There is no shortcut for Small to Medium-Sized Enterprises (SMEs).

All the tasks are required. One of the hardest things to change in SMEs will be the reliance on Excel spreadsheets. Although Excel can be used by SMEs for reporting, in the short term, a replacement application will be necessary for the reasons stated above.

To the report designer, I point out that being an expert in Excel is career-limiting in the twenty-first century.

Reporting the KPIs to Management and Staff

Reporting measures to management needs to be timely. As mentioned previously, KPIs need to be reported 24/7, daily, or, at the outside, weekly; other performance measures can be reported less frequently (monthly and quarterly).

Intraday/Daily Reporting on KPIs

At least half of the KPIs will be reported 24/7 or daily. Exhibit 10.4 shows how KPIs should be reported on the intranet. Some form of table giving the contact details, the problem, and some history of performance is required. Another benefit of providing senior management with daily/ weekly information on the key performance areas is that the month-end becomes less important. One government department had a 9 o'clock news report every morning covering the processing of benefit payments by each office around the country. Regional management teams were able to compare their service levels and achievements daily. In other words, if organizations report their KPIs on a 24/7 or daily basis, management knows intuitively whether the organization is having a good or bad month.

Exhibit 10.4 Example of a Daily KPI Report

Planes more than two hours late

Time: 4.30pm 12 Sept 201X

| Flight number | Statistics of last stop | | | Region manager's name | Current time at location | Contact details | | | Number of planes over one hour late | | |
	Arrival late by	Departure late by	Time added			Work	Mobile	Home	Past 30 days	30-day average of past three months	30-day average of past six months
BA123	1:40	2:33	0:53	Pat Carruthers	18:45	xxxxx	xxxxx	xxxx	4	4	2
BA158	1:45	2:30	0:45	Basil John	10:48	xxxxx	xxxxx	xxxx	2	3	1
BA120	1:15	2:27	1:12	xxxxxxxx	20:45	xxxxx	xxxxx	xxxx	4	4	7
BA146	1:25	2:24	0:59	xxxxxxxx	21:45	xxxxx	xxxxx	xxxx	5	4	4
BA177	1:15	2:21	1:06	xxxxxxx	22:45	xxxxx	xxxxx	xxxx	1	4	2
BA 256	1:35	2:18	0:43	xxxxxxx	23:45	xxxxx	xxxxx	xxxx	5	4	5
BA124	1:45	2:15	0:30	xxxxxxx	0:45	xxxxx	xxxxx	xxxx	2	4	6
Total	7 planes										

Intraday Exception Reporting to the Chief Executive Officer on Human Resources Issues

> **It is vital that certain human resources issues be reported to the chief executive officer immediately when they occur.**

It is vital that certain human resources issues be reported to the chief executive officer immediately when they occur. The following issues need to be addressed in private and public organizations:

- All job offers that are more than three days outstanding should be personally followed up by the CEO. The lack of acceptance means, in most cases, that the candidate is still looking around. A personal call from the CEO saying, "I understand, Pat, that we have offered you the position of _____. I believe you will succeed well in this role, and I will take a personal interest in your career. What do we need to do to get your acceptance today?" could help convince the candidate to accept. This 10-minute call could well save over $20,000 of recruiting costs, a return of $120,000 per hour!

- In-house courses with low registrations because staff and their managers think that daily firefighting is more important than training. Here the CEO makes a phone call to the manager emphasizing that training is and should be the most important priority. Managers will know to expect a call whenever they get this priority wrong.

- Staff members who have been ill for over two weeks who do not have an activated back-to-work program—the CEO should phone the HR advisers responsible for setting up the back-to-work program that might include a visit to the organization's doctor and a phased back to work schedule.

- Most CEOs treat accidents or safety breaches seriously, and, therefore, these are reported—an acceptable report-back time would be within an hour of the incident.

- The CEO should follow up on all key staff members who have handed in their notice. This would be reported within an hour of resignation. A personal phone call may be enough to turn around the situation or, at the very least, open the door for a return in the future.

These issues can be reported, by HR staff, in a simple intranet-based report, as illustrated in Exhibit 10.5, to the senior management team and the CEO.

