THE KPI INSTITUTE

CERTIFIED
OKR PROFESSIONAL

CERTIFIED OKR
The KPI Institute
Objectives and Key
Results Framework
v 1.0 2018
PROFESSIONAL
C-OKR

2020 EDITIONS:
> 30-3 APRIL
> 8-12 JUNE

Getting **Objectives and Key Results** right by using a rigorous OKRs implementation and value generation framework

Key business benefits:

> Improve the strategy execution of your company by identifing the main short term objectives and key drivers of success;

> Obtain better business results by focusing on key streched objectives for each quarter;

> Increase employee accountability by enabling them to practice OKRs alignment and by fostering flexibility.

Over the last years, the team at The KPI Institute:

> Documented 8,000+ KPIs from 16 functional areas and 25 industries;

> Reviewed 1,000+ performance reports from 125 countries;

> Referenced 30,000+ resources as part of the documentation process.

Course overview

The three-day course trains participants in how to set and work with OKRs and offers them the opportunity to get certified on the ability to deploy and use OKRs in accordance with The KPI Institute's standards, developed through extensive research and practical knowledge in the field of Performance Management and Objective Setting.

🧑 Participants' profile

> **Professionals interested in measuring performance**

Professionals from different fields, such as finance, human resources, production, logistics, information technology and others, interested in objectives and key results, will acquire the competencies needed to measure the performance of their team, department or organization.

> **Top/middle/lower management professionals**

Executives or operational managers, regardless of their field of expertise, will gain the ability and knowledge to measure performance and maximize the value of using OKRs. The tools and resources offered as part of the Certified OKR Professional Training Course enable managers to apply the concepts learned within their organizations, immediately after the course.

> **Performance measurement experts**

For professionals like Data Analyst, Strategy Manager, Performance Management Officer or Performance Architect, it is important to develop competencies in measuring performance, especially in terms of OKR selection and data gathering. Usually, this particular audience already has a performance measurement system set in place and the Course offers them the opportunity to learn the best practices used in this field and identify how their current processes and approaches regarding OKRs can be improved.

➕ Benefits

> Support fast decision making by fostering constant feedback and communication;

> Access an innovative learning experience based on a 3 stage educational process;

> Obtain premium recognition as a Certified OKR

> Professional by completing a unique international learning program;

> Expand your business network by becoming a member of the international Certified OKR Professionals Community;

> Champion the use of a rigorous OKRs process within organizations.

➕ Learning objectives

> Differentiate between objectives, Key Results and Initiatives;

> Recognize different types of OKRs;

> Acknowledge the benefits of stretched goals;

> Understand OKR setting in different contexts;

> Apply best practice techniques to align OKRs across the organization;

> Comprehend the review and decision making process;

Agenda

Day 1 - 4h

Understanding OKRs

› What are OKRs?
› Stretched goals;
› Measurable Key Results;
› Action oriented initiatives.

OKRs and other PMS

› OKRs vs KPIS;
› OKRs and KPIs integration;
› OKRs vs MBO.

Day 2 - 4h

Performance management system based on OKRs

› Challenges in working with OKRs;
› OKRs lifecycle;
› The value added by OKRs;
› Governance.

OKRs typology

› Strategic vs tactical OKRs;
› Aspirational vs committed OKRs.

Day 3 - 4h

OKRs in different environments

› OKRs in general organizations;
› OKRs in innovative/ project based organizations;
› OKRs in governmental entities.

Setting OKRs

› OKRs setting process;
› Common mistakes in setting OKRs;
› OKRs setting in practice.

Day 4 - 4h

Aligning OKRs

› OKRs alignment approaches;
› OKRs alignment in different types of organizations;
› OKRs alignment in practice.

OKRs review

› OKRs review process;
› Types of OKRs review;
› OKRs review in practice.

Day 5 - 4h

Learning from OKRs

› Decision making process based on OKRs;
› Initiative management;
› OKRs refinement.

