



SoftExpert CPM

Better decisions. Faster results



[Challenges](#)

[Solution](#)

[Benefits](#)

[Compliance](#)

[Features](#)

[About
SoftExpert](#)

Soft Expert[®]
Software for Performance Excellence



How do you **ensure** that employees are using the **correct information** for **decision making**?

How do you **organize** information and ensure its **availability**?

How do you **track the objectives** defined?

How do you **react** to problems and **deviations** of corporate **performance**?



Challenges

- Ensure the use of relevant information to the business.
- Optimize the information flow by integrating data from various sources.
- Align strategic and tactical goals to operational indicators.
- Ensure the strategy execution.



Solution

Strategy planning

SoftExpert CPM assists in the entire process of strategic planning development, from conception to implementation.

Integration and productivity

SoftExpert CPM builds metrics using data from any source, including ERP and CRM systems, spreadsheets, legacy and mainframe data, formulas and user-entered values.



Solution

Strategic alignment

SoftExpert CPM ensures strategic to operational alignment through scorecard and metrics cascading.

Initiatives as a way of strategy execution

SoftExpert CPM offers specific features to select, implement and monitor projects and action plans. The good project management practices can be applied within the context of corporate performance management.



Benefits

- Increases productivity by performing consolidations and calculations automatically.
- Eliminates alternative versioning and data integrity issues.
- Focuses on the indicators that reflect strategy and are most critical.
- Helps to increase corporate transparency.
- Increases decision making.

Compliances

COBIT

PMBOK

6σ
Six Sigma

ISO 9000

BSC

LEAN

Features



Closing the gap between strategy and execution.



Strategic elements

Scorecard structure

Strategy map

Planning and Mapping

Select the best strategic alternatives, develop the scorecard, draw the strategy map, all in a unique environment.



Strategic elements

Scorecard structure

Strategy map

Planning and Mapping

Select the best strategic alternatives, develop the scorecard, draw the strategy map, all in a unique environment.

Scorecard planning > CPL - Strategy Planning | HO - Head Office - Revision: 0

Vision		Search field	Record data			Edit			Tools										
Structure	Strategy map	Display inactive	Element	Indicator	Link	Target	Associate	Edit	Delete	Change status	Paste	Export	Expand	Collapse					
Institutional	Strategic Analysis									Cut	Edit order								
										Copy									
Scorecard																			
						I	SP	A	RC..	M	P	RIS	CTR	ID #	SS	Weight	Range	Frequency	View profile
▲	Strategy Planning								↑	⊙				CPL	<input type="checkbox"/>		Maximize		With Accum
▲	Shorten the production cycle and explore new types of products								↑					STCPL1	<input checked="" type="checkbox"/>	1.00	Maximize	Monthly	With Accum
▲	Financial								↑					PECPL1	<input checked="" type="checkbox"/>	1.00	Maximize	Monthly	Standard
▲	Increase the company revenue								↑	⊙				OBCPL1	<input checked="" type="checkbox"/>	1.00	Maximize	Monthly	With Accum
▲	Company revenue				fx				↑					CPL001	<input checked="" type="checkbox"/>	1.00	Maximize	Monthly	With Accum
	Company sales								↑					CPL008	<input checked="" type="checkbox"/>	1.00	Maximize	Monthly	With Accum
	Company financial revenues								↑					CPL009	<input checked="" type="checkbox"/>	1.00	Maximize	Monthly	With Accum
▲	Total Manufacturing Plant Sales								↑					TMS - 0 - 61	<input checked="" type="checkbox"/>	1.00	Maximize	Monthly	With Accum
	Total sales revenue				fx				↑					0092 - 0	<input checked="" type="checkbox"/>	1.00	Maximize	Monthly	Standard
	Market Segment Totals				fx				↑					0093 - 0	<input checked="" type="checkbox"/>	1.00	Maximize	Yearly	Standard
▲	Customer								↑					PECPL2	<input checked="" type="checkbox"/>	1.00	Maximize	Monthly	With Accum
▲	Achieve new customers by internet sales								↑	⊙				OBCPL2	<input checked="" type="checkbox"/>	1.00	Maximize	Monthly	With Accum
	Number of Internet new customers								↑					CPL002	<input checked="" type="checkbox"/>	1.00	Maximize	Monthly	Without Accum
▲	Business Process								↑					PECPL3	<input checked="" type="checkbox"/>	1.00	Maximize	Monthly	With Accum
▲	Decrease the product release time from 1 year to 6 months								↑	⊙				OBCPL3	<input checked="" type="checkbox"/>	1.00	Maximize	Monthly	Without Accum



Strategic elements

Scorecard structure

Strategy map

Planning and Mapping

Select the best strategic alternatives, develop the scorecard, draw the strategy map, all in a unique environment.



Goal Setting

Establish specific and measurable goals as well as their owners.

Metrics

Stakeholders

Targets

Soft Expert Home Portals My tasks Components Shortcuts

File Indicator (ST007)

Search filters

Quick search

Saved searches

No saved searches

Have quick access to your searches by saving them.

Type

Select type

Advanced filters

Save SEARCH

<input type="checkbox"/>	S	Icon	Indicator type	ID #	Name	Range	Target?	Classif.	Frequency
<input checked="" type="checkbox"/>			Supplier Performance	sup-01	Compliance rate	Simplified range	<input checked="" type="checkbox"/>		Monthly
<input type="checkbox"/>			Supplier Performance	sup-05	Supplier lead time	Simplified range	<input checked="" type="checkbox"/>		Monthly
<input type="checkbox"/>			Supplier Performance	sup-06	PO cycle time	Simplified range	<input checked="" type="checkbox"/>		Monthly
<input type="checkbox"/>			Supplier Performance	sup-07	Vendor availability	Simplified range	<input checked="" type="checkbox"/>		Monthly
<input type="checkbox"/>			Supplier Performance	sup-10	Procurement ROI and benefits	Simplified range	<input checked="" type="checkbox"/>		Monthly
<input type="checkbox"/>			Supplier Performance	sup-12	Perfect Order Measurement	Simplified range	<input checked="" type="checkbox"/>		Monthly
<input type="checkbox"/>			Tactical	CF.01	Actions Implementation of the Operation and Compliance Committee	Simplified range	<input checked="" type="checkbox"/>		Monthly
<input type="checkbox"/>			Governance	FI.02	Operating Revenue per Employee	Simplified range	<input checked="" type="checkbox"/>		Monthly
<input type="checkbox"/>			Governance	FI.05	Operating Expenses per WLU	Simplified range	<input checked="" type="checkbox"/>		Monthly
<input type="checkbox"/>			Supplier Performance	sup-11	Price Competitiveness	Simplified range	<input checked="" type="checkbox"/>		Monthly
<input type="checkbox"/>			Supplier Performance	sup-02	Supplier defect rate	Simplified range	<input checked="" type="checkbox"/>		Monthly
<input type="checkbox"/>			Supplier Performance	sup-08	Cost per invoice and PO	Simplified range	<input checked="" type="checkbox"/>		Monthly
<input type="checkbox"/>			Supplier Performance	sup-13	On time shipping rate	Simplified range	<input checked="" type="checkbox"/>		Monthly

Display total number of records 1 - 51



Goal Setting

Establish specific and measurable goals as well as their owners.

