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This preview shows selected pages that are representative of the entire course book; pages are not consecutive. The page numbers shown at the bottom of each page indicate their actual position in the course book. All table-of-contents pages are included to illustrate all of the topics covered by the course.

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# **TDWI Performance Management**

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## Measurement, Metrics, and Monitoring



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# Module 1

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## Introduction to Performance Management

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# Defining Performance Management

## Performance + Management



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# Defining Performance Management

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## Performance + Management

### PUTTING THEM TOGETHER

Combining the key elements of performance – execution, action, procedures, requirements, and skills – with the key concepts of management – goals, objectives, resources, efficiency, and effectiveness – begins to give some shape and structure to the processes of performance management. At the intersection of performance and management we need processes to:

- Measure and monitor performance
- Analyze performance measures
- Decide what to do and take action

### PERFORMANCE MANAGEMENT DEFINED

Gary Cokins defines performance management concisely as “the translation of plans into results – execution. It is the process of managing an organization’s strategy”<sup>1</sup>

Wayne Eckerson says performance management “consists of a series of processes and applications designed to optimize the execution of business strategy... a framework that takes the long-standing task of *measuring performance* to the next level, that of *managing performance*.”<sup>2</sup>

Frank Buytendijk states “Performance management tries to capture an organization’s business model. As it becomes clear how various business domains affect the business results, performance management provides insight into who drives results and how results are driven.”<sup>3</sup>

While each of these definitions offers slightly different perspective, they support some common themes about performance management:

- Performance management focuses on execution of strategy.
- Measurement is only a part of performance management.
- Analysis, especially cause-and-effect analysis – is a key part of performance management.
- The right actions and results are the goals of performance management.

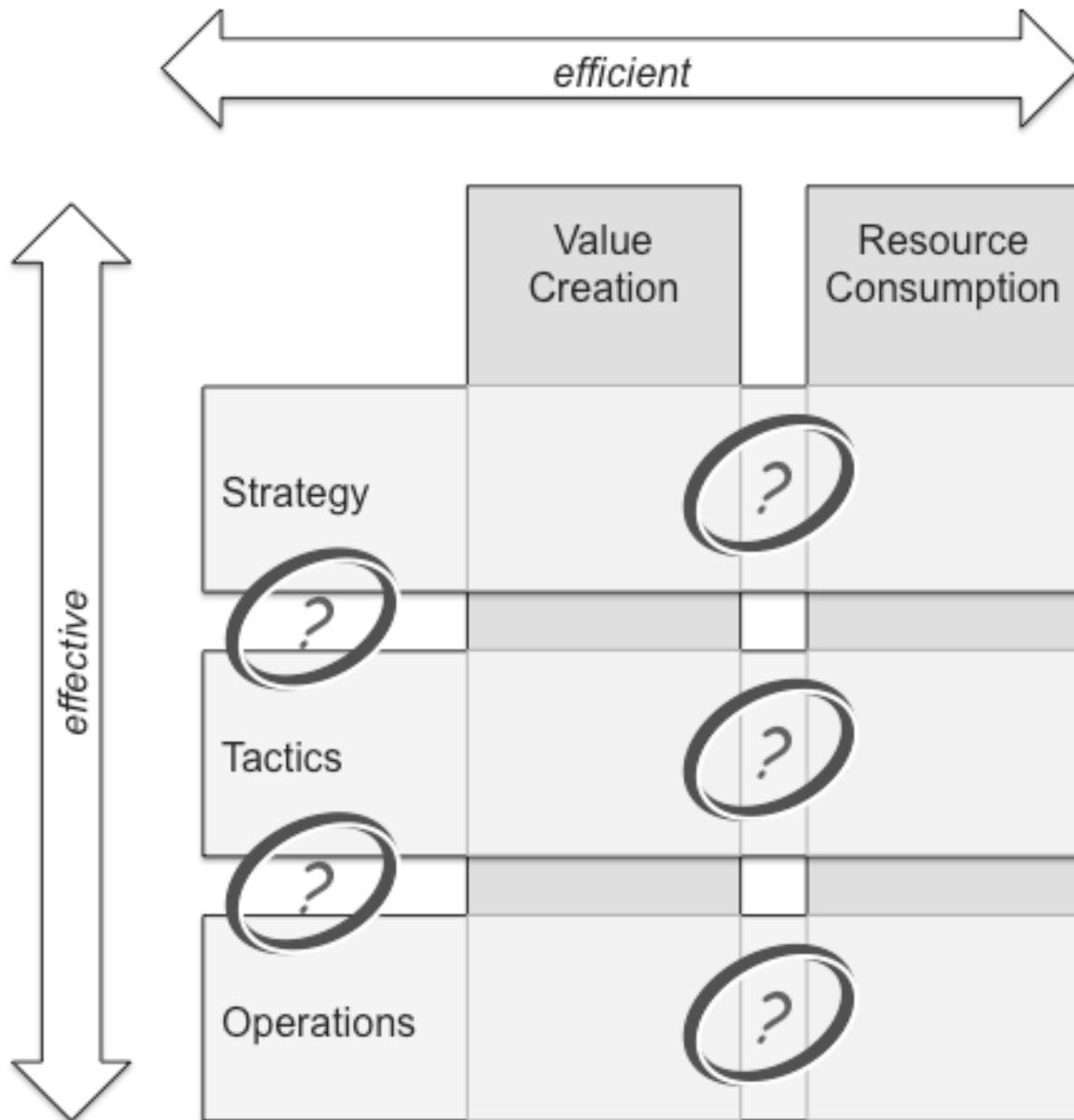
<sup>1</sup> *Performance Management*, pp. 9, Cokins

<sup>2</sup> *Performance Dashboards*, pp. 11, Eckerson

<sup>3</sup> *Performance Leadership*, pp. 17, Buytendijk

# Defining Performance Management

## Why Performance Management



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# Defining Performance Management

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## Why Performance Management

### **BUSINESS AT THREE LEVELS**

Strategy defines a company's future position as a set of goals and the methods by which they plan to achieve those goals. Strategy is typically a long-term (three to five year) view of business position with financial and market/competitive goals.

Tactics are the means by which strategy is carried out – the work of implementing strategy. Tactics encompass a set of planned activities to progress from one milestone to the next in pursuit of strategic goals.

Business operations are the day-to-day activities and the end-to-end business processes that carry out the work of the business. Operations includes creating, marketing, selling, and delivering products and services as well as managing the resources – human, financial, and physical – that are necessary to conduct business.

### **BUSINESS EFFECTIVENESS**

Business effectiveness is the degree to which strategy is realized as action in business operations. Two translations occur that directly influence effectiveness: translating strategy to tactics, and translating tactics to operations. At both of these points performance measures are used to know how well strategy is translated into action, and to provide feedback up the management chain.

### **TWO BUSINESS PROCESS DIMENSIONS**

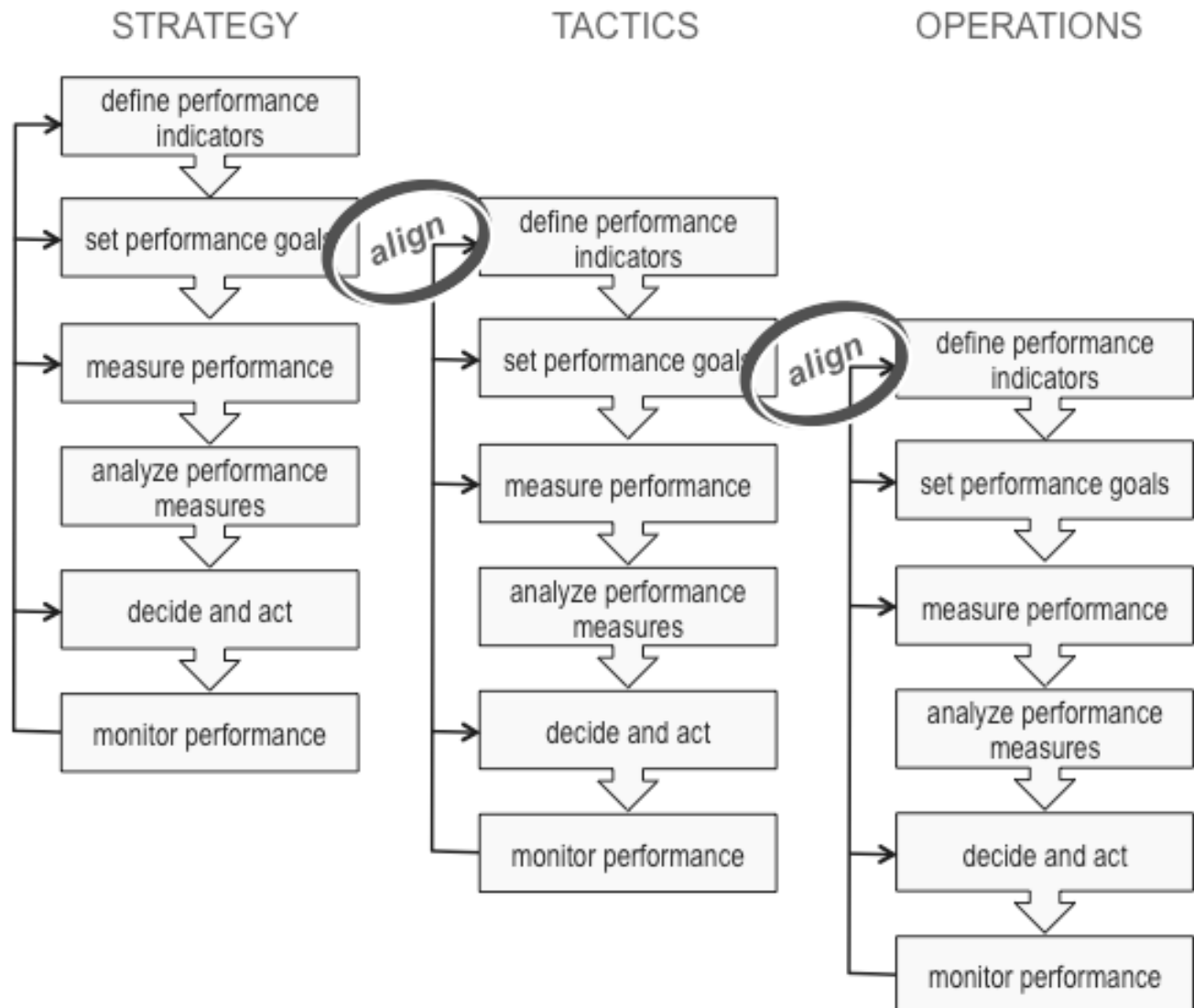
Every business process or activity can be viewed from two perspectives: the value created and the resources consumed. This holds true at all three levels of business activity – strategic, tactical, and operational.

