



PERFORMANCE MANAGEMENT

CORVU 5

CORVU

*Driving Breakthrough Performance*

CorStrategy

CorPlanning

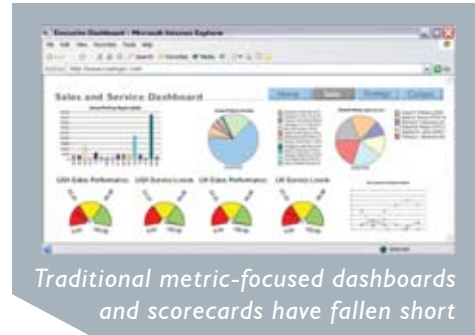
CorRisk

CorIncentive

CorBusiness

Key market forces – regulatory, competitive, and economic – are driving dramatic change for virtually all businesses today. Since most organizations have largely squeezed costs as much as possible, they now face significant pressure to drive profitable growth. As a result, companies are looking to technology to help grow the business.

Performance management technology, which is designed to manage and monitor business performance, holds the promise of helping businesses drive profitable growth. But the traditional metric-focused approach has fallen short. That's because there's more to performance management than metrics, dashboards, and scorecards.



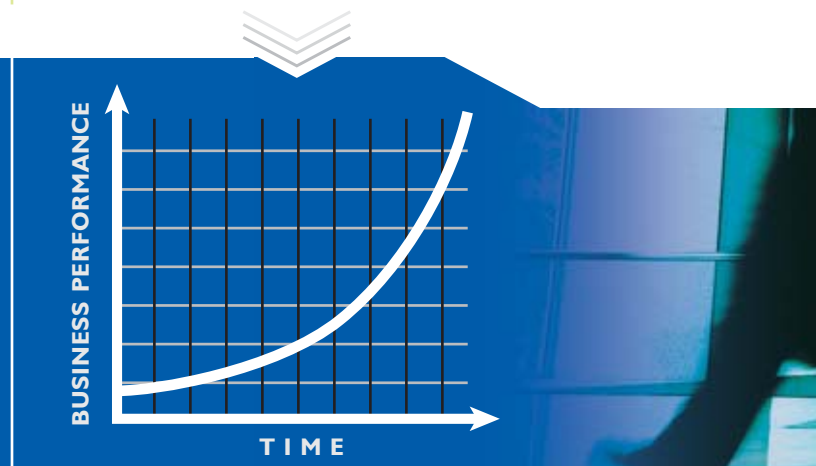
THE PROBLEM IS, there's a fundamental **disconnect**...

Strategy, initiatives, resources, and risks are discussed at the executive level, but day-to-day activities and performance metrics are not connected to them.

As a result, organizations can **measure performance**, but they **can't manage it**.

THE KEY TO BREAKTHROUGH PERFORMANCE MANAGEMENT IS... **tying** performance metrics to business strategy.

It's not just about **performance metrics**... it's about tying performance metrics, initiatives, resources, and risks to strategic objectives.





## TYING Performance Metrics to Business Strategy

Tying performance metrics to business strategy, however, is a non-trivial task. It represents the most important project management effort that an organization can undertake. It cannot be managed effectively with desktop tools like Excel or PowerPoint. At the same time, it's outside the design intent and scope of ERP systems, planning tools, and business intelligence tools. It requires a specialized system for managing strategy-related processes – it requires a Strategic Management System.

### FROM THE INNOVATIVE THOUGHT LEADER IN PERFORMANCE MANAGEMENT SOFTWARE...

It's CorVu 5 – a purpose-built application that combines the two key technology components necessary for driving breakthrough performance:

- ▶ **Strategic Management System** – a comprehensive system that manages the key business processes that impact strategy execution, including objective management, initiative management, budgeting and planning, risk management, and incentive management
- ▶ **Performance Metrics** – a robust business intelligence platform for automated data exchange, reporting, and analysis

**CorStrategy**, **CorPlanning**, **CorRisk**, and **CorIncentive** form the CorVu Strategic Management System. And **CorBusiness**, the powerful CorVu business intelligence platform, provides enterprise-wide performance metrics.

INTRODUCING CORVU 5...