Metrics

Stakeholders

Targets

Scorecard data > CPL - Strategy Planning | Scorecard data

Record Vision Record data SE Suite Tools

Save Save and exit Save and new Structure General data Revision Security Documentation Action plan Project Configurations

NAVIGATION <<

- Scorecard
- Indicator/Element

INDICATOR/ELEMENT

Scorecard Indicator/Element default security

<input type="checkbox"/>	Type	Name	Controls	Permission
<input checked="" type="checkbox"/>	User	Tetsuo Kendo	Alerts, View, Edit (Details), Target, Measurement, Responsible	Allow
<input type="checkbox"/>	User	Harry O. Summers	View	Allow
<input type="checkbox"/>	User	Alice Chain	View, Target, Measurement	Allow
<input type="checkbox"/>	User	Andrew Stewart	View	Allow
<input type="checkbox"/>	User	Manuel Coronado	Measurement	Allow
<input type="checkbox"/>	User	Paul Medelson	View, Measurement	Allow

Total records: 6



Metrics

Stakeholders

Targets

Goal Setting

Establish specific and measurable goals as well as their owners.

Measurement value > CPL - Strategy Planning | HO - Head Office

Actions Record data View Tools

Calculate General data Data Export

My indicators Scorecard

- CPL - Strategy Planning
 - STCPL1 - Shorten the production cycle and explore new types
 - PECPL1 - Financial
 - OBCPL1 - Increase the company revenue
 - CPL001 - Company revenue
 - CPL008 - Company sales
 - CPL009 - Company financial revenues
 - TMS - 0 - 61 - Total Manufacturing Plant Sales
 - 0092 - 0 - Total sales revenue**
 - 0093 - 0 - Market Segment Totals
 - PECPL2 - Customer
 - OBCPL2 - Achieve new customers by internet sales
 - CPL002 - Number of Internet new customers
 - PECPL3 - Business Process
 - OBCPL3 - Decrease the product release time from 1 year
 - CPL003 - New product released time
 - OBCPL4 - Establish a distribution net to internet sales

Target/measurement > 0092 - 0 - Total sales revenue

Save

Start: 01/2020 End: 12/2020

Actions	Period	Target	Measurement f_x	Accumulated ta...	Accumulated m...
	Dec 2020	3,050,000.00		11,000,000.00	
	Nov 2020	2,900,000.00		7,950,000.00	
	Oct 2020	2,750,000.00		5,050,000.00	
	Sep 2020	2,300,000.00		2,300,000.00	
	Aug 2020	2,300,000.00		9,950,000.00	
	Jul 2020	2,900,000.00		7,650,000.00	
	Jun 2020	2,750,000.00		4,750,000.00	



Identify and analyze

Control measures

Monitoring

Risk Management

Identify, analyze and treat potential risks that may affect the accomplishment of the strategic objectives defined.

Planning > VCC-73899 - Vista Credit Card | Structure | Under revision

Structure | Evaluation | Attributes | Add | Associate | Edit | Delete | Edit order | Responsible | View profile | Tools | Expand | Collapse

Plan	Actual
<ul style="list-style-type: none"> VCC - Boston Foods International <ul style="list-style-type: none"> PP1 - Financial <ul style="list-style-type: none"> OO01 - Increase shareholder value <ul style="list-style-type: none"> 0096 - 0 - Shareholder Value (SVA) OO02 - Decrease costs <ul style="list-style-type: none"> 0097 - 0 - Operating costs OO03 - Increase revenue <ul style="list-style-type: none"> 0098 - Revenue 0092 - 3 - Total sales revenue 0120 - 0 - Revenues from other sources PP2 - Customer <ul style="list-style-type: none"> OO04 - Increase market share <ul style="list-style-type: none"> 0099 - 0 - Market share OO05 - Improve brand image <ul style="list-style-type: none"> 0100 - 0 - Brand awareness score 	

Risk: #00048 - Dollar variation

Details | Evaluation | Display | Current evaluation

ID # Rev 1 (12-2020) Evaluation 12/09/2020

Evaluation | Action plan | Attachment | Document | Information

Significant

Actual

High

		Probability			
		Low	Medium	High	Very High
Severity	Very High			I	
	High				
	Medium				
	Low				

Actual | Explanation

Criterion	Result
Probability	High
Severity	Very High



Identify and analyze

Control measures

Monitoring

Risk Management

Identify, analyze and treat potential risks that may affect the accomplishment of the strategic objectives defined.

Planning > VCC-73899 - Vista Credit Card | Control | Under revision

Control analysis

Control	Implementation	Responsibility	Risk plan	Risk
<input type="radio"/> #00017 - Purchases are made in accordance with contracted rates	✓ Completely implemented	james.tooby James J. Tooby	VCC-73899 - Vista Credit Card	#00048 - Dollar var
<input checked="" type="radio"/> #00018 - Employee satisfaction program	⚠ Partly implemented	carl.jordan Carl Jordan	VCC-73899 - Vista Credit Card	#00050 - Turnover
<input type="radio"/> #00019 - Alternative supplier	✗ Not implemented	james.tooby James J. Tooby	VCC-73899 - Vista Credit Card	#00051 - Acquisition
<input type="radio"/> #00020 - Payment insurance	✓ Completely implemented	john John Smith	VCC-73899 - Vista Credit Card	#00048 - Dollar var

Display total number of records 1 - 4

Details: General data

Control analysis

Scorecard: VCC - Boston Foods International | Risk: #00050 - Turnover

ID #: #00018 | Control: PP0021 - Employee satisfaction program

Responsible: carl.jordan - Carl Jordan

Control characteristic: Preventive

Automation type: Manual

Implementation: Partly implemented



Identify and analyze

Control measures

Monitoring

Risk Management

Identify, analyze and treat potential risks that may affect the accomplishment of the strategic objectives defined.

SoftExpert Home Portals My tasks Components Shortcuts

Acme Corporate Private 2 Following

Corporate Governance Framework Risks and Controls Governance Initiatives Metrics Actions Planning and Control Requirement Implementation Audit **Risks per Process**

Risks and controls portal

Risk plan 10

Cards Chart Group by

Risk ID	Risks	Controls	Actual Risk Level	Open Events	Open Action Plans
0414 - Purchase Process	9	7	Low (18.33)	2 (Red), 2 (Yellow), 5 (Green)	0 (Red), 0 (Yellow), 0 (Green)
AC01 - ACME Credit Union	1	0	Low (10.00)	1 (Green)	0 (Red), 0 (Yellow), 0 (Green)
ICT-75458 - Communication	1	1	Moderate (25.00)	1 (Yellow)	4 (Red), 0 (Yellow), 0 (Green)
046 - Product Planning	1	1	Low (10.00)	1 (Green)	0 (Red), 0 (Yellow), 0 (Green)

Risk list Next level >



Initiative Management

Plan, implement and monitor projects and action plans specially selected to ensure the achievement of objectives.