### **BUSINESS EFFICIENCY**

Business efficiency is the balance of value created and resources consumed. Improvements in efficiency are achieved by increasing value, by reducing resource consumption, or a combination of the two.

# Performance Management Processes

## Alignment



# Performance Management Processes

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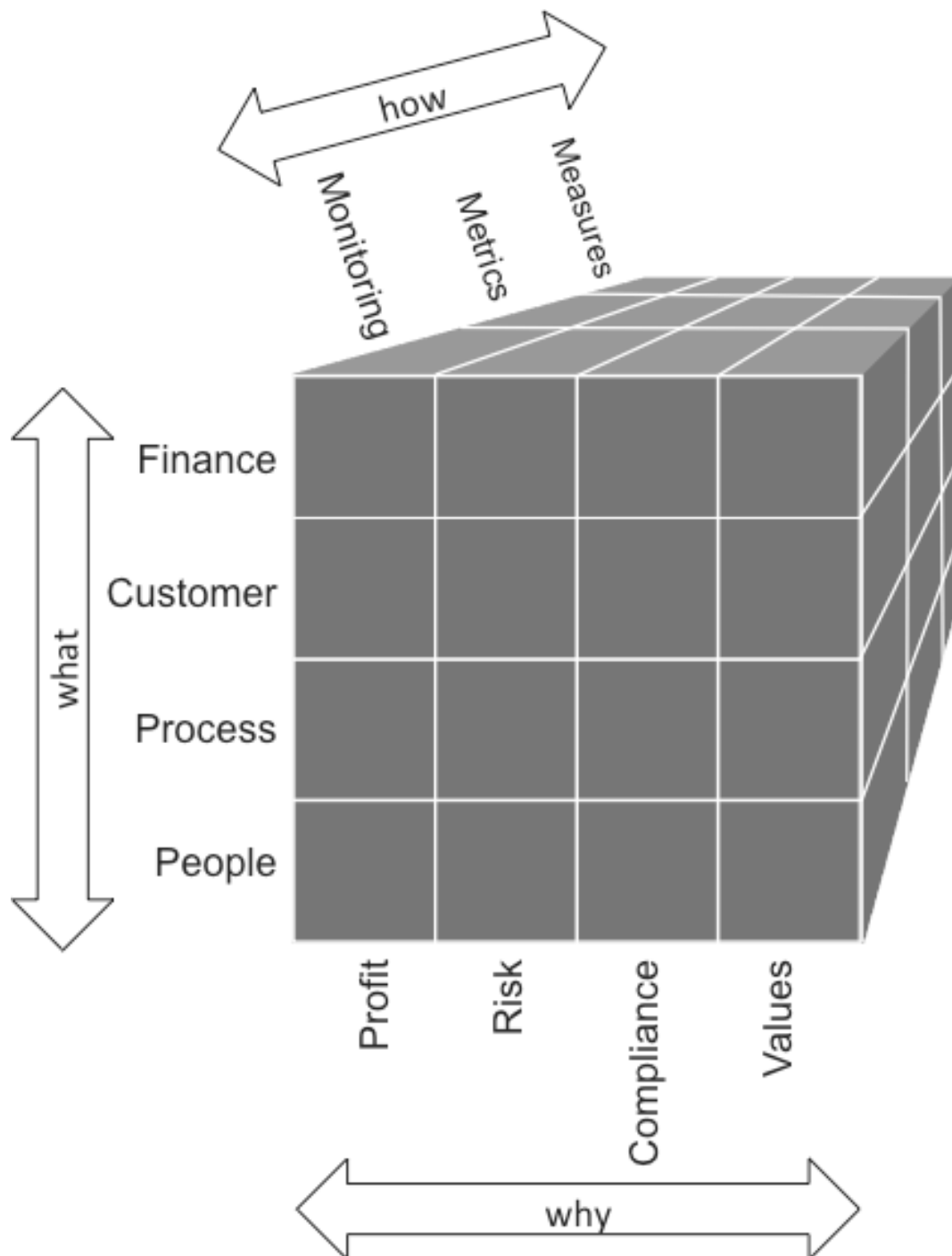
## Alignment

### **PM AT THREE LEVELS**

Performance management can be performed at any or all of three levels – strategic, tactical, and operational. It is most effective when practiced at all three levels with attention alignment of tactical indicators with strategic goals and alignment of operational indicators with tactical goals.

# Performance Management Applications

## A PM Framework



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# Performance Management Applications

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## A PM Framework

### SCOPE AND STRUCTURE

Performance management can be a large and intimidating initiative. One way to make it manageable is to break it into smaller pieces. The framework on the facing page provides one perspective to manage scope and structure – to start small and grow. In three dimensions – what, how, and why – two of them are variables. The *how* dimension is fixed; you must measure and monitor before you can manage.

The *why* dimension is configurable and selectable. To configure, list the things that are the management motivators in your company. The facing page shows profit, risk, compliance, and corporate values, but these are only examples. To select, choose only a subset of the motivators when you need to reduce the scope.

The *what* dimension is based on the balanced scorecard categories. You may choose to configure it differently to add granularity. Categorizing the *what* dimension by business function, for example, might list finance, R&D, marketing, sales, customer support, human resources, operations, and information technology as distinct areas. More detailed classification allows finer-grained selection when managing scope.

The goal is to carve performance management into manageable pieces for incremental implementation without losing sight of the big picture. With that goal in mind, adapt the framework in the way that best fits your needs.





# Module 2

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## Measurement and Metrics

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# Measurement Concepts

## Measurement Scales

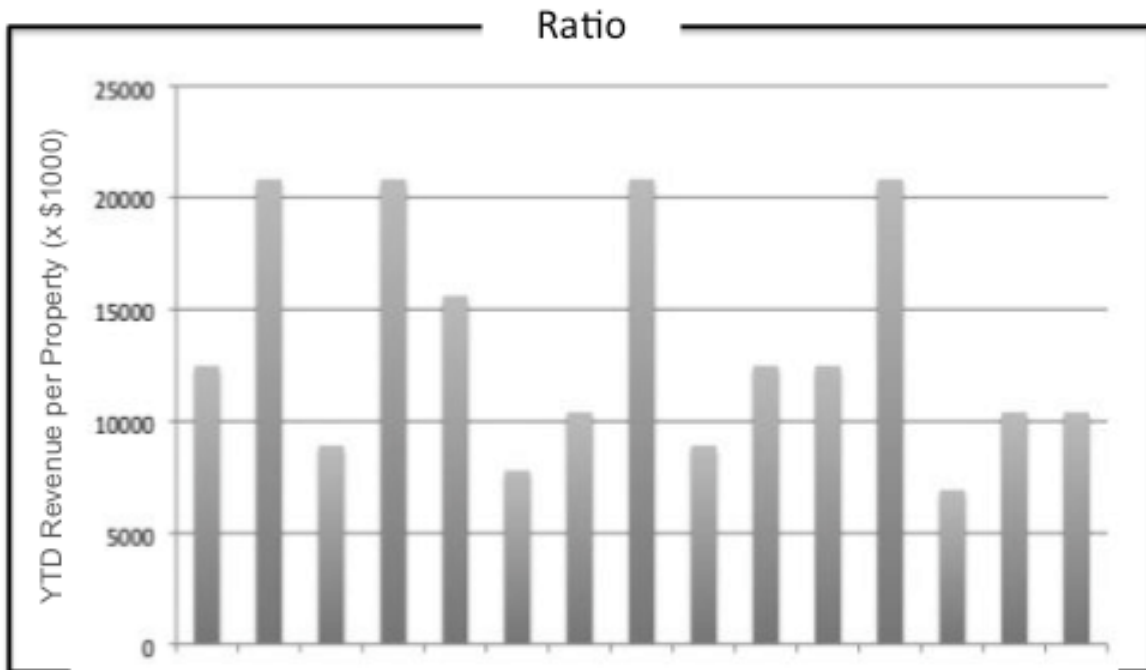


image source: *Measuring Intangibles*, © David L. Wells, reprinted with permission

