



How to create and manage KPIs

Advanced Quorso training

2022

STRICTLY CONFIDENTIAL



Introduction

What

As a KPI manager, you can set up a KPI to track the performance of:

- A specific product, sub-category or category
- A combination of multiple products or sub-categories that sit within different parts of your product hierarchy

For example, you might want to track the performance of all 'Lunch' items, or, perhaps a meal deal promotion comprising a sandwich, snack and a drink.

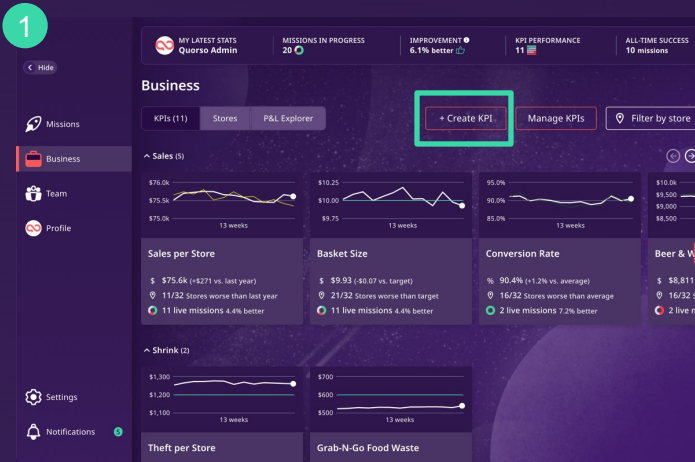
Why

- Setting up a KPI enables you to track performance over time, versus a target.
- You can click into the KPI to view the rank of your site/store(s) on that KPI versus all site/stores in your organisation.
- Quorso will automatically surface opportunities for improvement just within this KPI, that you can create action plans for.

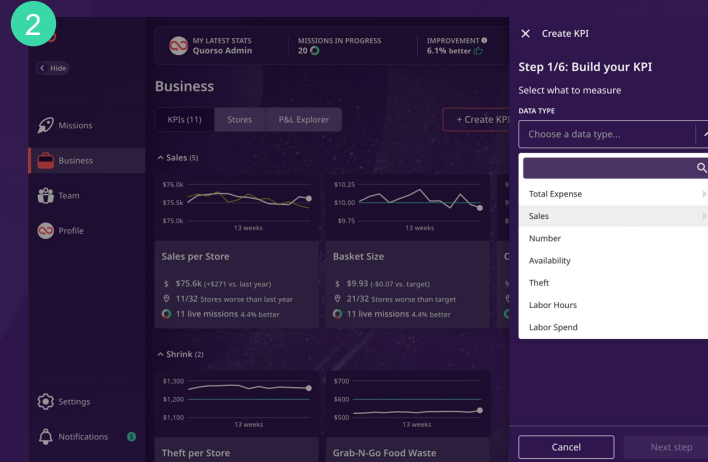
Who can do this

- You need to have KPI manager permissions to set up and manage KPIs. This is controlled by your Project Lead or Quorso Account Lead – please contact support@quorso.com to request access.
- Note that your peers in Quorso will be able to see the KPIs that you have created (although, only their data will be populated for each KPI, they will not see your performance data).

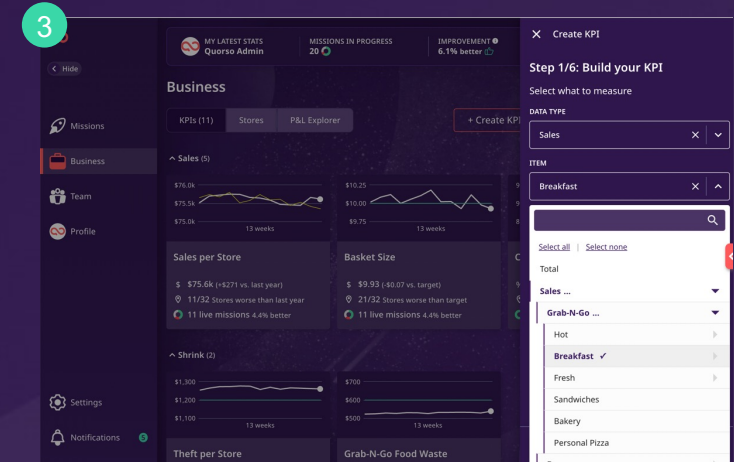
How-To (1 of 2)



