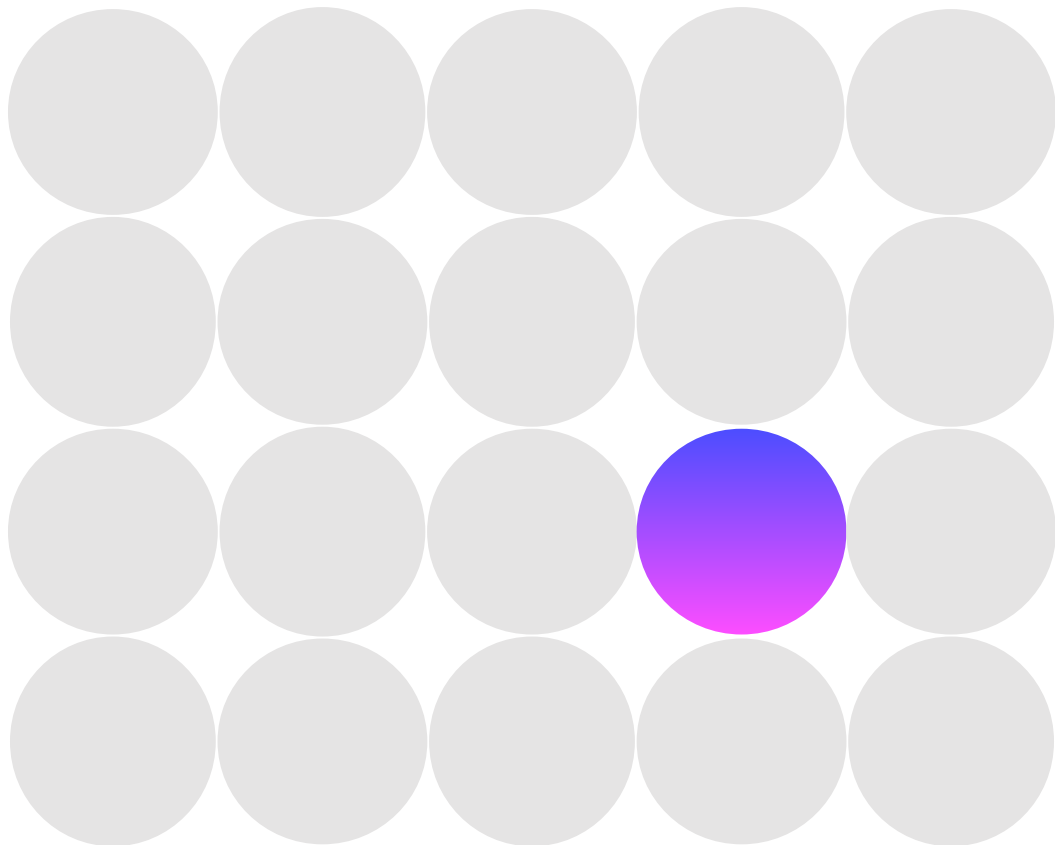


THE KPI INSTITUTE

systems



SERVICE
CATALOG



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OUR BRAND AND HISTORY



MODELING BUSINESSES ARCHITECTURES

At Systaems, we assist our customers by translating their strategy to operational terms, making it everyone`s everyday job, and mobilizing change through commitment and perseverance, leading them towards becoming strategy-oriented organizations.

We have been writing our chapters in the great book of performance management for almost two decades in our parent company, The KPI Institute, ensuring that our clients maximize their value and accelerate their growth. Our philosophy is based on a long-term, transformational approach; hence, through each consulting project, we aim to develop a relevant learning experience that will be transformed into practice through direct stakeholder engagement. This will ultimately consolidate a Strategy and Performance Management System fit for each unique organizational environment.

21+
YEARS OF PROFESSIONAL EXPERIENCE

100+
GLOBAL PARTNER ORGANIZATION

400+
SOLUTIONS IMPLEMENTED

500+
RESEARCH BACKED PUBLICATIONS

CONSULTING APPROACH

HOLISM

Strongly motivated by the principle of treating the cause rather than the effect, we apply the systemic approach when delivering our services for this reason. The architectures we developed produce the desired change at the system level, linking individual efforts and accomplishments to business unit objectives under the auspices of the shared performance model.