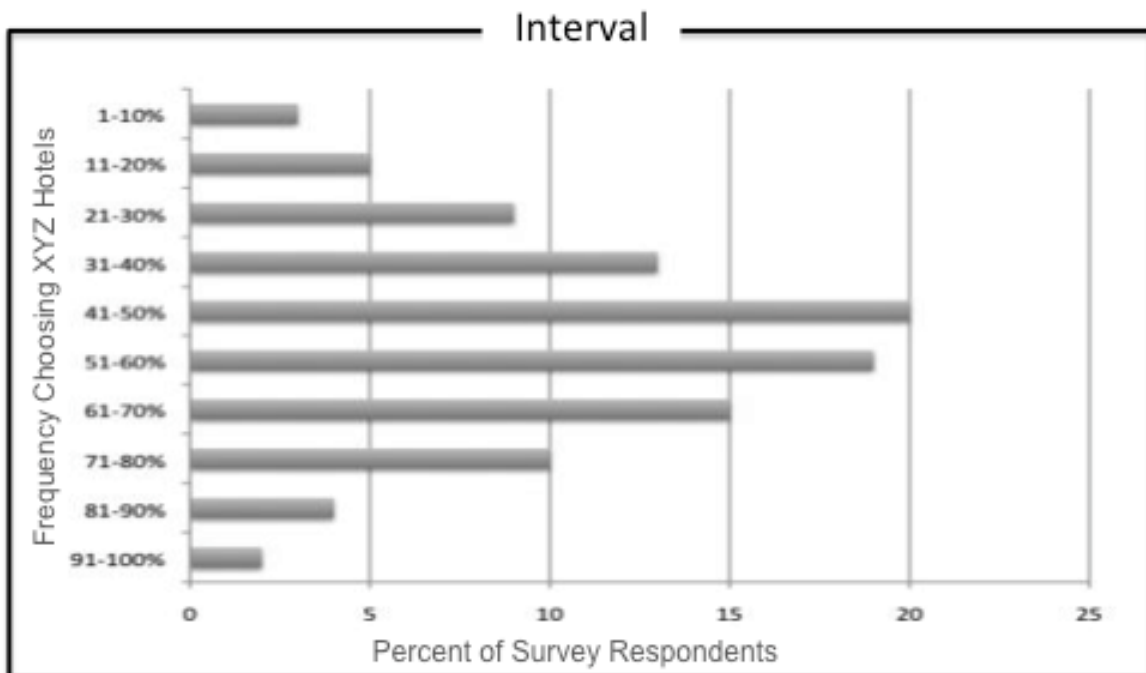


image source: *Measuring Intangibles*, © David L. Wells, reprinted with permission

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# Measurement Concepts

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## Measurement Scales

### **SCALES**

Scales of measurement describe the ways that quantities are typically represented in the field of measurement. Four kinds of scales are common and widely recognized: ratio, interval, ordinal, and nominal.

### **RATIO**

Ratio scales are perhaps the most recognized of measurement scales. Virtually all physical measures – mass, length, velocity, etc. – are ratio scales. A ratio scale is distinguished by the fact that it has a non-arbitrary zero value, and that all other values are relative to zero. Comparing ratio variables, then, becomes standardized – twenty is always five times larger than four. All arithmetic operations and all statistical functions can be applied to ratio measurements. Ratio measures are commonly used in physical sciences and for tangible subjects. They are well suited to quantitative analysis but difficult to apply for intangible subjects.

### **INTERVAL**

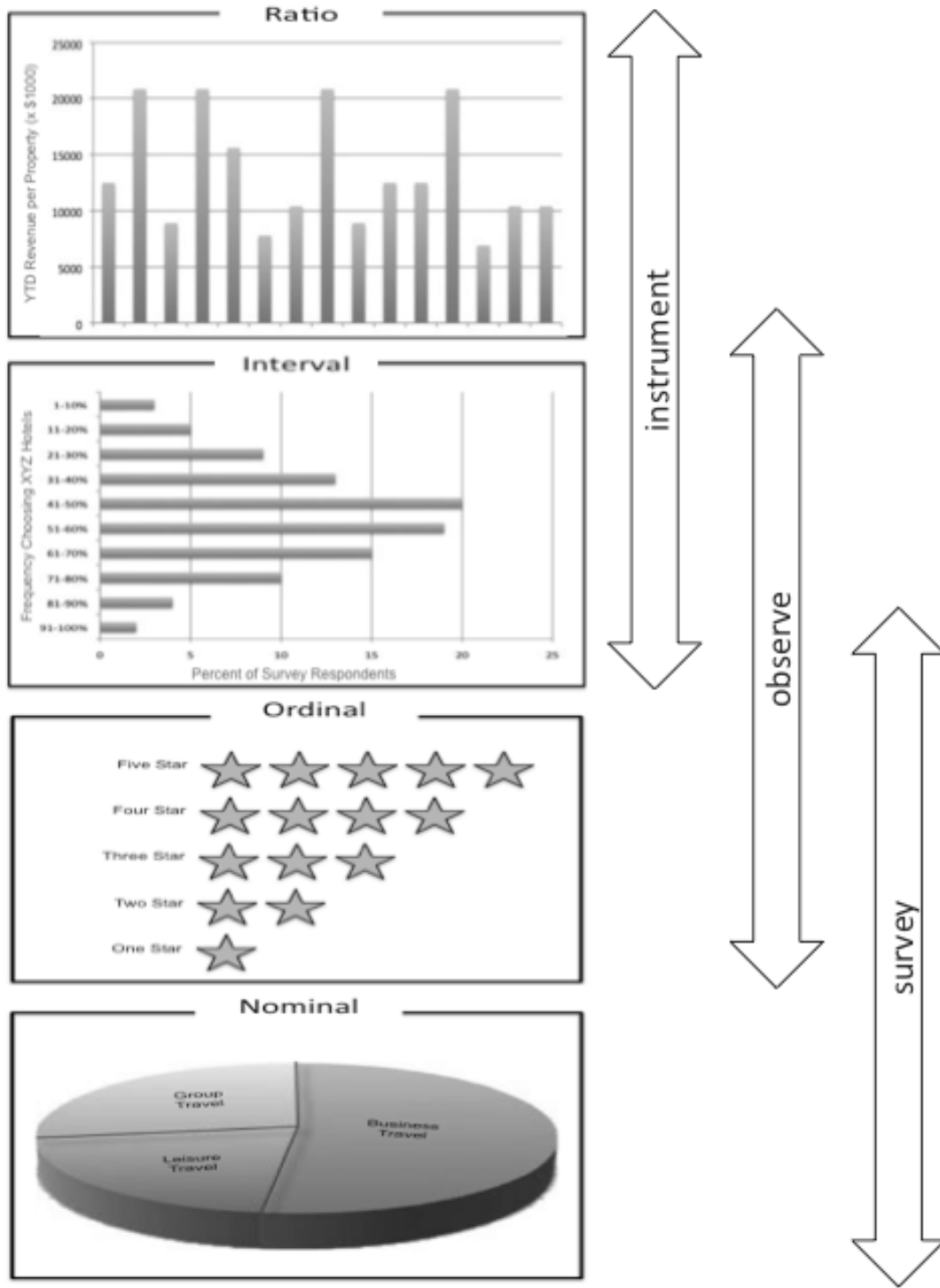
With Interval scales, there is no absolute zero point, which limits the ability to compare values. Units of the scale are equally distributed as with a ratio scale, but the zero point is arbitrary.

A common example of an interval scale is the Fahrenheit temperature scale where zero degrees is arbitrary (the Kelvin scale has non-arbitrary zero point). Using the Fahrenheit scale, it doesn't make sense to say that 60 degrees is twice as hot as 30 degrees, so ratio arithmetic – multiply and divide – don't apply, but add/subtract analysis is useful. Many common statistical functions (correlation, regression, variance, mean, standard deviation) can be applied for quantitative analysis of interval variables.

In business analysis, common intervals include percentile, decile, and quintile scales. The rigor of measurement is less demanding than for ratio scales.

# Measurement Concepts

## Measurement Methods



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# Measurement Concepts

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## Measurement Methods

### **GETTING MEASUREMENT DATA**

One of the challenges of performance measurement is deciding how the measurement data will be collected – the specific techniques and mechanics of data gathering. The three methods most readily applied are observation, survey, and instrumentation.

