, 104–105, 197–202

Dashboard, Board dashboard (exhibit), 217

Dashboard design, common pitfalls, 198

Drucker, Peter, xxvii–xxix, xxxvi, 127

Duarte, Nancy, 81

Dysfunctional measures, measures to avoid, xxi

#### $\mathbf{E}$

Edersheim, Elizabeth, xxvii–xxix

Emotional drivers, buyer's emotional drivers, 67–69

Employee engagement, steps to get them involved, 63–83

Empowerment, transfer of power to the front line, 48–49

Examples, Financial Institution, 237–241

Examples, Food Distributor, 241–243

Examples, British Airways, 7–9

# F

Facilitator to KPI team, checklist, 93

Facilitator to the KPI team, external appointment, 92

Facilitator to the KPI team, guidelines, 92

Facilitator to KPI team, role, 99–100, 105

Few, Stephen, 198–202, 204, 213–214

Fraser, Robin, 14, 27-28

## G

Gallo, Carmine, 72 Graph design, best practices (exhibit), 199–201

#### H

Hamel, Gary, 101–102 Hope, Jeremy, xxvii–xxviii, xxxiv, xl, 14, 27–28, 34 Hoshin Kanri, forerunner to the Balanced Scorecard, 30–31

Human behavior, unintended consequence, xviii–xxii

## Ι

Implementation, foundation stones, 46–56

Implementation, foundation stones (exhibit), 46

Implementation, lessons, 256–266

Implementation, rollout duration, 107–109

Implementation, rollout duration (exhibit), 108–109

Implementation steps, overview of the three-stage process,

Implementation, Stage 1, 63–112

Implementation, Stage 2, 115–145

Implementation, Stage 3, 149–235

Implementation steps, the threestage process (exhibit), 44

J

Jobs, Steve, xiv Just-do-it culture, 112

K

Kaplan, Robert S., 14, 29–30, 36, 103, 153, 267–270

Key performance indicators (KPIs), a lack of commitment, xxxvi–xxxix

Key performance indicators, confusion, xxx–xxxi

Key performance indicators, definition, 6

Key performance indicators, difference between KRIs and KPIs (exhibit), 15

Key performance indicators, examples, 7–10, 12

Key performance Indicators, finding the winning KPIs, 190–191

Key performance indicators, four types of performance measures, 3–13

Key performance indicators, intraday/daily reporting on KPIs (exhibit), 207

Key performance indicators, KPI team leader, 54–55 Key performance indicators, major benefits of getting KPIs to work, xvii–xviii

Key performance indicators, myths surrounding KPIs, 25–29

Key performance indicators, seven characteristics of KPIs, 10–11

Key performance indicators, the great misunderstanding, 3

Key performance indicators, performance related pay, xxxiv-xxxv

Key performance indicators, ongoing support and refinement, 230–234

Key performance indicators, reporting KPIs to management, 206–210

Key performance indicators, selling the project, 70–75

Key performance indicators, weekly KPI report (exhibit), 211

Key result areas, 126

Key result indicators (KRIs), background, 5–6

Key result indicators, examples, 6

Key result indicators, key tasks for finding the KRIs, 187–189

Kim, Chan, xxvii, xxix Kotter John, 65–67

KPI team, establishing a "winning" team, 97–98

KPI team, establishing a
just-do-it
culture, 105
KPI team leader, 54–55
KPI team, mix of oracles and
young guns, 98–99
KPI team, need for mentors, 106
KPI team, reporting lines
(exhibit), 98

L
Lead and lag, confusion,
16–17
Lead and lag indicators, debate,
32–34
Lead and lag indicators, debate
(exhibit), 33
Leading change, 63–83
Liker, Jeffrey K, xxviii–xxix
Logan, Dave, 63–64, 66

 $\mathbf{M}$ Mauborgne, Renée, xxvii, xxix Measurement, common traps to avoid, 149-150 Measurement, negative cost vs benefit relationship, 150, 155, 161–162 Measurement, rules for designing measures, 154-156 Measurement, suggested exercises, 156-165 Measurement, wisdom from other authors, 149, 152-15 Measures gallery, 183-184

Mills, Harry, 64–65
Mission, linkage of mission to
the CSFs (exhibits), 124
Myths of performance
measurement, 25–30
Myths of the balanced
scorecard, 32–37

N Norton, David P., 14, 29–30, 36, 103, 153, 267–270

O Outcomes, characteristics, (exhibit), 123
Outcomes, distinguishing between CSFs and outcomes, 121–122
Outcomes, wording, 127–129
Overview of the three stage process (exhibit), xliv–xlvi