STRATEGIC THINKING

At The KPI Institute, we consider strategy as the art of turning the organization`s aspirations into reality. Our services meet the purpose of having an organization`s desired state trickled down into strategic objectives that will lead toward sustainably achieving the vision. We accomplish this by clarifying these objectives and mobilizing and focusing on the right resources accordingly.

TRANSFORMATIONAL PERFORMANCE

Championing transparency and accountability, the paradigm proposed by The KPI Institute to measure performance, is dedicated to harvesting openness, trust, honesty, and collaboration within the organization or between employees. Such an approach further consolidates the focus on customers and flexibility, as socializing the measurement plays a strategic role in maximizing the results, considering that early measurement is DNA hard-wired.

DECISION-MAKING INSIGHT

Taking premature action is often labeled the «deadly disease» of management. That`s why our services focus on providing the necessary knowledge based on proper context interpretation, augmented by environmental research and benchmarking.

PERFORMANCE CULTURE

Our approach transforms performance from a process-related concept to an authentic social movement. Our services are meant to raise awareness over having the day-to-day rhythm governed by a performance-oriented perspective, with purposeful work and opportunities for growth.

EXECUTIVE SUMMARY

We guide our clients through their journey to performance excellence, adding value to their organization from the moment we get to know each other to when we analyze what we can build together and conclude our ideas through customized proposals.

If there is something we can call our recipe for success, it is all about constructivism, flexibility, and friendliness, as one's success is the other's achievement and vice versa. We build on your experience, are adaptable to your internal context, and showcase interpersonality in building a step-by-step roadmap for achieving your mission.

OUR SERVICES ARE

STRATEGY AND BUSINESS PLANNING

Organizational and Environment Analysis | Corporate Identity | Objective Setting - Corporate OKRs | Objective Setting - Strategy Map | KPI Selection for Objectives | Initiative Mapping | Strategy Alignment - Balanced Scorecard or OKRs | Strategy Review | Strategy Communication

PERFORMANCE MEASUREMENT

KPI Documentation | Target Setting | KPI or OKRs Selection/Review in operational contexts | Healthogram | Sustainogram

STRATEGY EXECUTION

Strategic/Performance Analysis | Reporting | Business performance review meeting/decision making | Initiative portfolio management | Strategy/system recalibration | Performance Management Culture and Buy-in

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Project Performance | Process Performance | Board Performance | Innovation Performance | Supplier Performance

EMPLOYEE PERFORMANCE MANAGEMENT

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AUDIT

Strategy and Performance Management System Audit | Capability Development Audit | Governance Audit

ENABLERS

Performance Management/Strategy Office Setup | Customized Coaching Program | PM system components review | Project Management Office Setup | Performance Management Software Implementation

DATA SERVICES

Data Gathering | Data Quality | Data Visualization | Data Analysis | Data Management

STRATEGY AND BUSINESS PLANNING

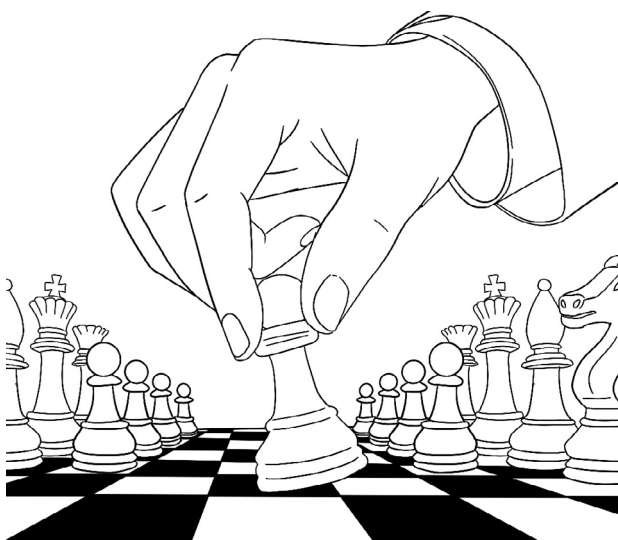
SERVICES

- > Organizational and Environment Analysis
- > Corporate Identity
- > Objective Setting - Corporate OKRs
- > Objective Setting - Strategy Map
- > KPI Selection for Objectives
- > Initiative Mapping
- > Strategy Alignment - the Balanced Scorecard or OKR
- > Strategy Review
- > Strategy Communication

LEARN MORE



STRATEGY WITHOUT PLANNING IS EXERTION. PLANNING WITHOUT STRATEGY IS FAILURE.



