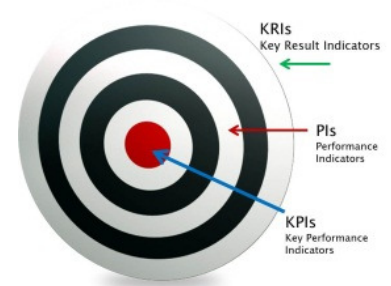# web**KPI**

## KPI Assessment Form

To understand Key Performance Indicators, it's important to understand what they are, and what they are not.

- KPIs should be limited to approximately ten (10) in number, and will be mostly operational
- KPIs should be reviewed weekly, at the very least, and mostly on a daily basis
- KPIs keep business owners and business managers awake at night, and if they're lucky enough to fall asleep, they're those things that they want answers for when they wake up in the morning
- KPIs are the center, or "heart" of your business, and define what is necessary to keep your business "pumping"

There are other "Indicators" to be reported on, but they are not "Key Performance Indicators"

a. Performance Indicators – Performance Indicators can usually have up to 80 metrics that look at key indicators such as profitability of top clients
b. Key Report Indicators – Key Report Indicators tell us how we have done in the past, and usually include material from your Board package or monthly reports



For this assessment, we will identify the following KPI characteristics:

a. Name of KPI
b. KPI explanation
c. Relevance of the KPI
d. How often is it measured (daily, weekly)
e. How to measure this KPI

Date: _____     Interview By: _____

Company: _____

Location: _____

Company Representative: _____

QuickBooks Version: _____

QuickBooks Computer (Laptop, Desktop, Server, Hosted At, ….) : _____

Other Financial or Operational Solutions (HR, Inventory, ……….) : _____

_____

Ref : David Parmenter, Key Performance Indicators, 2007, Hoboken, New Jersey, John Wiley & Sons, Inc.
    : www.davidparmenter.com

1. Name of KPI : _____
   a. KPI explanation : _____
   b. Relevance of the KPI : _____
   c. How often measured (daily, weekly) : _____
   d. How to measure this KPI : _____

2. Name of KPI : _____
   a. KPI explanation : _____
   b. Relevance of the KPI : _____
   c. How often measured (daily, weekly) : _____
   d. How to measure this KPI : _____

3. Name of KPI : _____
   a. KPI explanation : _____
   b. Relevance of the KPI : _____
   c. How often measured (daily, weekly) : _____
   d. How to measure this KPI : _____

4. Name of KPI : _____
   a. KPI explanation : _____
   b. Relevance of the KPI : _____
   c. How often measured (daily, weekly) : _____
   d. How to measure this KPI : _____

5. Name of KPI : _____
   a. KPI explanation : _____
   b. Relevance of the KPI : _____
   c. How often measured (daily, weekly) : _____
   d. How to measure this KPI : _____

6. Name of KPI : _____
   a. KPI explanation : _____
   b. Relevance of the KPI : _____
   c. How often measured (daily, weekly) : _____
   d. How to measure this KPI : _____

7. Name of KPI : _____
   a. KPI explanation : _____
   b. Relevance of the KPI : _____
   c. How often measured (daily, weekly) : _____
   d. How to measure this KPI : _____

8. Name of KPI : _____
   a. KPI explanation : _____
   b. Relevance of the KPI : _____
   c. How often measured (daily, weekly) : _____
   d. How to measure this KPI : _____

9. Name of KPI : _____
   a. KPI explanation : _____
   b. Relevance of the KPI : _____
   c. How often measured (daily, weekly) : _____
   d. How to measure this KPI : _____

10. Name of KPI : _____
    a. KPI explanation : _____
    b. Relevance of the KPI : _____
    c. How often measured (daily, weekly) : _____
    d. How to measure this KPI : _____