



Excel

KPI Scorecard

User Manual & Setup Guide

Document	User guide for Excel KPI Scorecards
Applies to	Every KPI Scorecard in Excel from NextGenTemplates.com
Template type	Definition-driven monthly scorecard - MTD / YTD, typed numbers
Workbook pages	Home, Scorecard, KPI Analysis, KPI Trend, Input Data, KPI Definition, Color Settings, Read Me, Get More Templates
Requirements	Microsoft Excel 2016 or later. No macros, no add-ins, no internet

Purpose of this guide

This manual explains how to set up, update and customise your Excel KPI Scorecard. It applies to every scorecard built on this NextGenTemplates structure, for any business area. The workbook is **definition-driven**: you maintain one list of KPIs, type your already-calculated monthly figures into a single input sheet, and the scorecard, the analysis page and the trend charts update themselves.

NOTE This template holds no transaction-level records and uses no pivot tables, no Power Query and no macros. You calculate each KPI in your own working file, then type or paste the finished MTD and YTD figures into the input sheet. Everything else is formulas, and it recalculates the instant a number lands.

How the workbook fits together

Nine visible pages in four layers, plus a hidden calculation engine.

Layer	Sheet	What it does
1. Master list	KPI Definition	The single source of truth - every KPI's number, group, name, unit, formula, definition, direction and YTD basis.
2. Data entry	Input Data	One numbered block per KPI, twelve months down. You type MTD and YTD figures for Actual, Target and Prior Year.
3. Output	Scorecard KPI Analysis KPI Trend	The tile wall with traffic lights and sparklines, the group roll-up with best and worst performers, and a single-KPI trend page.
4. Settings	Color Settings	The red / amber / green bands, the report title and the reporting year.
Reference	Home Read Me Get More Templates	Navigation, a short wiring guide, and more templates from NextGenTemplates.
Engine	Support Trend_Support	Hidden formula sheets that feed every tile and chart. Never edit these.

Keeping definitions, numbers and visuals apart is what makes the workbook safe to edit - changing one never breaks the others.

Step 1 - Open the workbook

- If you downloaded a ZIP, extract it before opening.
- Save your own copy before you start, and keep the original as a clean master.
- If Excel opens the file in Protected View, choose **Enable Editing**.
- Set **Formulas > Calculation Options > Automatic** so figures update as you type.
- Start on the **Home** page - every card is a link to a sheet.

Step 2 - The KPI Definition sheet (start here)

This sheet is the heart of the template. It is one list of every KPI on your scorecard. Anything you type here - including the KPI name - flows straight into the input sheet, the tiles, the analysis page and the trend dropdown, because they all look the KPI up from this list.

Column	What it is	Example
#	Sequential KPI number. Keep 1, 2, 3 with no gaps.	1
KPI Group	Category used to organise KPIs. Drives the KPI Analysis page.	Sales
KPI Name	The label on the tile, the input block and the trend dropdown. Must be unique.	Revenue Growth
Unit	How the value is expressed. This drives the tile formatting - see below.	%, USD, Count
Formula	Plain-text description of how you calculate it. Reference only, never evaluated.	(Current - Prior) / Prior * 100
Definition	One sentence, shown on the KPI Trend page.	Growth versus the prior period.

Column	What it is	Example
Type	UTB = upper the better (higher is good). LTB = lower the better (lower is good). Drives the traffic light and the arrow.	UTB / LTB
YTD Basis	A note to yourself recording how you roll this KPI up to year to date. Documentation only - it changes nothing.	Sum / Average
Check	Automatic. Turns red if you create a duplicate KPI name.	OK

How Unit changes the tile

Unit you type	How the tile shows the number
%	36.4%
Count	1,637
USD (or any unit starting USD)	\$298.0
USD (000s)	\$334.3K - use this for large money values
Anything else	298.0

You can change KPI information freely

- **Rename a KPI** - type the new name and it updates everywhere automatically.
- **Change a group, unit, formula, definition or type** - it cascades through the workbook.
- **Add a KPI** - use the next empty row and continue the numbering in column #.
- **Set Type correctly** so the traffic light and arrow read the right way round.

