KEY INDICATOR REPORT pdf

1: Key Performance Indicators - KPI Definition | Investopedia

Key Indicators Report When you submit the Key Indicators Report, Payables prints two reports that allow you to review Payables transaction activity, and review the current number of suppliers, invoices, payments and matching holds in your Payables system.

The icons that represent indicators and their states are simple and visually effective even when used in small sizes. You can use state indicators in your reports to show the following: Trends by using trending-up, flat no change , or trending-down arrows. State by using commonly recognized symbols such as checkmarks and exclamation marks. Conditions by using commonly recognized shapes such traffic lights and signs. Ratings by using common recognized shapes and symbols that show progress such number of quadrants in a square and stars. You can use indicators by themselves in dashboards or free-form reports, but they are most commonly used in tables or matrices to visualize data in rows or columns. The following diagram shows a table with a traffic light indicator that conveys year to date sales by sales person and territory. Reporting Services provides built-in indicator sets and indicator icons to use as is, and you can also customize individual indicator icons and indicators sets to suit your needs. For more information about using indicators as KPIs, see Tutorial: Note You can publish indicators separately from a report as report parts. Read more about Report Parts. Comparing Indicators to Gauges Although they look very different, indicators are just simple gauges. Both indicators and gauges display a single data value. The key differences are that gauges have elements such as frames and pointers. Indicators have only states, icons, and optionally labels. Indicator states are similar to gauge ranges. Like gauges, indicators are positioned inside a gauge panel. When you want to configure an indicator by using the Indicators Properties dialog box or the Properties pane, you need to select the indicator instead of the panel. Otherwise, the available options apply to the gauge panel options and you cannot configure the indicator. The following picture shows a selected indicator in its gauge panel. Depending on how you want to depict the data value, gauges might be more effective than indicators. Choosing the Indicator Type to Use Using the right indicator set is key to instantly communicating the meaning of the data, whether the data is in a detail row or row or column group in a table or matrix, or by itself in the report body or dashboard. The built-in indicator sets have three or more icons. The icons can vary by shape, color, or both. Each icon communicates a different data state. The following table lists the built-in indicator sets and describes some common uses of them. After you choose a indicator set, you can customize the appearance of each indicator icon in the set by setting its properties in the dialog boxes for indicators or the Properties pane. You can use the built-in colors, icons, and sizes or expressions to configure indicators. Customizing Indicators Indicators can be customized to suit your needs. You can modify the indicators sets as well as individual indicator icon within a set in the following ways: Change the colors of indicator icons. For example, you might want the color scheme of an indicator set to be monochromatic or use colors other than the default ones. Change the icon in the indicator set. For example, you might want to use the star, circle, and square icons in one indicator set. Specify the start and end values for and indicator. For example, you might want to skew data display by using one icon for 75 percent of the indicator values. Add icons to the indicator set. For example, you might want to add additional icons to indicator sets to differentiate the indicator values in a more detailed way. Delete icons from the indicator set to make the data display simpler by using only a few icons. Using Indicators in Tables and Matrices The simple shapes of indicators make them ideal to use in tables and matrices. Indicators are effective even in small sizes. This makes them useful in detail or group rows of reports. The following diagram shows a report with a table that uses the directional indicator set, Four Arrows Colored , to indicate sales. The indicator icons in the report are configured to use shades of blue instead of the default colors: When you first add an indicator to a report, it is configured to use default values. You can then change the values so the indicator depicts data the way you want. You can change the appearance of the indicator icons, the way the indicator chooses which icon to use, and change the icons used by an indicator set. By default, indicators are configured to use percentages as the measurement unit and automatically detect the minimum and maximum values in the data. Each icon in the indicator set has a percentage range. The number of percentage ranges depends on the number of icons in the icon set, but the ranges are the same size and sequential. For example, if the icon set has five icons, there are five percentage ranges, each 20 percent in size. The first one starts at 0 and ends at 20, the second starts at 20 and ends at 40, and so forth. The indicator on the report uses the icon from the indicator set that has a percentage range within which the indicator data value falls. You can change the percentage range for each icon in the set. The minimum and maximum values can be set explicitly by providing a value or an expression. You can change the measurement unit to be a numeric value instead. In this situation, you do not specify minimum or maximum for the data. Instead, you provide only the start and end values for each icon that the indicator uses. Indicators convey data values by synchronizing across indicator data values within a specified scope. By default, the scope is the parent container of the indicator such as the table or matrix that contains the indicator. You can change the synchronization of the indicator by choosing a different scope, depending on the layout of your report. The indicator can omit synchronization. Indicators use only a single value. If you have to show multiple data values, use a sparkline or data bar instead of an indicator. They can represent multiple data values but are also simple, easy to understand at small sizes, and work well in tables and matrices. Sizing Indicators to Maximize Visual Impact In addition to color, direction, and shape you can use size to maximize the visual impact of indicators. Imagine a report that uses indicators to show customer satisfaction with different types of bicycles. The icon that the indicator uses can be configured to be different sizes depending on customer satisfaction. The greater the satisfaction, the larger the icon that appears in the report. The following picture shows a report of bicycle sales, and the sizes of the icon reflect the sales amount. Including Indicators and Gauges in Gauge Panels Indicators are always positioned inside a gauge panel. The gauge panel is a top-level container that can include one or more gauges and state indicators. The gauge panel can contain child or adjacent gauges or indicators. If you use an indicator as a child to a gauge, you can further visualize the data by showing the state of the data value displayed in the gauge. For example, an indicator within a gauge can display a green circle to tell you that the value in the gauge points to the upper 33 percentage of the value range. Using a gauge and indicator side by side, you can represent the data in different ways. In either case, the indicator and gauge can use the same or different data fields. The following diagram shows an indicator side by side and within a gauge. Sequence of Indicator States The sequence of the indicator states in the Value and States tab of the Indicator Properties dialog box affect which indicator icon displays for a data value when the start and end values of indicator states overlap. This might happen whether you use the percentage or numeric state measurement unit. It is more likely to occur when you use the numeric measurement unit because you provide specific values for this measurement. It is also more likely to occur when you round report data values because this tends to make values less discrete. The following scenarios describe how the data visualization of data is affected when you change the sequence of the three states in the 3 Arrows Colored directional indicator. By default the sequence is: Red down arrow Yellow horizontal arrow Green up arrow The following scenarios show for four different state sequences and their value ranges and how the sequences affect data visualization. In these scenarios, the 3 Arrows Colored indicator uses numeric state measurements.