Projects and schedule

Resources

Monitoring

Task View Timeline Format Project schedule > 000163 - 000163 - Product Development | 9/28/2020 - 12/21/2020

Tools: Expand, Collapse, Enlarge, Reduce, Fit to window, Configurations

DL	S	WBS	ID #	Name	Responsible
▶	▶		000163	000163 - Product Development	Tetsuo Kendo
▶	⊞	1	1	Project planning	Tetsuo Kendo
⊞	▶	2	2	Scenario Simulation	John Smith
▶	▶	3	3	APQP	Tetsuo Kendo
⊞	▶	3.1	4	Product Planning and Definition	Robert Smith
▶	⊞	3.1.1	5	Initial Technical Sheet	Robert Smith
⊞	▶	3.1.2	6	Investment plan	Tetsuo Kendo
⊞	▶	3.1.3	7	Define Bill of Materials	Robert Smith
⊞	▶	3.1.4	8	Preliminary Flow Chart	John Smith
⊞	▶	3.1.5	9	Quality plan	Alice Damam
⊞	▶	3.2	10	Product development	Tetsuo Kendo
⊞	▶	3.2.1	11	Assignment of Part Code (Control No.)	Tetsuo Kendo
⊞	▶	3.2.2	12	FMEA preparation	John Smith
⊞	▶	3.2.3	13	Revised Technical Sheet Phase 2 an...	Robert Smith
⊞	▶	3.2.4	14	Design for Manufacturing and Assem...	Tetsuo Kendo
⊞	▶	3.2.5	15	Design of the Feeding System	Robert Smith
⊞	▶	3.2.6	16	Design Reviews	Tetsuo Kendo
⊞	▶	3.2.7	17	Control plan	Alice Damam
⊞	▶	3.2.8	18	Prototype Manufacturing	John Smith
⊞	▶	3.2.9	19	Definition of Test Equipment	Michael Miller
⊞	▶	3.3	20	Validation and Testing	Robert Smith

Gantt chart showing task dependencies and progress from Oct/04/20 to Nov/08/20. Tasks are assigned to Tetsuo Kendo, John Smith, Robert Smith, and Alice Damam.

Tasks: 23 | Zoom



Projects and schedule

Resources

Monitoring

Initiative Management

Plan, implement and monitor projects and action plans specially selected to ensure the achievement of objectives.

My calendar > 0004 - Tetsuo Kendo | Legal / Contract Manager

Vision: Daily, Work week, Weekly, Monthly | Browse: Previous, Next | View: Data, Histogram | Charts: Export, Configurations

Search filters: Quick search, Saved searches (No saved searches), Overall (2020, Jan-Mar, Apr-Jun, Jul-Sep, Oct, Nov-Dec), Display: Allocation, Responsibility, Status: Advanced filters

Sun	Mon	Tue	Wed	Thu	Fri	Sat
Sep 27, 2020	28	29	30	Oct 1	2	3
	1 - Project planning 1 - Project planning +4 Events	1 - Project planning 1 - Project planning	1 - Project planning 1 - Project planning	1 - Project planning 1 - Project planning +6 Events	1 - Project planning 1 - Project planning +2 Events	
4	5	6	7	8	9	10
	1 - Project planning 1 - Project planning +2 Events	1 - Project planning 1 - Project planning +2 Events	22 - Production and Conti 1 - Project planning +2 Events	22 - Production and Conti 1 - Project planning +2 Events	22 - Production and Conti 11 - Assignment of Part C +3 Events	
11	12	13	14	15	16	17
	22 - Production and Conti 22 - Production and Conti +1 Event	22 - Production and Conti 22 - Production and Conti +1 Event	22 - Production and Conti 14 - Design for Manufactu +2 Events	User15630161340164 - I User15630161340164 - I +7 Events	22 - Production and Conti 16 - Design Reviews +3 Events	
18	19	20	21	22	23	24
	RTO-001 - Record Occurr Decision19924141437250 +3 Events	RTO-001 - Record Occurr RTO--010 - Effectiveness +2 Events	22 - Production and Conti 22 - Production and Conti	23 - Customer delivery 23 - Customer delivery		
25	26	27	28	29	30	31
		User16929104030254 - I Acti000007 - Incident Rec +1 Event		Activity111125165529348 Activity17126154933951		

Allocation: 00:00 Available: 176:00



Projects and schedule

Resources

Monitoring

Initiative Management

Plan, implement and monitor projects and action plans specially selected to ensure the achievement of objectives.

Status report > 000102 - Status Report | 12/09/2020 - 12/16/2020 | Issue

Record | Actions | Record data | View | SE Suite | Tools

Save | Save and exit | Finish | Overview | Hours | Project progress | Project tasks | Finances | Communication | Data | Action plan | Incident | Reports | Configurations | External sharing

Project

ID #: 000163 Name: 000163 - Product Development

Planned

Start: 9/28/2020
End: 12/21/2020
Duration: 61

Actual

Start: 9/28/2020
End:
Duration: 0

87%

16%

Performance

Base values for analysis

Planned value (PV) US\$ 101,000.00	Actual cost (AC) US\$ 83,166.67	Earned value (EV) US\$ 27,656.20
---------------------------------------	------------------------------------	-------------------------------------

Performance indicators

- Schedule variance (SV) US\$ -73,343.80
- Cost variance (CV) US\$ -55,510.47

Forecasts

- Delay at completion (DAC) -267 day(s)
- Variation at completion through (VACk) US\$ -55,510.47
- Delay of cost through (VACc) US\$ -252,320.32
- Variation at completion through (VACs) US\$ -315,547.58

Cost performance index (CPI) 0.33

Schedule performance index (SPI) 0.27

Schedule cost index (SCI) 0.09



Measuring and Monitoring

Measure the result either automatically or manually and monitor the performance of scorecards and indicators.

