

Halderstone



Training module

Auditing Objectives & Performance Evaluation

Assess whether objectives and KPIs credibly
measure and steer organisational performance



Do objectives and KPIs guide decisions or just populate dashboards?

Overview

Objectives and key performance indicators are central to how management systems monitor performance and guide improvement. In practice, organisations often maintain objectives and dashboards that appear credible while remaining weakly connected to operational decisions.

This module develops the capability to audit whether objectives and KPIs meaningfully steer organisational priorities and improvement. Participants first review how objectives, measurement, monitoring, and evaluation are intended to function within management systems and then learn how auditors test KPI credibility, trace evidence trails, and detect misleading or incomplete performance information.



Target audience

- Aspiring auditors who want to audit management systems following best practices
- Practising management system auditors who want to strengthen their audit knowledge, judgement, and effectiveness

Is this module for you?

It is a good fit for you if you...

- seek to audit whether objectives and KPIs genuinely steer decisions and improvement.
- are aiming to judge relevance, coherence, and use of performance information.
- focus on identifying gaps between stated objectives and operational reality.
- are prepared to base findings on evidence trails rather than metric existence.
- expect to strengthen audit conclusions around effectiveness and performance.

It may be less suitable for you if you...

- prefer to design, define, or optimise objectives and KPIs yourself.
- are looking for methods to implement or manage performance measurement systems.
- focus primarily on facilitation, coaching, or improvement workshops.
- do not intend to audit objectives, KPIs, or performance evaluation at all.

Learning outcomes

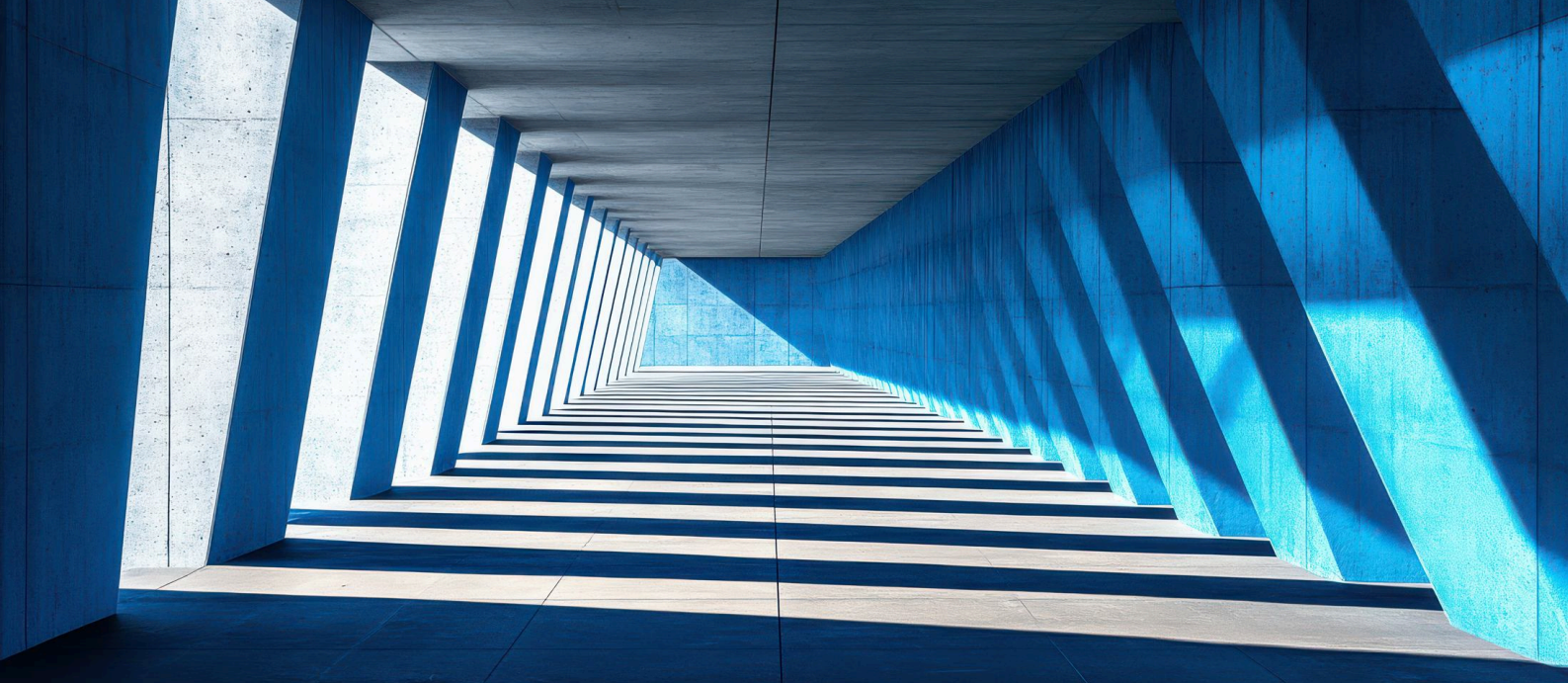


Key outcomes

- Assess whether objectives are operationally defined, measurable, and deployed beyond documentation
- Trace objective → KPI → result → action chains and identify where traceability breaks down
- Judge KPI relevance by testing alignment, coverage, and decision usefulness rather than metric existence

Additional capabilities

- Identify common KPI failure modes such as gaming, local optimisation, missing leading indicators, and blind spots
- Triangulate performance claims using independent evidence sources and time-based sampling
- Evaluate whether performance evaluation is actually used in governance routines, including links to review and improvement



Agenda

Foundations of objectives and performance evaluation in management systems

How objectives, indicators, monitoring, measurement, analysis, and evaluation function within ISO management systems and inform governance decisions

What effective auditing of objectives and KPIs looks like

How auditors judge whether objectives provide operational direction and whether KPIs function as decision instruments rather than reporting artefacts

Building an objective-to-evidence audit trail

How to trace objectives through indicators, results, and actions and identify the evidence sources that substantiate that chain

Testing whether objectives are operational and measurable

How to evaluate ownership, baselines, targets, cadence, and scope using structured sampling

KPI credibility and false assurance patterns

How to identify vanity metrics, lag-only reporting, weak data definitions, and silent exclusions that undermine assurance

Gaming, incentives, and blind spots

How to recognise metric gaming, incentive distortions, and missing leading indicators using triangulation across evidence sources

Case-based audit simulation

Applying the learned concepts, methods, and approaches in a realistic case setting

Included materials



Learning materials

- Slide deck
- Participant workbook

Templates & tools

- Audit interview planning tool
- Documented information checklist
- Sampling tool
- Audit analysis worksheets
- Failure pattern library
- Supporting AI prompt set

Confirmation

- Confirmation of participation

Preparation guidance

Assumed background

This module assumes participants can perform basic audit activities and apply evidence-based judgement.

Helpful background includes:

- General understanding of management systems and performance reporting
- Ability to follow evidence trails across dashboards, minutes, action tracking, and operational records
- Basic familiarity with objectives, measures, targets, and sampling logic

Preparatory modules

Foundation (depending on background)

Useful if you are new to the underlying concepts

- Audit Principles

Supporting (optional)

Helpful but not required to participate effectively

- Audit Communication & Interviewing
- Audit Reporting & Follow-up

Logistics



Available languages

- English
- German

Standard delivery options

- Virtual live teaching
- Blended learning (e-learning + live)

Bespoke delivery options

- On-site delivery at your place
- Content adapted to your organization



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