

Halderstone



Training module

Monitoring & Measurement

Design and run monitoring activities and measurement methods to generate reliable performance data for evaluation and improvement



Are inconsistent or unreliable performance data hindering your decision-making and management system effectiveness?

Overview

Many organizations struggle with performance data that is inconsistent, difficult to compare, or unreliable, leading to suboptimal decisions and ineffective management systems.

This module addresses these challenges by offering a disciplined foundation for monitoring activities, measurement methods, data quality checks, and measurement registers. Participants will learn when ongoing monitoring is needed, how specific measurements should be defined, how robust data quality controls are applied, and how systematic registers keep data generation reproducible. The focus is on practical application, enabling participants to ensure performance data is consistent, explainable, and maintainable, thereby supporting informed decision-making without delving into complex statistical analysis.



Target audience

- Management system implementers and coordinators
- Executives and department heads accountable for management system performance
- Those responsible for processes, policies, assets, risks, and controls related to a management system
- Auditors seeking insights into management-side best practice (not audit technique)
- Management consultants working with management system design, governance, or improvement

Is this module for you?

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

- rely on KPIs or reports but question their reliability.
- struggle with inconsistent definitions, sources, or calculations.
- experience debates about numbers instead of decisions.
- need measurement results that are explainable and repeatable.
- want monitoring that holds up over time, not ad-hoc reporting.

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

- already operate a stable, trusted, and consistently applied measurement system.
- have no mandate or interest in shaping how data is collected or validated.
- need KPI design, performance interpretation, or analytics tooling.
- are looking for automation or BI solutions rather than measurement foundations.

Learning outcomes



Key outcomes

- Define suitable measurement methods for different types of performance data and the monitoring activities around them
- Implement data quality checks to ensure reliability and accuracy of measurement results
- Establish and maintain registers that keep monitoring and measurement activities consistent and traceable

Additional capabilities

- Distinguish between monitoring activities, measurement methods, and different types of performance data in relation to management system objectives
- Develop a systematic approach to data collection and validation for informed decision-making
- Identify and address common pitfalls in monitoring and measurement, such as data overload or inconsistent reporting

Agenda

What monitoring and measurement each cover in a management system

How monitoring and measurement complement each other in management systems: monitoring as ongoing observation of status, trends, and conditions, and measurement as the generation of defined quantitative or qualitative results; and where unclear definitions, unclear methods, and weak ownership undermine results

Turning existing objectives and KPIs into monitoring and measurement tasks

How to translate KPI statements into defined monitoring and measurement activities with minimum specifications covering data source, collection method, calculation logic, and unit or format

Defining measurement methods and data quality criteria

How to define measurement frequency, responsibilities, and hand-offs, and set data quality criteria with acceptable tolerance and error ranges

Designing the measurement workflow

How to design a clear workflow from data collection through calculation, validation, and documentation, and manage versioning of definitions and calculations to keep results reproducible

Data quality checks that work in practice

How to apply practical plausibility, completeness, and consistency checks, and address common issues such as duplicates, partial coverage, stale data, and human error

Evidence trail and traceability

How to capture just enough evidence so results can be explained later, and maintain traceability from source through calculation to reported value in a lightweight and usable way

Manual versus automated measurement

How to decide when spreadsheets are acceptable and how to control them, and what to consider when automating measurement with respect to transparency, calculation logic, and version drift

Building and maintaining a monitoring and measurement register

How to define essential register fields and a maintainable structure, and establish review cycles, ownership, and routines to keep monitoring activities and measurement methods current

Case-based workshop

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

Included materials



Learning materials

- Slide deck
- Participant workbook

Templates & tools

- Measurement and monitoring process including key role definitions
- Monitoring and measurement register
- KPI measurement method sheet
- Measurement planning template

Confirmation

- Confirmation of participation

Preparation guidance

Assumed background

This module assumes general familiarity with management system concepts and how objectives and KPIs are used in organisational reporting. Participants do not need prior standard-specific clause knowledge.

Helpful background includes:

- Basic understanding of processes, roles, and operational reporting routines
- Familiarity with common performance measures used in your organisation

Preparatory modules

Foundation (depending on background)

Useful if you are new to the underlying concepts

- Objectives & Performance Management

Supporting (optional)

Helpful but not required to participate effectively

- System Framing

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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