Manual input

Automatic input

Performance monitoring

Alerts

Measurement value > CPL - Strategy Planning | HO - Head Office

Actions Record data View Tools

Calculate General data Data Export

My indicators Scorecard

- CPL - Strategy Planning
 - STCPL1 - Shorten the production cycle and explore new types
 - PECPL1 - Financial
 - OBCPL1 - Increase the company revenue
 - CPL001 - Company revenue
 - CPL008 - Company sales**
 - CPL009 - Company financial revenues
 - TMS - 0 - 61 - Total Manufacturing Plant Sales
 - 0092 - 0 - Total sales revenue
 - 0093 - 0 - Market Segment Totals
 - PECPL2 - Customer
 - OBCPL2 - Achieve new customers by internet sales
 - CPL002 - Number of Internet new customers
 - PECPL3 - Business Process
 - OBCPL3 - Decrease the product release time from 1 year
 - CPL003 - New product released time
 - OBCPL4 - Establish a distribution net to internet sales

Target/measurement > CPL008 - Company sales Save

Start: 01/2020 End: 12/2020

Actions	Period	Target	Measurement	Accumulated ta...	Accumulated m...
	Dec 2020	75,000.00		900,000.00	
	Nov 2020	75,000.00	76,934.00	825,000.00	734,631.65
	Oct 2020	75,000.00	73,154.00	750,000.00	657,697.65
	Sep 2020	75,000.00	69,888.00	675,000.00	584,543.65
	Aug 2020	75,000.00	72,400.00	600,000.00	514,655.65
	Jul 2020	75,000.00	75,200.65	525,000.00	442,255.65
	Jun 2020	75,000.00	52,000.00	450,000.00	367,055.00



Manual input

Automatic input

Performance monitoring

Alerts

Measuring and Monitoring

Measure the result either automatically or manually and monitor the performance of scorecards and indicators.

Formula data > CPL001 - Company revenue

Record | Actions | General | Operation

Save | Save and exit | Check for errors | Evaluate formula | Logic | Text | Calibration | Maintenance | + | - | = | <>
 Math | Statistic | Performance | * | / | < | >
 Date and time | Asset | (|) | <= | >=

```

IF (INDICATOR('Measurement'; 'CPL008') > 0)
RETURN (INDICATOR('Measurement'; 'CPL008') + INDICATOR('Measurement'; 'CPL009'
ELSE
RETURN (INDICATOR('Measurement'; 'CPL008'))
END
  
```

DYNAMIC ACCUMULATION
 INDICATOR
 SUB-INDICATORS AVERAGE
 SUB-INDICATORS SUM

```

1 IF (INDICATOR('Measurement'; 'CPL008') > 0)
2 RETURN (INDICATOR('Measurement'; 'CPL008') + INDICATOR('Measurement'; 'CPL009') + INDICATOR('Measurement'; 'TAC'))
3 ELSE
4 RETURN (INDICATOR('Measurement'; 'CPL008'))
5 END
  
```



Measuring and Monitoring

Measure the result either automatically or manually and monitor the performance of scorecards and indicators.

- Manual input
- Automatic input
- Performance monitoring
- Alerts

Value import

- 1 Select file
- 2
Run- 3 View

Run

In this step, the data entered must be checked, being possible to delete it. When you click "Next", the import will be executed and the records will be saved.

<input type="checkbox"/>	S	ID #	Sub-period	Period	Year	Weight	Not applicable	Target	Measurement	Accumulated target	Accumulated measurement	Adc
<input checked="" type="checkbox"/>	🌱	CPL008		12	2020	1.000000000000	2	75000.000000000000		900000.000000000000		
<input type="checkbox"/>	🌱	CPL008		11	2020	1.000000000000	2	75000.000000000000	76934.000000000000	825000.000000000000	734631.650000000000	
<input type="checkbox"/>	🌱	CPL008		10	2020	1.000000000000	2	75000.000000000000	73154.000000000000	750000.000000000000	657697.650000000000	
<input type="checkbox"/>	🌱	CPL008		9	2020	1.000000000000	2	75000.000000000000	69888.000000000000	675000.000000000000	584543.650000000000	
<input type="checkbox"/>	🌱	CPL008		8	2020	1.000000000000	2	75000.000000000000	72400.000000000000	600000.000000000000	514655.650000000000	
<input type="checkbox"/>	🌱	CPL008		7	2020	1.000000000000	2	75000.000000000000	75200.650000000000	525000.000000000000	442255.650000000000	
<input type="checkbox"/>	🌱	CPL008		6	2020	1.000000000000	2	75000.000000000000	52000.000000000000	450000.000000000000	367055.000000000000	
<input type="checkbox"/>	🌱	CPL008		5	2020	1.000000000000	2	75000.000000000000	67855.000000000000	375000.000000000000	315055.000000000000	
<input type="checkbox"/>	🌱	CPL008		4	2020	1.000000000000	2	75000.000000000000	63600.000000000000	300000.000000000000	247200.000000000000	
<input type="checkbox"/>	🌱	CPL008		3	2020	1.000000000000	2	75000.000000000000	63100.000000000000	225000.000000000000	183600.000000000000	
<input type="checkbox"/>	🌱	CPL008		2	2020	1.000000000000	2	75000.000000000000	61200.000000000000	150000.000000000000	120500.000000000000	
<input type="checkbox"/>	🌱	CPL008		1	2020	1.000000000000	2	75000.000000000000	59300.000000000000	75000.000000000000	59300.000000000000	

