

Halderstone



Training module

Performance Evaluation

Evaluate monitoring and measurement results, interpret trends and deviations, and summarise conclusions to support management decisions



Are your monitoring and measurement results failing to provide clear, actionable insights for management decisions?

Overview

Organizations often generate large volumes of monitoring and measurement data but struggle with consistent interpretation, leading to ambiguous insights and ineffective management decisions.

This module addresses these challenges by providing a structured approach to performance evaluation. Participants will learn to analyse monitoring and measurement results, interpret trends and deviations, and effectively summarise evaluation outputs for management decisions. The focus is on developing a practical evaluation discipline that supports clear decision-making and credible improvement initiatives, transforming raw data into actionable intelligence.



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...

- work with performance results but struggle to interpret what they mean.
- face reports full of numbers but little shared understanding.
- need to distinguish signal from noise and explain deviations.
- support management review, evaluation, or improvement decisions.
- want performance evaluation that leads to action, not just reporting.

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

- already operate a clear, consistent performance evaluation discipline.
- have no mandate or interest in interpreting or summarising results.
- need KPI design, monitoring system setup, or analytics tooling.
- are looking for audit execution or corrective action techniques.

Learning outcomes



Key outcomes

- Analyze performance results to identify key trends and deviations
- Interpret monitoring and measurement results to derive actionable insights for management decisions
- Summarize evaluation outputs effectively for various stakeholders and management review inputs

Additional capabilities

- Distinguish between different types of performance indicators and their implications for evaluation
- Develop a systematic approach to performance evaluation that supports continuous improvement
- Identify and address common pitfalls in performance evaluation, such as data misinterpretation or biased reporting

Agenda

Role of performance evaluation in management systems

How performance evaluation builds on monitoring and measurement by focusing on meaning, significance, and decision relevance, and where common failure modes such as overload, defensiveness, and false precision reduce its value

Preparing evaluation inputs

How to consolidate monitoring and measurement results from multiple sources and apply basic comparability checks across definitions, time windows, baselines, and scaling

Reading trends, deviations, and patterns

How to recognise practical patterns such as trends, spikes, plateaus, and recurring variation, and identify triggers that warrant deeper investigation

Building credible interpretations

How to separate observation, interpretation, and implication, and assess confidence and uncertainty by distinguishing what is known from what is assumed

Evaluating what is working and what is not

How to use performance evidence to assess process stability and control operation at management level, and recognise when indicators no longer support decision-making

Synthesising multiple inputs into an integrated picture

How to combine monitoring and measurement results with audit outputs, incidents, and feedback without cherry-picking, and apply consistency checks across conflicting or lagging and leading signals

Communicating evaluation outputs for leadership use

How to prepare management-ready summaries that move from situation to interpretation, implication, and decision input, and avoid dashboard overload and overly technical narratives

From evaluation outputs to improvement inputs

How to translate evaluation summaries into actionable improvement inputs and follow-up questions, and define what evidence would demonstrate improvement over time

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

- Performance evaluation process
- Dashboards examples
- Performance evaluation worksheet
- Trigger and follow-up checklist
- Insight-to-action mapping sheet

Confirmation

- Confirmation of participation

Preparation guidance

Assumed background

This module assumes general familiarity with management system operation and routine performance reporting. Participants should be comfortable reading basic performance charts/tables and discussing process performance in operational terms.

Helpful background includes:

- Basic understanding of objectives, measures, and monitoring outputs
- Familiarity with management review as a governance routine (conceptually)

Preparatory modules

Supporting (optional)

Helpful but not required to participate effectively

- Objectives & Performance Management
- Monitoring & Measurement

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



Halderstone

Halderstone by Langer & Co

Zürcherstrasse 2

CH-8852 Altendorf

Switzerland

info@halderstone.com

www.halderstone.com