

# **KPI Development: Brainstorming Template**

*Creating Actionable and Effective Key Performance Indicators and Metrics for your business*

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# KPI BRAINSTORMING TEMPLATE

FOCUS	WHERE ARE YOU NOW?	WHERE DO YOU WANT TO GO?	WHAT MUST BE DONE TO GET THERE?
<p><b>1. TOP LEVEL</b></p> <p>How your business is going to compete in the next 12 months?</p> <p>What should be done at the top / overall strategic level?</p> <p>Even if you are developing functional dashboard like production or marketing dashboard start with the top cross-functional KPIs.</p> <p>Translate your strategy into clear objectives, initiatives and action items. It's all about clear expectations.</p>	<p>Objectives:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <p>Initiatives:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <p><b>KPIs:</b></p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <p><b>Targets:</b></p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<p>Objectives:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <p>Initiatives:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <p><b>KPIs:</b></p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <p><b>Targets:</b></p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<p><b>Action Items:</b></p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p> <p>NOTES:</p>

FINANCIAL DASHBOARD	WHERE ARE YOU NOW?	WHERE DO YOU WANT TO GO?	WHAT MUST BE DONE TO GET THERE?
<p><b>2. FINANCIAL</b></p> <p>Typical financial areas:</p> <p>Revenue, Profit Margins, Operational Expenses, Management Efficiency, Leverage, Debt, Assets, Equity, Cash Flow, ROI.</p>	<p>Objectives:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Initiatives:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>KPIs:                      Targets:</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p>	<p>Objectives:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Initiatives:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>KPIs:                      Targets:</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p>	<p>Action Items:</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p> <p>NOTES:</p>

**MARKETING DASHBOARD**

**WHERE ARE YOU NOW?**

**WHERE DO YOU WANT TO GO?**

**WHAT MUST BE DONE TO GET THERE?**

**3. MARKETING**

Typical marketing areas:

Revenue, Profit Margins,  
 Product/Service Performance,  
 New Product/Service Sales,  
 Sales from New Customers,  
 Customer Satisfaction,  
 Customer Loyalty, Customer  
 Share of Wallet, Market Share,  
 Sales per Customer Segment,  
 Sales per Channel, Sales per  
 Region, Number of Referrals,  
 ROI per Campaign, ROI per  
 Media, Advertising ROI,  
 Advertising Expenses.

Objectives:

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Initiatives:

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**KPIs:**

**Targets:**

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**KPIs:**

**Targets:**

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Action Items:

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NOTES:

SALES DASHBOARD	WHERE ARE YOU NOW?	WHERE DO YOU WANT TO GO?	WHAT MUST BE DONE TO GET THERE?
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**4. SALES**

Typical sales areas:

Revenue, Profit Margins, Sales per Product/Service, Sales per Channel, Sales per Sales Rep, Online Sales, Number of Referrals, Number of Calls, Number of Prospects, Number of Appointments, Sales from New Business, Sales per Channel, Sales per Territory, Sales Pipeline Stage Metrics, Conversion Rate, Closing Ratio.

Objectives:

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Initiatives:

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Objectives:

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Action Items:

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**HR DASHBOARD**

**WHERE ARE YOU NOW?**

**WHERE DO YOU WANT TO GO?**

**WHAT MUST BE DONE TO GET THERE?**

**5. HR**

Typical HR areas:

Training & Development,  
Employee Retention,  
Recruitment Process,  
Absenteeism, Revenue per  
Employee, Productivity,  
Accidents, Safety, Salaries,  
Overtime, Employee  
Satisfaction, Employee Loyalty,  
Benefits.

Objectives:

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Initiatives:

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**KPIs:**

**Targets:**

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**KPIs:**

**Targets:**

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**Action Items:**

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OPERATIONS DASHBOARD	WHERE ARE YOU NOW?	WHERE DO YOU WANT TO GO?	WHAT MUST BE DONE TO GET THERE?
<p><b>6. OPERATIONS</b></p> <p>Typical operations areas:</p> <p>Supply Chain, Logistics, Order Processing, Delivery, On time Deliveries, Late Deliveries, Delivery Errors, Inventory Management, Number of Purchase Orders, Productivity, Efficiency, Quality.</p>	<p>Objectives:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Initiatives:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>KPIs:                      Targets:</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p>	<p>Objectives:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Initiatives:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>KPIs:                      Targets:</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p> <p>_____                      _____</p>	<p>Action Items:</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p> <p>NOTES:</p>