Paradigm shifters, books you should read (exhibit), 101–103
PDF toolkit, xlvi–xlvii
PDF toolkit, contents, xlvii, 94, 111–112, 144, 165, 191–192, 224, 235, 273
Performance indicators (PIs), definition, 13
Performance indicators (PIs), difference between RIs and PIs (exhibit), 16
Performance indicators (PIs),

examples, 13

Performance measurement, purpose, xxii–xxiii

Performance measurement, failings, xxvi–xxviii, xxxii–xxxiii

Performance measurement, myths, 25–37

Performance measures database, (exhibit), 179

Performance measures database, categories (exhibit), 182

Performance measures, current measures, 17–20

Performance measures, database, 171–172, 178, 179, 181, 183, 186

Performance measures, database layout (exhibit), 179

Performance measures, evaluation checklist (exhibit), 22

Performance measures, four types of measures (exhibit),

Performance measures, future measures, 17–20

Performance measures, future measures (exhibit), 19

Performance measures, how to derive measures from a CSF, 173–176

Performance measures, how to word measures properly, 176–177

Performance measures, interrelated levels (exhibit), 37

Performance measures, past measures, 17–20

Performance measures, past, current, and future-looking measures (exhibits), 18, 177–178

Performance measures, refinement processes, 178, 180–184

Performance measures, selection by teams, 185–187

Performance measures, timely measurement, 20–21

Performance measures, to avoid, xvii

Performance measures, unintended consequence, xviii–xxii

Performance measures gallery, 183–184

Performance measures workshop, how to run it, 169–180

Performance-related pay, myth, xxxiv-xxxv, 27 Peters, Tom, xxvii-xxviii

R

Reading list, for the KPI team, 108

Reporting, a smartphone dashboard (exhibit), 204

Reporting, board dashboard (exhibit), 217

Reporting, common pitfalls in dashboard design, 198

Reporting, developing the reporting framework, 195–196

Reporting, framework (exhibit), 196

- Reporting, HR measures (exhibits), 209, 212
- Reporting, intraday/daily reporting on KPIs (exhibit), 207
- Reporting, key result indicators (exhibit), 217
- Reporting, KPIs to management and staff, 206–210
- Reporting, monthly report to management (exhibits), 213–214
- Reporting, monthly report to staff (exhibit), 215
- Reporting, portfolio (exhibit), 223
- Reporting, "sparklines" and "bullet" graphs (exhibit), 214
- Reporting, reporting regime, 195–205
- Reporting, team performance measures (exhibit), 222
- Reporting, weekly KPI report (exhibit), 211
- Result indicators (RIs), 5–6
- Result indicators (RIs), examples, 6
- Reynolds, Garr, 81

S

Self-persuasion, 64–65 Self-persuasion, the 4 stages (exhibit), 65 Selling change, 63–83

- Selling change, planning the content of a presentation (exhibit), 80
- Senior management team commitment, 94
- Small to medium enterprises shortcuts, 56–59, 91
- Small to medium enterprises (SMEs), shorter three-stage process for an SME with less than 100 FTEs (exhibit), 59
- Small to medium enterprises, shorter three-stage process for SMEs with 100-250 FTEs (exhibit), 58
- SMART success factors, 127 Software, common problems with spreadsheets, exhibit,
- Software, designing reports in appropriate software, 202–204
- Software, using existing systems, 264–265
- Spitzer, Dean, xix, xxii, xxiv, xxxv–xxxvi, 28, 54
- Strategy, balanced strategy, 30, 270–271
- Strategy, linkage of strategy to the CSFs (exhibits), xxiii, 121, 124
- Strategy, linkage with CSFs, 119–121
- Strategy, testing linkage of CSFs to strategic objectives (exhibits), 140
- Strategy mapping, (exhibit), 35

Strategy mapping, Jeremy Hope criticism, 34
Strategy mapping, myth, 34–36
Success factors, description, 127–129
Success factors, mapping the sphere of influence (exhibits), 134
Success factors, SMART, 127
Success factors, spreadsheet matrix (exhibit), 136
Summary of winning KPI methodology, (exhibit), xliv–xlvi

T
Templates, electronic versions,
 xliii
The KPI manual, 41–42
Toyota, xxviii–xxix

U Unintended consequence, accident and emergency department, xx Unintended consequence, city train service, xix
Unintended consequence, fast food service, xx–xxi
Unintended consequence, unintended behavior, xviii–xxii

Vision, linkage of vision to the CSFs (exhibits), 124

W
Welch, Jack and Suzy,
 xxviii–xxix, 27, 87, 102
Winning KPI methodology, a
 summary of the new
 simplified approach
 (exhibit), xliv–xlvi
Witcher, Barry J., 30

**Z** Zaffron, Steve, 63–64, 66















