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cardlytics

# Cardlytics

June Signature Event





# Personal KPIs

*A Holistic Approach to Help You Succeed  
and Move Your Organization Forward*

**Presented by: Michelle Coussens,  
Business Strategist, Plan B Consulting**

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# OKRs

# Cyndi Richardson

# 2022 focus

## MISSION

To redefine marketing by using data for good

## PURPOSE

We create undeniable impact for partners while delivering real value to people

## GOALS

Grow our addressable market share

Evolve our platform

Enhance our bank relationships

Capitalize on our data advantage

Create a great place where great people like to be

## OBJECTIVES

Scale demand

Drive adoption of one platform for serving all partner funded ads

Stabilize Ads Manager +++

Expand and diversify Bridg solutions

Retain and select the best global talent to CDLX

Diversify demand

Expedite adoption of the new consumer experience

Externalize the marketplace

Enrich purchase graph by integrating Bridg and CDLX data

Ready the organization to navigate cultural transformation

Enhance our brand position

Grow and maintain strategic MAUs

Optimize the marketplace

Enable cross-sell/up-sell across CDLX and Bridg solutions

Build individual capacity through investing in learning development

Ensure US/UK global product parity

Launch product level offers within our marketplace



# Scale Demand

**EXECUTIVE SPONSOR: ROSS MCNAB**

## Grow the US and UK Enterprise business

- + Address the budgets we already do.
- + Bigger budgets from big advertisers
- + Selling our existing ad products
- + Direct sales oriented
- + Agency contribution
- + Winning more net new logos
- + Bridg cross / joint sales

## 2022 Key Results

- + \$430M Billings (US) / £37m Billings (UK)
- + 125 Advertisers \$1m+ TTM – US
- + 10 Advertisers \$1m+ TTM – UK
- + \$60M to be driven and supported by Agencies
- + \$40M in total new business signed and delivered

## Q1 Progress (85%)

- + \$70m in Q1 US Enterprise Billings (88% of goal)
- + \$9.4m in Q1 US Agency Billings (96% of goal)
- + 2 SMaaS deals in late stages
- + 15 US Advertisers \$1m+ YTD (75% of goal)
- + £9.8m in Q1 UK billings delivered (130% of goal)
- + Maintained 8 Advertisers \$1m+ TTM (100% of goal)



# Meet the Expert

Michelle Coussens | Business Strategist | Plan B Consulting

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- Michelle Coussens is a frequently sought-after speaker and business strategist for numerous types of organizations on a wide range of topics related to the workplace, including but not limited to talent management, business strategy, and operational effectiveness.
- She is a resourceful, resilient, and relentless business professional with demonstrated success in building new programs, driving short-term efficiencies, and improving long-term effectiveness all through innovation, rigor, and courageous leadership.
- She has direct experience with a variety of industries, as well as in consulting, education, and not-for-profit organizations. With consistently high participant ratings, her webinars, seminars, and speaking engagements bring practical value to businesses of every size and type.



# Session Deliverables

Learn how to create, measure, and track your continuous improvement across five, main categories:

1. Professional impact and development
2. Personal fulfillment
3. Physical and emotional health
4. Interpersonal commitments to others
5. Your organizational and industry contribution

## Takeaways:

- Personal Evaluation: Assess where you stand across the 5 categories
- Create a personal improvement plan to hit your future goals
- How to measure and track your KPIs

**Q&A:** *There will be time for your questions.*

# **Personal Evaluation: Assess where you stand across the 5 categories**

- **Assess your true impact on your organization**
  - Incorporate truthful peer perspectives into your self evaluation
- **Determine the current needs of your organization**
  - Align your unique strengths to support success
- **Turn your personal evaluation into real, tangible goals and objectives**



# Your Personal Evaluation

- **Interrelated areas:**
  1. Professional impact and development
  2. Personal fulfillment
  3. Physical and emotional health
  4. Interpersonal commitments to others
  5. Your organizational and industry contribution
  
