

EDGE: Performance Insight Checklist

Assess how well your data drives decisions — not just dashboards.

EDGE Core Toolkit –Evaluate - #1 | Breakthrough Edge



Purpose

The Performance Insight Checklist helps organizations assess the strength, availability, and use of performance data in decision-making. It is designed to uncover blind spots in how data is gathered, interpreted, and applied — especially in the context of strategy execution and operational alignment.

When to Use:

When leadership feels disconnected from frontline performance reality
During strategic planning or operational reviews
Before launching a KPI redesign or dashboard effort
To diagnose execution blind spots or misaligned decision-making

How to Use This Tool

Score each item below on a scale from 1 to 5:

1 = Not at all true, 5 = Fully true.

Tally the total score to assess the maturity of your performance insight capability.

Checklist – Performance Insight

Data Availability

We consistently capture performance data across all key areas (e.g., operations, financials, workforce, quality).

We can access both historical and real-time data to support decisions.

Our performance metrics cover both leading and lagging indicators.

Data Relevance & Quality

Our KPIs and dashboards reflect what actually matters to business outcomes.

We regularly review and refine metrics to ensure they remain aligned to strategy.

Our data is trusted — definitions are clear and inconsistencies are rare.

Data Use & Actionability

Decision-makers use performance data in regular planning, reviews, and approvals.

Performance trends are actively analyzed and acted upon, not just reported.

We have clear accountability for investigating and closing performance gaps.

Interpretation Guide

Score Range:

****33–45**** – Strong insight foundation: Data is actionable, complete, and trusted.

****20–32**** – Moderate insight: Improvements needed in data use or consistency.

****< 20**** – Weak insight: Performance data may be incomplete, irrelevant, or unused.