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2: Indicators (Report Builder and SSRS) | Microsoft Docs

A Key Performance Indicator (KPI) is a measurable value that demonstrates how effectively a company is achieving key business objectives. Organizations use KPIs to evaluate their success at reaching targets.

Posting payments in Kareo is a two step process Enter a Payment record when the medical practice receives a payment. Apply portions of the Payment to open charges corresponding with procedures rendered to a Patient by a specific Provider. Kareo also tracks two different Post Dates representing the two steps of this process Post Date that the Payment is entered when the medical practice receives the payment i. Post Date for individual transactions associated with applying portions of the Payment to open charges for procedures rendered to a Patient by a specific Provider i. Payment Application Post Date. It is important to note that each of the two steps of the payment posting process can occur on different dates with different Post Dates, and as a result, the transactions may fall into different accounting periods. This fact becomes important in the sections to follow. Tracking Payments on the Key Indicators Reports Kareo totals payments on the Key Indicators reports under the metric entitled "Receipts" if the Post Date of transactions fall within the start and end date of the report. Receipts are tacked in two sections of the report. Total payments to the practice that is displayed under the "All Providers" section the last section of the report. Key Indicators Summary Report with Options: The Key Indicators Summary report can be calculated using either of the following options. The options are chosen by selecting the Customize button at the upper right hand corner of the screen. The Receipts metric in the "All Providers" section is calculated as the sum of all payments the medical practice receives from patients, insurance companies, or other payers in the period. The Receipts metric in the "All Providers" section will equal the sum of the "Receipts" metrics in the individual Providers sections plus the "Change in Unapplied Balance". Why is the sum of the Receipts metrics in the individual Provider sections not equal to the Receipts metric in the "All Providers" section? This happens because payments can be received in one reporting period but applied to open charges in another period. So in the first period, there is a balance on the payment that remains "unapplied". But in the next period, the remaining portions of the payment may be "applied". The "Change in Unapplied Balance" tracks the change to the unapplied balance on payments from one reporting period to the next. The "Change in Unapplied Balance" gives you greater visibility into the two step process of payment posting. The Receipts metric in the "All Providers" section is calculated as the sum of all individual transactions associated with applying payments to open charges across all Providers.

KEY INDICATOR REPORT pdf

3: 8: How Do I Use Time Wisely?

Key performance indicators (KPIs)â€”also called "strategic measures"â€”are both actions and tools of measurement used to monitor the progress toward achieving these objectives. In its simplest form, a KPI is a measurement device that helps you understand how your organization is doing in regard to its goals.