- **Ratings represent strengths to leverage, efforts to scale back or let rest, and priorities for improvement or additional growth**
  - Inexistent
  - Somewhat, but not enough
  - Adequate
  - More than enough

# Assess your true impact on your organization

- **Conduct a personal SWOT analysis**
- **Review analysis results**
- **Apply the 80/20 Rule**
  - Which of your activities produce the most impact?
- **What will it take to continue to be successful?**
  - Are there any problems or barriers?
- **Is there anything you should stop doing?**

*Are you efficient? In what ways?*

- Doing things right
- Productive use of resources
- Turn-around times
- Manual versus automated efforts
- Continuous improvement

*Are you effective? In what ways?*

- Doing the right things
- Actions in line with organizational priorities?

# Incorporate *truthful* peer perspectives into your self evaluations

- **Make a list of key stakeholders**  
(*those who impact you and/or you impact*)
  - 360 degrees
  - Internal and external stakeholders
  - Professional contacts and personal connections
- **Use SurveyMonkey or a similar mechanism to solicit feedback**
  - Keep it anonymous for candor
- **Don't retaliate based on feedback**

# Conducting a personal SWOT analysis

**SWOT:** Overview of your strengths, weaknesses, opportunities, and threats.

**Step 1:** Determine *desired* attributes for success

**Step 2:** Consider internal influences, assessing strengths and weaknesses

**Step 3:** Consider external influences, assessing opportunities and threats

**Step 4:** Compare internal S&W with external O&T

|          | OPPORTUNITY   | THREAT        |
|----------|---------------|---------------|
| STRENGTH | Go for it!    | Take care of? |
| WEAKNESS | Invest in it? | Walk away???  |

# Determine the current needs of your organization

Long-term Goals

SMART Objectives

Projects/Initiatives

WorkPlans & Budgets

- **Understand its history, plans for the future, allies, and opposition**
  - Strategic plans
    - Long-term goals
  - Business/operational plans
    - Short-term goals, initiatives and projects
- **Drill down**
  - **Organization**
    - **Division**
      - **Department**
        - **Business unit**

# Organizational Plans-- Components

- **Vision:**
  - Picture of what the ideal steady state would look like
  - Where you want to go/be
  - Should be inspiring, energizing, and aligning
- **Mission (purpose)** —Why you exist/what business you are in
- **Goals**—over-arching; what will get you there
- **Objectives**— S.M.A.R.T. sub-goals
- **Activities**—How you will go about doing it
  - Tactics—Who will do what and by when
  - Roles—Ownership of tasks
- **Relationships**—Who will be affected



# Strategy leads to tactics

*“If you don’t know where you’re going, it doesn’t much matter how you get there”. – The Cheshire Cat, Alice in Wonderland*



**Mission, Vision, Values,  
Long-term goals**

**Positioning**

**Operational  
Objectives**

**ACTIVITIES**

# Use your unique strengths to help the organization succeed and advance

- **What core competencies do you hold that add value to the organization?**
  - Those demonstrated skills that make you the best for the job and/or for the organization
  - What about you is unique and would be hard for others to do instead?
  - What value do you provide to your stakeholders?
- **How could you apply them in new ways or in new settings?**
- **What new core competencies should you be developing?**



# Turn your personal evaluation into real, tangible goals and objectives

- **Goals**

- What you want to accomplish
- Over-arching, longer-term
- Must be consistent with the organization's priorities
- Realistic but aspirational

**S**pecific  
**M**easurable  
**A**chievable  
**R**ealistic (and relevant)  
**T**ime-bound

- **Objectives**

- **May be shorter-term; more tangible and quantifiable**

- **Example:**

- **Organizational goal:** *To improve employee morale*
  - **Potential objective:**
    - *Achieve a 15% increase in your employee satisfaction ratings by 12/31/2022.*

# Sample Objectives - Are they S.M.A.R.T.?

1. Increase production by 20 percent in 20 weeks.
2. Sign new contracts with new funders in the next 12 months.
3. Use feedback from performance reviews to develop a plan to improve customer service.
4. Create a basic disaster recovery plan containing agreements with one or more departments by 12/31/22.
5. Reach at least six new agencies or community groups and recruit at least two of them to participate in a series of classes.
6. Develop and lead at least three staff development sessions for the team during the next calendar year.



