

# KPI Worksheet

**Department Name:**

**Date:**

## Section 1: Goal

**What is the institutional priority you're trying to support?**

- ☐ Enrollment
- ☐ Reputation / Brand
- ☐ Student Success / Retention
- ☐ Engagement / Fundraising
- ☐ Other:

Write the goal in one sentence: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

## Section 2: Strategy

**What is your/your department/division's specific role in advancing that goal?** (Not what the institution does — what YOU can influence.)

*Example: Increase awareness in priority OOS markets; Improve mid-funnel conversion; Strengthen brand storytelling; Improve the visit experience; etc.*

\_\_\_\_\_  
\_\_\_\_\_

## Section 3: KPI

**What measurable indicator will tell you whether your strategy is working?** Must be: specific, trackable, repeatable, and tied to change.

\_\_\_\_\_  
\_\_\_\_\_

#### Section 4: Data Source

**Where does this metric come from?** (Choose all that apply.)

- ☐ GA4
  - ☐ Slate / CRM
  - ☐ Social analytics
  - ☐ Email platform
  - ☐ Media monitoring tool
  - ☐ Enrollment data
  - ☐ Other: \_\_\_\_\_
- \_\_\_\_\_

#### Section 5: Reporting Rhythm

**How often will you review/report it?**

- ☐ Weekly (operational)
- ☐ Monthly (tactical)
- ☐ Quarterly (strategic)

**Why does this reporting schedule work?**

\_\_\_\_\_

\_\_\_\_\_

#### Section 6: Stress Test

**Answer YES/NO to each:**

1. Can I explain why this KPI matters? ☐ Yes ☐ No
2. Does it clearly support an institutional priority? ☐ Yes ☐ No
3. Can I get this data consistently? ☐ Yes ☐ No

*If you answered No to any: revise your KPI.*