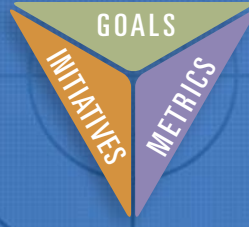


INTRODUCTION TO **PilotWorks**



Get it together with PilotWorks

Whether seeking a more effective way to present and communicate progress towards goals, or simply because you have been mandated to do so, you already know that performance management software can help. But how do you know what technology can best support your performance management needs?

The key is selecting a solution that integrates all three of the cornerstones of performance management — goals, initiatives and metrics; for only when these elements are aligned can an organization hone performance and achieve its objectives, both short- and long-term.

Follow the lead of like-minded progressive companies

With both the first-ever performance management solution deployed and the largest-known operational performance management deployment within the U.S. federal government — Pilot's solutions are used by leading companies worldwide such as Advanced Navigation and Positioning Corporation, American Heart Association, The Boeing Company, Coors Brewing Company, General Services Administration, Health Net, Ingersoll-Rand, JetBlue, Pacific Life Insurance, Phillips Medical, Sarasota County Government of Florida, and SMARTpages.com®.

OPERATIONAL PERFORMANCE MANAGEMENT SOFTWARE SOLUTION

Pilot has helped hundreds of organizations dramatically improve performance with its ability to manage goals, initiatives and metrics in one comprehensive, yet modular software solution. Learn why companies around the world are choosing Pilot Software.

- ▶ Integrates goals, initiatives and metrics, the three cornerstones of performance management
- ▶ Allows organizations to start with multiple disconnected deployments, each with their own requirements, and grow across the enterprise over time, without requiring one-size-fits-all mandates
- ▶ Provides unmatched personalization, addressing organization-specific requirements and the unique needs of each individual user
- ▶ Promotes organization alignment by facilitating communication and encouraging collaboration



ALIGNING EXECUTION WITH STRATEGY™

PilotWorks Universal Features

FEATURE	WHY IT MATTERS
Integration of goals, initiatives and metrics	Rather than relying on separate systems to manage goals, initiatives, and metrics, and create unintended silos of information, an organization can have a complete view of performance; and in turn make tangible improvements to it.
Personalization — by deployment, context and individual	Makes the system more relevant and useful to each individual user and various groups within the organization — all of which increase adoption. For example: <ul style="list-style-type: none">• The sales and marketing departments may have their own goals and metrics which are managed separately but roll up to common corporate priorities• One group may adopt letter grade scoring (A, B, C, etc.) while another may choose a traffic light color scheme (red, green, yellow)• Organizations can use the language most intuitive to them — e.g. goals vs. outcomes vs. objectives or measures vs. metrics vs. indicators• Meanwhile, each individual user has the flexibility to select specific content to display on his/her own home page
Threaded, searchable, and archivable comments, input by end users	Facilitates effective collaboration and discussion, prompt notifications, timely problem resolution, and efficient sharing of “best practices” throughout the organization. Allows individuals to share domain expertise or background about issues directly in the system by annotating objectives, initiatives, KPIs/metrics, dashboards and reports. Saves time by alerting users to comments that they have not yet read. Also, helps users learn from past experience documenting prior issues and resolutions. Archiving of expired comments removes information no longer relevant for the current situation, but allows playback of comments in circulation during a specified prior period.
Distributed and delegated entry, approval and publishing	Streamlines the process for getting performance management-related data — from objectives to targets to metrics to KPIs — into the system. Answers the question: <i>“How do we reduce the time and labor involved in populating our performance management system while maintaining our confidence in the resulting information?”</i>
Archivable notification and subscriptions	Eliminates concerns over lost or misfiled e-mails, ensuring a comprehensive repository of performance management insight. Immediately notifies users of critical updates and system changes for uninterrupted access to the PilotWorks system. Flag objectives that on the surface look fine, but actually may be in danger of failing.
Community of active users	Enables all users to actively participate in the performance management process from reviewing status to updating information and responding to posted comments so that organizations can harness their full potential, unlike other solutions that force some stakeholders into the role of passive users. As a result, moves performance management from just a communication tool to true collaboration.
Coexists with other productivity tools	Recognizing that the true benefits of performance management come about when performance improvement becomes part of the daily routine, PilotWorks lets users print, e-mail and create links from within the application. In addition, they can create printable views that are easily exported into business applications such as Microsoft® Word and PowerPoint, making the usage and sharing of performance insight easier than ever.