KPI Templates Your business can be at a huge disadvantage. You are not going to have any form of structured data to base your business performance off of over a period of time. By giving it a rough analysis over certain processes and think that everything is working fine is not really the way to do it. The business world is getting more complex with so many layers from regulators, competitors, scaling etc. You are also going to need to put that data into some kind of framework. Then make sense of it in order for it to be easily communicated across the different layers of your organization. This is where the key performance indicator report creeps in. To create a key performance indicator report, it comes with 7 main sections. These are objective, measure, definition, frequency, source, graph and owner comments. You can see them in more detail below. Objective In this section you are going to put the goal you are going to set for a particular key performance indicator or a group of indicators. Every key performance indicator has to be under a goal. When your key performance indicator data is collected you can then evaluate it to see if it is aligned with your goal. Measure This is going to be where you put the key performance indicator in order to measure the goal. Make certain that your indicators can be easily measured and attainable this will reduce a lot of confusion going forward. Definition In this part of your report you are going to define why you are tracking that particular indicator. In your definition section you can say that you feel strongly that as a company you need to grow quickly. And increasing sales revenue in the next 6 months can give you enough run way. That will allow you to compete with the big guys in our market. Frequency You are going to put how frequently this specific key performance indicator is to be measured. This is all up to you and your goal. Some indicators can be measured weekly, monthly, quarterly, every six months etc. Source In this section you are going to put where in your organization this indicator will be measured. These can be from your production line, human resource, supply chain management etc. Graph Showing visualized data diagrams of the data collected will let your key performance indicator become more understandable. Using graphs and charts to help visualize your data is probably one of the easiest ways. Owner comments In this area, if you are the one responsible for keeping track of the key performance indicator. You are going to give your final thoughts on the indicator. Or if it was a huge success you can write a sentence or two on what took place. You can see an example of a key performance indicator report below. Objective Achieve better sales results and be the market leader in our market. Achieving a great sales result in the next 6 months and beat analyst expectations can help us to invest into new innovations and infrastructure in order to make our organization thrive. We need to train our customer service representatives better. Additionally we need to also make changes in our logistic strategies in order to deliver product at a faster rate. By looking at the sample report above you can see that the layout is very straight forward. Pricing is available on the next page Search for:

4: Key Performance Indicator (KPI) Examples and Templates - Klipfolio

Weekly Key Indicator Report is designed to help the business owner track all the key variables in their business on a weekly basis. Weekly Key Indicator Report is a simple sheet that brings.

Key indicators can be used to distinguish between adequate and poor-quality care and between adequate and good or excellent care. The following illustrative list contains key indicators that have been tested and used by various states or facilities. Some apply to all residents, others only to residents in one or two of the four case-mix groupings proposed in Chapter 4. Excessive use of tranquilizers and antipsychotic drugs, medication errors, and adverse drug interactions are evidence of poor quality in nursing homes. Survey procedures and protocols for determining proper medication administration for nursing home residents have been developed and are being used. Another potential indicator of poor quality of care is the development of bed sores. The development of infections among nursing home residents with indwelling urinary catheters may also be a sign of poor care. Management of Urinary Incontinence. Another indicator of quality might be the use of indwelling catheters as opposed to bladder training programs and prompt staff attention to individuals when they need to urinate. Many view the excessive use of indwelling catheters as a sign of poor care, and protocols have been developed for their proper use. The survey should take into account whether the facility has attempted a bladder training program for catheterized residents. Dehydration among nursing home residents is frequently cited by physicians in admitting hospitals as a major problem. The survey would focus in particular on every physically dependent and severely mentally impaired resident in surveying for dehydration. Other key indicators of medical and rehabilitative care include the blood pressure of hypertensive residents because elevated diastolic pressure has been shown to correlate directly with events such as heart attack and stroke , changes in weight, contractures, existence of physical restraints, decline in functional status, and the ability to perform the activities of daily living ADL. Nursing and Personal Care. Issues relating to nursing and personal care are very relevant to both quality of care and quality of life experienced by nursing home residents and to their sense of well-being, satisfaction, and mental and social functioning. A similar set of items and scoring procedures could be developed for the federal survey. In addition, the surveyors might observe whether call lights and other resident requests for assistance are promptly acknowledged, whether indwelling catheter tubes are clean, and whether catheter tubes and bags touch the floor. While the elderly in nursing homes suffer from mental disorders that affect younger persons for example, schizophrenia, neuroses , the two most frequent diagnoses among nursing home residents are depression and intellectual impairment organic brain syndrome, confusional states, dementia. One possible indicator of quality in this domain is appropriate use of medications for this population, particularly for residents with depression. Some measures of resident satisfaction discussed below may also capture important elements of mental status, particularly depression, demoralization, and social isolation. There is substantial evidence that environmental circumstances of older persons have an influence on personal well-being. Diet, Nutrition, and Food Service. Diet, nutrition, and food service are especially important to quality of care and life for residents of a nursing home. Therapeutic diets, for instance, are vital to the physical health status of some residents for example, those with conditions such as hypertension and diabetes. Adequate nutrition is essential to the physical health status of all residents. Residents with functional impairments may require assistance in eating or special utensils. Without such needed assistance, the quality of the diet or menu is meaningless, since such residents may not, in effect, "receive" the food they require and the facility provides. Finally, the quality of the foodâ€”whether it is warm when served, well seasoned, and whether residents have some choice in their menusâ€”has been found to be a major element of their rating of the "quality" of a facility. Activities and Social Participation. Staff attitudes and treatment of residents also affect quality of life. The dignity with which residents are treated and the friendliness and caring of staff, especially aides, are critical prerequisites to a quality life experience. Opportunities for personal choice in the details of daily lifeâ€” mealtimes, time to rise and retire, activities, and clothingâ€”can allow residents a small but important measure of control over their surroundings and personal lives and significantly enhance the quality of life in a nursing home. Operational Use of Key