### **OBSERVATION**

Observation involves people watching events or activities and keeping count of the properties of interest. It is common at polling places during elections, in traffic-flow analysis, and with similar kinds of applications. Observation is labor intensive, subject to biases of the observers, and to inaccuracies of human error. It can work for occasional measurement, but is impractical for recurring and frequent measurement. The high cost makes observation rare in business performance measurement.

### **SURVEYS**

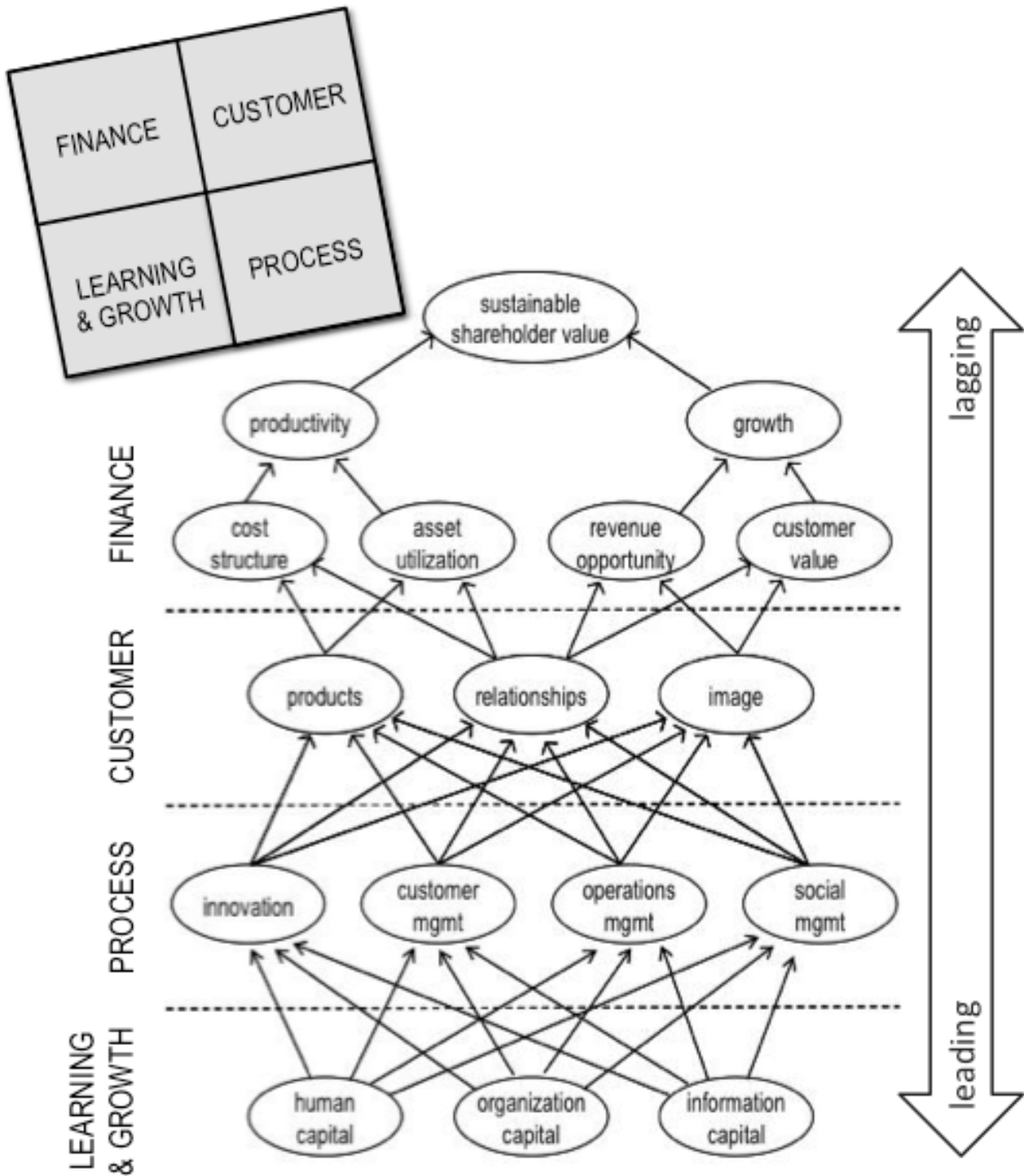
Surveys are a form of self-reporting most commonly used to measure human perceptions and emotions. Surveys are subject to biases of the respondents – a positive quality when measuring intangibles such as satisfaction, morale, and commitment. When measures need to be verifiable, surveys must include a means to identify respondents. It is important to note, however, that identifiable surveys may experience skew of responses not present in anonymous surveys. It is essential to avoid bias in the survey tool by avoiding leading or deceptive survey questions. Developing and administering surveys is a discipline that must attend to quality of the survey, means of distribution, rate of response, bias through partial responses, and analysis and interpretation of results.

### **INSTRUMENTATION**

Instrumentation uses mechanical or technological means to collect data. Measurement instruments range from simple mechanical devices such as a timers and counters to technologies such as databases and computer programs. Many instruments are self-contained – data extract programs, website counters, etc. Others are intended to work together with observation – stopwatches and thumb-click counters, for example. Self-contained instruments are often the most effective way to achieve high levels of objectivity and verification. Instruments can be designed to eliminate bias and to capture metadata.

# Metrics Concepts

## Leading and Lagging Indicators



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# Metrics Concepts

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## Leading and Lagging Indicators

### **LEADING INDICATORS**

Leading indicators are measurable factors of business performance that change before the underlying business behavior starts to follow a particular direction or trend. Leading indicators can be used to forecast the future patterns of performance. Leading economic indicators, for example, include orders for durable goods, orders new housing starts, change in raw material prices, change in energy costs, and money supply.

### **LAGGING INDICATORS**

Lagging indicators are measurable factors of business performance that tend to change after business behavior begins to follow a particular pattern or trend. Lagging indicators can be used to assess the current state and to track historical trends of business performance. Lagging economic indicators, for example, include the unemployment rate, outstanding consumer loans, outstanding business loans, business spending, business profits, business inventories, labor costs, and consumer price index (CPI).

### **BALANCED SCORECARD AND STRATEGY MAPS**

The balanced scorecard and related strategy mapping technique provide a useful illustration of leading and lagging concepts in business.

- Financial performance (profit, for example) depends on customer behaviors such as customer retention, customer attrition, and purchasing patterns. Customer measures are leading indicators for financial performance.
- Customer performance (retention, for example) depends on process competencies such as relationship management and customer service. Process measures are leading indicators for customer performance.
- Process performance (quality of service, for example) depends on learning and growth capabilities such as employee skills, motivation, and morale. Learning and growth measures are leading indicators for process performance.

# Integrating Metrics

## Consistency and Cohesion

*identical*

*consistent*

Monthly Simple Loss Ratio		✓
Description	Simple Loss Ratio is the percent of earned premium dollars that is lost as claims payments and adjustments. It quantifies profitability of insurance policies, and is a key measure of corporate financial performance.	✓
✓ Unit of Measure	Percentage	
✓ Calculated as	$\frac{\text{(claim payments + adjustment expenses)}}{\text{earned premium}}$	
Aggregated by	Month, Line of Business, Geographic Area	✓
Classified as	<input checked="" type="checkbox"/> finance <input type="checkbox"/> customer <input type="checkbox"/> process <input type="checkbox"/> people <input checked="" type="checkbox"/> strategic <input type="checkbox"/> tactical <input type="checkbox"/> operational	

Underwriter Simple Loss Ratio		✓
Description	Underwriter Simple Loss Ratio is the percent of earned premium dollars that is lost as claims expense for each underwriter. It quantifies financial risk inherent in policies, and is a key measure of underwriter performance.	✓
✓ Unit of Measure	Percentage	
✓ Calculated as	$\frac{\text{(claim payments + adjustment expenses)}}{\text{earned premium}}$	
Aggregated by	Month, Line of Business, Underwriter, Agent	✓
Classified as	<input type="checkbox"/> finance <input type="checkbox"/> customer <input checked="" type="checkbox"/> process <input type="checkbox"/> people <input type="checkbox"/> strategic <input checked="" type="checkbox"/> tactical <input type="checkbox"/> operational	

# Integrating Metrics

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## Consistency and Cohesion

### **PREVENTING CONFLICT AND CONFUSION**

It is important that metrics at different levels are sufficiently consistent to not create confusion. When a tactical metric tells a different story than a similar strategic metric, uncertainty is compounded instead of reduced. Use classification to identify related metrics, then carefully consider the things that need to be consistent among them to achieve metric cohesion.

The example on the facing page illustrates this concept with a strategic metric and a related tactical metric.

Later in the course, when we discuss cascading metrics, the importance of this concept is amplified.





