



Managing from a Dashboard

Worksheets

Exercise 1: Your Current Metrics

What are the top 3 performance measures that you are currently using?

How do you get the data?

Why you feel it is important?

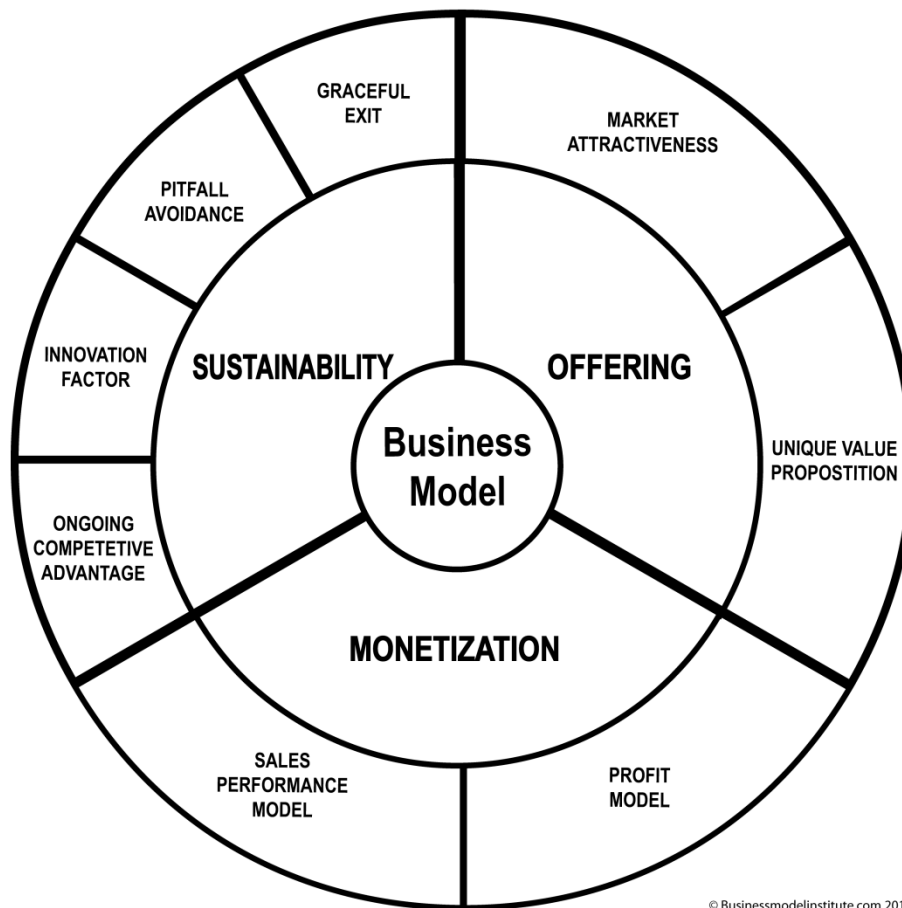
How many days old is the final data when you get it? How does this affect your management?

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Exercise 2: Key Business Drivers

Using the Business Model Wheel™, identify 3-5 key business drivers. Don't worry about figuring out the KPI, just identify what are the business drivers. Look at each area of the wheel for issues and opportunities with:

- ✓ Customer acquisition
- ✓ Pricing power/margin
- ✓ Customer retention
- ✓ Sales efficiency
- ✓ Operational efficiency/waste
- ✓ Innovation





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Exercise 3: Translating Business Drivers to KPIs

- ✓ Assign a benefit/\$ gain to improving each of the above areas or a cost of getting it wrong

- ✓ Choose the 3-5 most impactful items

- ✓ Figure out how to measure them. Don't be afraid to be creative. It's alright to have a complex metrics, but don't create a complex measurement system.



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✓ What is the current norm?

✓ What is your target value?

✓ Figure the best way to represent them (graph, list, chart, numeric value)



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Exercise 4: Personal Action Steps & Accountability

Write down what you will accomplish in the next month

Write down what you will accomplish in the next year

Why is it important?

What will it mean to the organization and you personally?



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Accountability Worksheet

What do you need to be held accountable for?

What will you DO to hold yourself accountable?

- Positive trap?
- Accountability partner?
 - From group
 - Group leader
 - No friends or family

Who will you enlist to help with your goal?

What is their role?

Feedback and follow-up

- This session will help my business
- This session will not impact my business

- I would like to discuss this topic in more detail with the group leader
- I could use some coaching/consulting on this topic, please contact me