Change management culture

› Change management;
› Employee engagement;
› Gamification.

Certification Process
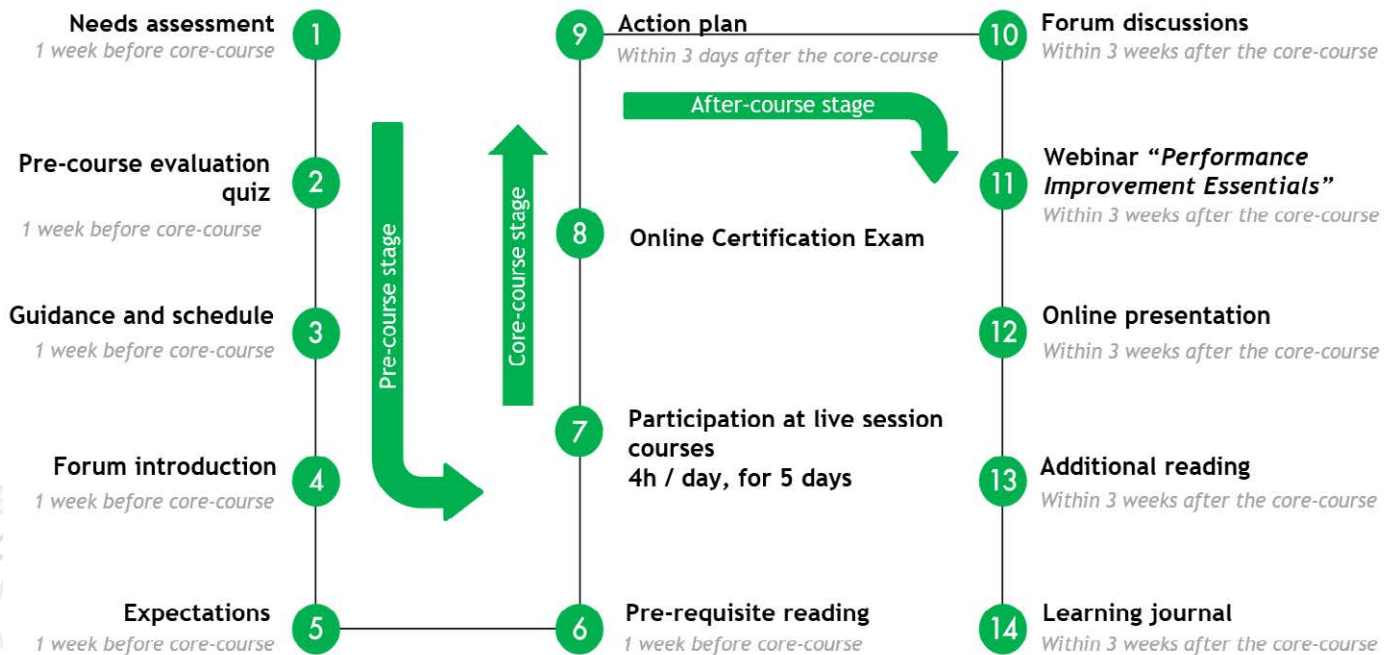
Step	Activity	Timing
1	**Needs assessment**	*1 week before core-course*
2	**Pre-course evaluation quiz**	*1 week before core-course*
3	**Guidance and schedule**	*1 week before core-course*
4	**Forum introduction**	*1 week before core-course*
5	**Expectations**	*1 week before core-course*

Pre-course stage

Core-course stage

Step	Activity	Timing
6	**Pre-requisite reading**	*1 week before core-course*
7	**Participation at live session courses**	4h / day, for 5 days
8	**Online Certification Exam**	
9	**Action plan**	*Within 3 days after the core-course*

