

**COURSE OVERVIEW SS0838-3D**  
**Performance Measurement for Service Organizations**  
**from records side**

**Course Title**

Performance Measurement for Service Organizations from Records Side



**Course Date/Venue**

Session 1: September 13-15, 2026/Tamra Meeting Room, Al Bandar Rotana Creek, Dubai, UAE

Session 2: December 20-22, 2026/Sur Meeting Room, Royal Tulip Muscat, Muscat, Oman



**Course Reference**

SS0838-3D

**Course Duration/Credits**

Three days/1.8 CEUs/18 PDHs

**Course Description**



***70% of this course is practical sessions where participants will be engaged in a series of interactive small groups, class workshops and role-plays.***

Service organizations generate vast amounts of operational, administrative, customer, financial and compliance records that can be leveraged to measure performance, improve service delivery, support decision-making and ensure accountability. effective performance measurement requires the systematic collection, management, analysis and reporting of records-based data to evaluate efficiency, effectiveness, quality, compliance and customer satisfaction.



This intensive course is designed to establish robust performance measurement systems based on organizational records and documented evidence. Participants will learn how to develop performance frameworks, establish meaningful KPIs, analyze service records, measure service quality, evaluate operational performance and use records-based evidence to drive continuous improvement.



Further, the course will also discuss the importance of evidence-based performance management and the characteristics of service organizations; the records as a source of performance data, records management fundamentals and performance measurement frameworks; and the key performance indicators (KPIs) for service organizations, data quality and performance measurement reliability.

During this interactive course, participants will learn the service delivery performance measurement, customer service performance analysis and quality measurement using records; the productivity and resource utilization analysis, compliance and governance performance measurement as well as trend analysis and performance benchmarking; the performance reporting and dashboard development, data interpretation, decision support and performance auditing and evaluation; the continuous improvement and service excellence as well as digital records and performance analytics; and the performance measurement framework for service organizations.

### **Course Objectives/Outcomes & Benefits for the Participants**

Upon the successful completion of this course, each participant will be able to:-

- Apply and gain a comprehensive knowledge on performance measurement for service organizations from records side
- Discuss the importance of evidence-based performance management and the characteristics of service organizations
- Assess records as a source of performance data and explain records management fundamentals and performance measurement frameworks
- Carryout key performance indicators (KPIs) for service organizations, data quality and performance measurement reliability
- Apply service delivery performance measurement, customer service performance analysis and quality measurement using records
- Employ productivity and resource utilization analysis, compliance and governance performance measurement as well as trend analysis and performance benchmarking
- Implement performance reporting and dashboard development, data interpretation, decision support and performance auditing and evaluation
- Employ continuous improvement and service excellence as well as digital records and performance analytics
- Develop a performance measurement framework for service organizations

### **Exclusive Smart Training Kit - H-STK®**



Participants of this course will receive the exclusive “Haward Smart Training Kit” (H-STK®). The H-STK® consists of a comprehensive set of technical content which includes **electronic version** of the course materials conveniently saved in a **Tablet PC**.

### **Who Should Attend**

This course provides an overview of all significant aspects and considerations of performance measurement for service organizations from records side for service managers, records managers, performance analysts, quality professionals, auditors, customer service leaders, operations managers and public sector professionals.

### Course Certificate(s)

Internationally recognized certificates will be issued to all participants of the course who completed a minimum of 80% of the total tuition hours.

### Certificate Accreditations

Haward's certificates are accredited by the following international accreditation organizations: -

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British Accreditation Council (BAC)

Haward Technology is accredited by the **British Accreditation Council** for **Independent Further and Higher Education** as an **International Centre**. Haward's certificates are internationally recognized and accredited by the British Accreditation Council (BAC). BAC is the British accrediting body responsible for setting standards within independent further and higher education sector in the UK and overseas. As a BAC-accredited international centre, Haward Technology meets all of the international higher education criteria and standards set by BAC.
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The International Accreditors for Continuing Education and Training (IACET - USA)

Haward Technology is an Authorized Training Provider by the International Accreditors for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this authority, Haward Technology has demonstrated that it complies with the **ANSI/IACET 2018-1 Standard** which is widely recognized as the standard of good practice internationally. As a result of our Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for its programs that qualify under the **ANSI/IACET 2018-1 Standard**.

Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking **Continuing Education Units** (CEUs) in accordance with the rules & regulations of the International Accreditors for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology Middle East will award **1.8 CEUs** (Continuing Education Units) or **18 PDHs** (Professional Development Hours) for participants who completed the total tuition hours of this program. One CEU is equivalent to ten Professional Development Hours (PDHs) or ten contact hours of the participation in and completion of Haward Technology programs. A permanent record of a participant's involvement and awarding of CEU will be maintained by Haward Technology. Haward Technology will provide a copy of the participant's CEU and PDH Transcript of Records upon request.

