

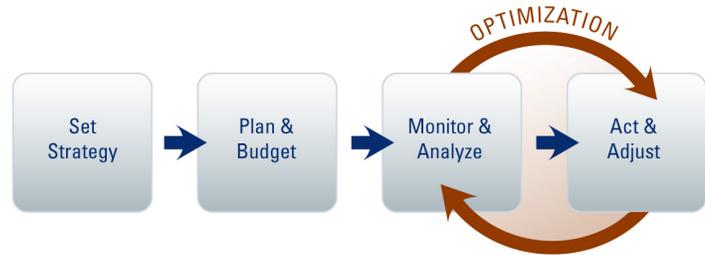
Improve Operational Performance for Better Business Results



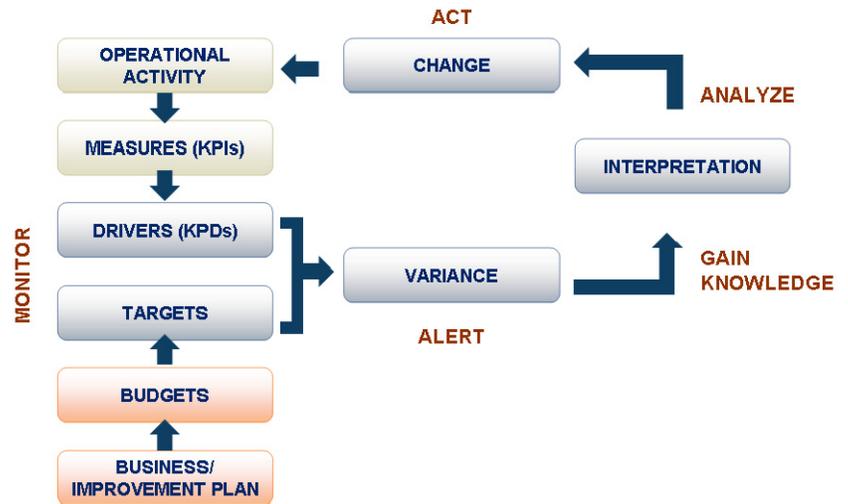
myDIALS 3.2 delivers new capabilities:

- **Additional analytics:**
 - Variance analysis;
 - Lean Process analysis;
 - Correlation analysis;
- **Interactive Scorecards:**
 - View snapshot of KPI values, targets, variance, status, overall trend;
 - View a micro-chart of historical data, trend and analytic lines for each KPI;
 - View alerts, notes on the micro-charts;
 - Drill into selected data points and see underlying detail and use what-if scenarios to better understand what is impacting the KPIs;
- **Interactive Data Tables:**
 - In addition to visualizations, myDIALS now offers table dials showing values as data cells in a table;
 - Alerts are shown as colored cells;
 - Notes can be attached to a data cell and will appear wherever that data point appears on any dial or dashboard;
 - Filter and drill into a cell by any relevant dimension or its drivers;
 - Perform a what-if scenario and immediately see the results across all affected data cells;
- **Flexible Data Grid:**
 - For any dial (visual or table) view source data showing underlying data records;
 - Filter the data grid on one more aspects by selecting values of interest;
 - Apply sorts to the data grid based on any metric or relevant data aspect;
 - If authorized, edit the values, add a new record or delete a record and immediately see the updated information;
- **Single Sign On:**
 - Support for Active Directory Federated Services (ADFS) to provide single-sign-on between myDIALS and other SaaS or on-premise solutions;
- **Enhanced NetSuite Integration:**
 - Embed a myDIALS ribbon into the NetSuite Application Home page in addition to the integrated myDIALS dashboard;
 - Single-sign-on from NetSuite to myDIALS;
 - Immediate update and availability of NetSuite information within the myDIALS dashboards as transactions occur;

myDIALS is a Performance Management Platform for the visualization and analysis of performance metrics – measures and drivers. This enables companies to improve operational performance and business results through better decision making. myDIALS is the optimization component of Operational Performance Management:



myDIALS supports a continuous improvement approach to performance management that supports a monitor, alert, learn, analyze, act decision cycle:



Each of these steps in the decision cycle and myDIALS' capabilities in each area are outlined below.

Monitor

Easily filter and expand information to see what is most important to you:

- Select a time period of interest or easily move up or down time granularity;
- Set context on any aspects or dimension of the data;
- Drill on dial to obtain more detail along any aspect or dimension
- Select a component - a bar, segment or point of interest and filter based on your selection to view more detail;
- View period-over-period time comparisons;
- Use an interactive scorecard to see a snapshot of Key Performance Indicators (KPI) values, targets, variance, status, trend along with a fully interactive micro-chart of historical values;
- Use many different visualizations to aid understanding and interpretation
- View, filter, sort underlying data records and if authorized, edit, add or delete records and immediately see the effect of those changes.

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Effective Performance Metrics are:

- Related to strategic goals;
- Timely;
- Individualized and relevant for each decision maker;
- Consistent and accurate;
- Span a value stream or business process;
- Support a continuous improvement methodology.