Indicators The proposed standard survey relies on key indicators to determine whether a facility is providing high quality, moderate but acceptable quality, or potentially poor quality of care and quality of life. Taken together, the indicators must therefore discriminate among the degrees of quality. For facilities failing the key indicators in the standard survey, a full or partial extended survey will be conducted, more fully to investigate whether there are care or life deficiencies and the reasons for them. Following is a brief illustrative list of possible key indicators in various domains of quality of care and life and the types of follow-up investigation that would be required in the extended survey. A given percentage of residents with weight loss of 5 pounds within 30 days source of data: In the extended survey, the procedures would include examining records for acceptable reasons for weight loss diagnosis of cancer, obesity, recent physical activity level changes , examining the current dietary program caloric intake , observing residents for treatable conditions poor or missing teeth, depression , observing meal presentation temperature and taste of food , observing and interviewing residents regarding eating habits, need for assistive devices or staff assistance, food preferences, and investigating nursing staff levels and policies regarding food supplementation and nursing assistance in eating. A given proportion of residents with urinary tract infections associated with indwelling catheters source of data: A given percentage of residents physically restrained source of data: In the extended survey, surveyors would investigate reasons for restraints to determine justification from medical records and staff interviews; investigate quality of care for restrained residents by observing positioning, release, and exercising of residents from medical record reviews and staff interviews ; and investigate nursing staff levels and nursing procedures. A given percentage of mentally unimpaired residents with depression source of data: The extended survey would encompass investigating the causes physical disability, drugs, dissatisfaction with quality of care or life ; and determining whether depression has been diagnosed and noted in the record and whether a plan of treatment has been formulated and is being carried out. Number of medications per resident exceeding a threshold level source of data: The extended survey would entail review of medical records and care planning procedures to determine whether medications are reconsidered monthly; review of drug interactions; investigation of the adequacy of pharmacy review; investigation of the extent of Medical Director involvement in the drug prescription process; investigation of nursing procedures regarding physician contacts; investigation of nursing oversight of medication complications; and investigation of the adequacy of care planning. Are a given percentage of residents eating most of the food served? The extended survey would investigate nursing staff levels; investigate availability of assistive devices; investigate whether residents not eating are missing teeth or have other dental or medical problems impeding eating; interview residents as to whether they are given an opportunity to make choices and express preferences for food; and investigate excessive and rigid use of therapeutic diets. Do a given percentage of residents report having friends among the staff? The extended survey would investigate whether resident isolation has been identified and recorded in medical record and review care plan to determine if it is being addressed, and investigate staff training by interviewing staff and examining training procedures. Do a given percentage of resident rooms have personal memorabilia, rugs, curtains, pictures, plants? The extended survey would involve interviews with residents to determine why rooms lack personalization, and interviews with staff and the administrator. Facility policies regarding personal possessions in rooms would also be reviewed. Epidemiological Evidence Suggesting Misuse. American Journal of Public Health 70 May: PMC] [PubMed: Long-Term Care in Virginia. The Virginia General Assembly. Medication Procedure in a Nursing Home: Abuse of PRN Orders. Journal of the American Geriatrics Society Department of Health, Education, and Welfare. Office of Nursing Home Affairs. Journal of Gerontological Nursing 5 March-April: Health Care for the Elderly: Designing a Data System for Quality Assurance. Computers, Environment, and Urban Systems 6 Spring: Performance of Intermediate Care Facilities in Iowa: Journal of Gerontology 33 November: Medications and the Elderly: A Guide for Promoting Proper Use. Journal of the American Geriatrics Society May: Journal of the American Geriatrics Society 24 July: Infections in Nursing Homes: Policies, Prevalence, and Problems. New England Journal of Medicine September: Medical Care 22 January: Journal of the American Medical Association Van Buren, and K. Causes for Hospitalization of Nursing Home Residents: The Role of Infection. Journal of the American Geriatrics Society 32 February: New England Journal of Medicine Journal of the American Geriatrics Society