Total records: 12 < 1 >

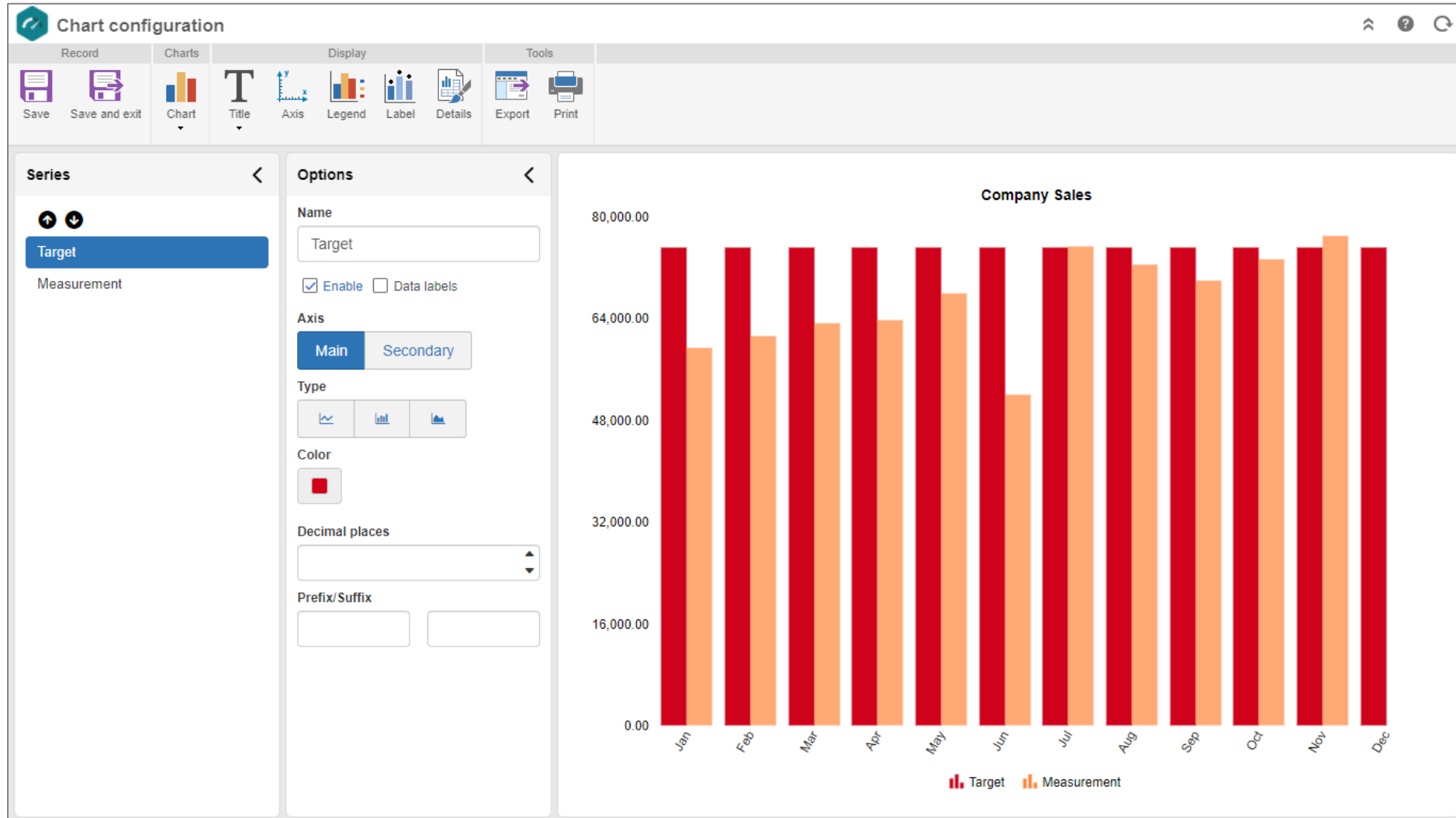
<
Cancel
Previous
Next >
Finish ✓



- Manual input
- Automatic input
- Performance monitoring
- Alerts

Measuring and Monitoring

Measure the result either automatically or manually and monitor the performance of scorecards and indicators.



Measuring and Monitoring

Measure the result either automatically or manually and monitor the performance of scorecards and indicators.



Manual input

Automatic input

Performance monitoring

Alerts

[SE Suite] - Performance alert - Google Chrome

Reply all | Delete | Junk | ...

[SE Suite] - Performance alert

des308@intranet.softexpert.com
Today, 10:47 AM

Reply all | ...

| SE Suite notifications | Mar 6, 2020 - 10:53:36 AM

Performance
Performance alert

001 - Alert

INDICATOR
0097 - Operating costs

PERIOD
Feb/2020

STATUS
 Regular

TARGET	MEASUREMENT
620.000,00	630.000,00

You have received this notification for being involved directly or for being part of a group that is involved.
Access: <https://endor.softexpert.com/softexpert>

SoftExpert
Excellence Suite

Deviations and corrections

Identify, analyze and correct performance deviations.

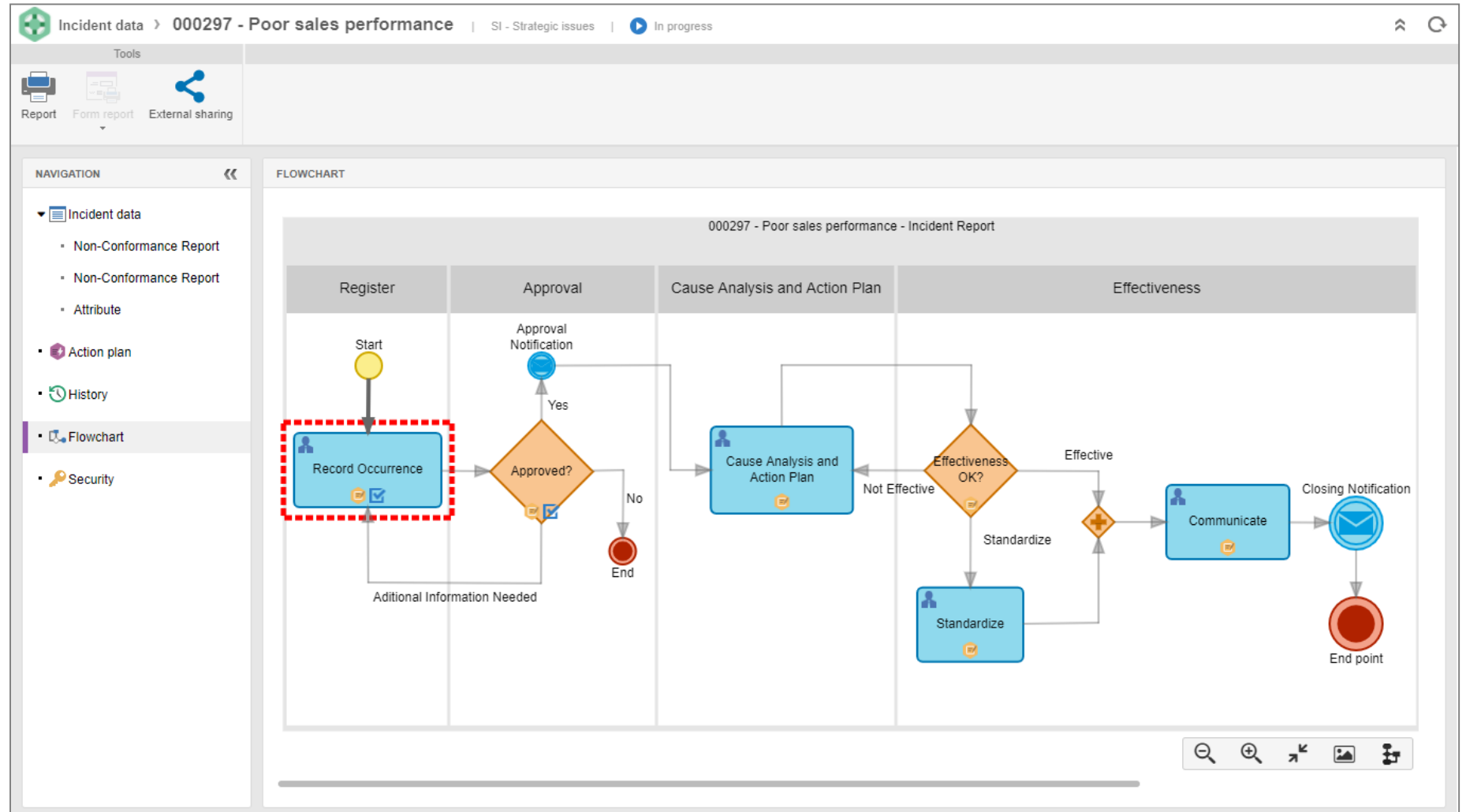


Performance deviations

Cause analysis

Action plans

Automatic detection



Deviations and corrections

Identify, analyze and correct performance deviations.