Strategy and Business Planning encompasses the full-fledged set of services related to formulating, implementing, and monitoring a coherent plan that aims to create a sustainable competitive advantage for an organization.

The train of thought behind the clustered services debuts as follows:

01

Validating the corporate identity

02

Setting the foundations for the strategic planning process

03

Choosing the appropriate competitive strategic paradigm

04

Conducting internal and external environment assessment

05

Piloting a growth strategy

06

Setting the SMART strategic objectives

07

Cascading the programmed démarche to the strategic unit or departmental level.

As a direct result of applying this cluster, the outputs for the client organization consist of determining the organizational vision, mission, and values, formulating the strategic goals and objectives, and establishing a suitable performance management system. All of this would follow the reinforced governance architectures.

STRATEGY ALIGNMENT - THE BALANCED SCORECARD OR OKRS

In terms of Objective Setting and Strategy Alignment, several approaches can be followed:

- > The traditional approach, generally represented by the Balanced Scorecard (BSC);
- > The agile approach, portrayed by the Objectives and Key Results (OKRs) system;
- > The hybrid approach, integrating both BSC and OKRs.

THE BALANCED SCORECARD (BSC)



AN ORGANIZATIONAL TRIUMPH IN 4 ACTS

The Balanced Scorecard (BSC) is one of the Management Systems implemented under the umbrella of Strategy and Business Planning. The BSC can lead to long-term performance improvement due to its agility in building a consensus among financial and non-financial objectives and its 4-helix perspectives:

- > Financial
- > Customer
- > Internal Processes
- > People, Learning, and Growth

The Balanced Scorecard supports companies and institutions in clarifying and understanding their strategy and organizational alignment (i.e., strategic, operational, and individual). It also defines the performance measurement and improvement framework, considering stimulating engagement from individual involvement toward converting the corporate vision into reality.



REWARDING EFFORT AND PROMOTING IMPROVEMENT

OBJECTIVES AND KEY RESULTS (OKRS)

Objectives and Key Results (OKRs) is a simplified and agile goal-management framework used to connect the destination with the operational reality of the organization. By focusing on aspirational and challenging Objectives measured through value-oriented, bottom-up aligned Key Results, OKRs capitalize on employee engagement and innovative solutions.

We create a solid knowledge foundation through awareness sessions, educational materials, and round table discussions. To ensure the organization is culturally prepared for OKRs, we follow through with communication, involvement, and gamification.

Throughout the implementation, the emphasis is on correct OKRs being set and flawless alignment between different organizational levels. Moreover, we focus on integrating OKRs with other performance management systems organizations use. We also emphasize the importance of OKR refinement, a process that we ensure takes place during each review meeting to nurture constant OKR evolution.

THE HYBRID APPROACH

The hybrid approach, as unorthodox as it might sound, is preferred by organizations that wish to benefit from the stability brought by the Balanced Scorecard and the agility of OKRs. The two possible integration options between the two are:

1. The BSC is used to monitor the performance of business-as-usual operations, while 1 or 2 OKRs are added to capture the aspirational objectives - the ones that are based on innovative ideas;
2. The BSC monitors performance at higher organizational levels (N or N-1). At the same time, OKRs are used at operational levels to achieve higher-level objectives through a bottom-up alignment and out-of-the-box solutions, focusing on contribution and impact.

PERFORMANCE MEASUREMENT

SERVICES

- > KPI Documentation
- > Target Setting
- > KPI/OKRs Selection or Review in operational contexts
- > Healthogram
- > Sustainogram

LEARN MORE



ONE ACCURATE MEASUREMENT IS WORTH A THOUSAND EXPERT OPINIONS. – Grace Hopper

Performance is linked to two main ideas: measuring and managing performance. These concepts work best when used one after the other. To effectively manage performance, having a measurement system is crucial. We promote active management and decision-making based on performance data. Measurement focuses on defining, describing, tracking, and visually representing performance results.

KPI documentation gathers all relevant information about a Key Performance Indicator (KPI) using a standardized template called the KPI Documentation Form. It forms the foundation for a thorough Performance Measurement Framework by providing details about the KPIs, such as their description, targets, purpose, limitations, and accountability. Using KPI documentation forms helps clarify what, why, and how a KPI is measured. It also emphasizes accountability by assigning data owners and custodians for each KPI. These forms ensure a standardized approach to working with KPIs and contribute to creating an organizational KPI catalogue.