# Prioritize Resulting Projects, Tasks & Activities





# Create a personal improvement plan to hit your 2022 goals

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- Support your long-term goals with a successful path guaranteed to get you there
- Determine which indicators support **YOUR** goals—and how to set targets for each
- Derive relevant outputs, outcomes, and impacts associated with your goals that also enable your organization to achieve greater success
- Discover the secret behind micro-goals, and why you should learn to live by them

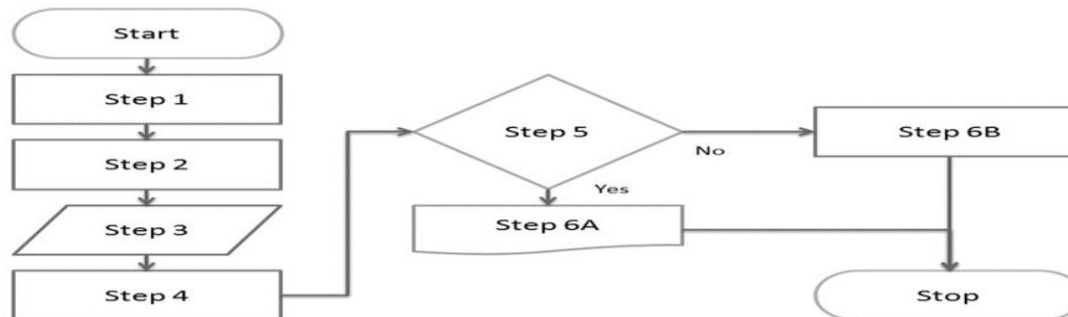
# Create a path to reach those long-term goals

- **Develop your strategy**

- How will you get from here to there?
- What activities will be needed?
- What steps should be taken in what order?
- What tasks are most critical?
  - What are alternatives/work-arounds?
- What are the advantages and drawbacks to different paths?

- **Visuals can help**

Sample Flowchart



# Some sample strategies

**GOAL:** *Broaden client base to serve more of the community needs*

**Objective #1:** Increase single-family rehab, completing 5 units by end of FY2022

Strategy:

- Identify the property
- Buy the property at the right price
- Bid out the work to be done
- Start and complete rehab work
- Rent or sell the property rehabbed

**Objective #2:** Increase awareness of available business classes, bringing in 10-15 new students by 09/30/2022

Strategy:

- Build awareness of available classes
- Gauge interest
- Develop class schedule
- Populate the classes
- Conduct classes
- Follow-up with students

# Determine indicators & targets to support your goals, objectives, & key milestones

- **Identify Key performance indicators (“KPIs”) to track**
  - **Units to be used in evaluating goals**
    - Numbers, ratios, percentages, rates, costs, time, dollars, etc.
    - Examples: # people served, # items produced, etc.
- **Targets= metrics that specify the amount of or change in such units that is needed to meet or exceed the goals.**
  - Examples– targeted: amount of money to be raised, level/rate of membership growth; specific # visitors, people served, overhead costs targeted, etc.
  - These may already be in your objectives if they are **SMART**.

# Sample KPIs & Targets

## Professional Impact

Reduce administrative costs by 10%

Increase new sales revenue by 15%

## Professional Development

Complete PMI certification

Make at least 3 external presentations

## Personal Fulfillment

Create a diversity and inclusion committee, recruiting at least 25 new members and holding 3 events

Mentor another employee, committing to assisting in at least one major initiative

## Physical/Emotional Health

Journal about my day at the conclusion of at least 3 workdays a week

Set my alarm for 5 AM each weekday and commit to meditating or exercising from 5-5:30 am.

## Interpersonal Commitments to Others

Schedule lunch with others in the workplace at least twice a week.