### Course Fee

**US\$ 3,750** per Delegate + **VAT**. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

### Course Instructor(s)

This course will be conducted by the following instructor(s). However, we have the right to change the course instructor(s) prior to the course date and inform participants accordingly:



**Mr. Pete Du Plessis** MSc, BSc, is a **Senior Quality Consultant** with over **25 years** of extensive experience. His expertise lies extensively in the areas of **Internal Audit, Statistical Process Control, Statistical Data, Quality Management, Project Management, Value Engineering, Estimation & Costing, Human Resource Management, Financial Management, Planning, Budgeting & Cost Control, Document Management, Record Management, Contract Management, Negotiation Management, Risk Management, Leadership & Business Management, Production & Inventory Management, Warehousing, Purchasing & Marketing Management, Work Engineering & Advanced Production Techniques, Production Logistics, Supply Chain Management, Fleet Management, Stores & Stock Control, Human Resources & Industrial Relations Management, Quality Assurance & Control, Operations Management, Project Management, and Strategic Planning & Management.** Previously, he was the **Quality Manager of Benteler Automotive**, where he was responsible for implementing, controlling and managing quality and technical department processes and systems and mobilizing the quality control department, procedures and quality management system.

During his career life, Mr. Plessis has worked with several prestigious companies occupying numerous challenging managerial and technical positions such as being the **Project Manager, Operations Manager, Technical & Quality Manager, Logistics & Purchasing Manager, Head Metrologist, Quality Engineer, Project Engineer, Materials & Warehouse Planner & Controller and Quality Control Inspector.** All throughout his career, he has mastered and specialized in the application of project management, warehouse & inventory control, value chain analysis, logistics & strategic planning, process flow analysis, business process evaluation & re-engineering, master-plan development, capacity planning and site space-planning & development.

Mr. Plessis has **Master** and **Bachelor** degrees with **Honours** in **Industrial Engineering & Management.** Further, he has gained **Diploma in Quality & Production Management.** He is also a **Certified Trainer** as well as a **Certified Assessor & Moderator** with the Manufacturing, Engineering & Related Services Education and Training Authority (MERSETA).

### Training Methodology

This interactive training course includes the following training methodologies as a percentage of the total tuition hours:-

30% Lectures

70% Practical Exercises, Case Studies, Games, Customized Videos, Site Visits, Simulations, Role Play, Group Skill Sessions, Outdoor & Indoor Activities

In an unlikely event, the course instructor may modify the above training methodology before or during the course for technical reasons

### Learning Design & Customization

This course can be customized to the exact requirements of clients. Haward Technology is so proud of our huge capabilities in tailoring our courses to the training needs of our valued clients.

**Accommodation**

Accommodation is not included in the course fees. However, any accommodation required can be arranged at the time of booking.

**Course Program**

The following program is planned for this course. However, the course instructor(s) may modify this program before or during the workshop for technical reasons with no prior notice to participants. Nevertheless, the course objectives will always be met:

**Day 1**

0730 – 0800	Registration & Coffee
0800 – 0815	Welcome & Introduction
0815 – 0830	<b>PRE-TEST</b>
0830 – 0930	<b>Introduction to Performance Measurement in Service Organizations</b> Principles and Objectives of Performance Measurement • Importance of Evidence-Based Performance Management • Characteristics of Service Organizations • Linking Performance Measurement to Organizational Strategy
0930 – 0945	Break
0945 – 1030	<b>Understanding Records as a Source of Performance Data</b> Types of Organizational Records • Operational, Administrative, and Customer Records • Records as Performance Evidence • Data Integrity and Reliability Considerations
1030 – 1130	<b>Records Management Fundamentals</b> Records Lifecycle Management • Records Classification and Retention • Document Control and Accessibility • Compliance and Governance Requirements
1130 – 1215	<b>Performance Measurement Frameworks</b> Balanced Scorecard Approach • Results-Based Management Frameworks • Service Excellence Models • Developing Performance Measurement Systems
1215 – 1230	Break
1230 – 1300	<b>Key Performance Indicators (KPIs) for Service Organizations</b> Characteristics of Effective KPIs • Operational versus Strategic KPIs • Leading and Lagging Indicators • KPI Selection and Alignment
1300 – 1345	<b>Data Quality &amp; Performance Measurement Reliability</b> Data Accuracy and Completeness • Data Validation and Verification • Managing Inconsistent Records • Establishing Data Quality Controls
1345 – 1420	<b>Workshops</b> Records Inventory and Classification Exercise • KPI Development Workshop • Performance Measurement Framework Design • Data Quality Assessment Exercise
1420 – 1430	<b>Recap</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day One

