CONCEPT

Organisational Performance Review Course: Results Analysis, Review Meetings and Improvement



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Introduction:

Organisational Performance Review Course: Results Analysis, Review Meetings and Improvement is a 3-day course for department and section managers, performance and excellence office staff, planning officers and quality staff, ending with a Unit Performance Review Pack and improvement action plan. Many organisations collect performance results every month, yet review meetings stop at reading figures aloud, gaps are explained away and agreed actions are not followed up. Nominees already report or review unit results and practise on performance case studies from service, industrial and public organisations. CoreConcept Training Center delivers this organisational performance review course.

Course Objectives:

- Translate an approved plan into unit goals, targets and a performance follow-up calendar
- Prepare performance data and a one-page results summary that shows trends, targets and gaps
- Run monthly and quarterly performance review meetings with a clear agenda, roles and decision log
- Analyse performance gaps using trend reading, comparison with targets and root cause analysis
- Convert review findings into corrective and improvement actions managed through the PDCA cycle
- Produce a Unit Performance Review Pack with results analysis, decisions and an improvement action plan for leadership

Target Audience:

- Department and section managers responsible for unit results and chairing performance reviews
- Performance and excellence office staff responsible for collecting results and preparing review reports
- Planning officers responsible for linking operational plans to unit goals and targets
- Quality and continuous improvement staff responsible for root cause analysis and corrective actions
- Team leaders responsible for reporting team results and carrying out agreed improvement actions

Course Outline:

Day 1: Unit Goals, Performance Data and the Review Cycle

- Performance Management Cycle from Planning to Improvement
- Unit Goal and Target Sheet Derived from the Operating Plan
- Performance Follow-Up Calendar and Reporting Responsibilities Matrix
- Performance Data Collection Template and Data Validation Checks
- One-Page Results Summary with Trends, Targets and Gaps

Day 2: Review Meetings, Gap Analysis and Root Causes

- Performance Review Meeting Agenda, Roles and Decision Log
- Run Chart Trend Reading and Target Gap Calculation
- Fishbone Diagram and Five Whys for Performance Gaps
- Pareto Analysis to Prioritise Underperforming Areas
- PDCA Improvement Cycle and Corrective Action Plan Template

Day 3: Performance Review Case Study and the Review Pack

- Customer Service Centre Case Study with Missed Targets
- Maintenance Unit Case Study on Repeated Backlog Gaps
- Simulated Quarterly Review Meeting with Peer Observers
- Leadership Results Report with Decisions and Follow-Up Status
- Unit Performance Review Pack Completion and Peer Review

Skills You Will Gain:

- Goal and Target Setting
- Performance Data Preparation
- Review Meeting Facilitation
- Trend Analysis
- Root Cause Analysis
- Improvement Planning
- Action Follow-Up
- Results Reporting

Why Attend This Course:

- Present a Unit Performance Review Pack with results analysis and an improvement action plan to the unit head and the performance or excellence office
- Decide which performance gaps need corrective action now and which need further monitoring, based on trends and root causes
- Stop review meetings that end without decisions, and prevent the same targets being missed quarter after quarter
- Train colleagues to use the results summary, decision log and corrective action template in their own team reviews

Conclusion:

Back at work, the participant uses the Unit Performance Review Pack in the next monthly or quarterly review. The unit head relies on it to agree which gaps need corrective action, who owns each action and when progress will be checked, while the performance or excellence office receives results in a consistent format. After the first review cycle, the unit should check whether actions were completed, whether the gaps narrowed and whether the agenda and results summary need adjusting.

Frequently Asked Questions FAQ:

What should participants know before an organisational performance review course?

Participants should already report, review or act on unit results. Bringing an anonymised performance report, the unit's targets and minutes or notes from a recent review meeting lets them apply the results summary, gap analysis and action plan to familiar material.

How does an organisational performance review course differ from a KPI design course?

A KPI design course builds indicators from strategy, documents them and sets their targets. This course starts once goals and indicators exist, and teaches how to review results, analyse gaps and root causes, run decision-focused meetings and follow up improvement actions.

How often should an organisational performance review take place?

Most units review operational results monthly and hold a broader quarterly review linked to the plan. The right rhythm depends on how quickly results change and how fast corrective actions can take effect, so each unit agrees its calendar with leadership.

What do participants take back from an organisational performance review course?

Participants take back a Unit Performance Review Pack containing a goal and target sheet, follow-up calendar, results summary, meeting agenda and decision log, gap and root cause analysis, and an improvement action plan ready for their next review.