Conduct meeting “thumbs up or down” at the conclusion of each meeting and track results

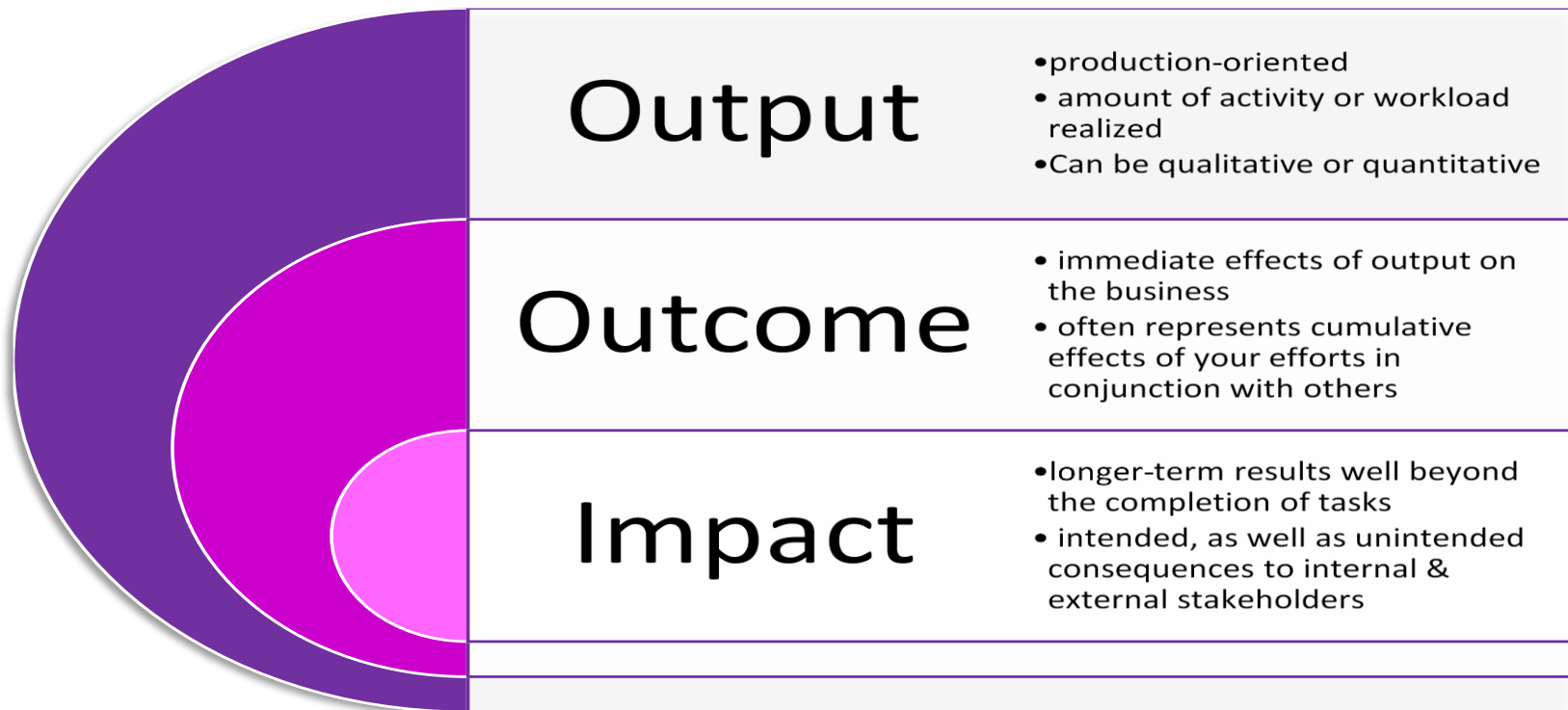
## Contributions to Your Org. & Industry

Conduct a project debrief at the end of each project and share +s and –s with stakeholders

Read at least three recommended business books and present the highlights to key stakeholders



