CONCEPT

Performance Reporting and Executive Dashboards for Leadership Decision-Making



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Technical depth: Practitioner · **Practical mode:** Case study

Introduction

Leadership teams receive long performance reports that describe everything and explain little. Indicators appear without targets or trends, commentary repeats the numbers, and the decisions leaders need to take are buried or missing, so reporting cycles consume effort without changing action. This Core Concept course equips the managers who prepare institutional performance reports to design them around leadership decisions, apply recognised reporting and visual standards, and write commentary that explains performance. Participants work on case material from several sectors and leave with a Leadership Performance Report Pack for their own organisation.

Course Objectives

- Analyse leadership information needs and design a reporting hierarchy and cadence around the decisions each forum takes
- Apply IBCS rules and the Pyramid Principle to structure reports, dashboards and executive messages
- Set status rules and analyse variances and trends so that real performance signals are separated from noise
- Write performance commentary that explains causes, consequences and the actions or decisions required
- Control data quality and report integrity before performance information reaches leadership
- Produce a Leadership Performance Report Pack ready for an executive committee

Target Audience

- Performance management office managers who compile institutional reports
- Strategy and planning managers reporting progress against strategic objectives
- Business intelligence and reporting managers responsible for executive dashboards
- Executive office and chief-of-staff team leads preparing leadership briefings
- Finance and operations managers contributing performance sections to board papers

Course Outline

Day 1: The Performance Reporting Landscape and Leadership Needs

- Leadership Information Needs Analysis: Decisions, Questions and Cadence
- Reporting Hierarchy for Board, Executive and Operational Forums
- Performance Architecture Mapping: Objectives, KPIs, Initiatives and Risks
- Current Reporting Audit Using a Report Rationalisation Inventory
- Performance Data Roles Under the IIA Three Lines Model

Day 2: Reporting Standards and Frameworks

- IBCS SUCCESS Rules for Reports and Dashboards
- Integrated Reporting Framework Guiding Principles and the Six Capitals
- Human Capital Metrics for Leadership Reports Under ISO 30414
- DAMA-DMBOK Data Quality Dimensions for Performance Data
- Minto Pyramid Principle for Executive Messaging

Day 3: Building the Performance Report

- KPI Status Logic: Targets, Thresholds and RAG Rating Rules
- Variance Analysis Against Target, Baseline and Prior Period
- XmR Process Behaviour Charts for Separating Signal from Noise
- Executive Dashboard Layout and Chart Selection
- Performance Commentary Structure: What Happened, Why and What Next

Day 4: Advanced Reporting, Integrity and Risk

- Integrated Report Pages Linking KPIs, Initiatives and Key Risk Indicators
- Year-End Outturn Forecasting with Trend Projection
- Misleading Visuals and Metric Gaming Detection Checklist
- Data Validation and Sign-Off Controls Before Publication
- Report Automation Options with Power BI and Tableau Data Models

Day 5: Case Work and the Leadership Performance Report Pack

- Public Service Agency Case Study: Condensing a Quarterly Performance Report
- Manufacturing Group Case Study: Exception Reporting for an Executive Committee
- One-Page Executive Summary Build from Supplied Data
- Leadership Performance Report Pack Drafting
- Executive Committee Briefing Rehearsal and Peer Critique

Skills You Will Gain

- Executive Reporting Design
- Performance Data Analysis
- Variance and Trend Interpretation
- Data Visualisation
- Business Writing for Executives
- Performance Data Quality Assurance
- Executive Briefing

Why Attend This Course

- Return to work with a Leadership Performance Report Pack built on your own organisation's indicators, already tested against peer critique
- Cut report length while giving leaders more of the information they act on
- Answer the question every executive asks next, why performance moved and what to do about it
- Compare reporting practice with managers from other sectors and countries who brief senior leadership

Conclusion

Performance information is only useful when leaders can read it quickly, trust it and act on it. This course moves from the decisions leadership forums take, through the reporting, visual and data quality standards that shape a credible report, to status rules, variance analysis, commentary and the controls that protect report integrity. The final day turns that material into a Leadership Performance Report Pack that participants take back to their organisation, giving them a structured and defensible format for the next reporting cycle.