JUPITER PRIME

Consulting • Training • Advisory

جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

Finance Key Performance and Key Risk Indicator Scorecards Training Course

26 – 30 July 2027
Madrid

Finance Key Performance and Key Risk Indicator Scorecards Training Course

Ref: 2818_108082 **Date:** 26 – 30 July 2027 **Location:** Madrid **Fees:** 5600 GBP

Finance Key Performance and Key Risk Indicator Scorecards is a 1-week training course for finance business partners, performance managers and risk officers, producing a Business Unit Indicator Scorecard. Boards now expect one view of whether strategy is on track and whether exposures are rising, so finance must pair each measure with a risk signal. Jupiter Prime Training delivers this course on finance key performance and key risk indicator scorecards.

Why Finance Key Performance and Key Risk Indicator Scorecards Matter Now

Three forces shape this subject. Boards and audit committees want fewer, sharper measures with clear owners instead of long monthly packs. Risk functions are asked to show early warning, not only loss history, which means indicators that move before results do. An organisation that designs key performance indicators and key risk indicators together spots drift early and argues less about numbers. The course rests on strategy mapping, indicator cascades and risk appetite statements expressed as tolerances.

Who Gains Most from Finance Key Performance and Key Risk Indicator Scorecards

- Finance business partners who translate unit strategy into measurable targets and explain variances
- Performance reporting staff who build and maintain management dashboards and indicator definitions
- Risk officers who set risk appetite limits and monitor early warning signals
- Planning and budgeting analysts who link targets to forecasts and resource requests

Finance and risk groups that attend together from the same business unit gain most, since each pair needs a target owner and a tolerance owner.

Finance Key Performance and Key Risk Indicator Scorecards Capabilities

Participants turn a strategic objective into a small set of paired measures, each with a definition, an owner and a trigger.

- Align each key performance indicator to one strategic objective and its value driver — the business unit head
- Design key risk indicators that lead rather than lag the outcome they protect — the risk committee
- Specify targets, thresholds and tolerance bands with escalation rules — the executive approving limits
- Build cascades from enterprise measures down to unit and process measures — divisional managers
- Test indicator definitions for data source, frequency and gaming risk — internal control reviewers
- Communicate a one-page board dashboard with status colours and commentary — the board and audit committee

Key Finance Key Performance and Key Risk Indicator Scorecards Terms

- Key performance indicator — a measure of progress towards a stated objective, with a target and owner.
- Key risk indicator — a measure signalling a rising exposure that could prevent an objective from being met.
- Leading indicator — a measure that moves before the outcome it predicts, giving time to act.
- Risk tolerance — the acceptable variation around a target or limit before escalation is required.
- Indicator cascade — the linked chain of measures from enterprise objectives down to unit and process level.
- Traffic-light threshold — the boundary values that set green, amber and red status for a reported measure.

Finance Key Performance and Key Risk Indicator Scorecards Day by Day

Day 1: Strategy and the Purpose of Measurement

- Strategy Map of Objectives and Value Drivers — Choice of What to Measure
- Performance Versus Risk Questions per Objective — Pairing Measures with Exposures
- Board Information Needs Interview — Scope of the Top-Level View
- Current Report Pack Inventory — Retiring Measures Nobody Uses
- Indicator Selection Criteria Grid — Relevance, Controllability and Data Cost

Day 2: Designing Finance Performance Measures

- Indicator Definition Sheet — Formula, Source, Frequency and Owner
- Financial and Non-Financial Driver Measures — Balance Between Lagging and Leading
- Target Setting from Plan and Benchmark — Stretch Versus Achievable Levels
- Cascade Tree from Enterprise to Unit — Line of Sight for Managers
- Gaming and Perverse Incentive Review — Behaviour the Measure Encourages

Day 3: Building Risk Indicators and Tolerances

- Risk Appetite Statement to Tolerance Translation — Limits Leaders Approve
- Early Warning Signal Identification — Liquidity, Credit and Operational Exposures
- Threshold Calibration from History — Amber and Red Trigger Levels
- Escalation Matrix by Breach Severity — Who Acts and How Fast
- Indicator Correlation Check — Redundant Signals and Blind Spots

Day 4: Dashboards and Reporting Decisions

- One-Page Board Dashboard Layout — Status, Trend and Commentary
- Variance Narrative Writing — Cause, Consequence and Corrective Step
- Reporting Calendar and Data Ownership — Timeliness Against Accuracy
- Indicator Quality Assurance Tests — Reconciliation to Ledger and Source
- Periodic Indicator Refresh Review — When to Retire or Redefine a Measure

Day 5: Practising the Business Unit Indicator Scorecard

- Objective and Driver Selection for a Case Unit — Scope of the Scorecard
- Paired Performance and Risk Measure Set — Definitions and Owners
- Target and Tolerance Calibration — Trigger Levels Ready for Approval
- Dashboard Mock-Up with Commentary — Board Readiness Test
- Business Unit Indicator Scorecard — Sign-Off by Unit and Risk Leads

Applying Finance Key Performance and Key Risk Indicator Scorecards After the Course

- Run an inventory of the current management pack and retire measures that fail the selection criteria grid.
- Pair each retained measure with one leading risk indicator and propose tolerance bands.

Finance Key Performance and Key Risk Indicator Scorecards Questions FAQ

What are finance key performance and key risk indicator scorecards, and why do they matter now?

They are paired sets of measures showing progress on objectives and the exposures that threaten them. They matter now because boards want early warning alongside results.

Which roles gain most from finance key performance and key risk indicator scorecards?

Finance business partners, performance managers and risk officers gain most. You agree targets and tolerances with colleagues who own the other half of each pair.

How do finance key performance and key risk indicator scorecards differ from a general enterprise risk course?

The focus is measure design, not risk registers. An enterprise risk course covers identification and treatment; here you define, calibrate and report indicators tied to unit objectives and finance targets.

What do you bring back from finance key performance and key risk indicator scorecards?

You bring back a scorecard ready for approval. It holds paired measures, owners, tolerance bands and a dashboard mock-up.

Finance Key Performance and Key Risk Indicator Scorecards: The Way Forward

The Business Unit Indicator Scorecard first informs which targets and tolerance bands the unit head and risk committee approve for the coming period. Finance partners use it in monthly reviews and risk officers when deciding escalation. After the first quarter, revisit whether each risk indicator actually moved ahead of results.