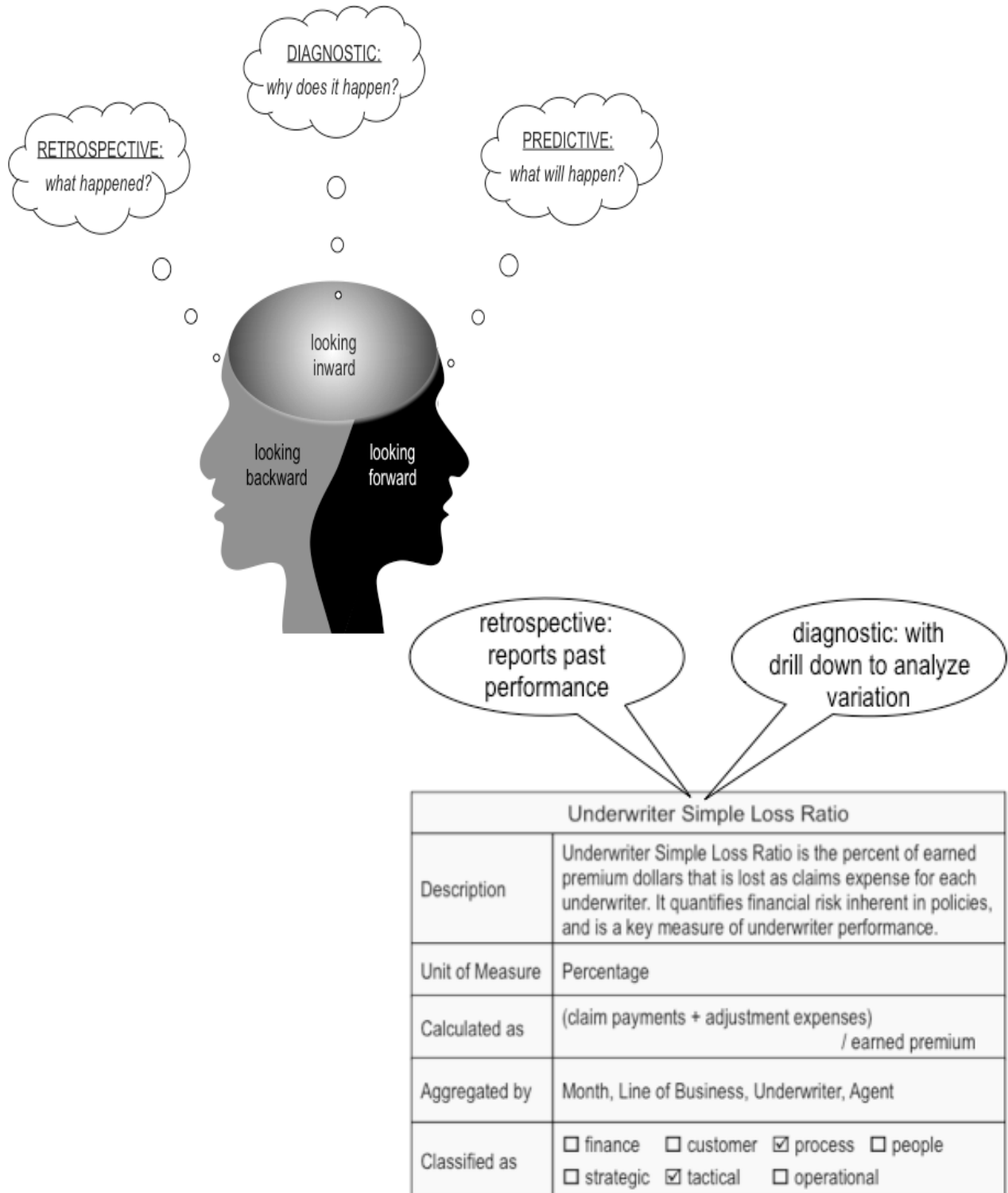
# Module 3

## Implementing Metrics

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# Metrics Identification

## Purpose



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# Metrics Identification

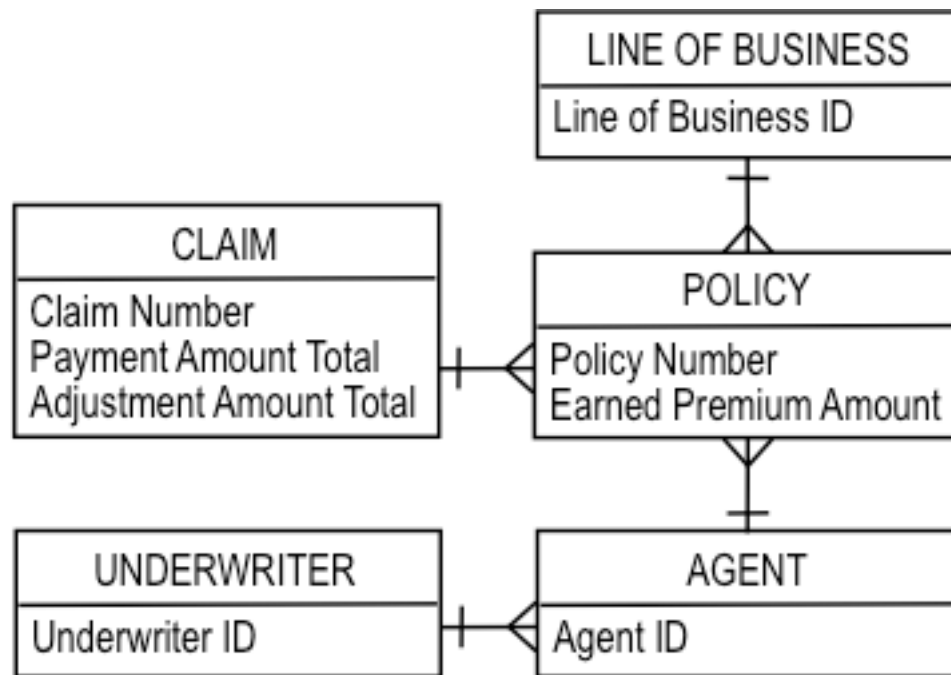
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## Purpose

- USE OF METRICS** Next in metrics identification, consider how the metrics will be used. Each metric needs analysis context to be valuable. Metrics-based analyses are of three kinds: retrospective, diagnostic, and predictive.
- RESTROSPECTIVE** Retrospective metrics measure process performance and conditions that exist on completion of a process. Retrospective analysis looks at past performance to know what happened. Retrospective metrics help to validate predictive metrics and are an integral part of learning and growth through feedback.
- DIAGNOSTIC** Diagnostic metrics measure relationships and correlations among the components of a process. Diagnostic analysis seeks to know why things happen, and to understand variance of actual outcomes from what is expected. This kind of cause-and-effect analysis is essential when performance falls below expectations to determine how to improve.
- PREDICTIVE** Predictive metrics are measures of future performance expectations. As measures of the future they have no corresponding true value at the time they are reported. Every predictive metric is a forecast – an estimate of future outcomes and conditions. Predictive analysis builds on diagnostic analysis to forecast future performance. Predictive information is valuable when revising and adjusting performance goals.

# Measurement

## Data Requirements



Underwriter Simple Loss Ratio	
Description	Underwriter Simple Loss Ratio is the percent of earned premium dollars that is lost as claims expense for each underwriter. It quantifies financial risk inherent in policies, and is a key measure of underwriter performance.
Unit of Measure	Percentage
Calculated as	$(\text{claim payments} + \text{adjustment expenses}) / \text{earned premium}$
Aggregated by	Month, Line of Business, Underwriter, Agent
Classified as	<input type="checkbox"/> finance <input type="checkbox"/> customer <input checked="" type="checkbox"/> process <input type="checkbox"/> people <input type="checkbox"/> strategic <input checked="" type="checkbox"/> tactical <input type="checkbox"/> operational