## Tie performance metrics and initiatives to strategic objectives

**CorStrategy is the foundational module of the CorVu 5 Strategic Management System. With comprehensive capabilities, including interactive scorecards, strategy maps, briefing books, dashboards, and out-of-the-box reports and views, CorStrategy ties performance metrics and initiatives to strategic objectives. Designed to be configured to an organization's unique needs, it can be quickly deployed and easily scaled to meet expanded requirements.**

### OBJECTIVE MANAGEMENT

- ▶ Automated Objective Management to monitor and manage strategic objectives
- ▶ Communicate objectives within a strategic context, visually and with words
- ▶ Associate performance measures with individual objectives
- ▶ Scoring and color coding of measures and objectives at all levels
- ▶ Cascade objectives
- ▶ Measure progress toward objectives by combining the scores of any number of metrics (KPIs)

### METRICS MANAGEMENT

- ▶ Tracking of performance measures (KPIs) over time
- ▶ Periodic metric data can be automatically loaded from other corporate information systems, submitted via email or manually entered via webforms
- ▶ Email reminders when manual data entry is due

### INITIATIVE MANAGEMENT

- ▶ Link one or more initiatives and accountabilities to any strategic objective
- ▶ Provide performance monitoring of individual initiatives and objectives
- ▶ Graphically track and manage the status of all initiatives and subordinate tasks with Gantt charts
- ▶ Link to existing project management systems

### MANAGEMENT DISCIPLINES

Supports all major management disciplines and methodologies, including:

- ▶ Balanced Scorecard
- ▶ Six Sigma
- ▶ Total Quality Management (TQM)
- ▶ Economic Value Add (EVA)
- ▶ European Foundation of Quality Management (EFQM)
- ▶ ISO 9000
- ▶ Malcolm Baldrige Award for Quality

### CAUSAL LINKAGE

- ▶ Automatically diagnose root causes
- ▶ Track specific metrics and initiatives that impact desired outcomes
- ▶ Cause-and-effect diagrams highlight interdependencies that exist between objectives and functional areas
- ▶ Dynamic strategic planning
- ▶ Comprehensive performance modeling, including "what-if" analysis, time series regression, and resource planning

### KNOWLEDGE MANAGEMENT

- ▶ Discuss performance, communicate decisions, and record relevant actions
- ▶ Capture knowledge for developing alternative plans and strategies



**CORSTRATEGY**  
AT-A-GLANCE



**CORSTRATEGY**  
MAIN STRATEGY MAP



**CORSTRATEGY**  
SIX SIGMA  
ISHIKAWA DIAGRAM



*Link the budgeting and planning processes to business strategy*

**CorPlanning enables organizations to plan and budget in the context of strategic objectives and initiatives. It can be quickly deployed and easily configured to an organization's specific needs.**

**With CorPlanning, organizations can discuss resource plans, readily create standard financial reports, and make decisions within a strategic context. An integrated component of the CorVu 5 Strategic Management System, it can also be used as a stand-alone application.**

### **STRATEGIC RESOURCE PLANNING**

- ▶ Centralized management of the financial planning cycle
- ▶ Secure necessary resources for strategic initiatives
- ▶ Capture knowledge for developing resource plans and making informed decisions

### **SIMPLE DATA ENTRY**

- ▶ Distributed data entry over the web
- ▶ Customizable explanations and help for users
- ▶ Actual values from previous years available for comparison
- ▶ Exchange data using spreadsheets

### **BUDGETING METHODS**

CorPlanning supports all commonly used planning methods, including:

