Purpuse

The KPI Alignment Worksheet helps teams review and refine their performance indicators to ensure they align with strategic outcomes and operational control points. It is designed to prevent metrics from becoming disconnected from what they're supposed to drive — and instead serve as active tools for execution and decision-making.

When to Use

Use this tool when setting or reviewing KPIs as part of strategy execution, operational improvement, or performance reviews. Ideal when new initiatives are launched, or when KPIs are being updated to reflect strategic shifts or delivery milestones.

How to Use This Tool

1. List your current KPIs by function, team, or initiative.
2. For each KPI, answer:
   • What strategic outcome does this support?
   • Is it a leading or lagging indicator?
   • Is it within the control of the team being measured?
   • Is the data timely, trusted, and actionable?
3. Identify KPIs to improve, replace, or drop. Then add any needed KPIs that better reflect current goals or drivers.

Fields to Include

KPI Name	Linked Strategic Outcomes	Type (Leading / Lagging)	Owner / Team	Actionability (Yes / No / Partial)	Data Source / Frequency	Current Performance Trend	Keep / Replace / Improve?

Optional Output

An updated KPI dashboard or performance tracking set that is directly linked to strategy, operations, and decision-making.