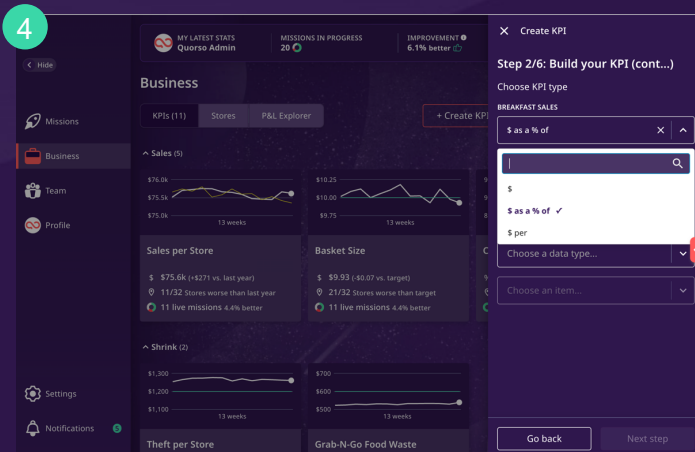
Go to Business screen > +Create KPI



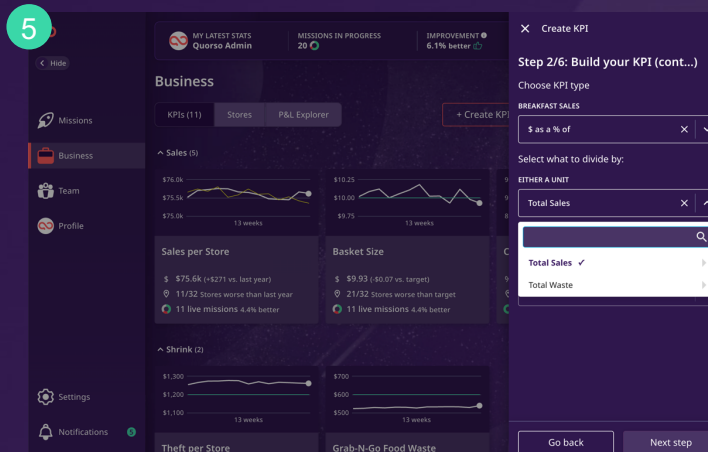
Select the top-level metric/data type. Arrows mean you can click further down a hierarchy.



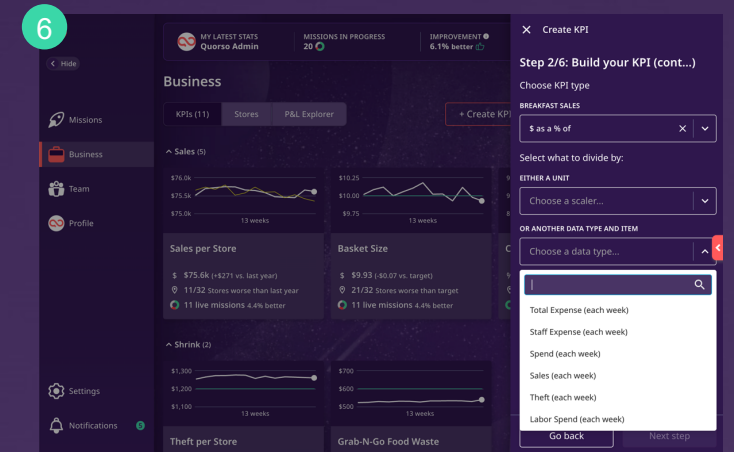
Select one or more category, sub-cats or products that you want to measure.



Your KPI can be a straight value or a percentage / \$ per something else.



In this example, we're measuring Breakfast sales as a % of Total Sales.



An alternative selection could be another metric, e.g. if comparing labor or waste to sales.

How-To (2 of 2)

1

Step 3/6: Configure your KPI
For multiple Stores the KPI value will be:
 Total across all your Stores
 Average per Store
NAME YOUR KPI
Breakfast as a % of Sales

When looking across all of your sites/stores, select whether you want to display a total or average. We normally set up the total, as you can then filter to a single store.

2

Step 4/6: Performance measure
For each Store, performance will be measured against:
 Average of all other Stores
 Last year
 Budget
 Forecast
 Last year (adjusted)
 Target
 Trend
Stores should be ranked based on their:
 Raw KPI value
 Performance versus average of all other Stores

Set a baseline for your target line. Average of all other stores is what we refer to as 'performance vs peers', which is an adjusted average.

3

Step 5/6: Launch missions
Should Quorso generate missions to improve this KPI?
 No
Your team won't receive missions for this KPI
 Yes, if they are high priority
Your team will receive a mission for this KPI when it is one of their top 4 improvement opportunities
 Yes, whenever they are worse than their baseline
Your team will receive missions for this KPI whenever they miss their baseline by the amount specified below
What is the minimum value of missions that Quorso should generate?
50
Your team will only receive missions for this KPI if their value is greater than the minimum opportunity value specified. If this is set blank then the highest priority missions will be sent, which may include Missions which are a long way off the mark but lower value ("quick wins")
Incoming missions will be prioritized based

Determine whether GMs will receive missions based on your KPI (when underperforming vs your target). Note that this will apply to everyone in your business.

4

Step 6/6: KPI access
Incoming Missions will only be generated for users who can see this KPI
WHO SHOULD SEE THIS KPI?
3 selected
Select all | Select none
Area Manager ✓
General Manager ✓
Quorso Admin ✓

Tick or untick which roles can view your KPI.

5

Manage KPIs | Filter by store

To make your new KPI visible, go to Manage KPIs.

6

New KPI
New Group
Move up
Move down
Edit
Delete

Move it up to the relevant group, or create a new group. Come back here to edit or delete KPIs.