

The KPI Clarity Canvas

*A starting framework for picking a KPI worth tracking —
and being able to say plainly why it matters.*



Adaptive · Predictive · Delivered

How to Use the KPI Clarity Canvas

Canvas Overview

Use this when you're not sure which numbers are actually worth tracking, or you're building that judgment for the first time. You'll test a few candidate KPIs against a short filter, pick one likely to hold up, set a baseline and target, and write a plain case for why it matters — so it's something people actually look at, not just something that exists.

Getting Started

1. List Your Candidates. Write down every KPI currently tracked or proposed — three to six is plenty. Don't filter yet.

2. Run the Filter. For each candidate, answer four questions: Is it forward-looking, or a rearview mirror? Does it tie to one outcome, with a target and a date? Can leadership act on it within a week of seeing it move? Would it survive being read out to the board, unsanitized?

3. Score and Choose. Cross out any candidate that fails two or more questions. What's left is worth a closer look.

4. Set the Baseline and Target. Write down where the number sits today, where it needs to be, and by when.

5. Write the Case. Three sentences: what it measures, why it moves the needle, and what changes if it doesn't.

Facilitation Tips

- Keep candidates under six, or the filter session runs long.
- If two candidates tie, pick the one that's harder to quietly sandbag.
- Revisit quarterly — a good KPI stops being useful once everyone hits it without changing behavior.

After You Choose

- Put it somewhere everyone sees it weekly — the dashboard or the board packet, not just when someone asks.
- Note the review date next to the target, so “by when” doesn't quietly slide.
- Retire it publicly if it stops moving behavior; a stale KPI is worse than none.

Which KPI area or initiative is this for?

Member Experience — Account Opening

1

Candidate KPI	Forward-looking?	Tied to one outcome + date?	Actionable in a week?	Survives the board?
Open IT ticket count	No	No	No	No
% projects “on track” (self-reported)	No	No	No	No
Avg. member account-opening time	Yes	Yes	Yes	Yes
# initiatives with exec sign-off	No	No	Yes	No
Portfolio budget variance	Partial	No	No	Partial

2

3

4

Chosen KPI

Average member account-opening time

Current Baseline

25 minutes, average across all branches.

Target (with date)

Under 10 minutes by end of Q2.

5

The Case (why it matters)

It measures the first real impression a new member gets. Every extra minute is a minute a competitor's app doesn't ask for. If it doesn't move, growth targets quietly slip with it.

Which KPI area or initiative is this for?

Candidate KPI	Forward-looking?	Tied to one outcome + date?	Actionable in a week?	Survives the board?

Chosen KPI	
Current Baseline	
Target (with date)	
The Case (why it matters)	



KPI Clarity Canvas

Bringing It All Together

The KPI Clarity Canvas won't settle every argument about metrics by itself. What it gives you is a repeatable way to test candidates, land on ones worth tracking, and explain why — useful whether this is the tenth time you've done it or the first.

- **Get a faster read** on whether “on track” is real, or just a comfortable habit.
- **Give the board something concrete** to hold you to, instead of a status color.
- **Filter out metrics** that keep everyone busy without telling leadership anything.
- **Trade rearview reporting** for a forward-looking signal, updated weekly.

Used consistently, it's a way to build that judgment over time — not a one-time fix.

Want a Second Set of Eyes on Your KPI?

Contact Metagyre to learn how we support leadership teams building this kind of judgment — from choosing KPIs through standing up the dashboard that displays them.

