

User Guide

KPI&Goal keeper

Basic steps in demo example

- Step 1. Create a new Goal
- Step 2. Create new KPI`s to measure the Goal
- Step 3. Make an individual employee KPI`s map
- Step 4. Analyze the results in a dashboard

Step 1. Create a new Goal

- 1.1. Enter the "Masterdata" menu section.
- 1.2. Go to the "List of goals" tab.
- 1.3. Click «Create new Goal».
- 1.4. In the upper free line, add the name of the new goal "Increase profitability", fill in the required attributes.
- 1.5. Press the "√" (save) button, your goal has been added to the goal directory.

The screenshot shows the 'Goals and KPI management' interface. The 'List of goals' tab is active. A 'Create new Goal' button is visible. A table lists existing goals, and a new goal 'Increase profitability' is being added in the top row. The 'Save' button is highlighted with a checkmark.

Goal ID	Goal Description	Projection	Start year	End year	Planning step	Unit	
	Increase profitability	Finance	2023	2025	Quarter	%	✓
Goal-061	Staff development and retention	Personnel	2022	2025	Annual	%	✕ /
Goal-016	Increase employee engagement	Personnel	2022	2025	Quarter	%	✕ /
Goal-015	Optimize storage processes	Processes	2022	2025	Month	%	✕ /
Goal-014	Optimize logistics processes	Processes	2022	2025	Month	%	✕ /
Goal-013	Optimize manufacturing processes	Processes	2022	2025	Month	%	✕ /
Goal-012	Strengthen the company brand	Clients	2022	2023	Half year	%	✕ /
Goal-011	Increase the number of clients	Clients	2022	2025	Quarter	%	✕ /

Step 2. Create new KPIs to measure the Goal

- 2.1. Enter the "Masterdata" menu section.
- 2.2. Go to the "List of KPIs" tab.
- 2.3. Click «Create new KPI for goal».
- 2.4. In the "Selected goal", find the goal you created in Step 1 " Increase profitability ".
- 2.5. In the upper free line, add the name of the KPI, which will be the goal metric, fill in the required attributes.
- 2.6. Press the "√" and Save button. The KPI is created and linked to the goal.
- Similarly, create other KPIs for this Goal.
- 2.7. Deselect the filter in the "Selected goal " list by clicking the "x" button to view all KPIs.

The screenshot displays the 'Goals and KPI management' interface. The sidebar on the left contains a 'Masterdata' icon (1). The top navigation bar includes 'List of KPIs' (2). The main area features a 'Create new KPI for goal' button (3) and a 'Selected goal' dropdown menu (4) currently set to 'Increase profitability'. A search input field (6) is located to the right of the dropdown. Below these elements is a table with the following structure:

KPI ID	KPI Description	Unit	Type
	Profit growth 5% QoQ	%	+
KPI-090	Investment income growth 10% QoQ	%	+

The first row of the table is highlighted with a red box (5). A checkmark icon (6) is visible in the bottom right corner of the table area.

Step 3. Make an individual employee KPI map

2.1. Enter the "KPI " menu section.

2.2. Select an employee and a year from the lists.

2.3. On the period scale, select the required period for which an individual KPI map will be created (month, quarter, half year or year).

2.4. To create a map, click "Create KPI card".

2.5. Add a new row by clicking on the "Add new KPI record" button.

2.6. Fill in the line of the KPI map: select the goal, select the KPI, enter the KPI weight, fill in the value of the plan and the fact.

Similarly, add a new row of Goals and KPIs.

It is recommended to add from 2 to 5 KPIs to the map.

The sum of the weights must not exceed 100%.

2.7. Click the "Save" and "Exit" button, the KPI map has been created.

Similarly, create KPI maps for another period.

KPI&Goal keeper LOGO

1 **Personal employee`s KPI card**

John Smith **2** 2023 **3**

January February March April May June July August September October November **December** I II III IV I HY II HY Year

4 Create KPI card

Goal	KPI	Unit	Type	Weight	Plan	Actual	Rate	Weighted rate
Total				100				98,57
Improve service quality	Execution of service standards, at least 8 out of 10	score	+	25	8	7	87,5	21,88
Optimize storage processes	Inventory turnover, 20 days	days	-	50	20	25	80	40
Revenue Growth	Sales budget execution	\$	+	25	1000	1200	120	30