# Measurement

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## Data Requirements

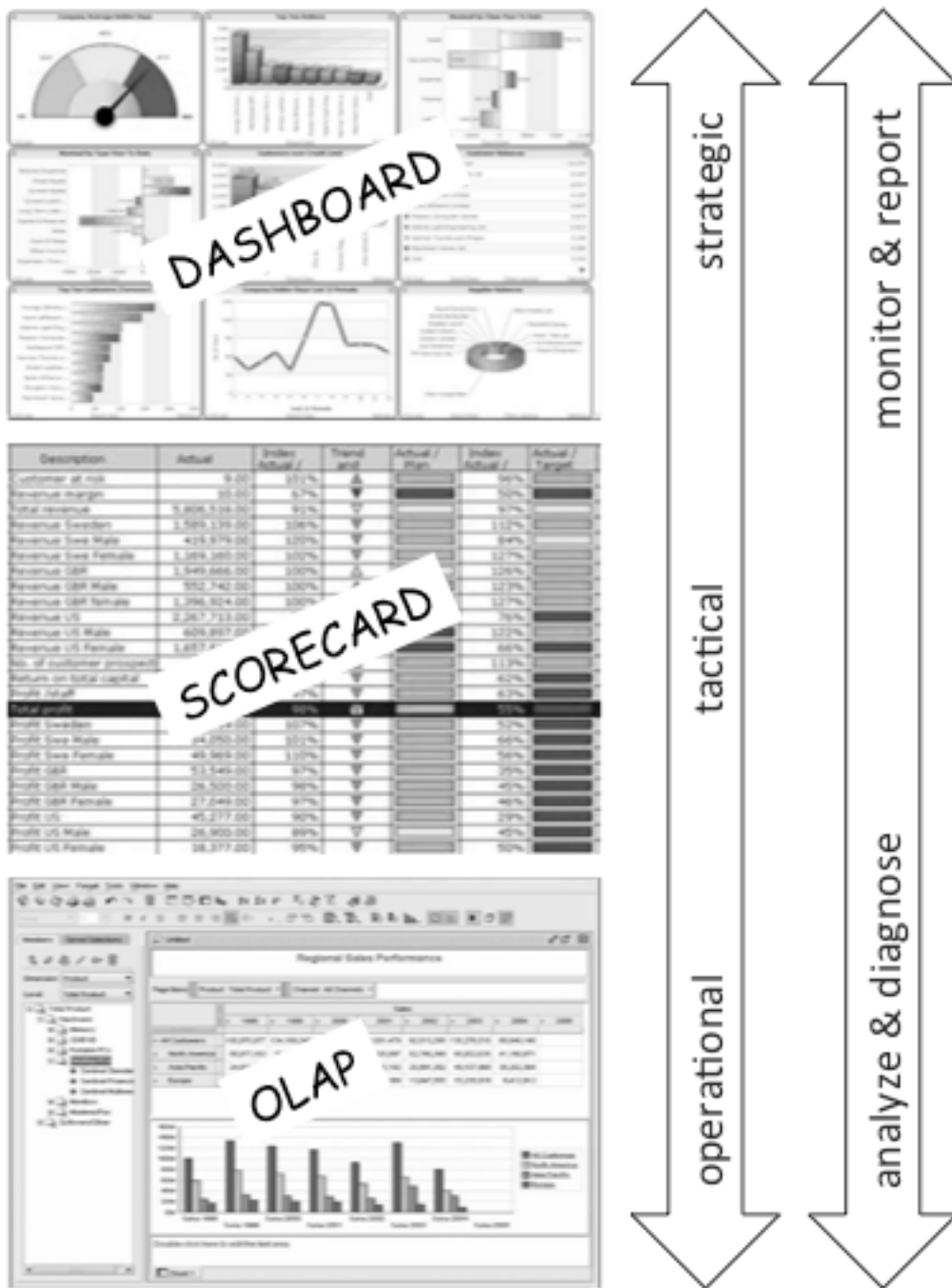
### WHAT DATA

Measurement is the act of collecting the data to which formulas and algorithms are applied to derive metric values. Measurement data requirements include:

- Quantitative data needed to derive the value of the metric. In the example shown here, quantitative data includes *claim payment amount*, *claim adjustment amount*, and *policy earned premium amount*.
- Identifying data that supports traceability of metric values back to data sources. The identifiers here are *claim number* and *policy number*.
- Reference data that supports aggregation. In this example the reference data includes *line of business ID*, *agent ID*, and *underwriter ID*.
- Date (and optionally time) that the measure is taken. Measurement dates are important for historical data and trend analysis. In this example, date stamping also supports aggregation by month.

# Calculation and Reporting

## Dashboards, Scorecards, and OLAP



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# Calculation and Reporting

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## Dashboards, Scorecards, and OLAP

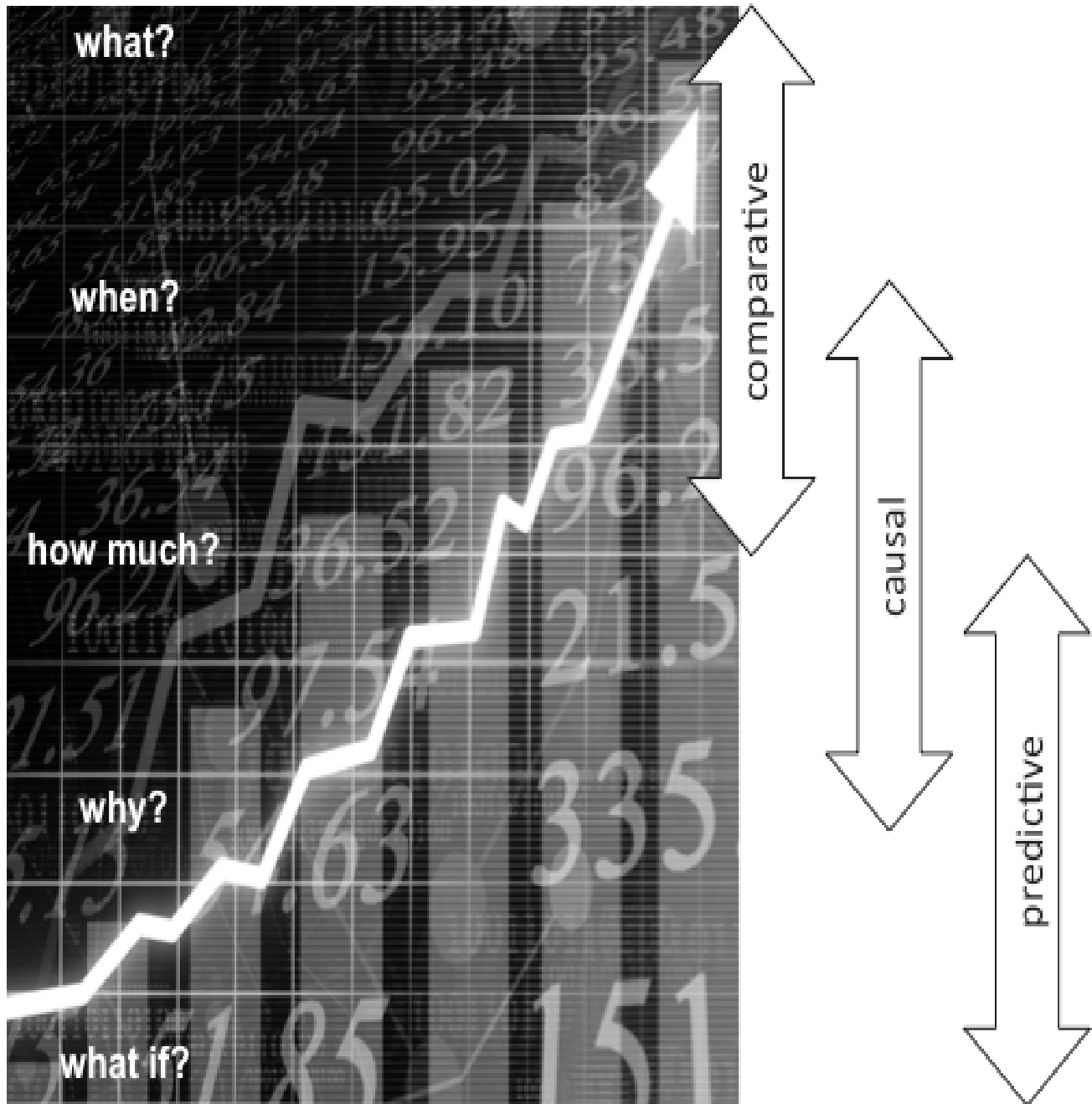
### **DELIVERING THE METRICS**

Once calculated, metrics need to be delivered to those who use them for monitoring and analysis. The three common forms of delivery are:

- Dashboards that include a small number of key performance indicators, typically as visual display of gauges and alerts, to support monitoring of business performance. Dashboards are better suited to strategic uses than to tactical and operational activities. They show actual values of metrics (or a visual summary of those values) but don't include goals and targets.
- Scorecards that include a larger number of performance indicators than is typical of a dashboard. Scorecards include both tabular and graphical views of indicators showing both actual and target values. Variance of actual from target, trend, and status are common scorecard elements. Scorecards are well suited to tactical and operational performance management with support for monitoring and analysis. Scorecards may be positioned as drill-down detail for dashboards.
- Online Analytical Processing (OLAP) capability for multi-dimensional analysis of metrics and their underlying measures. OLAP is best applied as drill-down functions for scorecards.

# Analysis and Application

## Comparative, Causal, and Predictive Analysis



# Analysis and Application

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## Comparative, Causal, and Predictive Analysis

### FROM METRICS TO KNOWLEDGE

Analysis is the work of examining the metrics to develop knowledge. Three layers of analysis include:

- Comparative analysis that looks at the variance of actual values from target values, and variance among different dimensions. Comparative analysis answers questions of *what*, *when*, and *how much*.
- Causal analysis that examines correlation among various performance indicators to identify influences and understand cause-and-effect chains. Causal analysis answers the question *why*.
- Predictive analysis that uses patterns and correlations in past performance data to develop inferences about future performance. Predictive analysis answers questions of *what-if* and *what next*.