# Derive relevant outputs, outcomes, and impacts for organizational success



# Measuring & Tracking Your KPIs



- What data to collect, how to do so, and how often to log and review progress and results, all while avoiding excessive measurement/effort or lost efficiency
- Identify leading (output-oriented) and lagging (input-oriented) indicators that will measure and monitor your progress - and eliminate the possibility of sudden, unexpected derailment
- Determine everyday behaviors and actions to turn intimidatingly large annual goals into smaller, clearer, more tangible objectives and actions
- Maintain a personal dashboard of progress and what you should highlight when communicating to your boss, mentor, employees, peers
- **Engage employees:** Tap others to objectively determine your progress, while leading by example and giving employees the opportunity to set their own KPIs that contribute to the organization

# Set and live by micro-goals to foster progress

## Create sound plans with objectives for each task, including:

- Desired results and time to achieve
- People collaborating with or relying on
- Identification of other resources needed
- Ways to mitigate risks

## Identify leading and lagging indicators to avoid derailment, plus:

- Milestones—periodic for achievement
- Stage Gates—go/no-go decision points

## What to avoid

- Metrics for which you cannot collect accurate or complete data
- Metrics that may in theory measure the right thing but cause perverse behavior
  - People do anything to “make their numbers”
  - Crush creativity or flexibility
  - Foster short-term thinking
- So many metrics that you create excessive or unnecessary work and/or confusion
- Metrics that are too complicated to track and difficult to explain

# Develop an implementation plan

- Breaks the goals and objectives down into smaller pieces – typically, what will be completed within a year's time
- Identifies the specific tactics or steps to be taken to achieve the objective
- Determines the individuals within the organization to be responsible for completing the steps
- Establishes a timeframe for completing the step/task

| Task | Owner | Priority<br>H/M/L | Target<br>Start<br>Date | Target<br>Finish<br>Date | Actual<br>Start<br>Date | Actual<br>Finish<br>Date | Contingencies<br>&<br>Dependencies | Status:<br>Green<br>Yellow<br>Red | Status<br>Comments |
|------|-------|-------------------|-------------------------|--------------------------|-------------------------|--------------------------|------------------------------------|-----------------------------------|--------------------|
|      |       |                   |                         |                          |                         |                          |                                    |                                   |                    |
|      |       |                   |                         |                          |                         |                          |                                    |                                   |                    |

# Determine the right data to collect in the right ways, at the right times

- **Identify relevant data and available sources of information**
  - Determine what quantitative and qualitative data is needed
- **Gauge the credibility of data collected, including accuracy and representativeness**
- **Anticipate initial and ongoing challenges in collecting the data**
- **Avoid excessive measurement/effort or lost efficiency**
- **Leverage existing data already collected for other purposes, such as**
  - Budget data, project management system data, cost accounting data
  - Inventory SKUs, log-in sheets, automated processes data, etc.
  - Focus group information, customer satisfaction surveys
  - Industry-wide or competitor information
  - Workplace engagement surveys

# **Translate goals and plans into everyday manageable behaviors**

- **Create a process for managing change**
- **Strategize how you will communicate with and manage stakeholders**
- **Monitor costs against budget**
- **Hold status meetings and consistently update status reports**
- **Incorporate pilots or even small “try its” to manage risk**

# Have a contingency plan

- **Contingency Plan**

- An alternative plan that will be used if a possible foreseen risk event actually occurs
- A plan of actions that will reduce or mitigate the negative impact (consequences) of a risk event

- **Risks of Not Having a Contingency Plan**

- Having no plan may slow managerial response
- Decisions made under pressure can be potentially dangerous and costly

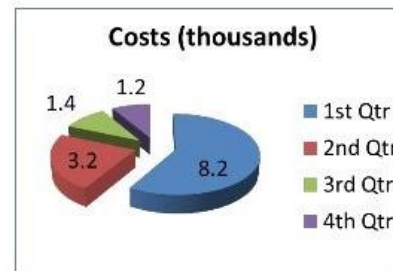
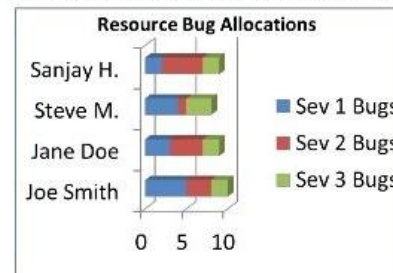