After-course stage

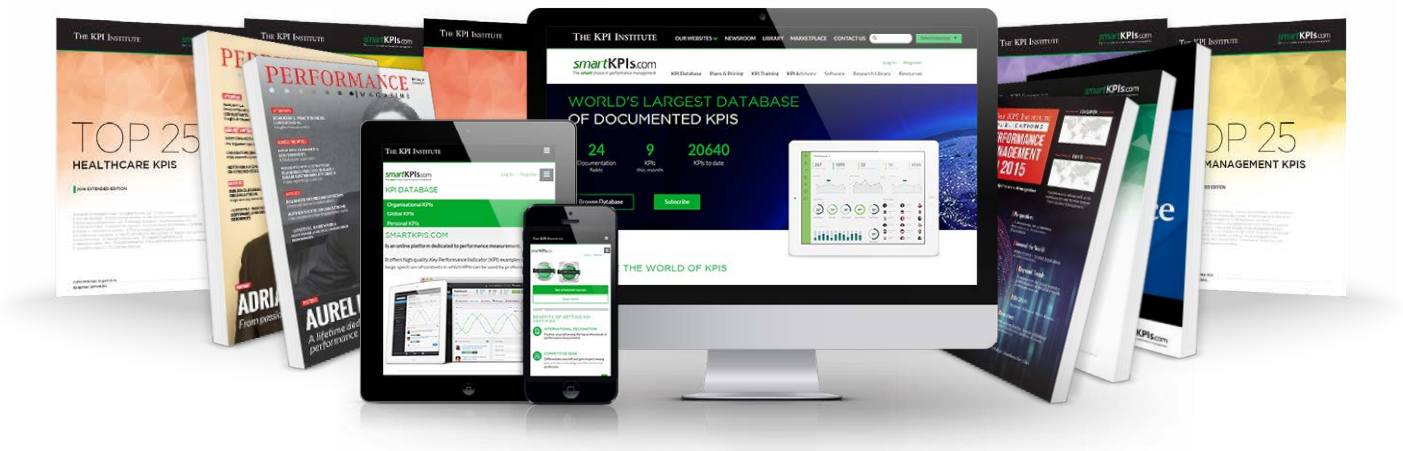| Step	Activity	Timing
10	**Forum discussions**	*Within 3 weeks after the core-course*
11	**Webinar "*Performance Improvement Essentials*"**	*Within 3 weeks after the core-course*
12	**Online presentation**	*Within 3 weeks after the core-course*
13	**Additional reading**	*Within 3 weeks after the core-course*
14	**Learning journal**	*Within 3 weeks after the core-course*

The certification process is finalized only when you complete all of the 3 stages of the learning experience. You will receive:

› Certificate of Completion (soft copy): after completing pre-course activities and passing the Certification Exam;
› Certificate of Attendance (soft copy): after participating at the 5 days of live session course;
› Certified Professional diploma (soft copy): after you have successfully completed all of the 3 stages of the learning experience.

Educational resources

Course materials

> Course slides;
> Course notes;
> Course quiz;
> The KPI Infographic.

The qualitative reports

> Performance Management in 2014 and 2015.

Catalogues

> KPI Documentation Forms;
> Negative Behaviors;
> Targets in Practice;
> Dashboards;
> Scorecards;
> Hardware;
> Graphs in Practice;
> Glossary of terms.

Videos

> 11 Videos dedicated to Performance Management.

Fact sheets

> KPI Definitions, KPIs in Practice;
> Terminology in Practice;
> KPI Selection Criteria;
> Performance Management Related Theories.

Webinars

> Free access to all Performance Management webinars series from 2014 to 2016.

Performance Management Toolkit

> **Templates:** Desired State of Evolution, Strategy Map, Performance Scorecard, Performance Dashboard, Performance Healthogram, Initiatives Portfolio, Performance Management System Architecture, Monthly Performance Management Process, Employee Scorecard;

> **Manuals:** Performance Scorecard Guide for Administrator, Performance Dashboard Guide for Administrator;

> **Publications:** KPIs for Human Resources Dashboard, KPIs for Human Resources Scorecard.

