[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

KPI Register

[Company name] This register lists every key performance indicator (KPI) that [Company name] tracks, with one row per KPI. It gives each KPI a clear definition, an owner, a target and a review date, so anyone can see at a glance what is being measured, who is responsible for it, and whether it is on track. Keep this register with the matching Excel workbook, KPI Dashboard, which holds the figures and works out the variance and the red, amber and green rating for each KPI automatically. Use this Word register when you need a printable record to share or file, and use the workbook when you need to work with the numbers.

Register details: Register owner: _____ Review period: _____ Last review: _____

Next review: _____ Version: _____

1. How to define and review KPIs A KPI is a single measure that shows whether an important part of the business is doing what it should. A good KPI is easy to understand, easy to count, and tied to a target and a date. Follow the steps below when you add a KPI to this register. **1. Choose a small number of KPIs.** Pick the measures that matter most to [Company name], usually no more than ten. A long list is hard to review and easy to ignore.

2. Define each KPI in one sentence. Write the definition so that two people counting it would get the same answer. Say what is counted, over what period, and where the figure comes from.

3. Set a target and a direction. Record the target value and whether a higher figure or a lower figure is better. A target with no direction cannot be judged.

4. Give every KPI one owner. The owner collects the figure, checks it against the target, and reports on it at each review. A KPI with no owner is nobody's job.

5. Review on a fixed cycle. Check each KPI at the frequency shown in the register. At each review, record the review date, update the status, and note what action is needed when a KPI is off track.

6. Act on red, and retire stale KPIs. When a KPI stays off track, agree an action and a date, and record it in the Notes column. When a KPI no longer tells you anything useful, remove it from the register rather than keeping it out of habit.

2. KPI register Add one row per KPI. Add or remove rows to fit your needs. The Status column uses On track, At risk or Off track. Review this register at every review meeting. When a KPI is off track, agree the action, the owner and the date, and record it in the Notes column before the next review.

KPI	Definition	Owner	Unit	Target	Frequency	Review date	Status	Notes
[KPI 1]	[Definition of KPI 1]	[Owner 1]	[Unit 1]	[Target value 1]	[Monthly / Quarterly / Annually]	[Next review date 1]	[On track / At risk / Off track]	[Notes 1]
[KPI 2]	[Definition of KPI 2]	[Owner 2]	[Unit 2]	[Target value 2]	[Monthly / Quarterly / Annually]	[Next review date 2]	[On track / At risk / Off track]	[Notes 2]
[KPI 3]	[Definition of KPI 3]	[Owner 3]	[Unit 3]	[Target value 3]	[Monthly / Quarterly / Annually]	[Next review date 3]	[On track / At risk / Off track]	[Notes 3]
[KPI 4]	[Definition of KPI 4]	[Owner 4]	[Unit 4]	[Target value 4]	[Monthly / Quarterly / Annually]	[Next review date 4]	[On track / At risk / Off track]	[Notes 4]
[KPI 5]	[Definition of KPI 5]	[Owner 5]	[Unit 5]	[Target value 5]	[Monthly / Quarterly / Annually]	[Next review date 5]	[On track / At risk / Off track]	[Notes 5]
[KPI 6]	[Definition of KPI 6]	[Owner 6]	[Unit 6]	[Target value 6]	[Monthly / Quarterly / Annually]	[Next review date 6]	[On track / At risk / Off track]	[Notes 6]
[KPI 7]	[Definition of KPI 7]	[Owner 7]	[Unit 7]	[Target value 7]	[Monthly / Quarterly / Annually]	[Next review date 7]	[On track / At risk / Off track]	[Notes 7]
[KPI 8]	[Definition of KPI 8]	[Owner 8]	[Unit 8]	[Target value 8]	[Monthly / Quarterly / Annually]	[Next review date 8]	[On track / At risk / Off track]	[Notes 8]

Sign-off: Prepared by: _____ Checked by: _____ Date: _____