23 August: Final report to U. Hypernatremic Dehydration in Nursing Home Patients: An Indicator of Neglect. Journal of the American Geriatrics Society August. Helen Smits, personal communication, Breslau, editor; and M. Causes, Care, and Consequences. Public Policy and Adequate Institutional Care. American Journal of Public Health 74 December: American Journal of Public Health Approach to the Geriatric Patient. Medical Clinics of North America 61 4: Nursing Homes Research and Public Policy. Journal of Chronic Diseases Medical Care 19 March:

5: Performance indicator - Wikipedia

Key Indicators Summary Report with Options: The Key Indicators Summary report can be calculated using either of the following options. (The options are chosen by selecting the Customize button at the upper right hand corner of the screen.).

More than , employees working in PCs already on-line with eRMS will be able to use this new service when the rollout is completed this year. Sites participating in Phase I of the rollout include: How will you know when you can use the new call-in number? The wallet card serves as a handy guide to help you through the telephone prompts when using the call-in number. For easy reference, the magnet has the call-in number printed on it and should be kept in a convenient place at home. Once eligible, you no longer will have to call your attendance control office to report unscheduled leave request. How the system works: Menu prompt 4 will take you to the unscheduled leave request system. Once connected, the voice response system will guide you. Your information is kept secure and confidential and is maintained in accordance wit the Privacy Act. The call-in number is available 24 hours a day, seven days a week. Hearing impaired employees should call TTY source: The report concluded that supervisors have failed to comply with Postal Service policies and procedures regarding unscheduled absences and recommended the following three actions: The two applications will maintain their functionality while sharing the same database. What does this merger mean to supervisors who use both systems? When supervisors approve leave, the information will automatically reside in TACS. That means we will all use real-time information to manage time and attendance. Reports will run faster and can be exported to other applications such as Excel. At the end of the day, these changes will save time and make sure we are using accurate data to make decisions. A pilot site in the Tennessee Performance Cluster is scheduled to go online in July. A phased national release is set for August and September. Nonbargaining unit employees, and bargaining unit employees if provided in their national agreements, are allowed to take up to 80 hours of their accrued sick leave per leave year to give care or otherwise attend to a family member as defined in See for information about FMLA entitlement to be absent from work. Arbitrator Das said that the Postal Service may not require an employee to describe the nature of an illness or injury during a phone call to report an absence from work. The arbitrator found that management is not in violation of the FMLA, however, when it requires medical evidence for absences of more than three days in instances in which an employee makes a request to substitute paid sick leave for unpaid intermittent FMLA leave. Donna and I both stated that this would help both sides of the house when verification is needed, or inquiries are made. We have had front line managers delete this data by innocence or intent from the system and end up recording the person as AWOL. We were able to have the leave status overturned as the employee had the confirmation number. Until all disputes are resolved at the National level, hopefully this will help to make our jobs a little easier. Section IV addresses absences and part B and see actually addresses scheduled and unscheduled absences. As a general rule unless you have a locally defined definition for unscheduled absences the question you ask, the first day of illness would be considered unscheduled and the second and third would be scheduled. The fact an absence is scheduled or unscheduled does not mean a whole lot unless the USPS does something. The absence can be scheduled and unscheduled and could be a FMLA issue as well. All attendance related discipline must be investigated and the test for just cause must be met. A brief summary just cause from the EL is listed below. Is there a rule? Is the rule a reasonable rule? Is the rule consistently and equitably enforced? Was a thorough investigation completed? Before administering the discipline, management must make an investigation to determine whether the employee committed the offense. Management must ensure that its investigation is thorough and objective. Employees have the right to know with reasonable detail what the charges are and to be given a reasonable opportunity to defend themselves before the discipline is initiated. Was the disciplinary action taken in a timely manner? One of the most difficult areas of discipline is the determination of the amount or type of discipline to be issued for a particular offense.

KEY INDICATOR REPORT pdf

6: Key Indicators Current Activity Report (Oracle Payables Help)

> United States Postal Service Employee Key Indicators Report Report:eRMSR Page 1 of 1.