# Maintain and share a personal dashboard of progress

- **Activities**
  - Observe completion of tasks
  - Identify & resolve issues
    - Mitigate impacts
- **Sample Tools**
  - Risk & Issue Log
  - Dashboards/Scorecards
  - Status updates in work plans

## Project Dashboards

Sample Dashboard of Common Project KPIs





# Engage others in determining progress and leading by example

- **Fairly assess your performance**
  - Determine if you are progressing towards your goals
  - Evaluate pilots and/or new information
  - Collect formative evaluation from key stakeholders
- **Make adjustments**
  - Ask questions of others to identify trends or anticipate issues in advance
  - Better leverage synergies and learnings
- **Reinforce accountability and acknowledgement**
  - Evaluate individual contributions, as well as team
  - Satisfaction, motivation and development
- **Be aware of Parkinson's Law**
- **Operate as a participant of an adaptive culture**
- **Address all three aspects of performance:** quality, quantity, and timeliness

# Monitoring progress and results

- How closely have actions been adhering to the plans made?
- What are the causes when milestones are missed?
- How are variations to schedule, budget, etc. handled?
- Are issues escalated and resolved in an effective, timely manner? If not, what is preventing resolution? What can be done to improve the situation?
- What practices/activities seem to be working well? Why?
- What are some of the biggest challenges/unanticipated problems that have arisen? How have you reacted to them?

# Issue tracking and resolution

- **When flagging and resolving, consider:**
  - How the issue was discovered
  - What parties should be involved in resolution
  - What steps are needed to investigate
  - What actions are necessary for resolution
  - What follow-up is required

Project Title

| No. | Description | Priority (H/M/L) | How Discovered | Raised By | Owner | Actions Needed to Investigate/Resolve | Resolution | Date Resolved |
|-----|-------------|------------------|----------------|-----------|-------|---------------------------------------|------------|---------------|
| 1   |             |                  |                |           |       |                                       |            |               |
| 2   |             |                  |                |           |       |                                       |            |               |
| 3   |             |                  |                |           |       |                                       |            |               |
| 4   |             |                  |                |           |       |                                       |            |               |
| 5   |             |                  |                |           |       |                                       |            |               |
| 6   |             |                  |                |           |       |                                       |            |               |
| 7   |             |                  |                |           |       |                                       |            |               |
| 8   |             |                  |                |           |       |                                       |            |               |
| 9   |             |                  |                |           |       |                                       |            |               |
| 10  |             |                  |                |           |       |                                       |            |               |