Target Setting is the process of setting targets for KPIs or Key Results. Steps include analyzing records, benchmarking, consulting external resources, a workshop, and validating targets. This

process sets performance levels to encourage positive employee behavior.

KPIs and OKRs can be used in multiple contexts within the organization, either as a part of an Integrated Performance Management System or isolated, such as KPIs or OKRs for processes, projects, and innovation, amongst others. In this context, KPIs/OKRs Selection or Review in operational contexts is considered for Processes and Capabilities.

The Healthogram, introduced by The KPI Institute, measures the «health» of each entity at the organizational level when implementing performance management systems. It helps identify the root causes of underperformance and tracks essential aspects of an organizational entity's capabilities and strategy.

The Sustainogram outlines the status of the KPIs from the Sustainability Report in terms of all aspects that relate to conducting a business, from economic to social and environmental areas. Its components are the following:

- > Sustainability areas - major directions of interest in sustainability: economic, social, environmental;
- > Clusters of main sustainability sub-areas - each area will be split into more sub-areas. For example, under environmental, there can be 2 other sub-areas, such as: materials and energy;
- > Disclosures - parts or articles from the Sustainability Report;
- > KPIs - indicators to measure the achievement of the disclosures.



STRATEGY EXECUTION

SERVICES

- > Strategic or Performance Analysis Reporting
- > Business performance review meeting/decision making
- > Initiative portfolio management
- > Strategy or system recalibration
- > Performance Management Culture and Buy-in

LEARN MORE



Strategy Execution is a dedicated cluster focused on implementing the strategic plan. It offers comprehensive services to address the challenges of bridging the gap between theory and practice, ensuring proper governance through stakeholder engagement and education. These services aim to enhance organizational capacities, optimize resource allocation, and provide operational tasks aligned with the overall plan, with the support of effective leadership. Recognizing that many strategists lack the necessary tools and skills for strategic initiatives, the cluster develops

customized instruments and guides stakeholders on successful management and achieving expected returns on investment.

The cluster focuses on aligning strategy planning with execution to determine the effectiveness of strategic steering within an organization. The services also assess an entity's capabilities to ensure they have the necessary resources for implementing their strategy while maintaining a balance between effectiveness and efficiency. Additionally, the cluster continuously improves processes to strengthen the organization's competitive advantage.

Clustered services are deployed through intensive induction sessions to optimize individual and teamwork in strategy execution. Decision-making based on collected data is emphasized, and technical assistance is enriched through experiential learning. Holism is promoted to ensure joint contributions and decisions are reflected in a complex framework at all organizational levels.



A GOOD STRATEGY AND A SMART EXECUTION GO HAND IN HAND.



OPERATIONAL PERFORMANCE MANAGEMENT IN CONTEXT

SERVICES

- > Project Performance
- > Process Performance
- > Board Performance
- > Innovation Performance
- > Supplier Performance

LEARN MORE



THE SUCCESS OF YOUR OPERATIONS DEPENDS ON THE QUALITY OF YOUR MANAGEMENT PROCESSES.

The Operational Performance Management in Context cluster can help organizations achieve their desired level of development by providing support for day-to-day operations. This includes diagnosing individual operational components such as projects, processes, board, innovation, and suppliers from a performance management perspective.

With a systemic approach, these services dive deep into how each component performs, offering customized solutions for the issues and targeting the root cause straight at the root level.

Project Performance has the primary role of driving the actions toward concluding the initiated project. Regularly monitoring the status is crucial in ensuring the project is completed on time and according to the specifications.

Process Performance is the jack-of-all-trades for identifying the bottlenecks and the way to solve them. With the critical processes identified and their activities mapped, the organizations can establish KPIs and track the status of each activity.

Board Performance helps organizations convert expertise into a strategic asset, ensuring the right mix of skills and knowledge. This way, leadership sets an example, gaining stakeholders' support and fostering a performance culture.

Innovation Performance boosts how your organization fosters, gathers, and grows innovative ideas, simplifying the procedures and continually building the competitive edge. Encouraging a creativity-focused culture expands an organization's creative capacity and surpasses a basic problem-solving method.