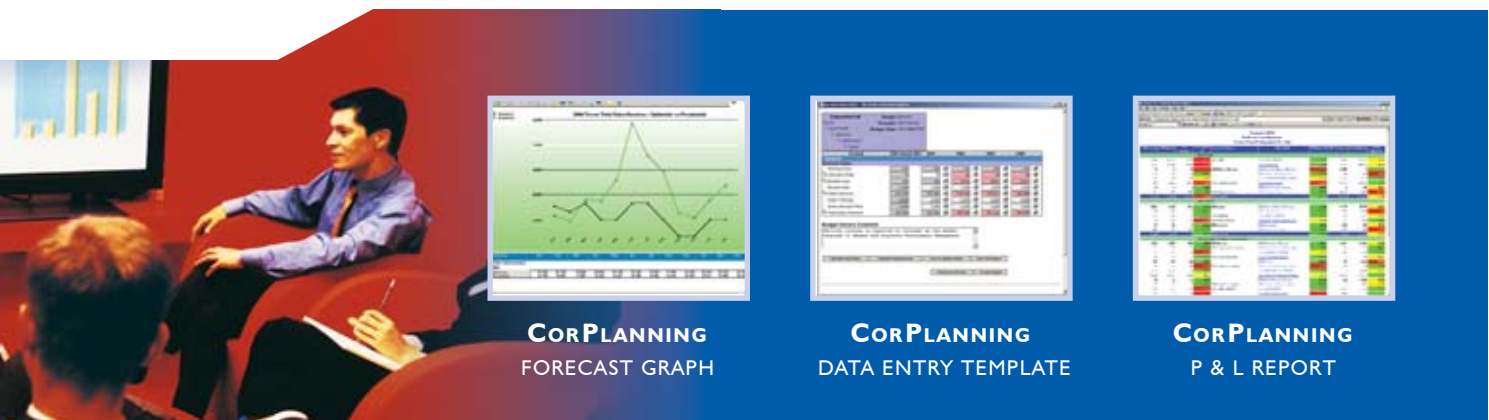
- ▶ Rolling forecasts
- ▶ Zero-base budgeting
- ▶ Outcome budgeting
- ▶ Activity based management
- ▶ Beyond budgeting
- ▶ Top-down and bottom-up
- ▶ "What-if" scenario modeling
- ▶ Multi-currency consolidation
- ▶ Financial and non-financial resources
- ▶ Approvals and reviews are customized to an organization's own workflows

### **FINANCIAL REPORTING**

- ▶ Consolidated financial reports
- ▶ Statutory reports
- ▶ Management reports
- ▶ Variance reports and exception analysis
- ▶ Reporting of key financial ratios
- ▶ Interactive financial reports, where financial outcomes can be linked to non-financial performance information

### **INTEGRATE WITH OPERATIONAL SYSTEMS**

- ▶ Automated Data Xchange (ADX) technology links CorPlanning to any system or data source
- ▶ Dynamic update of organization and account structures
- ▶ Automatic synchronization of planning data with other information systems



## Monitor and manage risks that can impact strategy

**CorRisk monitors and manages the threats and obstacles to achieving the organization's goals and objectives. Another integrated component of the CorVu 5 Strategic Management System, CorRisk enables companies to mitigate risks, ensure regulatory compliance, and enforce corporate governance.**

### COMPREHENSIVE RISK MANAGEMENT

- ▶ Monitor risk related to business plans, key business drivers, and objectives
- ▶ Tie Key Risk Indicators (KRIs) to objectives and desired outcomes
- ▶ Multiple risk scenarios per objective
- ▶ Simple entry of "soft" measures
- ▶ Support for Basel II, Sarbanes-Oxley, and other risk management frameworks

### RISK REPORTS

- ▶ Pre-defined risk reports for monitoring and managing risk by company, business unit, business driver, and key goals
- ▶ Control Reports keep managers up-to-date on all risk control strategies and their subordinate tasks
- ▶ Analyze accountability by owner
- ▶ Drill-down to risk dashboards to understand why control failures occur
- ▶ Alert managers to unacceptable risk control failures

### COMPLIANCE MANAGEMENT

- ▶ Out-of-the-box reports for monitoring risk and the status of control strategies
- ▶ Escalations and alerts for unacceptable compliance risk and process failures
- ▶ Alerts drive treatment plans

## Link employee incentives to corporate goals

**The most critical component in a successful organization is the alignment of its work force. CorIncentive, a key module of the CorVu 5 Strategic Management System, links employee performance results, appraisals, reviews, and variable compensation to corporate goals.**

### INCENTIVE LIBRARY

- ▶ Incentive Library allows users to centrally update organization hierarchies, incentives, definitions, strategies, models, business rules, and versions
- ▶ From a high-level, managers can update and maintain guidelines that support local managers' incentive plans
- ▶ At a departmental level, managers can pick-and-choose incentive information applying to their environment
- ▶ Delivers a consistent, centrally managed, incentive language that can be reported on from a high-level

### INCENTIVE RECORD

- ▶ Align incentive plans with strategy and policy structures
- ▶ Link incentive management initiatives to business plans
- ▶ Integrate with existing systems
- ▶ In-depth analysis of performance data

### INTERACTIVE ANALYSIS

- ▶ Easy access to performance data
- ▶ Powerful analytics
- ▶ Quickly identify root cause of performance results through ad hoc reporting, OLAP analysis, dashboards, and forecasting