Please avoid

- Leaving a blank row between KPIs - it breaks the dropdown and the lookups.
- Using the same KPI name twice - both blocks get added together.
- Deleting the header row or renaming the column titles.
- Reordering rows so that # no longer matches the numbered blocks on Input Data.

REMEMBER Whenever you add, remove or rename a KPI here, fill the matching numbered block on **Input Data**. The workbook has room for **20 KPIs**.

Step 3 - The Input Data sheet (where you type numbers)

Input Data is laid out as numbered blocks, one per KPI, running down the sheet - **KPI-1**, **KPI-2** and so on, matching the # column on KPI Definition. Inside a block the twelve months run down the rows, and the KPI name column fills itself from KPI Definition. You type six numbers per month.

Group	Column	What to enter
MTD	Actual	The result you achieved in that month alone.
MTD	Target	The goal or budget for that month alone.
MTD	PY	The same month last year.
YTD	Actual	The year-to-date result as at the end of that month.
YTD	Target	The year-to-date goal as at the end of that month.
YTD	PY	The year-to-date figure for the same point last year.

YTD is yours to calculate

The YTD columns are ordinary cells, not formulas. That is deliberate. The correct roll-up is not the same for every KPI:

- A **volume or an amount** - orders, visits, revenue - rolls up as a **sum** of the months so far.
- A **rate, ratio or average** - satisfaction %, average order value - rolls up as an **average**, or as a properly weighted figure. Adding twelve percentages together produces a meaningless number like 923%.
- Some KPIs are **neither** - a closing headcount or a stock level is the latest value, not a total, and some need their own weighting.

Because only you know which rule applies, calculate YTD in your own working file and type the finished figure in. Record the rule you used in the **YTD Basis** column on KPI Definition so whoever fills the sheet next uses the same one.

TIP Paste as **values**, not formulas. Enter Actual, Target and PY together for a month so every comparison on the scorecard is complete - a missing Target makes that tile read **n/a** instead of guessing.

Spare blocks

Blocks beyond your KPI count sit empty and are ignored - they are there so you can grow to twenty KPIs without any formula work. An empty block never appears on the scorecard.

Step 4 - Reading the Scorecard

The Scorecard is the tile wall. Ten KPI cards, each showing the selected month at a glance. Everything is driven by the four controls in the header strip - there is nothing to press or refresh.

Control	What it does
Select Month	Pick any month of the reporting year. Every tile recalculates instantly.
MTD / YTD	Switch the whole page between the month on its own and the year to date.
Vs.	Choose what each tile compares against - Target , PY (the same period last year), or Prior Month .
KPI set	Show KPI 1-10 or KPI 11-20. The wall displays ten tiles at a time.

Anatomy of a tile

Element	What it tells you
Traffic light	Green, amber or red against the bands on Color Settings. It reads the KPI's Type, so a lower-the-better KPI under its target is green.
Large value	The actual figure for the selected month and view, formatted from the KPI's Unit.
Target Value	Whatever you chose in the Vs. control - the target, last year, or the prior month. The label changes with it.
Change	The difference in the KPI's own units.
Arrow and %	The same difference as a percentage. The arrow points the way the number moved; its colour says whether that movement is good for this KPI.
Sparkline	The twelve-month shape of the actual figure, so you can see the trend without leaving the page.

NOTE A tile shows **n/a** with no traffic light when its comparison value is blank or zero - for example Prior Month in January. That is the workbook refusing to invent a percentage, not an error.

Step 5 - The KPI Analysis page

This page answers "how are we doing overall" for the month selected on the Scorecard.

- A **green / amber / red tally** and the total number of KPIs in the workbook.
- **Achievement by KPI Group** - each group's average achievement against target, as a table and a chart, so you can see which part of the business is behind.
- **Top 5 and Bottom 5 KPIs** - the strongest and weakest performers with their group and achievement.

Achievement is actual divided by target, flipped for lower-the-better KPIs so that above 100% always means good. Groups come straight from the KPI Group column, so grouping your KPIs sensibly is what makes this page useful.

