

Strategy KPI Tracker

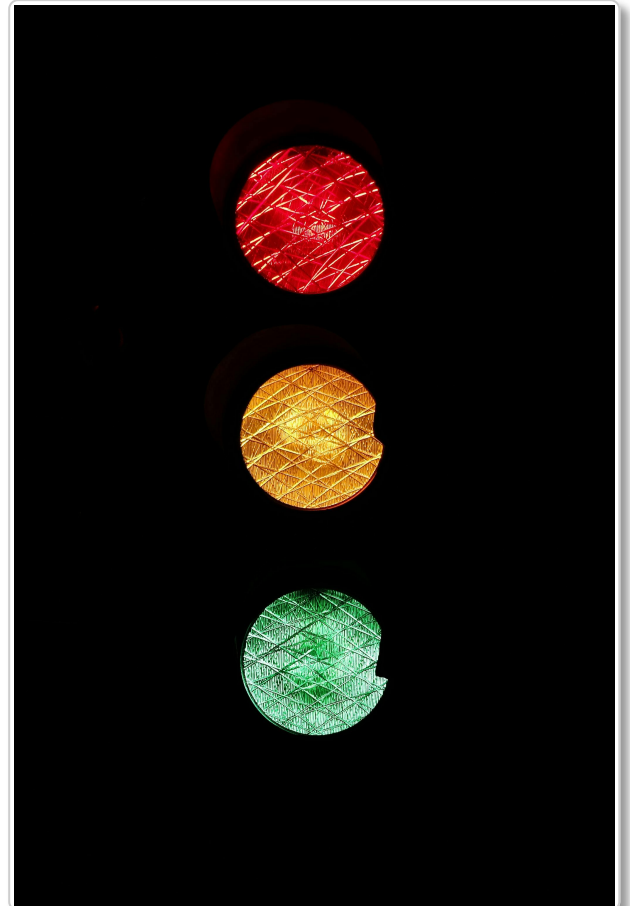
Feature

Measure what matters—track strategic performance with clarity, consistency, and confidence

This feature allows staff to capture monthly performance on strategic KPI's. The monthly and year-to-date progress reflects on a Strategic KPI Dashboard.

Epic's **Strategy KPI Tracker** empowers organisations to measure what matters—capturing monthly performance against strategic KPIs and turning raw data into actionable insight. It replaces disconnected spreadsheets and manual updates with a structured, real-time dashboard that reflects progress across teams, departments, and strategic objectives.

Whether you're tracking financial performance, operational efficiency, or customer satisfaction, this feature ensures that every KPI is visible, measurable, and aligned with your strategic goals.



Key Functions

- **Strategic Timeframe Setup:** Define KPI tracking periods—such as financial years or custom cycles—and set monthly and annual targets for each metric.
- **RAG Score Definitions:** Assign Red-Amber-Green thresholds to each KPI, creating a clear visual indicator of performance status.
- **Staff Allocation & Input:** Strategic Objectives with KPIs are assigned to staff, who enter monthly results directly into the system—feeding into the live dashboard.
- **Live KPI Dashboard:** View monthly and year-to-date performance across all strategic KPIs, with filters by team, objective, or timeframe.
- **Downloadable Reports:** Export full KPI results in Excel, PDF, or Word formats for leadership reviews, board packs, or audit documentation.
- **Performance Visibility & Accountability:** Leaders gain instant insight into what's working, what's lagging, and where support is needed—reinforcing ownership and enabling timely interventions.