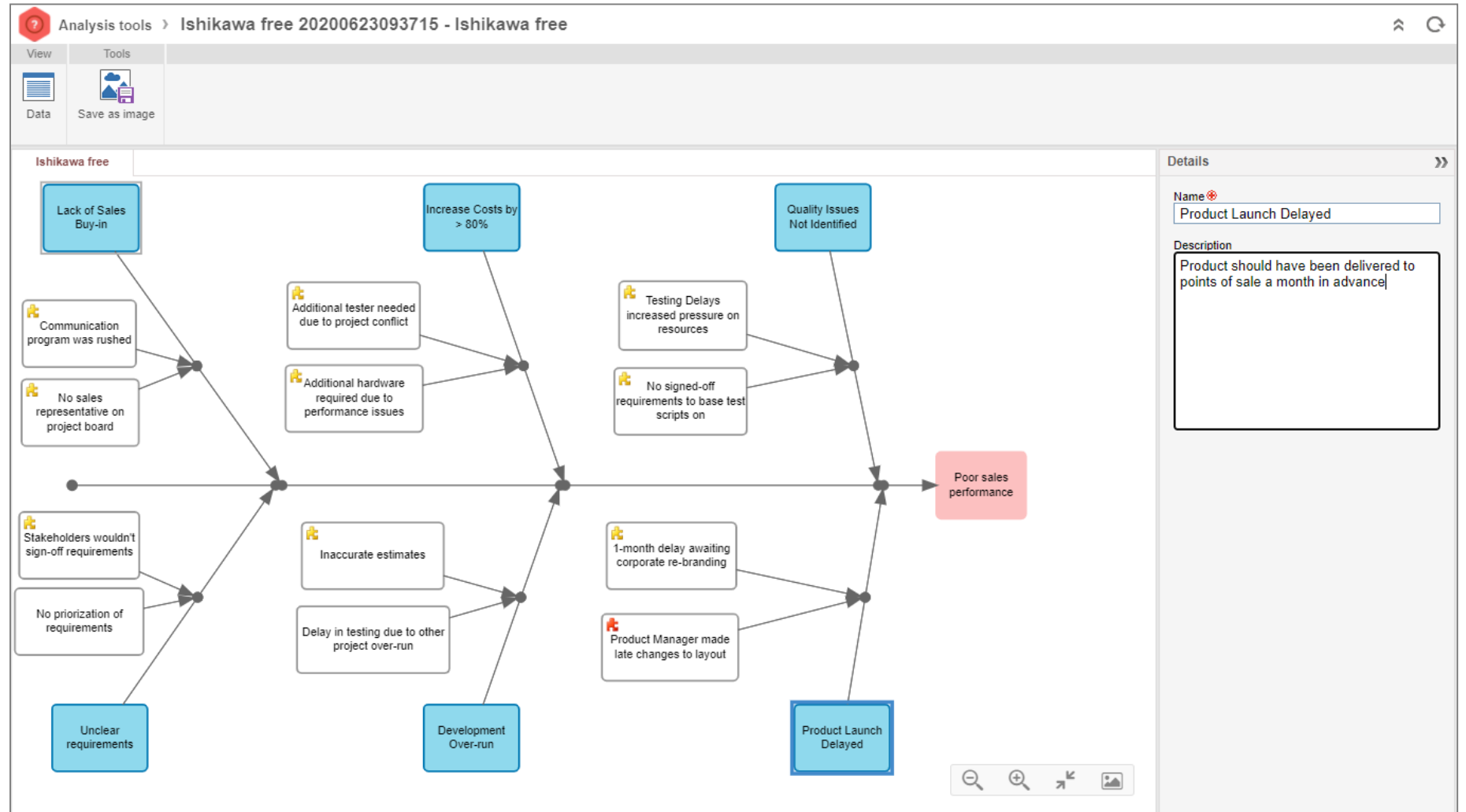


Performance deviations

Cause analysis

Action plans

Automatic detection



Deviations and corrections

Identify, analyze and correct performance deviations.



Performance deviations

Cause analysis

Action plans

Automatic detection

GENERAL DATA

General data

ID # 000264 Title KPI performance improvement actions

Category 01 - Corrective action Calendar

Responsible for planning 0004 - Tetsuo Kendo Responsible for action plan 0004 - Tetsuo Kendo Responsible team for planning Responsible team for action plan

Action record

Seq.	D	AS	ET	A	D	Actual %	Category	ID #	What?
1	▲	🔌	⊕			100.00		000001	Identify sales channel under target
2	▼	🔌	⊕					000002	Apply appropriate action
3	▼	🔌	⊕					000003	Suspend costs over 1 million
4	▼	🔌	⊕					000004	Collect/monitor market information
5	▼	🔌	⊕					000005	Start proess for strategy planning revision

Gantt

Timeline from Mon 08 Jun 2020 to Mon 06 Jul 2020. Tasks include Tetsuo Kendo, Alice Chain, Andrew Allen, Robert Smith, and Tetsuo Kendo.



Performance deviations

Cause analysis

Action plans

Automatic detection

Deviations and corrections

Identify, analyze and correct performance deviations.

🏠 📄 🔄 ↻

ID #

Name

General Related indicator

Generate event for the component:

Incident type

Responsible user

Range configuration

Apply rule from:

Generate event automatically after consecutive deviation(s)

Automatically restart the deviation count after generating the event

Rules Customized rule

- Any measurement deviation LOWER than the period target value
- Any accumulated measurement deviation LESS than the accumulated target value
- Any measurement deviation LESS than the target value OR accumulated measurement LESS than the accumulated target
- Measurement deviation % LOWER than the target value
- Accumulated measurement deviation % LOWER than the value of accumulated target
- Measurement deviation % LESS than the target value OR accumulated measurement % LOWER than the value of accumulated target
- Measurement deviation % LESS than the target value AND accumulated measurement % LOWER than the value of accumulated target
- Bias deviation
- Any values
- Customized rule

Created on

Last updated

Updated by



Meeting management

Monitoring

Portals

Reporting and analysis

Analyze, understand and predict business performance through graphical analysis tools.

Meeting data > Project Kick off | Scheduling

Record: Save, Save and exit, Save and new

Record data: General data, Subject, Documentation, Actual time, History

Tools: Report, Timesheet configuration

General data

- ID #: ME001
- Name: Project Kick off
- Type: PR - Project
- Place: Meeting room 01

Scheduled dates

- Start: 8/05/2020, 10:00
- End: 8/05/2020, 12:00

Comments

Alignment meeting: CEOs, managers, employees in the coast region.

Wait until all participants have confirmed attendance

Created on: 8/09/2020 | Last updated: | Updated by: Tetsuo Kendo

Participants

Internal:

- Adam Cooper (Note taker)
- Andrew Jones
- Andrew Stewart
- Brian Brown

Third-party: Constructors and suppliers

Security

Restricted meeting

Add users, teams, departments, positions...

- Tetsuo Kendo
- Adam Cooper
- Andrew Jones
- Andrew Stewart



Reporting and analysis

Analyze, understand and predict business performance through graphical analysis tools.