Premium subscription on smartKPIs.com

> Available for 6 months, providing access to 500 fully documented KPIs and over 20.000 KPIs enlisted and one research report from the Top 25 KPIs series.

Facilitator

Alina Miertoiu

Senior Consultant, The KPI Institute

Alina Miertoiu is a Senior Consultant within The KPI Institute, a research institute specialized in business performance improvement, considered today the global authority on Key Performance Indicators research and education. She is a Certified KPI Professional and Certified OKR Professional and has delivered over 1000 training and consulting hours last year.

Alina's recent research and consulting work in the field of strategy execution and performance improvement lead to the development of the training course and advisory services on OKRs, as well as to the establishment of the GCC Utilities Performance Program, dedicated to electricity utilities. Moreover, Alina's significant research projects focused on developing a benchmarking study in the utilities sector for Water, Gas and Electricity; and a National Development Indices Catalogue, containing 57 fully documented indices in a standardized format.

Alina is also frequently writing research-based articles for the Performance Magazine, The KPI Institute's online magazine dedicated to strategy and performance.

As an educator, Alina delivered the Certified KPI Professional and Practitioner, Certified Benchmarking Professional, Certified Performance Management Professional and Certified OKR Professional, both as an in-house and open course in Europe, Middle East, Asia and Africa and several webinars on the topic of performance management and benchmarking.

As a consultant, one of Alina's significant projects focused on the implemenation of an OKR system in a governmental entity from Middle East. Moreover, she worked on developing and implementing customized performance management systems based on KPIs for companies from different sectors, such as government, manufacturing, IT, financial and asset management.

Course Fees

Language	Date	Hours/day	Start TIME ME	Start TIME SEA	Standard Fee	Special Fee
English	> 30 - 03 April	4	09:00 GST	13:00 GMT +8	~~USD $ 1,500~~	USD $ 1,250
English	> 08 - 12 June	4	09:00 GST	13:00 GMT +8	~~USD $ 1,500~~	USD $ 1,250

Join as a Group

Customized Live Online Group Training Programs

The KPI Institute is offering Customized Live Online Group Training Programs that provide a perfect blend of research, best-practice and best-in-class instructional design.

Leveraging on our extensive research work, our highly skilled faculty, our expertise in providing customized learning solutions, together with next-generation online technology, our Group learning programs are unique, accessible anytime, anywhere learning experiences that deliver results for employees and the organization.

This fully customized training solution supports organizations of all sizes to provide their employees with development opportunities in an efficient, impactful and cost-effective way.

Benefits of customized live online sessions

▶ Flexibility and convenience

Participants can learn from anywhere and it can be scheduled in consecutive days throughout one week or selected days over 2 or more weeks. Participants can access learning materials from anywhere, anytime convenient for the group.

▶ Customized course content

Course content, case studies and exercises will be customized based on the group's industry or selected functional areas, as well as by assessing current needs and competency development requirements.

▶ Business continuity

Continuity of work with daily sessions scheduled for a maximum 4 hours to ensure both information assimilation efficiency and work-related task completion.

▶ Virtual collaborative learning

Facilitated inter-company learning is enabled, leading to Virtual Teams Cooperation and Communication, with the help of specialized E-Learning technology.

▶ Cost effectiveness

An estimated of up to 40% savings compared with traditional face-to-face in-house solutions, due to logistical burdens being waved from both customer and contractor.

Customized Live Online Group Courses	Online Live Format	Content details
Certification	5 Days - 4h/Day	Fully customized certification course
Masterclass	4 Days - 4h/Day	75% of the certification course content, selected based on group requirements
Essentials	2 Days - 4h/Day	50% of the certification course content, selected based on group requirements
Awareness Session	4 h	Selected 1 or 2 sessions from a certification content, depending on the length

Group sizes range from a minimum of 10, to a maximum of 25 participants.