Exhibit 10.5 Example of a Daily Human Resources KPI Report

	Contact details		Details	
Position offers still outstanding	**Candidate**	**Work**	**Mobile**	**Recruiting manager**	**Days outstanding**
Financial Controller	Pat Toms	——	——	Jim Curruthers	3
Stores Manager, Brisbane	Basil John	——	——	Sally Smith	3

Key recruitments in progress for which the last interview was over two weeks ago	**Manager**	**Work**	**Mobile**
Sales representative (Northern region)	Jim Curruthers	——	——
CFO	Sally Shell	——	——

Teams not represented in the in-house courses to be held in next two weeks	**Manager**	**Work**	**Mobile**	**Expected numbers from team**	**Average training days of team in past six months**
Team xx	Jim Curruthers	——	——	3	1
Team yy	Sally Shell	——	——	4	1.25
Team zz	Bob Helm	——	——	2	1.5
Team ss	Ted Smith	——	——	1	0

Accidents and breaches of safety	**Manager**	**Work**	**Mobile**	**Remedial action**
Pat Gow was in a car crash, unhurt but needs two weeks' recovery time	Jim Curruthers	——	——	Increase participation in advanced driving courses paid by company

Key staff who have handed in their notice today	**Job Title**	**Work**	**Mobile**	**Length of service**	**Importance**
Susan George	Financial Controller	——	——	3 years	Considered next CFO
John Doe	HR Manager, ——	——	——	10 months	Managed the ___ project
Jenny Gilchrist	Systems Coordinator ——	——	——	15 years	Expert in ___ system

Weekly KPI Reporting to the CEO

Some KPIs need only be reported weekly. Set out in Exhibit 10.6 is an example of a weekly KPI report.

Reporting RIs and PIs to Management

Management will need some weekly reports covering *result indicators* and *performance indicators*.

Weekly Human Resources Update to CEO

There are some HR issues that the CEO needs to focus on weekly. They are not as critical as the intraday or daily HR exceptions, and thus are not considered KPIs. The following HR issues need to be addressed in most organizations:

- It is not uncommon for new staff to miss out on the planned induction program. This can have a negative impact on their performance over the short-to-medium term. The CEO should make it known that there is an expectation that staff will attend induction programs and that phone calls will be made to follow-up on exceptions.
- In-house courses to be held within the next two months should be highlighted weekly where there are low registrations.
- Higher-than-average sick leave in a team may indicate a problem with leadership. The CEO should follow up when next in the area.
- The CEO needs to keep a weekly focus on the recognitions planned for the next week or two weeks. Peters and Waterman[4] and Collins[5] have emphasized the importance of celebration as a communication tool and a way of inspiring staff to exceed normal performance benchmarks.

The report could look like the one shown in Exhibit 10.7. It would be prepared by the HR staff for the senior management team.

Exhibit 10.6 Weekly KPI Report

Status of initiatives completed from the recent key customer satisfaction survey

	Status	Mobile	Manager assigned responsibility
Improve order entry system	No action	___	Jim Curruthers
Improve tracking of deliveries	No action	___	Sally Smith
Improve accuracy of pricing and discounts	Extra check in place for key clients		Not assigned

Date of next visit to key customers

	Sales representative	Date of visit	Mobile	Date of last order	Working days lapsed between visits
ABC Limited	Jim Curruthers	12/11/__	___	1/11/__	15
	Sally Shell	5/11/__	___	12/10/__	10
	Bob Helm	14/11/__	___	12/09/__	30
	Unassigned				60

List of key projects that are running late

	Manager	Weeks late	Mobile	Remedial action
KPI project	Jim Curruthers	6	___	Increase participation in advanced driving courses
New sales ordering system	Bob Helm	10	___	___

List of project managers with late projects

	Number of late projects	Late projects last month	Mobile	Recommended action
Susan George	6	4	___	Abandon ___, reassign ___ and ___.
John Doe	5	7	___	Phone call as progress being made
Jenny Gilchrist	4	2	___	Phone call as problem brewing

Innovations planned for implementation

	Within 30 days	30–60 days	60–90 days	Details
Team ___	0	0	1	___
Team ___	2	2	2	___
Etc	1	2	1	___

Abandonments planned

	Within 30 days	30–60 days	60–90 days	Details
Team ___	2	1	1	___
Team ___	2	2	2	___
Etc	1	2	1	___

Exhibit 10.7 Example of the Weekly Human Resources KPI Report

Number of planned CEO recognitions for next week/two weeks

	Reason	Work	Mobile	Suggested recognition
Jim Curruthers	Led project	——	——	Meeting in CEO's office
Sally Shell	Led project	——	——	Meeting in CEO's office
Susan George	KPI project manager	——	——	Meeting plus CEO newsletter feature