- Meeting management
- Monitoring
- Portals

Scorecard execution > CPL - Strategy Planning | HO - Head Office

Structure | Display inactive | Calculate | General data | Summary | Target/measurement | Date: 11/10/2020 | Data | View profile | Expand | Collapse

Scorecard	RC	Period	RA	O	RIS	IP	R	Target	Measurement	%
Strategy Planning	↑									
Shorten the production cycle and explore new types	↑	Nov/2020	●				▲			97.06 %
Financial	↑	Nov/2020	▲				●			104.35 %
Increase the company revenue	↑	Nov/2020	▲		●		●			104.35 %
Company revenue	↑	Nov/2020	●				●	1,395,000 US\$	1,466,934 US\$	105.16 %
Company sales	↑	Nov/2020	▲				●	75,000.00 US\$	76,934.00 US\$	102.58 %
Company financial revenues	↑	Nov/2020	●				●	1,320,000.00 US\$	1,390,000.00 US\$	105.30 %
Total Manufacturing Plant Sales	↑				●					
Total sales revenue	↑	Nov/2020						2,900,000.00 K		
Market Segment Totals	↑	2020						8 %		
Customer	↑	Nov/2020					●			108.33 %
Achieve new customers by internet sales	↑	Nov/2020			●		●			108.33 %
Number of Internet new customers	↑	Nov/2020					●	300 un	325 un	108.33 %
Business Process	↑	Nov/2020	●				◆			62.06 %
Decrease the product release time from 1 y	↑	Nov/2020	●		●		●			102.86 %

History: Company financial revenues

Period | Cumulative | The higher the better ↑

Jan/2008 | Dec/2020

Field	Jan/2020	Feb/2020	Mar/2020
Status	●	▲	●
Target	1,320,000.00 US\$	1,320,000.00 US\$	1,320,000.00 US\$
Measurement	1,640,000.00 US\$	1,280,000.00 US\$	1,360,000.00 US\$
%	124.24 %	96.97 %	103.03 %
Variation	320,000.00 US\$	-40,000.00 US\$	40,000.00 US\$
Score	10.00	7.00	10.00

Nov/2020

Target: 1,320,000.00 US\$ | Measurement: 1,390,000.00 US\$



Meeting management

Monitoring

Portals

Reporting and analysis

Analyze, understand and predict business performance through graphical analysis tools.

SoftExpert Home Portals My tasks Components Shortcuts

VCC Performance Private 1 Following

Main KPIs | SWOT Matrix | Strategy map | Initiatives

Shareholder Value (SVA)

↑ The higher the better

Month	Target	Measurement
Jan	38.00	37.43
Feb	38.00	39.57
Mar	38.00	37.43
Apr	38.00	39.57
May	38.00	36.71
Jun	38.00	39.57
Jul	38.00	38.14
Aug	38.00	37.43
Sep	38.00	39.57
Oct	38.00	38.14
Nov	38.00	36.71
Dec	38.00	37.43

Financial

Feb/2020

98.48%

50,00% 70,00% 100,00% 130,00%

Customer

Feb/2020

101.28%

50,00% 70,00% 100,00% 130,00%

Operating costs

↓ The lower the better

Month	Target	Measurement
Jan	17.142,86	17.142,86
Feb	17.142,86	28.571,43
Mar	17.142,86	17.142,86
Apr	17.142,86	22.857,14
May	17.142,86	17.142,86
Jun	17.142,86	17.142,86
Jul	17.142,86	17.142,86
Aug	17.142,86	17.142,86
Sep	17.142,86	17.142,86
Oct	17.142,86	28.571,43
Nov	17.142,86	17.142,86
Dec	17.142,86	17.142,86

KPI list

Indicator	Period	RIS	O	IA	RC	R	Target	Measurement
Shareholder Value (SVA)	Dec/2020				↑	▲	40.00 %	38.00
Revenues from other sources	Dec/2020				↑	●	400,000.00 K	300,000.00
Total sales revenue	Dec/2020				↑	●	800,000.00 K	1,050,000.00
Revenue	Dec/2020				↑	●	800,000.00 K	1,050,000.00

Total records: 5 | 1

Reporting and analysis

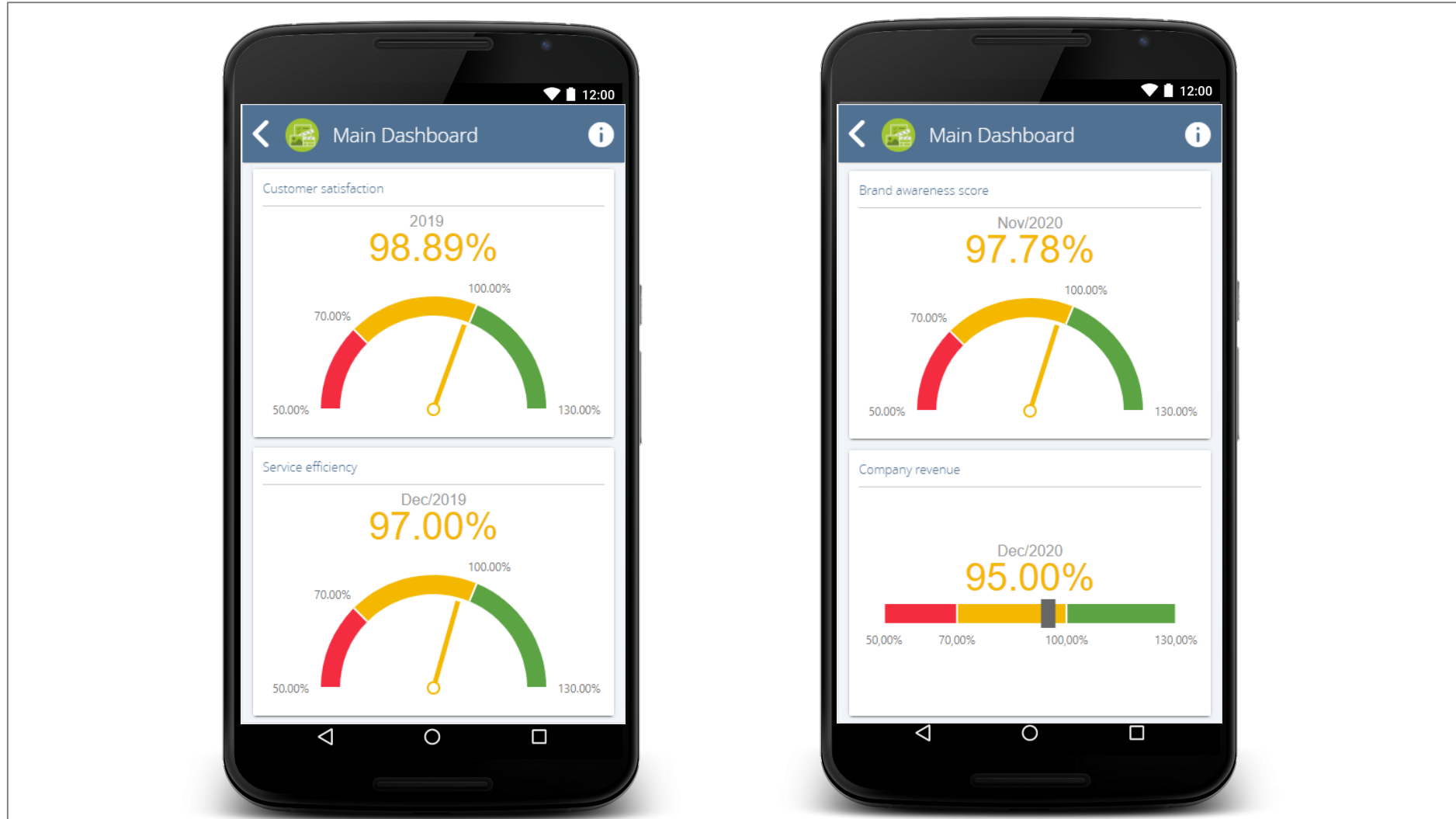
Analyze, understand and predict business performance through graphical analysis tools.