PilotWorks



COMPONENTS

True to Pilot's incremental approach, each component in PilotWorks can be deployed individually or as part of a larger effort.

Home Tab

As the success of any performance management program is directly related to its adoption, PilotWorks' home tab contains multiple modules designed specifically to personalize each user's experience. Comprised of *My Performance Summary*, *My Alerts*, and *My Bookmarks*, PilotWorks' home tab provides condensed content from all of the other PilotWorks components for true at-a-glance performance insight.

Customizable home page provides a personalized view

FEATURE

WHY IT MATTERS

Personalized performance summaries

Allows users to track those particular key performance indicators, objectives and initiatives important to them.

State-specific bookmarks

Users can capture and share a "moment in time" during their exploration and analysis of performance.

Wireless-enabled alerts

Wherever in the world they may be, managers can take immediate corrective action to head off future performance issues.

Archived alerts

Save a comprehensive repository of performance management insight; eliminates concerns over lost or misfiled e-mails.

Strategy Tab



Because managing goals requires more than simply documenting current objectives, PilotWorks' strategy tab consists of interactive *strategy plans*, *pathways* and *cause-and-effect* modules that serve as organizational memory behind the goal development process, deliver a unified view of the strategic plan, and provide a collaborative environment for discussing and updating goals.

While software products based on Microsoft® Office or Web forms enable organizations to publish their goals, these simple solutions lack the ability for multiple authors to collaborate, to track differing versions, or for others to participate in ongoing discussions.

System-generated strategy plans enable collaborative plan development

FEATURE	WHY IT MATTERS
Industry-first implementation of pathways	Depicts the progressive stages in realizing your organization's long-term vision; provides an understanding of the phases in which particular objectives play primary roles. Answers the question: "How do I communicate the various time horizons different stakeholders must consider (e.g., executives tend to think two to three years out, directors focus on the annual plan, salespeople worry about quarters, etc.)?"
Both system-generated and user-imported strategy plans	Easily create one-page summaries of the strategic plan within PilotWorks or import existing graphics into the system. Switch from one format to the other without losing interactivity or backup documentation. Also, allows you to easily create and update strategy plans to fit the requirements of your organization.
Enhanced cause-and-effect visualizations	Better understand how a mission can be achieved by illustrating which objectives play primary, secondary, or tertiary roles in meeting other objectives (<i>cause</i>) or alternatively which other objectives will be affected by a specific objective (<i>effect</i>).
Integrated, but available stand-alone	Publishing the strategy even before KPIs have been defined or operational systems integrated helps motivate the workforce and lay the foundation for successful adoption. Feedback from the field can be communicated directly to the strategy development team so that goals can be refined based on real customer feedback. Organizations can then use the system to collaborate on KPI definition.

Initiatives Tab



Comprised of *initiative management* and *prioritization* modules, PilotWorks' initiatives tab goes beyond simply tracking project resources and activities to help stakeholders prioritize and focus resources appropriately — even in the face of conflicting tasks — so that resources support the milestones most critical to organizational goals. Rooted in the knowledge that ownership fosters productivity, the initiative management module provides simple-to-digest summary views of initiatives supporting overall objectives, as well as the milestones supporting each initiative, interdependencies between them, and schedule and budget status.