Organizations use KPIs to evaluate their success at reaching targets. What is a key performance indicator KPI? Selecting the right one will depend on your industry and which part of the business you are looking to track. Each department will use different KPI types to measure success based on specific business goals and targets. Find out what types of key performance indicators are relevant to your department, industry, or role: KPI management can be done using dashboard reporting software, giving your entire organization insights into your current performance. Learn more about how to track KPIs in a report or dashboard: Build world-class reports and dashboards for your team or clients. Trusted by over 50, game changers and their teams What is KPI dashboard software? KPI dashboard software enables businesses to turn data into analytics and insights. The software allows organisations to enter their data into one specially designed system, or connect external services for faster and more accurate data collection. This type of software allows businesses to visualize and comprehend data from a number of KPIs that represent different areas of a business, all in one place. Companies benefit from faster and more accurate data collection, instant reports on performance, and alerts when a key performance indicator is over or under achieving. KPI dashboard software centralizes businesses data, while simplifying real-time reporting to always give them a competitive edge. What is a KPI? Intro to Key Performance Indicators from Klipfolio Business Metrics A Business Metric is a quantifiable measure that is used to track and assess the status of a specific business process. Every area of business has specific metrics that should be monitored â€” marketing metrics can include tracking campaign and program statistics, while sales metrics may look at the number of new opportunities and leads in your database, and executive metrics will focus more on big picture financial metrics. Types of KPIs Depending on your industry and the specific department you are interested in tracking, there are a number of KPI types your business will want to monitor. Each department will want to measure success based on specific goals and targets. Take a look at the departmental KPI examples below to learn more about the one you should be measuring:

7: About Key Indicators Reports - Kareo Help Center

The monthly Child Welfare Key Indicators Report presents data for the Florida Abuse Hotline, Child Protective Investigations, CBC lead agencies, as well as other key metrics describing the state of the Florida Child Welfare.

What is a KPI and what does it stand for? Now that we know KPI stands for key performance indicator it is only as valuable as the action it inspires. One of the most important, but often overlooked, aspects of KPIs is that they are a form of communication. As such, they abide by the same rules and best-practices as any other form of communication. Succinct, clear and relevant information is much more likely to be absorbed and acted upon. KPIs are an effective tool to help build better performing teams. In terms of developing a strategy for formulating KPIs, your team should start with the basics and understand what your organizational objectives are, how you plan on achieving them, and who can act on this information. This should be an iterative process that involves feedback from analysts, department heads and managers. As this fact finding mission unfolds, you will gain a better understanding of which business processes need to be measured with a KPI dashboard and with whom that information should be shared. Is your objective Specific? Can you Measure progress towards that goal? Is the goal realistically Attainable? How Relevant is the goal to your organization? What is the Time-frame for achieving this goal? How to define a KPI Defining key performance indicators can be tricky business. KPIs are often confused with business metrics. Although often used in the same spirit, KPIs need to be defined according to critical or core business objectives. Follow these steps when defining a KPI: What is your desired outcome? Why does this outcome matter? How are you going to measure progress? How can you influence the outcome? Who is responsible for the business outcome? How often will you review progress towards the outcome? These two steps are extremely important, as they ensure you continually assess your KPIs and their relevance to your business. Check out our blog on How to write and develop KPIs. Build world-class reports and dashboards for your team or clients. Trusted by over 50, game changers and their teams Are KPIs still relevant? KPIs often have a negative connotation associated with them. Unfortunately, many business users are beginning to see KPI monitoring as an obsolete practice. This is because KPIs fall victim to that most human of all problems: The truth is that KPIs are only as valuable as you make them. Key performance indicators require time, effort and employee buy-in to live up to their high expectations. Bernard Marr, best-selling author and enterprise performance expert, sparked an interesting conversation on this subject in his article, " What the heck is a KPI? So then why are key performance indicators so important? Setting key performance indicators for an organization usually happens during the strategic planning phase, whether you do that yearly, quarterly or even more frequently, the goal is to ensure the entire organization is aligned towards the same objectives. Imagine a large row boat with ten people, if 3 people think the boat is heading left, 5 people think the boat is supposed to be heading right and 2 people think the boat is supposed to turn around. What happens to the boat? The boat will start spinning around. Therefore, ensuring alignment from top of the organization all the way to the front line employees is the difference between a boat moving forward in unison vs getting nowhere. Key performance indicators in Action Alright so now that you have defined all your key performance indicators now what? For example, if we track Monthly Recurring Revenue MRR we know that of quality leads, of trials started, of successful onboards and many other measures will impact the success of MRR. So we track a daily number of new leads created with an email report every morning at 8am. We have a dashboard to track several key activities to ensure the product trial starts are going smoothly in real-time and we track monthly the number of onboards completed successfully by the customer success team. One of the most common uses cases of KPI dashboards are in startups who share their core organizational performance measures to get alignment from all the employees. So what about key business performance measures? If key performance indicators are your most important objectives for your business, how do you align your organization to get there? Therefore, business performance measures can be viewed as a way to quantifying i. Before picking and defining a business performance measure, managers and leaders need to know how to write them. There is a lot of great literature and research on this topic including Andrew Neely from the University of Cambridge, who wrote in designing performance measures you can leverage a structured approach by going thru a list questions to consider as you build your performance measurement system. Trusted by over 50, game changers and their teams Top 22 questions to use when designing key performance measures Review these questions as a checklist when building out your key business performance measurement systems:

KEY INDICATOR REPORT pdf

8: Key Performance Indicator Report Examples â€“ Mr Dashboard

Manage the key indicator lifecycle to monitor and report on insights to business risks. Establish and monitor metrics related to each business unit within the organization. Associate metrics with risks, controls, strategies, objectives, products, services and business processes to monitor quality assurance and performance.

