



KPI WORKSHEET

1. Identify the problem to be solved or opportunity to be leveraged.
2. Chart the process to execute.
3. Select leading and lagging KPIs to measure progress (leading is better).
4. Set outcome to be achieved and action to be taken.
5. Identify the person accountable.
6. Measure.
7. Report.

Get, Keep, and Grow:

- » Vendor Relationships
- » Customer Relationships
- » Employee Relationships
- » Shareholder Relationships

Better, Faster, and Cheaper:

- » Sales / Marketing / Customer Acquisition
- » Record Keeping
- » Manufacturing
- » Purchasing / Inventory
- » Distribution
- » Servicing

What is the problem to be solved?

Process Steps	Measure of Progress	Current Measure	Desired Measure	Who is Accountable?