Home
Strategy
Initiatives
Scorecard
Dashboard
Reports

Proprieties and Objectives
Initiatives Owner
Participant
Budget
Schedule
Target End Date
Phase Filter

Initiatives Summary

Prioritization matrix provides at-a-glance view of initiatives' importance and urgency

Initiatives and Sub-Initiatives of Initiatives: Customer Performance Survey	Owner (Team)	Progress Complete	Importance	Start	Target End	Actual End	Status
Initiatives customer survey program	turny	100%	Medium	Jan 01 2006	Jan 31 2006	Jan 30 2006	Delayed
Initiatives location for advertisement	andy	40%	Medium	Feb 01 2006	Mar 15 2006		Delayed
Initiatives customer survey	andy	0%	High	Feb 15 2006	Mar 15 2006		Delayed
Initiatives customer survey	andy	100%	Low	Feb 01 2006	Mar 31 2006	Apr 06 2006	Delayed
Initiatives customer survey	turn	0%	High	Mar 01 2006	Mar 31 2006		Delayed

FEATURE	WHY IT MATTERS
Initiative summary	Provides at-a-glance summary on the status of multiple initiatives and how they impact performance at the strategic level.
Unique initiatives prioritization matrix	Helps ensure that stakeholders organization-wide are doing the right work to support organizational goals, by providing an at-a-glance view of initiatives' relative importance and urgency, plus dependencies between individual initiatives and/or milestones.
Fishbone visualizations	Provides an intuitive overview of critical interdependencies between milestones to better understand and resolve bottlenecks within an initiative.
Filter initiatives by specific characteristics	Limits display of initiatives by specific properties such as owner, budget or schedule status, and related objective, focusing attention on those initiatives which are directly actionable by one individual or that demand immediate attention.
Initiatives notification	Keeps initiatives moving forward by notifying team members when they are assigned a related task.
Distribute ownership of initiatives	Distributing ownership across multiple people — including different owners for the overall initiative, associated milestones and sub-milestones — promotes effective collaboration and accountability.

Scorecard Tab



PilotWorks' scorecard contains multiple modules, including *readiness*-, *objective*- and *KPI-based views*, that provide a centralized and personalized view of progress toward desired outcomes. For whatever purpose at hand — whether using a readiness scorecard to determine when to move to the next phase of your performance management implementation; an objective scorecard to monitor performance toward goals; or a KPI scorecard to consolidate key financial and operational metrics — Pilot's flexible and multi-purpose scorecard acts as a beacon to help you reach desired goals.

Home	Strategy	Initiatives	Scorecard	Dashboard	Reports
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FEATURE WHY IT MATTERS

Objective scorecards Unlike traditional metrics-based dashboards, provides an at-a-glance summary of progress towards goals which may be based on multiple indicators of performance. Includes a comparison of actual vs. target, notification of underlying KPIs in trouble, and interactive commentary on performance.

Objective detail Provides complete details for a specific objective, including associated KPIs, their status and trend, description, owner, comments, associated initiatives, and links to related external info.

KPI scorecards Provides summary views across all KPIs, with at-a-glance comparisons of current actuals vs. historical performance, along with the ability to filter KPIs by time, owner, status, trend, and type of indicator or objective (e.g., leading/lagging, etc.).

KPI detail Provides complete details for a specific KPI, including its description, owner, score, trend, external and internal benchmarks, comments, and links to related external information.

Unique readiness scorecards Patent-pending approach helps organizations gauge their readiness to embark on one or more defined goals. The technique translates subjective opinions into easy-to-understand quantitative data that can be analyzed to identify current gaps in readiness so resources can be deployed appropriately.

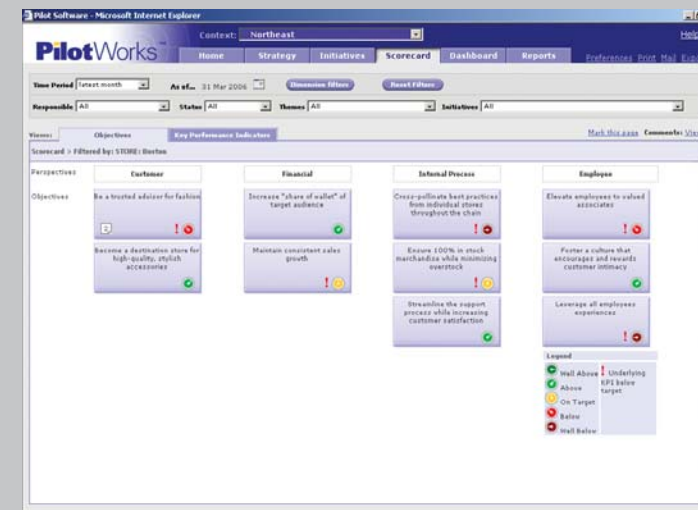
Filter objectives and KPIs by specific characteristics Limits displays of objectives and KPIs by specific properties such as owner, score, and timeframe, focusing attention on items that demand immediate attention.