7 **Personal employee`s KPI card**

John Smith I Quarter 2024

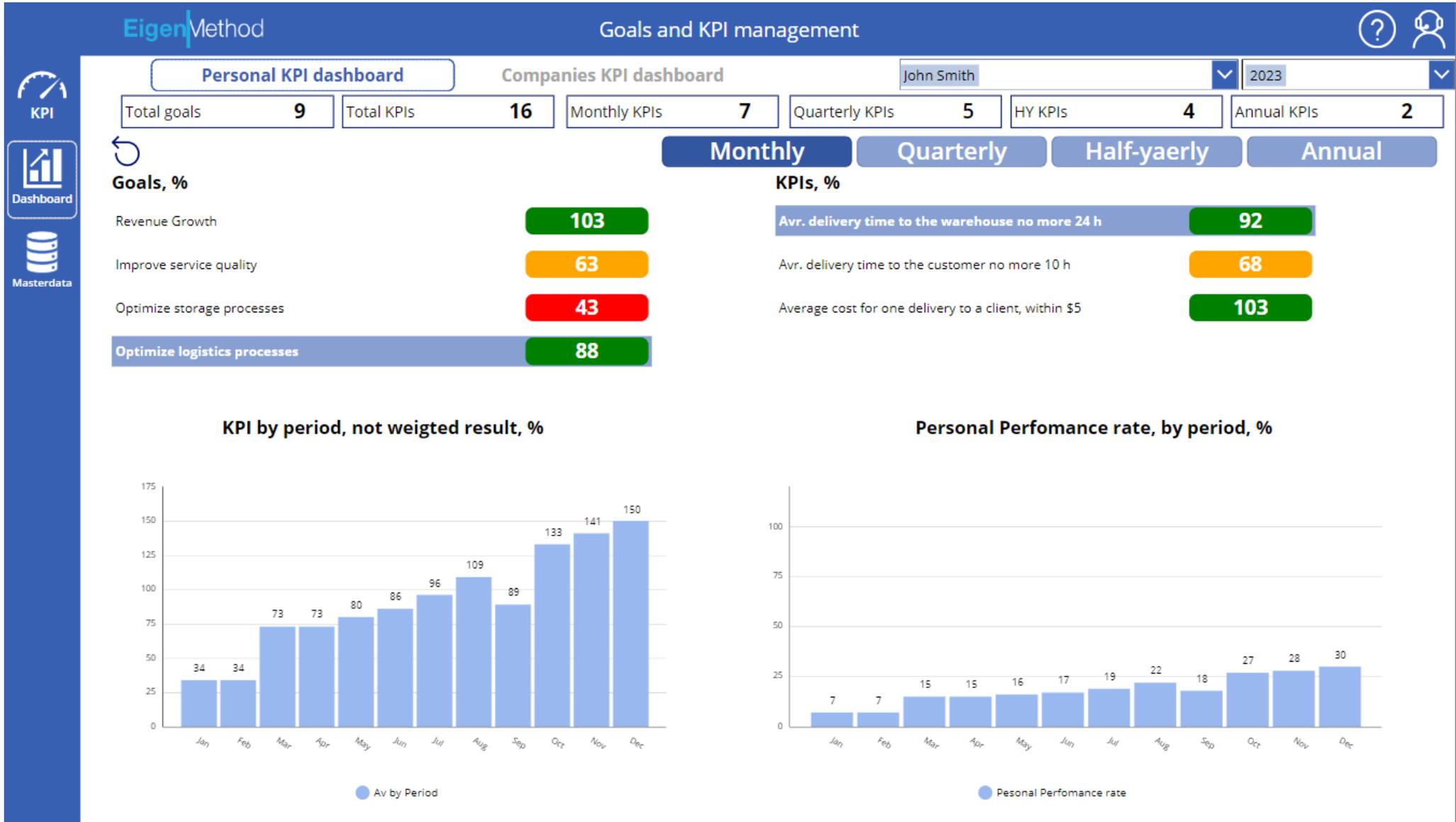
5 Save Exit **Add new KPI record** Copy Delete

Goal	KPI	Unit	Type	Weight	Plan	Actual	Rate	Weighted rate
Total				100				122
<input type="checkbox"/> Increase profitability	Investment income growth 10% QoQ	%	+	30	10	8	80	24
<input type="checkbox"/> Increase profitability	Profit growth 5% QoQ	%	+	70	5	7	140	98

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Step 4. Analyze the results in a dashboard

- 2.1. Enter the "Dashboard" menu section.
- 2.2. Go to the "Personal KPI dashboard" tab.
- 2.3. Select an employee and a year from the lists.
- 2.4. On the period scale, select the required period that you want to analyze (monthly, quarterly, half-yearly, Annual)
- 2.5. By default, the dashboard displays the final results of Goals and KPIs for the selected period.
- 2.6. Click on the Goal you are interested, the KPI table will display KPIs relevant to the selected target.
- 2.7. Click on the KPI you are interested in - the column charts by period will display the values for the selected KPI.



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