**What:** Departments should conduct KPI dashboard meetings on a regular basis. These should at least include all department critical numbers as represented in the Company Dashboard spreadsheet, and potentially include other underlying KPIs that should be tracked on a regular basis. To start I would recommend no fewer than four and no more than 10 KPIs to be included in the weekly dashboard.

Feel free to visit <https://www.managing-growth.com/post/kpi-construction-zone> if you need guidance on identifying the right KPIs for your department.

KPIs should be measured in as short a period as is practical, ideally weekly. Frequent measurements maximize the information available and shorten the feedback loop and reaction time if there are issues. If certain information is only possible to track monthly, then that should just be incorporated into the standing weekly meetings when it is available.

These should be 10-15 minute meetings, with KPIs presented in graphs allowing for short term comparisons against recent periods and longer term comparisons against prior year(s). Excel or Google Sheets are the easiest tools for immediately visualizing the information. Please let me know if you need help visualizing your information.

I recommend evaluating the KPIs being included as often as needed, but no less often than twice a year. The data tracked should allow a person who is familiar with our company, but not an expert in the given department, to easily understand how that department has been doing. If, after calculating a KPI for a period of time, you don’t think it answers that question anymore, then it should be eliminated - stop wasting time calculating it. If a different one would provide more information, then add it in.

**Why:**  These meetings create high visibility to the most important numbers that reflect team activity and performance. Including the entire team AND management continually reinforces the importance of, and accountability to, the KPI. I find KPIs remain top of mind for the team this way much better than simply calculating and including them in spreadsheets or similar tools, but not consistently discussing them.

Weekly reporting also allows the entire team to immediately understand if there is a problem or adverse trend, or if a data point just represents a one-time idiosyncratic data blip.

Additionally, these dashboard meetings create an opportunity for collaborative problem solving. Team members should be encouraged to speak up, particularly if their actions led to the over or under-performance of a data point that we’re tracking. For example, if there are quality issues, we would talk about them specifically, and the team member can present an initial suggestion for what they will do differently next time to avoid repeating the problem. These conversations can also save time later, by eliminating the need for lengthy separate retro meetings; instead, the “start / stop / keep” evaluations are done more regularly and with closer proximity to the timing of the underlying action.

Finally, it creates the opportunity for face-to-face (face-to-zoom?) engagement between team members and management.

**Who:** The entire team should attend each meeting (barring PTO). Team Leads and Department Heads should also attend. If the entire team is regularly talking about performance, then fewer recap conversations need to be had with teams, by Team Leads to Department Heads, or by Department Heads to Leadership Team members, about how things are going. That will instead be consistently clear and reported on.

The information should be presented by a team member, and ideally NOT a Team Lead or other manager. This has the benefit of creating greater engagement by the team (as people often feel more accountable for data when they have to prepare and present it). It’s also a good way to create low stakes presentation opportunities for Team Members who may be candidates for future management opportunities or who are normally too shy to speak up much. My best experience is to let a single individual run with this for at least a few months before switching to another presenter, as there is some learning curve to preparing the information.

**When:** Rather than scheduling an additional meeting, I recommend using one standup each week to present this information. It typically could fit into a regular meeting; perhaps an extra 5-10 minutes would have to be added once per week.

It may be appropriate for the Team Lead, Department Head, and Leadership Team member to occasionally hold a separate breakout session to discuss extended negative results or trends.

I would like these meetings to start by **[INCLUDE YOUR TARGET MEETING START DATE HERE]**. Please work with me to schedule which day of the week you want to hold it, so I can coordinate around other recurring meetings.

Once the team settles into a comfortable rhythm, some of these guidelines can get personalized for the specific needs of the department.