Below the horizon indicators (!) Flags objectives that on the surface look fine, but actually may be in danger of failing.

Compare KPIs against external and internal benchmarks Links internal and external metrics, such as those provided by third-party benchmarking companies, to create a truly comprehensive 360° picture of operational performance. Provides additional context for KPIs and how they measure up to other internal benchmarks. For example, compare one region or time period against another.

User-definable performance thresholds Enables managers to define up to five ranges for the difference between actual and target performance for both objectives and KPIs to provide a more precise gauge of status. These ranges can be mapped to a wide array of easy to understand scoring systems such as traffic light (red, green, yellow), grade school (A, B, C) or gladiator (thumbs up, down), increasing understanding and improving adoption.

Cascading scorecards Provides a unified view of key performance drivers across functional and divisional units; integrate financial and operational measures to provide a holistic view of the state of the organization.



Objective scorecards ensure everyone has a consistent view of progress towards goals



KPI summary provides underlying details for a particular performance measure

KPI	Trend	Status	Actual	Target	Score	Direction	Weight	Lead/Lag
Adv. Cost Efficiency	↔	🟡	33.79	37.89	8.92	Internal Process	Lagging	
Adv. Cost Efficiency	↔	🟡	8.57	8.53	8.54	Internal Process	Lagging	
Autodesk Directories	↔	🟡	64,787.92	50,343.50	28.38	Internal Process	Lagging	
Customer Loyalty Rate	↔	🟡	8.83	8.82	8.50	Customer	Lagging	
Customer Support	↔	🟢	25,946.06	17,228.00	21.50	Internal Process	Lagging	
Email Open Rate	↔	🟡	4,247.43	7,246.04	46.60	Employee	Lagging	
Employee Efficiency	↔	🟡	972.92	1,008.00	-0.78	Employee	Lagging	
Employee Exit Efficiency	↔	🟡	972.92	1,008.00	-0.78	Employee	Lagging	
Gross Profit Margin	↔	🟢	71.70	68.13	66.34	Financial	Leading	
Inventory Control	↔	🟡	6.05	6.45	28.84	Internal Process	Lagging	
Inventory Lead Time	↔	🟡	1.76	1.68	0.60	Internal Process	Lagging	
Net Sales	↔	🟢	1,293,423.70	1,000,396.48	62.04	Financial	Leading	
Product Availability	↔	🟡	25,440.00	23,077.00	4.95	Internal Process	Lagging	
Refunds Rate	↔	🟡	0.01	0.01	129.43	Customer	Lagging	
Refunds per Cost	↔	🟡	0.00	0.04	48.48	Customer	Lagging	
Revenue per Ad. L.	↔	🟡	4.75	4.20	23.34	Internal Process	Lagging	
Revenue per Cost	↔	🟡	89.63	89.68	100.00	Customer	Leading	
Web Sites per Ad. Cost	↔	🟡	0.05	0.04	9.37	Employee	Lagging	
Work Efficiency	↔	🟡	40.05	65.08	61.37	Financial	Lagging	
Work Exit Rate	↔	🟡	7.00	7.24	4.75	Financial	Lagging	
Work Hours Efficiency	↔	🟡	32.77	75.13	66.50	Financial	Lagging	
Work Hours Productivity	↔	🟡	0.33	4.72	60.00	Internal Process	Lagging	
Work Hours Staff	↔	🟡	65,800.00	70,170.00	93.78	Financial	Leading	
Work per Customer	↔	🟡	2.19	2.18	4.45	Customer	Leading	

KPI scorecard provides a summary view of multiple key performance indicators

Defining KPIs

PilotWorks provides more options and flexibility in KPI definition, which in turn delivers more accurate and meaningful performance information.