Should you be interested in scheduling a live online Group training course, email us at office@kpiinstitute.org or contact one of the region representatives.

Online Coaching (up to 4h)

▸ One of our consultants and facilitators will be dedicated to help customers individually achieve their business objectives, evaluate current systems or tools and provide feedback on how to improve current strategy, performance measurement and management practices.

▸ Our dedicated coaches are industry, capability and functional area experts who guide the participants in addressing their business needs and requirements.

▸ They will work closely with attendees and help them address their individual areas of improvement.

▸ We can assist in providing coaching on all the topics that we cover through our certification programs detailed in this brochure.

*Live coaching will be provided via conference call. The session scheduling will be established either via email/conference call for all delegates or individually between each participant and the facilitator.
**Hours to be accessed when required by scheduling as per customer preference and facilitator availability.

Get in touch with us for a customized quotation

Registration

✎ 3 ways to register

Online
marketplace.kpiinstitute.org

Direct contact
Call us and we will assist you through the registration process.

Contact Middle East
Teodora Gorski
Managing Director MENA
E: teo.gorski@kpiinstitute.com
M: +971 55 787 6427

Contact Rest of the World
Alexandru Muntean
Head of Customer Engagement
E: alex.muntean@kpiinstitute.com
M: +40 747 060 997

Registration form
Email us with your registration details

▣ Payment

Credit card
Pay by credit card using the online facility.

Bank transfer

1. Send an email containing your contact details and registration request;
2. An email confirmation containing the tax invoice and bank account details will be sent to you;
3. Proceed with the attendance fee payment by bank transfer;
4. Send through email the proof of the payment transaction completion;
5. A tax receipt together with the registration confirmation will be sent to you via email (after the attendance fee payment is confirmed).

Kindly ensure that your payments reflect the Total Amount of the invoice that will be presented to you. It is your responsibility to cover all bank fees due to Telegraphic / Wire transfer.

Registration form

By filling your contact data, you agree to receive further information about our events. Your privacy is very important to us. We will not sell, rent or share your personal information under any circumstances.

Participant details:

Mr. ☐   Mrs. ☐

....
First name   Last name

....
Job title

....
Email   Phone

....
Organization

....
Department   Date of training course

....
Training course

....
City   Country

Registration cancellation procedure

Any withdrawals have to be announced at least two weeks before the beginning of the course, through fax or e-mail. In this situation, the attendance fee will be refunded, less $400 retained for administrative expenditure. The attendance fee will not be refunded if the withdrawal from the course takes place less than 2 weeks before its start date. If you find yourself in the impossibility to attend the course after the registration process is already completed you may delegate another person to attend the course in your place without any further fees charged. If you have confirmed and made the attendance fee payment but you didn't attend the course, the course attendance fee will not be refunded. If you attend the course only partially (one day or a limited number of sessions), you will not benefit from any attendance fee reduction or refund.

Term of Agreement

If there are no other standing agreements, this form represents a valid contract between the parties.

I agree to the above terms and conditions.

....
Signed   Date

Company stamp ....

The Customer acknowledges and agrees that all materials provided by The KPI Institute, including but not limited to the live presentations, any audio-visual presentations, and the handout materials distributed pre, during and after the training course, shall at all times remain the sole and exclusive property of The KPI Institute. They cannot be made public, and can only used for the purpose of the individual course participant's benefit. In no event shall the Customer use the live presentations, any audio-visual presentations, and/or the handout materials for any other purpose, including but not limited to the offering of any course, training or seminar that in any manner competes with the course or any portion thereof. This provision shall survive the termination or expiration of this Agreement.

THE KPI INSTITUTE

Performance

Strategy Transformation

Innovation Systems People

Sustainability Productivity Capability

Measurement Benchmarking Analytics

Audit Evaluation Appraisal

Excellence Competence

Happiness

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