In house training courses due in next two months

	Enrollments	Expected numbers	Date of course
First Aid	5	20	——
Supervisors Part 1	3	45	——
Leadership part 2	40	60	——
Presenting	6	20	——

Staff who have been ill for over two weeks

Manager	Work	Mobile	Days left	Length of illness	Back-to-work program started
Jim Curruthers	——	——	25	10	Yes
Sally Shell	——	——	18	15	Yes
Ted Smith	——	——	14	25	No
			15		

Teams with above average sick leave

Manager	Last 30 days	Days per employee	Average per month for past three months
Jim Curruthers	5	1.5	4
Sally Shell	8	2	7
Ted Smith	3	1	12

New staff who have not attended an induction program within ___ weeks of joining

Manager	Work	Mobile	Mitigating circumstances
Jim Curruthers	——	——	——
Sally Shell	——	——	——
Ted Smith	——	——	——

Weekly/Monthly Updates to Management and CEO

There are endless ways these can be shown—see Exhibit 10.8—through icons, gauges, traffic lights, and so on. Stephen Few has introduced a new concept called "bullet" graphs. These are particularly powerful when combined with Edward Tufte's[6] "sparkline" graphs; see Exhibit 10.9. A sparkline graph looks like a line graph without the axes. Even with this truncated diagram, you can still see the trend. The bullet graph shows different details about current performance. The shades used range from dark gray (to indicate poor performance) through to lightest gray (to indicate good performance). The dark vertical line indicates a comparative measure such as a target or last year's result. Stephen Few is very cautious about the use of color. He draws attention to the fact that many readers will have some form of color blindness. In Exhibit 10.10, the only use of color would be red bullet points indicating the exceptions that need investigation and follow up.

Exhibit 10.8 Examples of a Monthly Report to Management
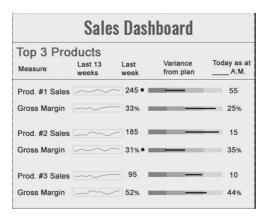*Source*: Used with the permission of Inside Info, www.insideinfo.com.au.

Exhibit 10.9 Combination of "Sparklines" and "Bullet" Graphs

Exhibit 10.10 Examples of a Monthly Report to Management

Reporting Performance Measures to Staff

Using a monthly icon-based report for staff is a good idea because they tell staff what is good, what is adequate, and what needs to be improved without giving away confidential data. If this icon report happens to be left on a bus, it would not be damaging to the organization if it found its way to a competitor. Exhibit 10.11 is an example of an icon staff report that covers the critical success factors and reminds staff about the strategies.

> Using a monthly icon-based report for staff is a good idea because they tell staff what is good, what is adequate, and what needs to be improved without giving away confidential data.

Progress Report for July xxxx

Our Mission	To provide our customers energy at the right price at the right time
Our Vision for next five years	To be the preferred energy provider in the xxx
Our Strategies	1. Acquiring profitable customers 2. Increase cost efficiencies 3. Innovation through our people 4. Using best business practices

Our progress against our critical success factors

Delivery in full on time to key customers		We are a learning organization		Innovation is a daily activity	
On time deliveries to key clients	☺	Staff training this month	☹	Ideas adopted last month	☺
Goods rejected due to quality defects	☺	Staff with mentors	☺	Paperless transactions with key suppliers/customers	☺
We are warriors against waste		**We grow leaders**		**We are respected in the communities we work in**	
Wastage reduction programs started in month	☹	Leaders appointed from within last month	☺	Community participation by employees in month	☺
Waste reduced from existing programs	☺	Managers in leadership programs	☺	New initiatives planned for community, next 3 months	☺
We finish what we start		**Attracting new profitable customers**		**Increase in repeat business from key customers**	
Number of late projects	☺	New customer orders	☺	Order book from key customers	☺
Number of project finishes in month	☹	Feedback from new customers	☹	Number of product developments in progress	☺
Points to note: xxxxxxxxxxx xxxx xxxx xxxx xxxxxx xxxxx xxxxx xxxx xx x x xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx xxxx xxxx xxxxx xxxx xxxx xxxx xxxxx xxxxxx xxxxx xxxxx xxxxx xx x x xxxxx xxxxx xxxxx xxxxx xxxxx xxxxx xxxx xxxx					

Exhibit 10.11 Example of a Monthly Icon-Based Report to Staff