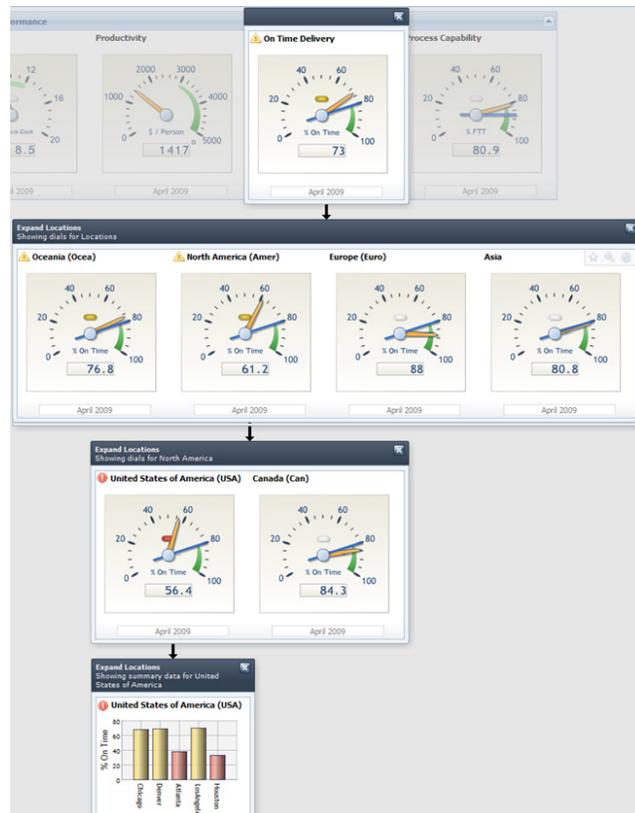
Performance Metrics can be:

- Measures - Key Performance Indicators (KPIs) or outcomes;
- Drivers - Key Performance Drivers (KPDs) that affect outcomes or are leading indicators that point to potential outcomes.

Performance Metrics are made actionable by:

- Directly relating KPI and KPD metrics;
- Logically grouping KPI and KPD metrics by value stream, business process or function;
- Providing the capability to filter or drill into metrics to obtain more detail;
- Showing metric snapshots, trends over time, and period over period comparisons;
- Presenting the metrics in context - either by dimension or time;
- Capturing user knowledge about the metrics and related analysis;
- Using trends, forecasts, Pareto, control charts, variance, correlation and lean process analysis to determine the characteristics of an issue;
- Performing “what-if” analysis to determine the most appropriate scenario or action to take.

When you “drill into” the metrics to obtain additional detail, you are presented with valid dimensions to select from and you retain the perspective of the original information and the path taken to the more detailed information through a unique Multi-level Metric Map:



Without closing the map, you can change the navigation path by selecting a different dial at any level or selecting a different dimension to expand for more detail. In this way you can quickly navigate to the root cause of a performance issue and obtain sufficient information to make an informed decision.

Alert

Issues requiring attention are identified as they occur and represented visually on the dashboards and emailed (with contextual information) to designated recipients. Alerts can be based on:

- Zones specified for any performance metric (Excellent, Good, Bad, Critical);
- Complex expressions across multiple metrics.

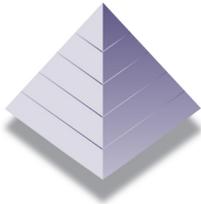
Learn and Share Knowledge

It is easy to embed knowledge that provides guidance on how the performance information should be interpreted including:

- The definition and description of a dial;
- The definition of the metrics contained within the dial;
- The formula used to calculate the metric;
- Information on how the metrics support the business process, value stream or continuous improvement;
- Hyper-links to any additional web-based information.

You can also share information by notes or annotations to a data point and that note will appear wherever that data point appears on any dial in any dashboard.

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JANICZEK & COMPANY, LTD.
 COMPREHENSIVE WEALTH MANAGEMENT

Managing Wealth Management Performance

Janiczek & Company, Ltd., a leading wealth management firm, uses myDIALS' software as a service (SaaS)-based Performance Management Platform to monitor and manage key performance metrics. With myDIALS, Janiczek & Company tracks portfolio management, relationship management, service management, sales management, and business management results, utilizing their proprietary methodology that is key to its continued success in "wowing" clients and stakeholders.

"You get what you inspect, not what you expect," said Joseph Janiczek, Founder and Chairman, Janiczek & Company.

"myDIALS' breadth of offering at a reasonable price point allowed us to implement a high-end, enterprise quality solution within our budget requirements. In particular, I value the ability to see visuals that depict how we are doing compared to targets and then drill down to details that pinpoint the key item behind a particular success or failure. myDIALS accelerates our learning, which is the ultimate advantage in any business."

Analyze

myDIALS provides the ability to drill into a dial to determine its underlying Performance Drivers. Many KPI metrics, which represent outcomes, are calculated from core metrics. For actionable information, you need to know how the KPI was calculated and the status of the underlying components, since these tend to be Key Performance Drivers or KPD metrics and hence are more actionable.

As can be seen below, myDIALS uses the contextual drill-tree to expand a dial by drivers and provides the expression as well as the underlying metrics.