### REVIEW PROCESS

- ▶ Review process facilitates continuous learning and improvement
- ▶ Collaboration framework helps employees refine the incentive management practice



**CORRISK**  
RISK OVERVIEW



**CORRISK**  
RISK LOSS EVENTS



**CORINCENTIVE**  
SCORECARD



*Business intelligence platform for automated data exchange, custom reporting, alerts, dashboards, and briefing books*

**CorBusiness is a powerful business intelligence platform with rich capabilities for reporting, graphical analysis, data access, KPI alerts, OLAP, and management dashboards. A critical technology component of the CorVu 5 performance management application, CorBusiness provides rapid access to data from any source, complex data manipulation, and automated data exchange.**

### INTERACTIVE ANALYTICAL REPORTS

- ▶ On-line reports for discovery, analysis, communication, and decision-making
- ▶ Quick navigation to further detail or related information to investigate cause and effect
- ▶ Commentary capabilities within reports for communication and collaboration
- ▶ Customization using simple wizards and a wide range of configurable settings
- ▶ Grouping, aggregating, sorting, color-coding, embedding graphics, formatting and filtering – with no programming or IT resources required
- ▶ Flexible report deployment options, including web pages and email
- ▶ Datamarts can be shared or centrally managed to ensure “one version of the truth”
- ▶ OLAP with flexible drill down “on-the-fly” through unlimited business dimensions and values

### AUTOMATED DATA XCHANGE

- ▶ Automated access to data from any source
- ▶ DynaMarts provide rapid access to targeted data for business users to build personalized queries and reports
- ▶ Automate complex data transformations (ETL)

### RAPIDAPPS

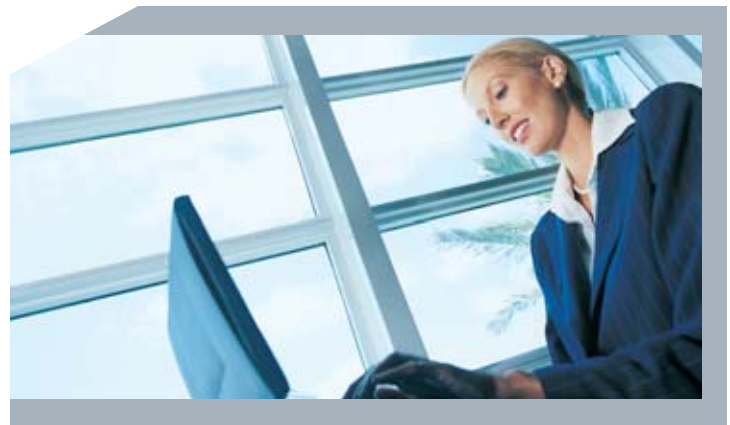
- ▶ Pre-integrated business intelligence applications for most commonly used ERP systems (including JD Edwards, QAD, BPCS)
- ▶ Pre-built report templates that can easily be tailored by end users
- ▶ Knowledge Library provides meaningful database interfaces (business user view) for commonly used ERP systems
- ▶ Pre-built DynaMarts to quickly build personalized reports and queries

### CORPORTFOLIO

- ▶ Graphical snapshot of the business
- ▶ Simplified mechanism for publishing complex combinations of graphical and textual reports as a single, comprehensive report
- ▶ Fully interactive, on-line access to comprehensive briefing books, monthly management reports, and project reports for the busy, non-technical manager or executive
- ▶ Scheduled execution and delivery of compiled sets of reports

### ADVANCED ANALYTICS

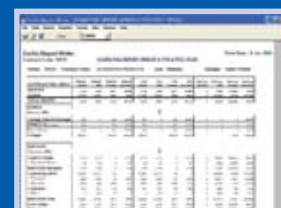
- ▶ “What-if” modeling of key business variables
- ▶ Forecasting to analyze trends and make projections
- ▶ Data mining using popular models and methods



**CORBUSINESS**  
EXECUTIVE ALERT



**CORBUSINESS**  
SALES ANALYSIS



**CORBUSINESS**  
REPORT WRITER

# CORVU 5



CorVu is the innovative thought leader in performance management software. The unique CorVu solution is a purpose-built application for tying performance metrics, initiatives, resources, and risks to strategic objectives. Founded in 1990, CorVu enables strategy-focused companies and government agencies to drive breakthrough performance.

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