FEATURE WHY IT MATTERS

Track any type of KPI Define any type of KPI — leading/lagging, qualitative/quantitative, subjective/objective, financial/operational, etc. to enable a truer gauge of performance status. Pilot's sophisticated analytical engine enables organizations to define simple qualitative KPIs or multi-dimensional quantitative KPIs.

Monitor "soft" objectives Monitoring intangible or subjective objectives, such as using qualitative or operational KPIs, enables the association of meaningful key performance indicators for all objectives, regardless of whether they are financial, subjective, or operational.

Combine multiple KPIs into one score Combining KPI scores, even those of financial KPIs with operational ones, delivers a more meaningful view of performance status. Weighting each KPI reflects their relative importance in meeting an objective.

"Placeholder" KPIs Creating KPIs before associated data is populated in the system facilitates collaboration on KPI definition without affecting higher level analyses until consensus has been reached.

Dashboards Tab



PilotWorks' live, role-based dashboards allow organizations to tailor information to specific functional roles. For example, a marketing director's dashboard might include summary information about advertising costs per lead, while a sales manager's might include summary information about new opportunities created, deals stuck in the pipeline, and sales performance by region. Unlike static dashboards that provide only summary information, PilotWorks' can be linked to underlying analyses, allowing deeper investigation to isolate and understand the drivers of performance. Dashboards can be expanded beyond functional groups and made public or kept private to be viewed only by the individual who created it.



Personalized dashboards can be tailored to specific objectives, individuals or groups

FEATURE WHY IT MATTERS

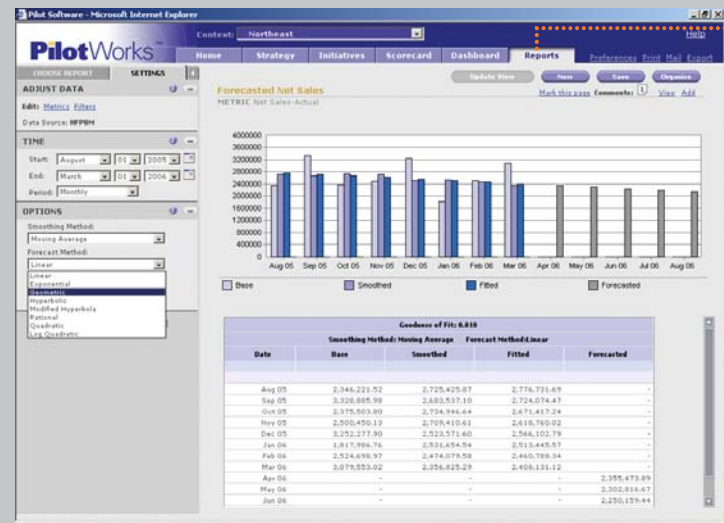
- Live dashboards** Dashboards are automatically refreshed to provide latest performance information.
- Personalized, role-based dashboards — departmental, regional or individual** The ability to create an unlimited number of dashboards, tailored to specific objectives, individuals or groups, delivers directly relevant information to users. Publishing rights can be defined as public, limited to a group, or private.
- Drill-down capabilities** Managers can probe deeper into areas of interest, directly from dashboards into related reports, to isolate and understand the drivers and roadblocks to progress toward goals.
- Packaged dashboard templates — Benchmarking, Trending, Ranking, Contributions** Simplifies the process of creating dashboards:
 - Compare up to 10 items with user-defined targets, another metric or time period (e.g., yearly, last seven days).
 - Display trends over multiple periodicities and time periods.
 - Show top performers for specific time periods.
 - Use familiar bar charts to decompose metrics into defined components.
- Customized dashboards** Users can build a dashboard from scratch or personalize an existing one to suit their needs.
- Multiple-model dashboards** Information can be drawn from multiple sources but displayed in a single panel.