**Day 2**

0730 – 0830	<b>Service Delivery Performance Measurement</b> Service Output and Outcome Measurement • Service Volume and Workload Analysis • Turnaround Time and Cycle Time Measurement • Service Efficiency Indicators
0830 – 0930	<b>Customer Service Performance Analysis</b> Customer Request and Complaint Records • Service Response Time Measurement • Customer Satisfaction Indicators • Service Resolution and Closure Rates
0930 – 0945	Break
0945 – 1100	<b>Quality Measurement Using Records</b> Quality Control and Quality Assurance Records • Error and Defect Tracking • Service Compliance Monitoring • Continuous Quality Improvement Indicators
1100 – 1130	<b>Productivity &amp; Resource Utilization Analysis</b> Workforce Productivity Metrics • Resource Allocation and Utilization • Cost per Service Transaction • Efficiency Benchmarking Techniques
1130 – 1215	<b>Compliance &amp; Governance Performance Measurement</b> Regulatory Compliance Records • Audit Findings and Corrective Actions • Policy Compliance Indicators • Governance Performance Metrics
1215 – 1230	Break
1230 – 1330	<b>Trend Analysis &amp; Performance Benchmarking</b> Historical Performance Analysis • Trend Identification Techniques • Internal and External Benchmarking • Performance Variance Analysis
1330 – 1420	<b>Workshops</b> Service Records Analysis Case Study • Customer Service Performance Measurement Exercise • Compliance and Audit Records Evaluation • Benchmarking and Trend Analysis Workshop
1420 – 1430	<b>Recap</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow
1430	Lunch & End of Day Two

**Day 3**

0730 – 0830	<b>Performance Reporting &amp; Dashboard Development</b> Designing Performance Reports • Service Performance Dashboards • Visualization of Records-Based Metrics • Executive Reporting Requirements
0830 – 0930	<b>Data Interpretation &amp; Decision Support</b> Converting Records into Actionable Insights • Identifying Performance Gaps • Root Cause Analysis Techniques • Supporting Management Decisions
0930 – 0945	Break
0945 – 1100	<b>Performance Auditing &amp; Evaluation</b> Conducting Performance Reviews • Evaluating KPI Effectiveness • Records-Based Audit Methodologies • Assessing Service Outcomes and Impact
1100 – 1130	<b>Continuous Improvement and Service Excellence</b> Performance Improvement Methodologies • Corrective and Preventive Actions • Process Improvement Using Records Analysis • Building a Culture of Continuous Improvement
1130 – 1215	<b>Digital Records &amp; Performance Analytics</b> Electronic Records Management Systems (ERMS) • Business Intelligence and Analytics Tools • Automation of Performance Reporting • Data Analytics for Service Optimization

1215 – 1230	Break
1230 – 1300	<b>Developing a Performance Measurement Framework for Service Organizations</b> Establishing Measurement Objectives • Defining Governance and Accountability • Designing KPI Monitoring Systems • Creating a Sustainable Performance Management Roadmap
1300 – 1345	<b>Workshops</b> Dashboard Design and Reporting Exercise • Root Cause Analysis Workshop • Performance Improvement Planning Session • Service Organization Performance Framework Development Project
1345 – 1400	<b>Course Conclusion</b> Using this Course Overview, the Instructor(s) will Brief Participants about the Course Topics that were Covered During the Course
1400 – 1415	<b>POST-TEST</b>
1415 – 1430	Presentation of Course Certificates
1430	Lunch & End of Course

### **Learning Outcomes**

By the end of this course, participants will be able to:

- Understand the role of records in performance measurement and organizational accountability
- Develop performance measurement frameworks aligned with service objectives
- Establish and monitor meaningful KPIs using records-based evidence
- Analyze operational, customer, quality and compliance records effectively
- Measure service efficiency, effectiveness, quality and governance performance
- Design performance dashboards and management reports
- Use records-based analytics to support decision-making and performance improvement
- Conduct performance evaluations and audits using documented evidence
- Implement continuous improvement initiatives based on performance insights
- Develop a sustainable performance measurement system that enhances service quality, accountability, and organizational effectiveness

**Practical Sessions**

70% of this highly-interactive course is practical sessions. Theory learnt (30%) will be applied using various role-plays, case studies and practical sessions.



**Course Coordinator**

Mari Nakintu, Tel: +971 2 30 91 714, Email: [mari1@haward.org](mailto:mari1@haward.org)