Supplier Performance is a service that assesses the quality, delivery, cost, customer service, and risk of the supply chain. It ensures that an organization has the necessary resources on time. Analyzing supplier performance against service-level agreements and using key performance indicators (KPIs) prevents resource shortages, expensive delays, and quality issues.



EMPLOYEE PERFORMANCE MANAGEMENT

SERVICES

- > Employee Performance Management System Design
- > Organizational Competency Models
- > Customized Employee Performance Review Form (Automated)
- > Performance Bonus Schemes

LEARN MORE



YOUR EMPLOYEES DON'T NEED TO BE THE BEST IN THE WORLD. THEY JUST NEED TO BE THEIR BEST VERSION OF THEMSELVES.

Employee Performance Management is not a one-size-fits-all process. A new philosophy and practices have replaced the old focus solely on employee performance appraisal and ratings. EPM now involves critical actions and decisions to align employee contributions with organizational goals, shape culture, and strengthen management capability.

Employee Performance Management System Design involves developing the system architecture through strategic decision-making, selecting appropriate tools and methods, and balancing short-term outcomes with long-term capacity

building. These decisions are made collaboratively, with guided workshops and collective intelligence.

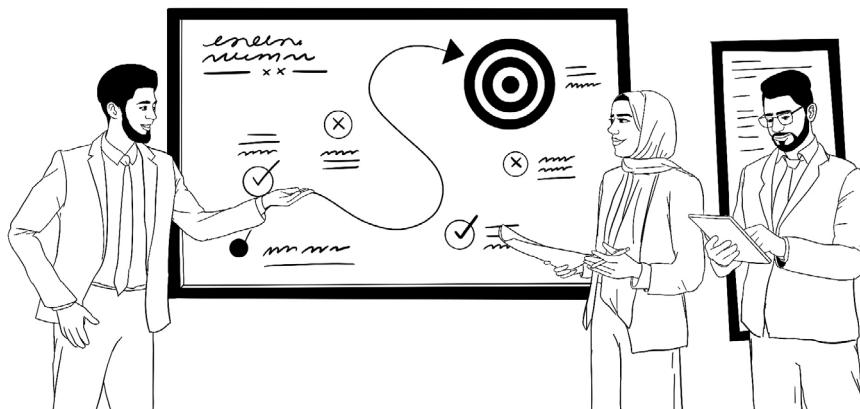
Performance needs to be defined before starting to measure it! There is a «What» and a «How» in any performance definition, and we can help you tailor them to your strategic requirements and priorities, desired culture, and identity.

A well-documented framework for designing a strategic EPM System includes options that align result expectations with strategic requirements for each organizational level or critical role. Our solutions for articulating expectations at the process level will shape work practices, encouraging desired company culture and values.

Our experience in designing Company Competency Models ensures that the included competencies, descriptions, and proficiency levels aid both managers and employees.

To build and implement an EPM Cycle, you need the correct elements for your desired focus. We'll help you design the tools for a successful implementation: procedures, manager and employee guides, EPM forms, and Performance Improvement plans.

We can assist in integrating the EPM System with other HR systems, creating performance-based bonus plans, developing learning and career plans, and linking with succession planning. We'll also help select metrics, segment data, and produce HR analytics for workforce performance insights.



AUDIT

SERVICES

- > Strategy and Performance Management System Audit
- > Capability Development Audit
- > Governance Audit

LEARN MORE



ASSESSING AN ORGANIZATION'S MATURITY LEVEL.



The Audit cluster reunites services dedicated to assessing an organization's maturity level, evaluating the entity's overall Performance Management System, identifying potential gaps, and providing solutions for the detected issues.

We use 3 analysis dimensions to determine the organizational maturity level. We start with document analysis and then incorporate insights from surveys and interviews with stakeholders. This allows us to combine quantitative and qualitative methods to assess both objective and subjective internal matters within the organization.

The KPI Institute's services add value by mapping the transformation process, shaping a clear strategic identity, and operationalizing the proper framework and tools to strengthen internal capabilities. Our auditing services help align goals with daily activities, clarify strategy, integrate KPI-based data into decision-making, and assign ownership of performance indicators. After an auditing cycle, organizations will integrate performance management practices at both strategic and operational levels, linking KPIs to goals and driving operational performance.