Just as when drilling by a dimension, it is possible to continue to obtain further detail by selecting another dial, and expanding either by a relevant dimension or by that dial's drivers. For example, the user could select the Availability dial above and drill into it by the drivers to see components that make up availability – such as scheduled and unscheduled downtime as a factor of available time during the period.

Another element of analyzing an issue is to characterize it:

- Did it happen abruptly or over a period of time?
- What is the likely outcome if I do nothing?
- What are the major contributors to the issue?
- Is there a correlation between metrics that show a relationship where one metric is impacting another?
- Where are the largest opportunity areas to positively improve the situation?

myDIALS provides sophisticated, yet easy-to-use and understand analytic capabilities to:

- Apply trend lines using multiple algorithms to better understand historical trends;
- Use forecast projections to see expected future outcomes;
- Identify correlations between metrics using scatter charts;
- Identify major contributors to an outcome through Pareto charts;
- See whether a process is in statistical control through the use of Control Charts;
- Use multiple types of Variance analysis to identify the major contributors to a deviation from a desired, previous or reference value;
- Utilize Lean Process analysis to quickly identify the major sources of problems or opportunities for improvement.

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myDIALS makes sophisticated analytics easy to use for all employees. Once a performance issue has been identified, the optimal corrective action must be determined. Rather than wait for a review by a business analyst, each person making an operational decision can quickly obtain the information they need to make those decisions quickly and effectively.

Examining trends, forecasts and controls charts quickly shows whether an issue is an abnormality or an ongoing problem. A Pareto chart can highlight areas contributing most to the problem. And performing “what if” scenario analysis shows which actions will lead to the best business outcome.

Combining this level of analytics with the ease-of-use inherent in myDIALS ensures everyone can take advantage of analyses that until now has typically been reserved for a small number of business analysts.

myDIALS takes operational performance management to a new level by focusing on optimization and continuous improvement.

The intuitive visual presentation, interactive drills, embedded knowledge, context setting, inherent association of KPI and KPD metrics, interactive scenario analysis and sophisticated analytics allow you to quickly understand performance, identify the root cause of performance issues and determine the best corrective action.

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Act

myDIALS provides interactive, real-time “What-if” scenario analysis. While analyzing current performance by drilling into a dial and expanding by a dimension or by drivers, you can specify a scenario to analyze. Immediately, myDIALS will show the resulting “roll-up” of that scenario and the impact on metrics being examined.

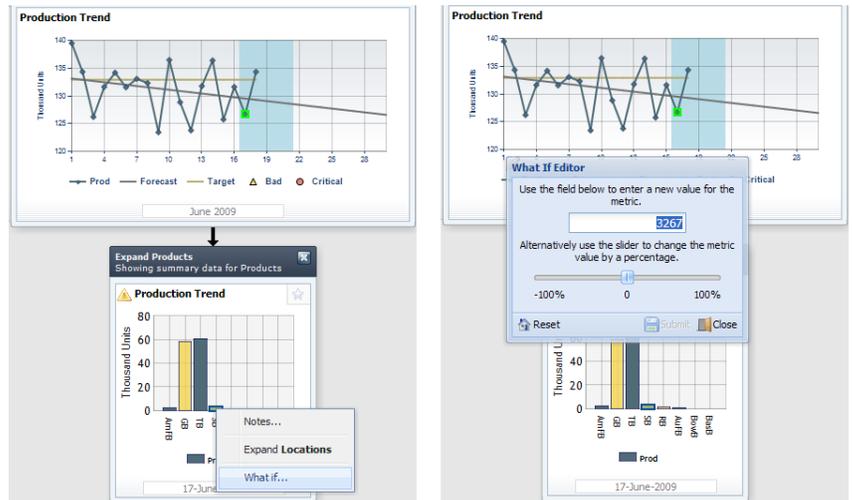
This is very powerful for asking simple questions, for example:

- If our plant in Germany could deliver more production what would the overall production level be?
- If our office in Los Angeles could sell more baseballs, what would the resultant product sales mix for the USA be?

By combining the scenario analysis with the ability to drill into drivers, more complex questions can be asked, such as:

- What would be the impact on gross margin if we changed product mix?
- If we were able to reduce variable people costs how would that impact profit?

As can be seen below, asking one of these questions is as simple as selecting a dial in a drill tree, highlighting a bar, segment or point of interest, and then specifying a new value or percentage change for that metric for that time period.



Scenarios can also be run on multiple points at once including future values. Using this powerful capability, you can determine which action or combination of actions will result in the optimal result.

Summary

Everyone making operational decisions has access to relevant, timely metrics that are easy to view, interact with, filter, analyze and use to perform scenarios with immediate results, which ensures better decisions are made more quickly. myDIALS is delivered via the Software as a Service (SaaS) model which ensures low-cost, low-risk, rapid deployment and no up-front capital expenditures for hardware and software and no ongoing requirement for people to support and maintain the solution.

myDIALS can be delivered as a turn-key solution or the customer or a partner can configure, deploy and update the myDIALS solution themselves.