# Module 4

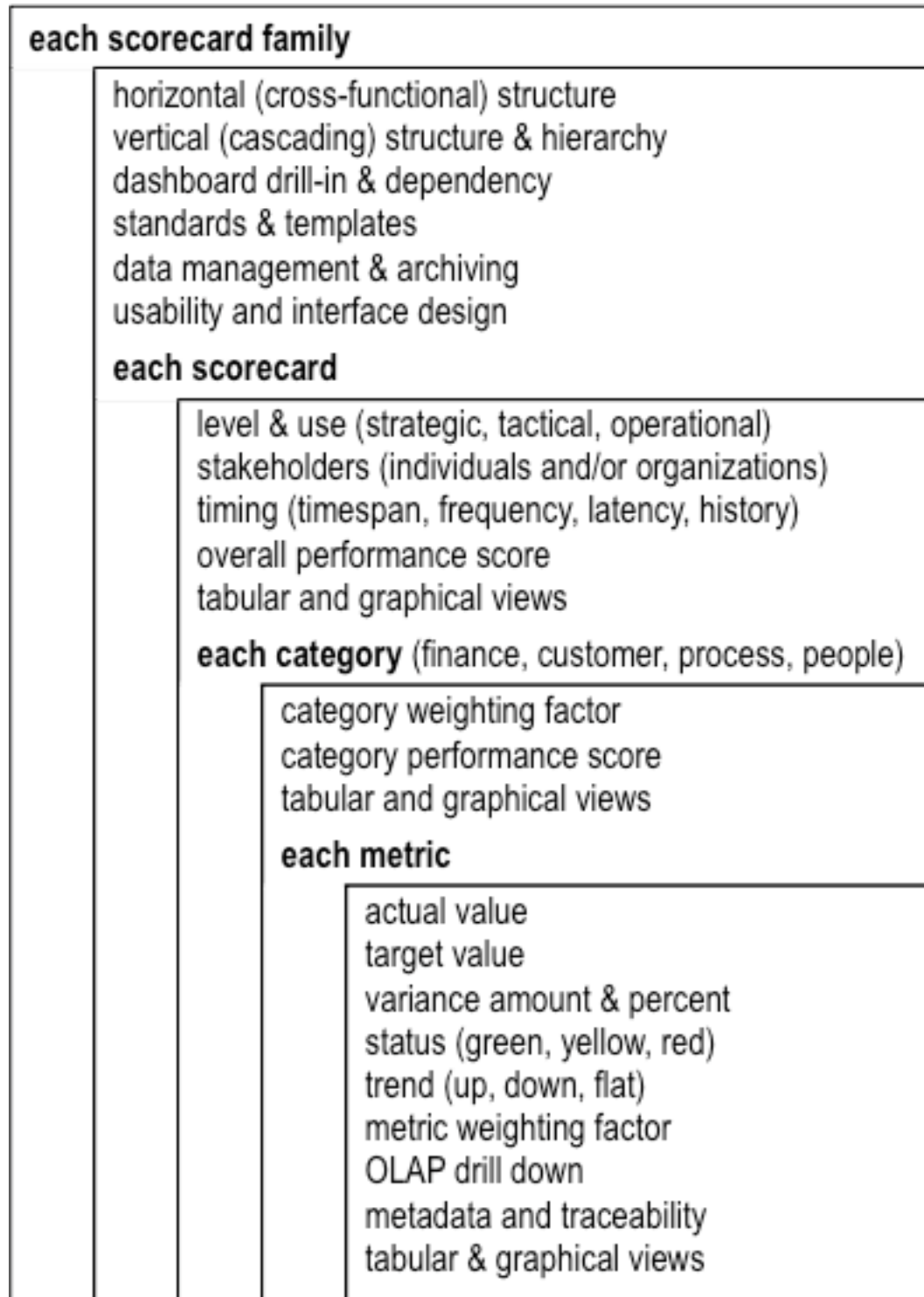
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## Scorecards and Dashboards

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# Performance Scorecards

## Designing Scorecards



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# Performance Scorecards

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## Designing Scorecards

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### **SCORCARD FAMILIES**

Designing scorecards is a layered process that begins by recognizing that a scorecard is not a stand-alone entity. Scorecards are related to other scorecards both horizontally and vertically. A scorecard “family” is a collection of related scorecards – all of the sales performance scorecards, for example, which may include a cascading structure of sales executive, sales manager, and salesperson scorecards. Scorecard family design defines the structure and standards for all scorecards in the group:

- Horizontal or cross-functional relationships
- Vertical and hierarchical structures of cascading scorecards
- Connection with and drill-in dependencies from dashboards
- Standards and templates for scorecard design
- Data management and archiving conventions for the family
- Usability and user interface design for the family
- The specific set of scorecards included in the family

### **SCORECARDS**

Within the standards and constraints of scorecard family design, the content and presentation of each scorecard is designed including:

- Consideration of the level and use of the scorecard, and of the individuals and organizations who will use it
- Timing considerations including timespan and intervals represented, frequency of measures, latency of measures, and historical retention
- Calculation and presentation of an overall performance score
- Scorecard-global conventions for tabular and graphical views of performance indicators
- The categories of performance indicators contained in the scorecard

### **PERFORMANCE INDICATOR CATEGORIES**

The metrics in a scorecard are ideally organized by category, often the BSC classifications. Each category may need

- A category weighting factor that determines its contribution to the overall performance score
- Calculation and presentation of a category performance score
- Category-specific conventions for tabular and graphical views of performance indicators
- The set of metrics that are performance indicators for the category

# Performance Dashboards

## Designing Dashboards

### dashboard architecture

business scope, levels, and hierarchies  
 data management / data integration  
 user access / user concurrency  
 query management (direct, in-memory, federated ...)  
 tools and technology

### each dashboard

cascading dashboard dependencies  
 scorecard drilldown dependencies  
 standards & templates  
 key performance indicators (KPIs)  
 filters

### each KPI

data connections  
 derivations and calculations  
 element types (text, graphs, gauges, alerts, , etc.)

### each element

element visual design  
 element help and explanation  
 element drill down

KPI help and explanation  
 KPI drill down

dashboard visual design  
 usability testing  
 iteration (next design cycle)

iteration (next dashboard)

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# Performance Dashboards

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## Designing Dashboards

### **DASHBOARD ARCHITECTURE**

Defining dashboard architecture is a necessary first step before designing dashboards. Architecture establishes the criteria, conventions, and technical infrastructure for dashboard implementation. Architecture considerations include:

- The business scope, levels, and hierarchies of dashboard use
- Data management and data integration needs and conventions
- User access standards and user concurrency requirements
- Query management standards – direct, in-memory, federated, etc.
- The tools and technology for dashboard development and deployment

### **DASHBOARD DESIGN**

Within architectural constraints, each dashboard is designed with attention to

- Dependencies for cascading dashboards
- Dependencies, relationships, and methods for drill-down from dashboard to scorecards
- Application of standards and templates for accelerated development and consistency of multiple dashboards
- Identification of the key performance indicators (KPIs) included on the dashboard
- Filters for selective viewing of business performance across various business dimensions
- Visual design of the dashboard

Usability testing and iterative design are good practices in dashboard design. Don't assume that you can get it right the first time, or that the users of a dashboard can clearly express their needs without the opportunity to touch and test.





# Module 5

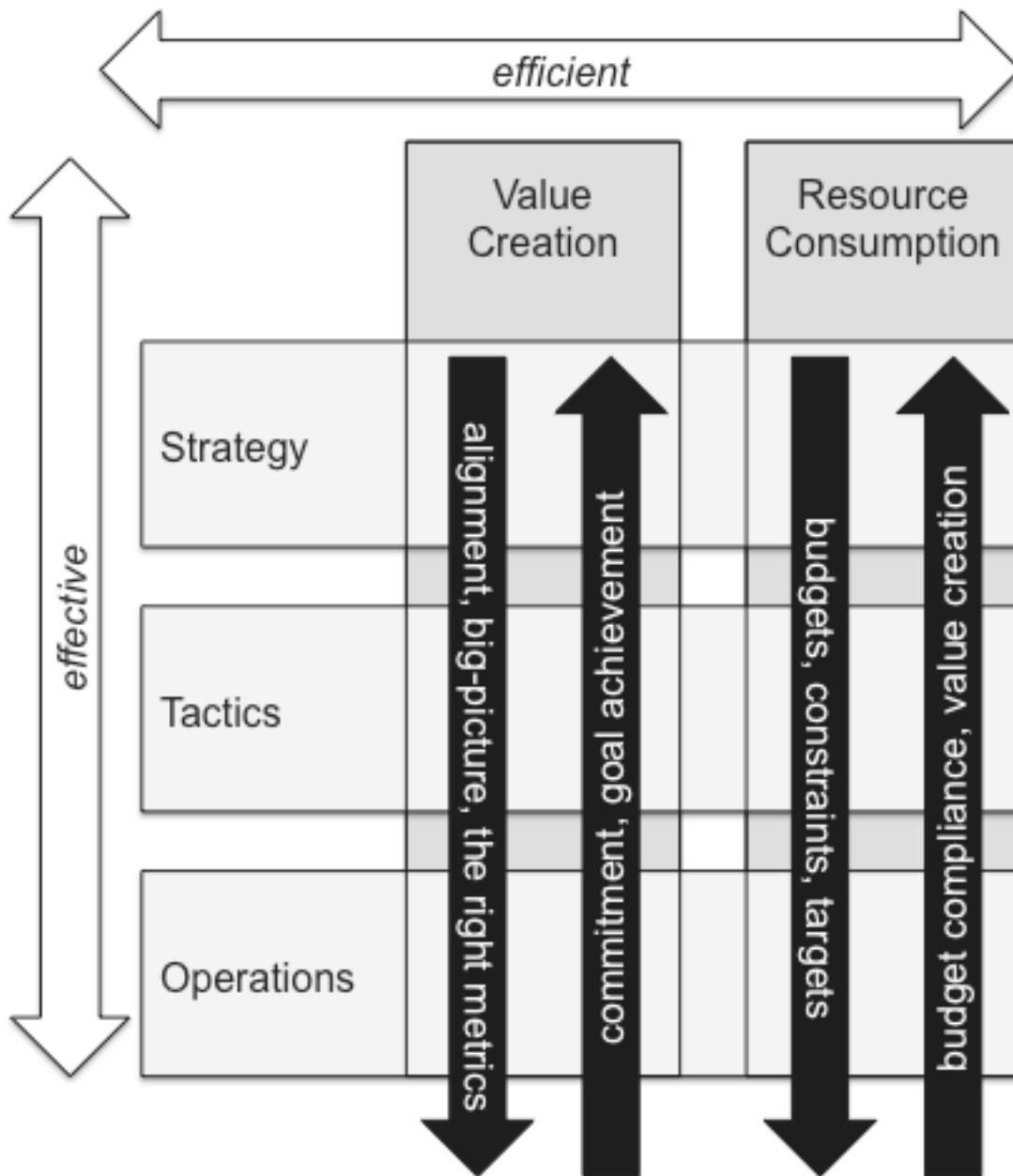
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## The Human Side of Performance Management