The KPI Institute's expertise led to organizations creating a Performance Management Manual, Strategy Office, and bonus policy. Auditing services increase accountability and promote an efficiency and results-oriented culture. Long-term benefits include improved customer experience, brand, quality, productivity, and trustworthiness.

The KPI Institute's Strategy and Performance Management Audit Framework includes 5 capabilities: Strategic Planning, Performance Measurement, Performance Management, Performance Culture, and Employee Performance Management. The intervention mechanism of the clustered services is based on 3 perspectives: Evidence-based Assessment, Perception-based Assessment, and Interview-based Assessment.

ENABLERS

SERVICES

- > Performance Management or Strategy Office Setup
- > Customized Coaching Program
- > PM system components review
- > Project Management Office Setup
- > Performance Management Software Implementation

LEARN MORE



Enablers is a service cluster that enhances organizational capabilities, driving performance and success in Performance Management, Strategy Management, Project Management, and Coaching. A mixed intervention mechanism supports successful implementation by bringing together implementers and enablers.

The cluster intervenes in organizations by creating internal structures for managing performance

and projects, evaluating the Performance Management System, and diagnosing any issues. These services help transform organizations through various approaches.

The cluster is a model incubator that supports improvement areas, explicitly creating the right internal environment for implementing Performance Management services in an organization. This is achieved through enablement plans and training. The enabler services also play a significant role in instilling an innovative mindset and identifying and nurturing opportunities for crucial areas of improvement. In the face of pressure for organizational growth and development, the enabling services act as the ultimate catalysts for change.

The implementation mechanism focuses on building the organizational infrastructure to manage the functionalities of a Performance Management Architecture and assess the performance of different components. It also emphasizes the importance of inner cohesion to ensure that all parts work together to deliver performance. These services support acquiring best practices, portfolios, programs, and projects.



ENABLERS HELP AN ORGANIZATION SURPASS ITS LIMITATIONS AND GROW FURTHER BEYOND.



DATA SERVICES

SERVICES

- > Data Gathering
- > Data Quality
- > Data Visualization
- > Data Analysis
- > Data Management

[LEARN MORE](#)



Data Services ensures proper data management, focusing on gathering, quality, and analysis, with consideration to governance. It distinguishes between KPI Ownership, Data Custody, and Report Generation. The cluster is the intelligence source for decision-making, converting data into knowledge and insight. Knowledge management catalyzes the process of turning data into a competitive advantage. Information is the ultimate instrument for organizational excellence.

The intervention mechanism, developed jointly or as independent services, aims



WHAT SEPARATES GOOD ORGANIZATIONS FROM EXCELLENT ORGANIZATIONS IS THEIR ABILITY TO TRACK DATA.

to enforce 6 essential conditions for how organizations handle their data: timeliness, completeness, consistency, uniqueness, conformity, and accuracy. Standardization ensures a clear flow of information, from gathering to archiving, so that stakeholders can make well-informed decisions based on thorough analysis. Additionally, clustered services provide knowledge transfer on data literacy, extrapolating sources, and operational excellence advice through communities of practice.

The steering mechanism balances single and double-loop learning to respond to issues and question initial premises, creating a comprehensive approach to problem causes. This approach enhances an organization's understanding of the market and business, leading to better daily decisions and strategy achievement. The data custodian gathers figures and safeguards valuable information for strategic decision-making.

Clustered services are crucial for assessing the feasibility of projects and programs and identifying reasons for underperformance in implemented initiatives. At a macrostructural level, Data Services enable organizations to analyze root causes and correlations between variables. From a broader perspective, clusters help organizations proactively respond to internal and external conditions by converting data into valuable insights.



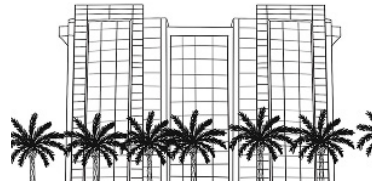
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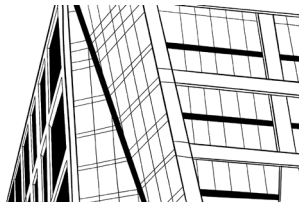
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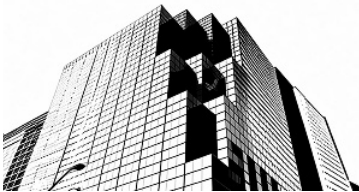
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