MERCURY

Professional Monitoring & Evaluation for Managers' Strategy

1 – 5 November 2027
Johannesburg (South Africa)



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Ref: 121559_1074113 **Date:** 1 – 5 November 2027 **Location:** Johannesburg (South Africa) **Fees:** 5300 Euro

Introduction

The Professional Monitoring & Evaluation for Managers' Strategy course helps managers understand how to connect strategy with measurable results. It explains how monitoring and evaluation support better decisions, stronger accountability, and more effective performance follow-up. Participants learn how to identify indicators, define outcomes, and interpret information in a practical managerial context. The program shows how to build a clear evaluation framework that supports planning, implementation, and review. It gives managers the confidence to track progress, assess impact, and improve organizational learning. Participants will understand how to use monitoring and evaluation as a strategic management tool rather than a reporting exercise.

Targeted Groups

This Professional Monitoring & Evaluation for Managers' Strategy training targets professionals seeking knowledge and skills:

- Managers are responsible for planning and follow-up.
- Team leaders who track performance.
- Supervisors managing departmental results.
- Program coordinators handling deliverables.
- Quality officers are improving internal processes.
- Strategy staff supporting organizational targets.
- Decision-makers who need evidence-based reporting.
- Professionals working on projects and programs.

Course Objectives

Participants will achieve the following objectives by completing the Professional Monitoring & Evaluation for Managers' Strategy course:

- Understand the role of monitoring and evaluation in strategic management.
- Distinguish between monitoring, evaluation, and performance review.
- Define objectives, indicators, and evidence needs clearly.
- Design a practical monitoring and evaluation framework for management use.
- Select suitable data sources for progress tracking and analysis.
- Interpret findings and connect them to strategic decisions.
- Strengthen reporting quality, accountability, and organizational learning.
- Apply evaluation results to improve plans, actions, and outcomes.

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Targeted Competencies

Participants will gain the following competencies during the Professional Monitoring & Evaluation for Managers' Strategy program:

- Strategic thinking for result-oriented follow-up.
- Indicator development and outcome tracking.
- Data interpretation for managerial decision-making.
- Report writing with clarity and precision.
- Evaluation logic and performance analysis.
- Problem identification through evidence review.
- Continuous improvement through lessons learned.

Studying Scenarios

In this Professional Monitoring & Evaluation for Managers' Strategy training, participants develop skills through the following scenarios:

- Reviewing a weak KPI system and improving it.
- Analyzing missed targets and finding root causes.
- Building a simple evaluation plan for a department.
- Checking data quality before using reports.
- Turning monitoring findings into corrective actions.

Course Content

Unit 1: Foundations of Monitoring and Evaluation in Management

- Introduce the meaning of monitoring and evaluation in strategic management.
- Explain how M&E supports planning, control, and organizational learning.
- Clarify the difference between input tracking, output tracking, and outcome review.
- Present the role of managers in evidence-based supervision.
- Discuss how M&E strengthens accountability across teams and departments.
- Show how monitoring and evaluation support service quality and performance discipline.
- Review the link between strategic objectives, operational targets, and measurable results.
- Explain why a results-based monitoring and evaluation mindset improves decision-making.

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Unit 2: Designing a Practical Monitoring and Evaluation Framework

- Identify the structure of a clear monitoring and evaluation framework.
- Define goals, outcomes, outputs, indicators, and assumptions.
- Build a logical flow from strategy to measurement.
- Select indicators that are realistic, relevant, and easy to track.
- Set baseline values that show the starting point for improvement.
- Determine target values that reflect business or program ambition.
- Match responsibilities to each stage of the monitoring process.
- Build a framework that supports management follow-up without complexity.

Unit 3: Data Collection, Analysis, and Reporting for Managers

- Explain the purpose of reliable data collection in managerial M&E.
- Identify common data sources such as records, surveys, interviews, and dashboards.
- Discuss how to protect data accuracy and consistency.
- Review how to organize evidence for analysis and interpretation.
- Introduce simple methods for comparing actual performance with targets.
- Show how to spot trends, gaps, and warning signs early.
- Develop reporting habits that convert data into useful management information.
- Present report structures that support clarity, transparency, and action.

Unit 4: Evaluating Performance, Results, and Impact

- Define evaluation as a structured review of performance and results.
- Explain how evaluation supports strategic improvement and accountability.
- Distinguish between process evaluation, outcome evaluation, and impact assessment.
- Show how to ask the right evaluation questions for managers.
- Review criteria such as relevance, efficiency, effectiveness, and sustainability.
- Analyze how to judge whether activities are producing meaningful change.
- Demonstrate how evaluation findings guide corrective and preventive actions.
- Connect evaluation insights to strategy adjustment and leadership decisions.

Unit 5: Using Monitoring and Evaluation to Improve Strategy Execution

- Show how M&E supports the execution of strategic plans.
- Explain how managers use findings to prioritize actions and resources.
- Discuss how to convert lessons learned into better operational control.
- Review how to strengthen accountability meetings with evidence.
- Present methods for tracking corrective actions after performance reviews.
- Explain how M&E creates a culture of continuous improvement.
- Demonstrate how to align reporting cycles with decision-making timelines.
- Summarize how strategic monitoring and evaluation improve long-term results.

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Final Insights & Key Takeaways

Professional Monitoring & Evaluation for Managers' Strategy gives managers a practical way to turn plans into measurable progress and informed decisions. Strong M&E practice improves accountability, sharpens strategic focus, and helps organizations learn faster from results.