Step 6 - The KPI Trend page

Use the **Select KPI** dropdown to study one KPI across the whole year. The page shows that KPI's group, unit, type, formula and definition, then four charts:

- **MTD Actual vs Target** and **MTD Actual vs PY** - month by month.
- **YTD Actual vs Target** and **YTD Actual vs PY** - the cumulative view.

TIP Add a new KPI and it appears in this dropdown by itself. Use this page in monthly reviews to tell the story behind a single number.

Step 7 - Color Settings

Three things live here, and all three flow through the whole workbook.

Setting	What it controls
RAG bands	When a tile turns green, amber or red. Out of the box: Green at or above target, Amber within 10% of target, Red more than 10% off. Two tables - one for upper-the-better KPIs, one for lower-the-better.
Report title	The heading on the Scorecard and the Home page.
Reporting year	Feeds the month picker so it reads Sep-2025 rather than just Sep.

Change a band and every traffic light, the analysis statuses and the tally follow it immediately. Tighten them for a mature process, loosen them for a new one.

Adding, removing and renaming KPIs

To add a KPI end to end:

- On **KPI Definition**, use the next empty row. Continue the # numbering and fill every column.
- On **Input Data**, find the block with the same number - its name column has already filled itself - and type the twelve months of figures.
- Open the **Scorecard**. If the new KPI is number 11 or higher, switch the header's **KPI set** control to KPI 11-20 to see its tile.

To remove a KPI: clear its row on KPI Definition and clear the numbers in the matching block on Input Data. Close the gap so the numbering stays contiguous.

To rename a KPI: change it on KPI Definition only. Every other sheet follows.

Troubleshooting

Symptom	Likely cause	Fix
A tile is blank or has no traffic light	That KPI has no numbers for the selected month, or its comparison value is blank or zero.	Fill the month on Input Data, including a Target.
Two tiles show identical numbers	Two KPIs share the same name, so both blocks are added together.	Make every KPI name unique. The Check column on KPI Definition flags duplicates.
The KPI Trend page is empty with flat charts	The Select KPI box holds a name that is no longer in the list.	Re-pick the KPI from the dropdown.
Figures do not change when you type	Excel calculation is set to Manual.	Formulas > Calculation Options > Automatic, then press F9.
A traffic light looks the wrong way round	The KPI's Type is set to UTB when it should be LTB, or the reverse.	Correct Type on KPI Definition.
A YTD figure looks absurd, e.g. 900%	A percentage was rolled up by adding the months together.	Recalculate that KPI's YTD as an average and retype it.
The Trend dropdown is missing a KPI	A blank row sits inside the KPI list.	Close the gap so the KPIs are contiguous.
Everything is green, or everything is red	The RAG bands do not suit this process.	Adjust the bands on Color Settings.

Best practices

- Keep **KPI Definition** and the numbered blocks on **Input Data** aligned - block 4 is always KPI number 4.
- Calculate KPIs in a working file and paste only the finished figures, as values.
- Enter Actual, Target and PY together for a month so every comparison is complete.
- Record your YTD rule in the **YTD Basis** column so the sheet stays consistent month to month.
- Keep Excel on Automatic calculation.
- Take a copy of the workbook before any large edit.
- Use consistent units - do not mix thousands and units inside one KPI.

- Never edit the hidden **Support** or **Trend_Support** sheets.

Pro tips

- # Group your KPIs into three to six meaningful groups - the KPI Analysis page is only as useful as the grouping behind it.
- # Use **USD (000s)** for large money KPIs so tiles stay readable.
- # Set **LTB** on cost, defect, churn and complaint KPIs so lower really does read as better.
- # Use **Vs. Prior Month** in a monthly meeting and **Vs. PY** in a quarterly review.
- # Ten KPIs on the wall is a scorecard; twenty is a report. Put the ten that drive decisions in the first set.

About NextGenTemplates

At NextGenTemplates.com we build ready-to-use business templates:

KPI Scorecards & Dashboards	Excel, Power BI and Google Sheets
Trackers & Planners	One-page tools with live charts
Data Entry Systems	Form-driven mini systems
Business Analytics Templates	Finance, HR, Sales and Operations

Every template is built to be easy to use, professional, fully dynamic and customisable.

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