These raw sets of values, which can be fed to systems that aggregate the data, are called indicators. There are two categories of measurements for KPIs. Quantitative facts without distortion from personal feelings, prejudices, or interpretations presented with a specific value - objective- preferably numeric measured against a standard. Qualitative values based on or influenced by personal feelings, tastes, or opinions and presented as any numeric or textual value that represents an interpretation of these elements. Points of measurement[edit] Performance focuses on measuring a particular element of an activity. An activity can have four elements: At a minimum, an activity is required to have at least an input and an output. Something goes into the activity as an input; the activity transforms the input by making a change to its state; and the activity produces an output. An activity can also have enabling mechanisms that are typically separated into human and system mechanisms. It can also be constrained in some way by a control. Lastly, its actions can have a temporal construct of time. Input indicates the inputs required of an activity to produce an output. Output captures the outcome or results of an activity or group of activities. Activity indicates the transformation produced by an activity i. Mechanism is something that enables an activity to work a performer , either human or system. Time indicates a temporal element of the activity. Identifying indicators of organization[edit] Performance indicators differ from business drivers and aims or goals. A school might consider the failure rate of its students as a key performance indicator which might help the school understand its position in the educational community, whereas a business might consider the percentage of income from returning customers as a potential KPI. The key stages in identifying KPIs are: Having a pre-defined business process BP. Having requirements for the BPs. Investigating variances and tweaking processes or resources to achieve short-term goals. Key performance indicators KPIs are ways to periodically assess the performances of organizations, business units, and their division, departments and employees. Accordingly, KPIs are most commonly defined in a way that is understandable, meaningful, and measurable. They are rarely defined in such a way such that their fulfillment would be hampered by factors seen as non-controllable by the organizations or individuals responsible. Such KPIs are usually ignored by organizations. This means the measure has a Specific purpose for the business, it is Measurable to really get a value of the KPI, the defined norms have to be Achievable, the improvement of a KPI has to be Relevant to the success of the organization, and finally it must be Time phased, which means the value or outcomes are shown for a predefined and relevant period.

9: Key Indicators Report (Oracle Payables Help)

South Africa Demographic and Health Survey Key Indicator Report, Statistics South Africa Published by Statistics South Africa, Private Bag X44, Pretoria