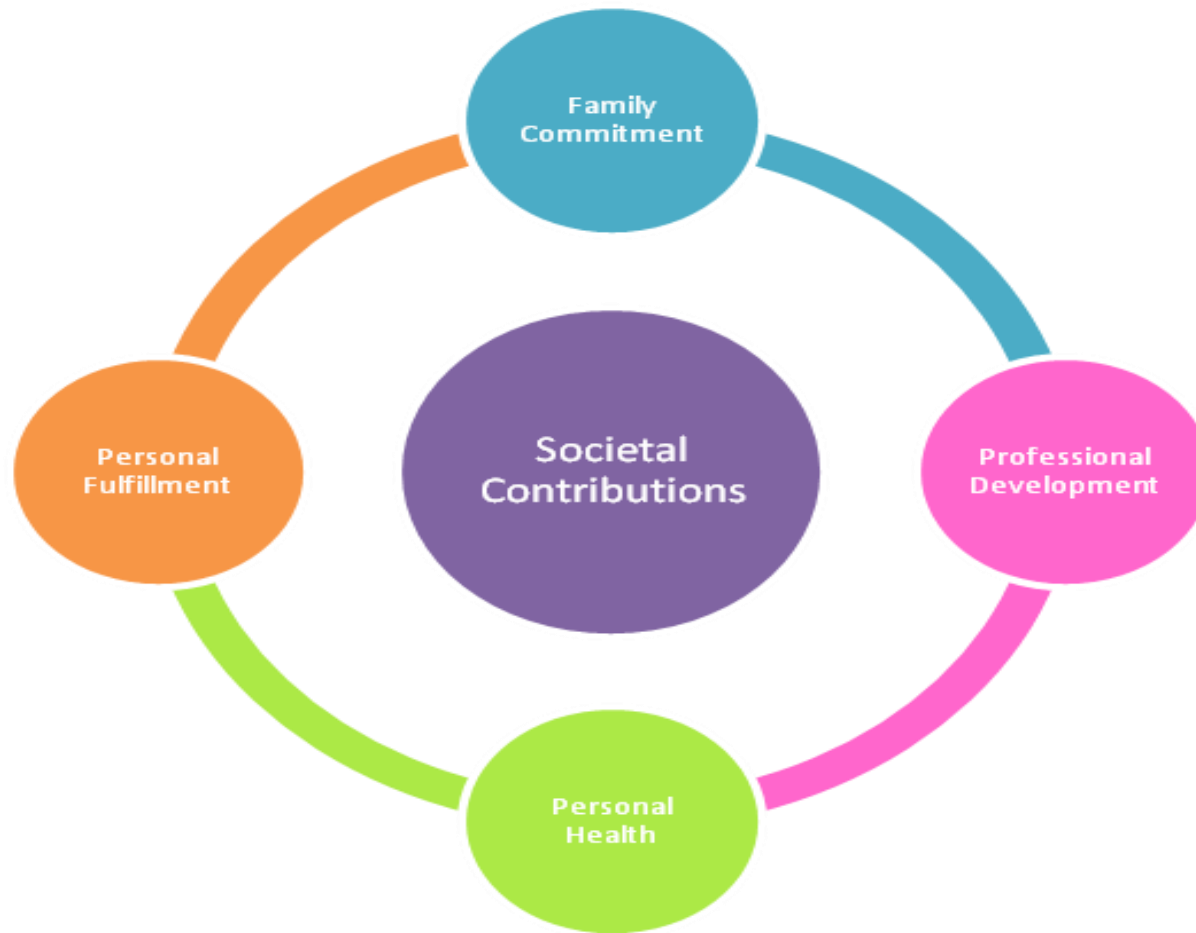
# Sample Project Debrief

|  |
|--|
| <b>Project title</b>   |
| <b>Project outcome</b> (whether objectives were met/exceeded and explanation)  |
|  |
| <b>Budget outcome</b> (actual vs. forecast expense results)  |
|  |
| <b>Next steps</b> (any necessary follow-through to achieve the desired results/impact or any suggestions for future project) |
|  |
| <b>Modifications to original project brief</b>   |
|  |
| <b>What went well</b>  |
|  |
| <b>Practices to Continue</b> (on an ongoing basis)   |
|  |
| <b>What didn't go well</b>   |
|  |
| <b>Practices to discontinue</b> (on an ongoing basis)  |
|  |
| <b>Data/information gaps</b>   |
|  |
| <b>Heroes</b> (anyone whose contribution was outstanding and why)  |
|  |

# Continuously Improve



# Think holistically about your personal and professional life



A woman with long brown hair, wearing a red sweater, is seen from behind, raising her right hand in a classroom or meeting. In the background, a woman with long red hair is smiling, and other people are seated at desks. The scene is dimly lit, with a whiteboard visible in the background.

# FINAL QUESTIONS?

# Next Steps

- Consider obtaining input from others you work with on Parts I and II of your Personal Evaluation Worksheet.
- Complete Part III of your Personal Evaluation Worksheet
- Return to a follow up webinar discussion at 1 pm EDT on 7/14/22 where...
  - You'll have an opportunity to obtain assistance in refining your personal plan.
  - You can “pick Michelle’s brain” with your follow-on questions regarding OKRs, KPIs, and how to be successful both personally and professionally.



Thank you for  
your participation!

