

KPI Definition and Dashboard Planning Worksheet

Instructions

Use this workbook independently with the people who own and perform the work. Record evidence, assumptions, disagreements, and open questions. Do not force a universal answer or rely on invented benchmarks. Professional technical, legal, financial, security, accessibility, or operational assessment may be appropriate for complex, sensitive, regulated, or business-critical decisions.

Decision and audience

Prompt	Notes, evidence, owner, and next action
Decision and user	
Cadence and possible action	
Escalation and context	
What happens if information is late or wrong?	

Metric definition

Prompt	Notes, evidence, owner, and next action
Name and business meaning	
Formula, population, period, and exclusions	
Source, owner, target, and limitations	
Validation and change approval	

Source-quality review

Prompt	Notes, evidence, owner, and next action
Completeness and consistency	

Prompt	Notes, evidence, owner, and next action
Timeliness and identifiers	
Ownership and reconciliation	
Known limitations and remediation owner	

Dashboard plan

Prompt	Notes, evidence, owner, and next action
Views, filters, and freshness label	
Exceptions and accessibility	
Permissions and validation	
Operating owner and review cadence	

This resource is educational and does not guarantee a result. Visit outlookintensified.com/resources/ for the accessible webpage and related guidance.