Meeting management

Monitoring

Portals



Company

SoftExpert is the market leader in software and services for enterprise-wide business process improvement and compliance management, providing the most comprehensive application suite to empower organizations to increase business performance at all levels and to maximize industry-mandated compliance and corporate governance programs.

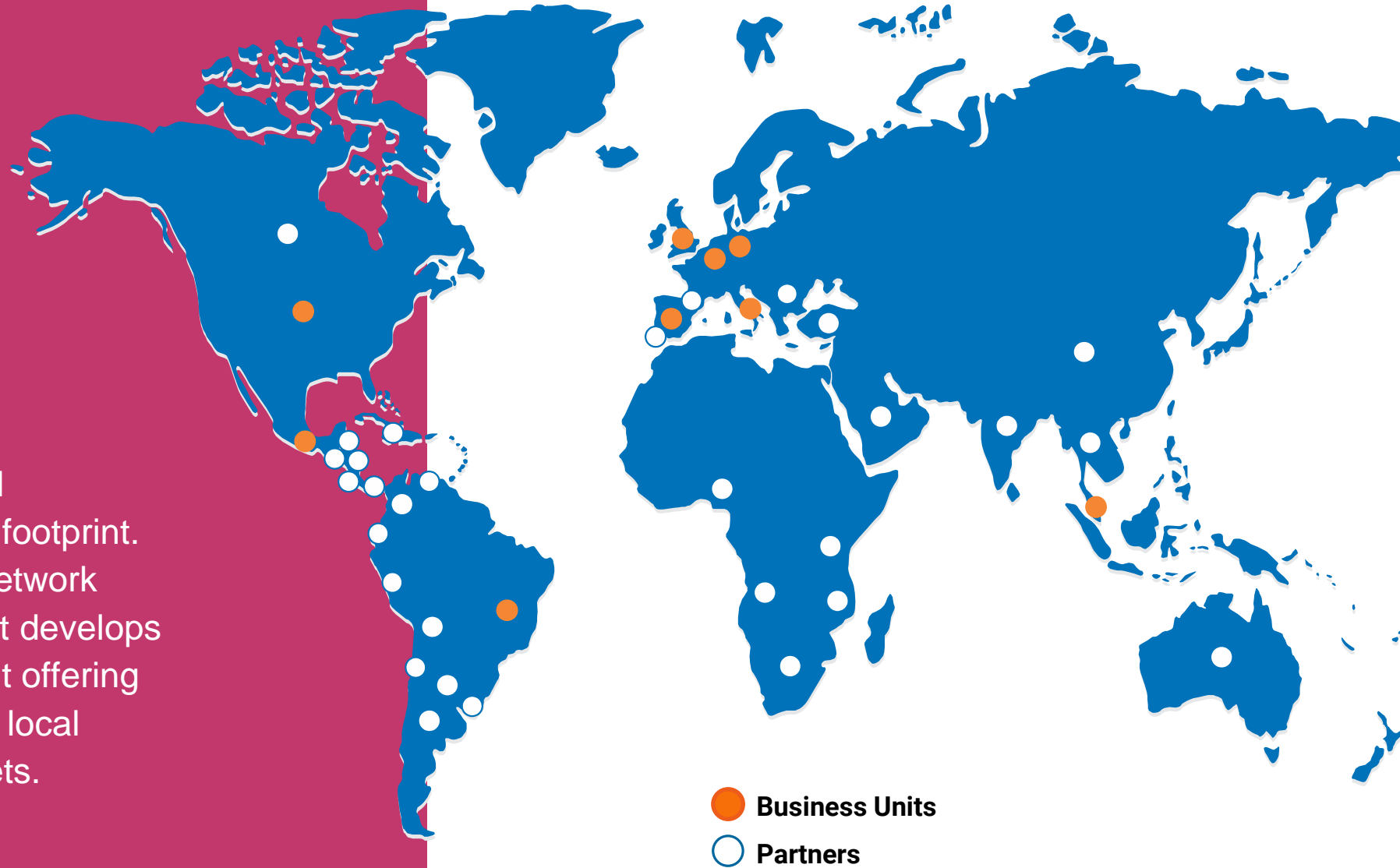
Founded in 1995 and currently **with more than 2,000 customers and 300,000 users worldwide**, SoftExpert solutions are used by leading corporations in all kinds of industries, including manufacturing, automotive, life sciences, food and beverage, mining and metals, oil and gas, high-tech and IT, energy and utilities, government and public sector, financial services, transportation, logistics and healthcare.

SoftExpert, along with its extensive network of **international partners**, provides **hosting, implementation, post-sales support and validation services for all solutions to ensure that customers get the maximum value from their investments.**



Thinking Global Acting Local

One of the driving forces behind SoftExpert's growth is its global footprint. With its extensive partnership network throughout the world, SoftExpert develops its operations on every continent offering customers strong service with a local approach specific to their markets.



SoftExpert Excellence Suite

SoftExpert Excellence Suite is the most comprehensive solution to collaboratively solve critical business excellence challenges into an integrated multi-application environment.

SoftExpert offers an integrated suite of components that can be implemented as business demands grow and the need to incorporate new functions.

Whatever the strategy chosen, only a fully shared Business Excellence environment allows its applications fit together like puzzle pieces and work seamlessly.





Software for Performance Excellence

Take your business to the next level.

www.softexpert.com | sales@softexpert.com

These materials are subject to change without notice. These materials are provided by SoftExpert and its affiliated companies for informational purposes only, without representation or warranty of any kind, and SoftExpert shall not be liable for errors or omissions with respect to the materials. The only warranties for SoftExpert products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty. Some product features and functionalities presented herein may be optional or dependent on the composition of the offer acquired.