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# Performance Management Principles

## Responsibility and Accountability



# Performance Management Principles

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## Responsibility and Accountability

### **PERFORMANCE AND PEOPLE**

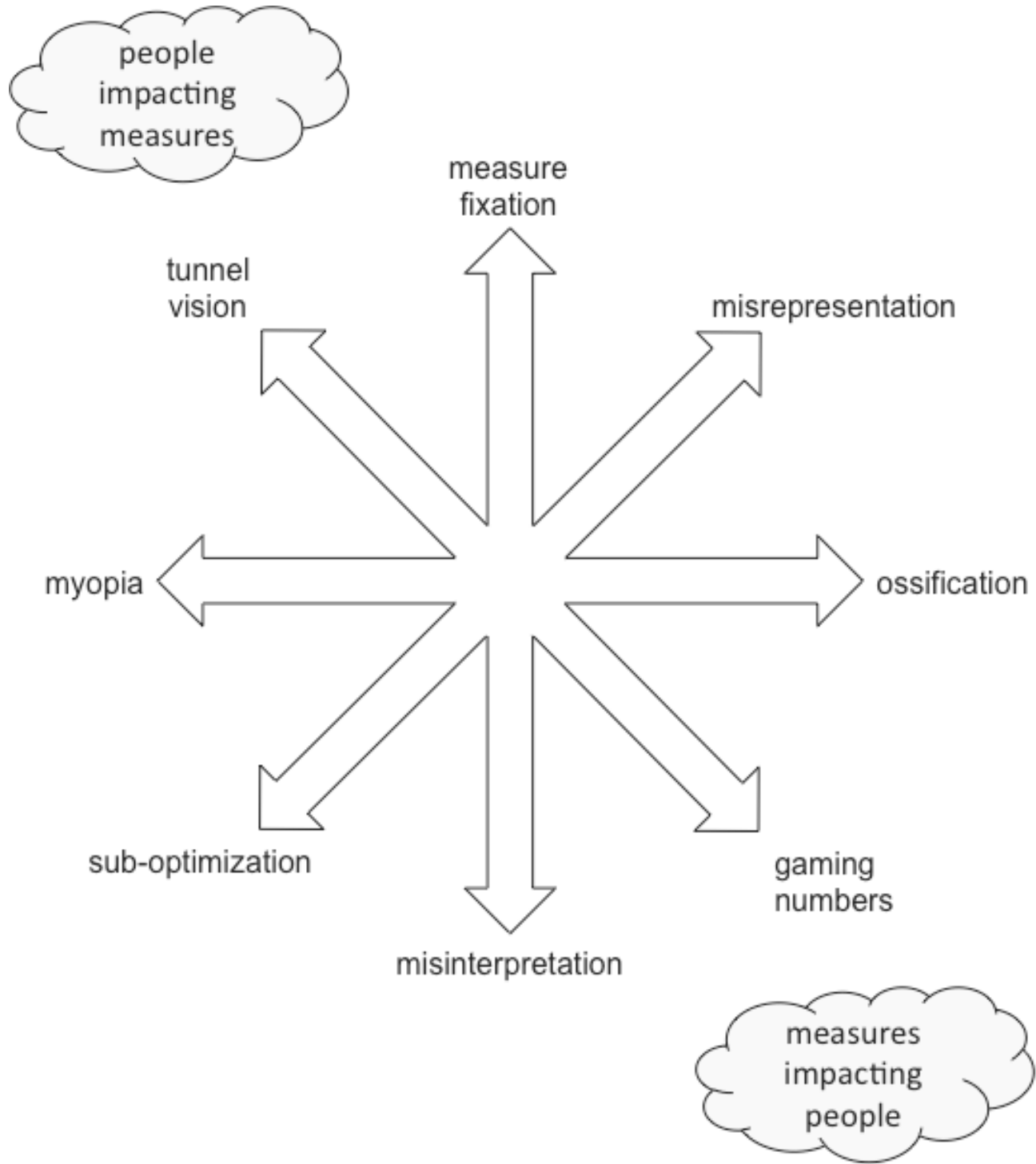
If performance is translation of strategy to results, business performance depends on people fulfilling their obligations to contribute to achievement of business strategy – their responsibilities and accountabilities.

Responsibility is the obligation to take actions and produce results that help to achieve strategic or tactical goals. Responsibility flows downward from strategy to operations with both value and cost components. Value-based responsibilities depend on alignment across the three levels of business activity, organization-wide communication of a “big picture” view, and use of the right metrics. Budgets, constraints, and targets drive cost-based responsibilities.

Accountability is the condition of being answerable to an authority for results and achievement of goals. Accountability flows upward from operations to strategy – operations personnel are accountable to tactical managers, who are accountable to executives at the strategic level. Value-based accountability drives commitment to goal achievement. Cost-based accountability is based on budget compliance and value creation in return for resources consumed.

# Performance Management Organizations

## Measurement and People



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# Performance Management Organizations

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## Measurement and People

### UNINTENDED CONSEQUENCES

Measurement is a form of observation, and people, when observed, change how they behave (the Hawthorne Effect). The changes in behavior may be improvements, but it is also possible that undesirable behaviors result from measurement. In *Performance Leadership*, Frank Buytendijk identifies eight unintended consequences of performance management.<sup>1</sup>

- Tunnel vision occurs when we focus on what is easy to measure instead of measuring the important things.
- Measure fixation is a condition of redefining (or attempting to redefine) the meaning of the measures to make the numbers look better.
- Misrepresentation is the act of cheating the system by forging or faking the numbers.
- Ossification is the act of presenting outdated (but presumably better than current) information.
- Gaming the numbers is the behavior of underachieving once targets are met.
- Misinterpretation is incorrect or incomplete interpretation of the meaning in the metrics.
- Sub-optimization uses company resources to drive local goals instead of corporate and strategic objectives.
- Myopia is the condition of focusing on short-term numbers and quick wins at the expense of long-term goals.

<sup>1</sup> *Performance Leadership*, pp 38-41, Buytendijk





# Module 6

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## Summary and Conclusion

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# Summary of Key Points

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## A Quick Review

- ✓ Performance management is execution of strategy to meet business goals
- ✓ Performance management is much more than performance measurement — it involves measuring, monitoring, analysis, decision, action, and feedback.
- ✓ Business activities occur at three levels – strategy, tactics, and operations. Performance management helps to translate strategy at the top level into action at the operations level. The quality of this translation is business effectiveness.
- ✓ Business processes create value and consume resources. The balance of value to resources is business efficiency.
- ✓ Performance management involves both indicators of outcomes (lagging) and indicators of cause (leading).
- ✓ Performance indicators need to address more than financial performance. The Balanced Scorecard offers a good framework.
- ✓ Defining the right metrics is a critical step in performance management.
- ✓ Well-defined metrics drive the right measures.
- ✓ You'll have many metrics. Metadata and good data management practices are important for them to be manageable over time.
- ✓ Units of measure are important. They influence measurement scales that determine the scope of analysis capabilities.
- ✓ Implementing metrics is a multi-step process of identification, definition, measurement, calculation, reporting, analysis, and application.
- ✓ Dashboards and scorecards are the primary forms of reporting performance indicators.
- ✓ Scorecard design and implementation is an important and complex skill.
- ✓ Dashboard design and implementation is an important and complex skill.
- ✓ Performance management is ultimately about people, culture, and behaviors. Attention to these areas is critical to success.

# Summary of Key Points

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## A Quick Review

**SUMMARY**

The facing page summarizes many of the key points from this course. It can be a useful quick-reference as you prepare for performance management.