Contacts The Area Book Printed or Digital Every teaching area has an area book printed or a digital tool , which becomes the lasting record of your day-to-day efforts. Update key information daily, and refer to it weekly during your weekly planning session. Keep it neat, current, and accurate so that any future missionary can build on the inspired service you have given. As invited, take your area book to interviews, zone conferences, and mission leadership council, where mission leaders can review it and help you know how to use it most effectively. You should refer to some part of the area book each day as you update and adjust your plans. This book should stay in your apartment after you are transferred so that future missionaries can use the information. In your area book, keep accurate, complete, and current records of all the people with whom you are working. An explanation of the tools that are provided follows. This form helps you record detailed information regarding the progress of people you are teaching. Front Personal information follow the Church data privacy policies for your mission. Dates of baptism and confirmation. A record of when you taught the principles from each of the five lessons and if a member was present. This section allows you the flexibility to track what you teach, regardless of the order in which you teach the principles. You can track lessons taught before baptism and lessons taught after baptism. A record of the status of the commitments people are to keep. In this section you record the date you extended the invitation and mark whether they are consistent in keeping the commitment. Back A section where you describe the background of the person or family. Do not include highly personal or negative comments follow the Church data privacy policies for your mission. A section where you describe important information from teaching visits. You might include concerns people have raised, commitments they have struggled to keep, and successes they have had in reading or in prayer. You can also indicate if they have attended church and what they are reading in the Book of Mormon. A section where you can track follow-up visits if the person or family stopped receiving lessons. When a Teaching Record has been created, it should remain in the area book for the appropriate amount of time as indicated by the Church data retention policies in your mission. This record enables you to summarize the progress of the people you are teaching. It also allows you to report on the key indicators. Use this record to coordinate your efforts with ward and stake leaders in missionary coordination and ward council meetings. You will update this record during your weekly planning session or before ward council meetings. If feasible, give copies of this record to the bishop, the ward mission leader, and other ward council members each week or as often as needed. When digital planning tools are used, these reports are sent automatically. Make sure the information you include on these forms is complete, accurate, and neatly written. This form enables you to keep a record of people who you have contacted or have received referrals for and who, through additional contact, may accept an invitation to learn about the restored gospel. The status of the person. Is he or she now being taught, or do you need to do further follow-up? If the person was a referral or found by missionaries. The date the person was contacted. Use this information to plan follow-up visits, review member- missionary work with the ward mission leader, and plan other activities that may help these people begin learning more about the restored gospel. This form also serves as a historical record for missionaries assigned to the area in the future. When you are transferred to another area, be sure to copy all the information from your Missionary Daily Planner. Weekly and Monthly Key Indicator Report: Use this report weekly to collect information on each of the key indicators. Each companionship should access and record this information on the Missionary Portal or through digital tools. The information you enter will automatically be sent to your mission president. If you do not have access to the Missionary Portal, then give this information to your district leader. The district leader writes the name of each companionship in his district on a Weekly and Monthly Key Indicator Report, along with their weekly totals for each key indicator. He then totals the results for the district at the bottom. District leaders give district totals to their zone leaders. Zone leaders give zone totals to the assistants to the president. Use the Weekly and Monthly Key Indicator Report and the Missionary Weekly Report to report baptisms for the week in which they take place and confirmations for the week in which they take place. When digital tools are used, this report is submitted automatically and there is no need to call in and report key indicators. However, missionaries will account for their progress in district council and in other ways as directed by their mission president. The Missionary Daily Planner: This tool includes the following features: Five weeks of daily schedules, with a sixth week on an at-a-glance page. Pages for monthly and weekly goals. A summary of the planning guidelines; a list of the events that lead to baptism, confirmation, and activity in the Church; lesson plans of the missionary lessons; ideas for finding people to teach; and baptismal interview questions. A section for information on contacts and for addresses, email addresses, and phone numbers of members and people being taught. Weekly and Monthly Key Indicator Results page for keeping track of your weekly and monthly results. During your weekly planning session, you will write your monthly and weekly goals on the Monthly and Weekly Goals and Plans page of the Missionary Daily Planner as illustrated below. Weekly goals for each key indicator and a monthly goal for people baptized and confirmed. Actual results for the week. The results for new people being taught each day are found on the daily schedule. The total for each week is transferred here. Names of people who are most likely to continue to progress toward baptism and confirmation. Set goals for what you hope will happen with these people attend church, read the Book of Mormon , set a baptismal date, and so on. Space to write other personal or companion goals. Each day as you plan and work, you will use the daily schedule. A daily schedule where you can record teaching appointments, meetings, and finding activities. Plan so that you have meaningful activities for every hour of the day. Space is also provided for backup plans. Space to list the tasks you need to do phone calls, people to contact, preparation for lessons, follow-up on commitments, and so on and what you will study as you prepare for teaching assignments. Daily goals and actual results for new people being taught. While the mission president will receive a weekly report on key indicators through the Missionary Portal, you will provide a brief account of the progress of the people you are teaching and any personal matters you wish to share through a weekly letter to the mission president. He is the only person who will read this letter, so feel free to be open with your comments. How to Set Goals Goals reflect the desires of our hearts and our vision of what we can accomplish. Through goals and plans, our hopes are transformed into action. Goal setting and planning are acts of faith. Set goals for each key indicator. You may also set goals for your personal development. Do everything within your power to achieve your goals while respecting the agency of others. The ultimate measure of success is not in achieving goals alone but in the service you render and the progress of others. They are not to be used to receive recognition. When one learns to master the principles of setting a goal, he will then be able to make a great difference in the results he attains in this life. Challenging goals will help you work effectively and lead you to stretch and grow. Follow the guidelines below as you set goals: Focus on the people, keeping in mind the key indicators for conversion. Although you will use numbers, be able to support your numbers with the names of people where possible. Be specific and realistic, but set goals that will make you stretch. Set daily, weekly, and monthly goals. Goals for key indicators are reported through the Missionary Portal or digital tools. Set goals for personal and companion study, including language study if you are learning another language. Measure your progress each day, each week, and each month. When you fall short of a goal, evaluate your efforts and seek for ways to accomplish the goal. If needed, adjust your expectations. Over time your mission president may establish standards of excellence or mission goals intended to raise your vision and increase your faith. District, zone, and mission standards will help you stretch, work effectively, and reach higher levels of performance. They are not to be used as quotas that impose specific goals on you and your companion. Companion Study Set weekly goals for each indicator and a monthly goal for people baptized and confirmed. For each goal, ask yourselves: Are there names associated with the number?

KEY INDICATOR REPORT pdf

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