Good business decisions require rich information with deep, meaningful context. Facts alone just aren't enough.

Without context, you can't answer questions like:

Where should I focus my limited time and effort to best improve profitability?	Where can I best make a dent in my surplus inventory?	How can sales be down if the number of new customers is up?

→ Turn Your Data into Productive Information

Data becomes *productive information* when it is contextualized within company objectives and conveys how various activities relate and meld together to affect downstream operations.

We built a tool that puts exactly that in the hands of your key decision-makers.

It's called **ProAdvisor.**

→ Leverage Performance Measurement and Resolution Guidance

ProAdvisor is a top-tier business performance management tool that uncovers growth and profitability opportunities—and directs your attention to ineffective operations that are limiting success.

How? **ProAdvisor** includes industry-critical KPIs organized around business objectives and 40 defined business goals related to accountability hierarchies that drive results throughout your organization. Information is presented in a form that allows for identifying action plans to solve business problems.

→ Ready to Use from Day One

ProAdvisor is delivered with a complete set of ready-to-use tools, allowing you to focus on your business and your results, not on learning complex BI software.

Supported by Microsoft's industry-leading Power BI software, **ProAdvisor** comes with prebuilt access to business data, making it the perfect tool for business decision-makers. Teams aren't spending time building an interface, recreating the data, determining how to interpret it, or acquiring Microsoft Power BI expertise. **ProAdvisor** is a self-serve tool for all levels of decision-makers.

ACCOMPLISH YOUR COMPANY GOALS

ProAdvisor is a comprehensive business product covering all aspects of your business including finance, operations, vendor relationships, customer behavior, and more. It empowers you to accomplish your goals by:

- Enabling you to compare your results to industry benchmarks and those of competitors

- Identifying the root causes of underperformance and the constraints that present obstacles to accomplishing your goals

- Exposing those causes within the context of the source contributor, and across all areas and functions impacted within the business

→ TAKE THE NEXT STEP

Our easy-to-use interface doesn't require a degree in data analytics. **ProAdvisor** uncovers hidden opportunities that drive productivity and profitability, all based on exceptional information-driven decision making. **Start your journey to operational excellence today with ProAdvisor.**

Ready to get started? **LET'S TALK.**

GOALS

- Easy Maintenance
- Maintained at any level
  (e.g. Company, Branch, Salesperson, Buyer, Warehouse, etc.)
- Yearly, Quarterly and Monthly goals
- Easy adjustments for new fiscal years

GOAL TYPES

- Unlimited sets of goals (e.g. Baseline, Stretch, Best Case)
- Overlay Industry Standard goals to measure your business against similar businesses

USER POSITIONS

- Executive, Regional Manager, Branch Manager, Sales Manager/ Person, Warehouse Manager, Buyer, Order Writer
- Controls table-level security

CUSTOMIZATIONS

- Support for loading custom data
- We can create custom goals
- Build your own reports using the security-controlled data model

DASHBOARDS

- **Filters** on "all pages" and a robust data model allow you to go from page to page without losing your filters
- **Executive Dashboards** for highest level snapshots of your performance

  Profitability – your financial results/performance

  Longevity – how well you are serving your customers

  Growth – how well you are positioned to sustain growth

- **Monthly/Yearly Comparative** – performance of all areas over time

  This runs your monthly status meetings

- **Dimensional tools** to see results from many different perspectives

  Provide insights into underperforming areas/branches/ salespeople/etc.

- **Comparative views** to examine relative performance between peers
- **Purpose-built reports** to analyze specific areas

  Dimensional Customer Defection exposes which customers may be leaving you for your competitors so you can proactively reach out to them to keep the business

  Current Receivables Over 90 Days aids collections and exposes potential areas with poor credit practices/policies

  Dimensional PO Analysis examines vendor performance across wide range of measurements

Executive Top View

Exec Branch Comp | Exec Mth/Yr Comp

Goal Type: Active
Fiscal Year: 2020

Profitability - ROA — 15.00% — 14.35%
Executive Profitability

Longevity - Customer Experience — 70.00% — 64.30%
Executive Longevity

Growth - Revenue Growth YTD — 0.70% — -100.00%
Executive Growth

Profitability - Summary

	Amount	Percent	Goal
Net Sales	$9,637,012		$20,800,000
Gross Margin	$3,086,722	32.03 %	30.00 %
Net Profit	$763,841	7.93 %	5.53 %

Curr Inv Value	$6,136,042		$5,420,833
Surplus Dollars	$1,383,736	22.55 %	25.00 %
Turns	2.29		3.00

Curr Rec - % Assets	$2,404,136	21.74 %	10.00 %
Rec Over 90	$1,297	0.05 %	0.50 %
DSO	44.02		30.00

Perfect Order - Summary

	Amount	Percent	Goal
Total Ship Lines	126,602		
First Ship Lines	116,339		
Filled Complete	115,968	99.68 %	99.00 %
Shipped On Time	88,298	69.74 %	80.00 %
Shipped Accurately	117,085	92.48 %	95.00 %
Perfect Order		64.30 %	70.00 %

Growth - Summary

	YTD Amount	Percent	Goal
Exist Cust Growth		-100.00 %	10.00 %
New Cust Sales			4.00 %
Exist Item Growth		-100.00 %	10.00 %
New Item Sales			10.00 %
Temp Item Sales			
Revenue Growth			0.70 %
Total Customers			
Defecting Customers			2.00 %
Defected Customers			1.00 %

Filters — Filters on all pages

Region is (All)
Branch is (All)
Salesperson is (All)
Customer is (All)
Warehouse is (All)
Buyer is (All)
Vendor is (All)
Purchasing Line is (All)
Fiscal Period Name is (All)
Calendar Year is (All)