Reports Tab



PilotWorks' reports and ad hoc analysis component covers the needs of all stakeholders, from the CEO to operational managers or analysts. An easy-to-use interface enables users of diverse functional backgrounds to quickly measure ongoing progress toward objectives, while unique features such as Time Intelligence™, support for attributes and user-defined hierarchies empower them to customize analysis to their particular needs — without help from IT.

For analysts seeking more depth to aid decision-making, PilotWorks' ad hoc analysis capabilities provide virtually boundless analysis options to measure and uncover the root of performance issues. Integrated forecasting capabilities help analysts project future performance and plan ahead based on current reality.



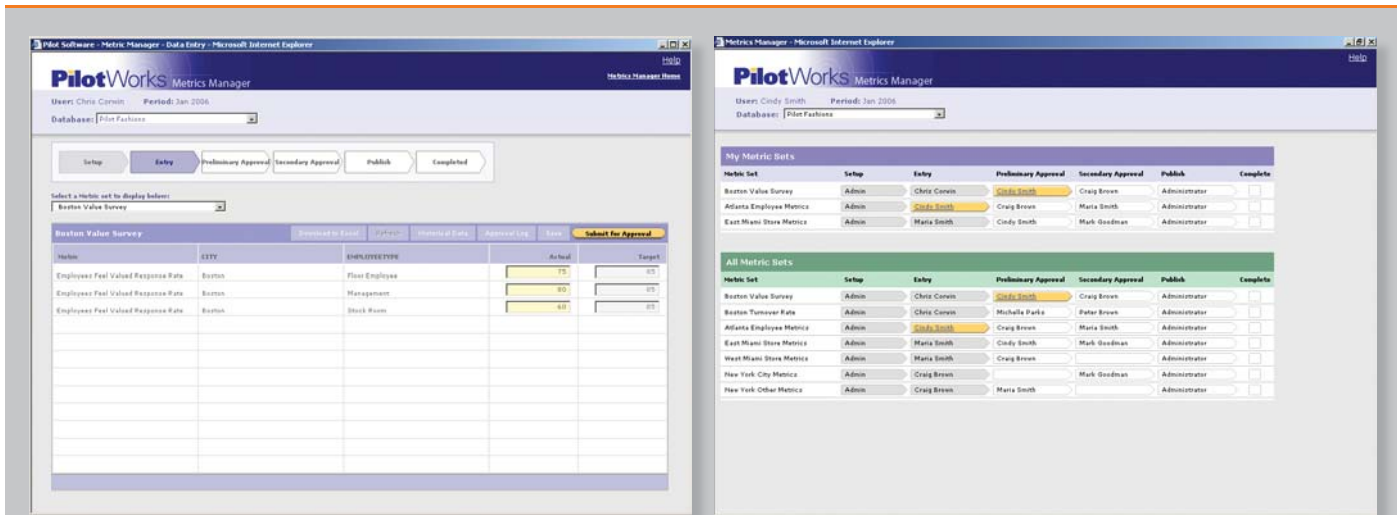
Library of performance analysis templates can be used right out of the box or customized

FEATURE	WHY IT MATTERS
Simplified report views	Users can view reports based on specific areas of analysis for a more meaningful, in-depth measurement of performance.
Library of packaged performance analysis templates — Ranking, Trending and Forecasting, Pareto (80/20), Exceptions	<p>Can be used right out of the box or customized for your particular needs to:</p> <ul style="list-style-type: none"> • Highlight areas that are performing well and flag potential problems by displaying elements in rank order based on a measure such as sales or units produced. • Display trends over time for measures such as product sales, market share or average selling price. • Answer questions critical to overall performance, such as what are the top revenue producers and what percentage of the whole do they represent? • See a high-level view of under- and over-performers in product goods, sales goals, or any other measure you choose.
Navigator ad hoc analysis	Helps analysts quickly understand the drivers of progress toward goals; slice and dice performance data any way they like; and answer very specific, in-depth questions unique to their business.
Reporting on performance versus previous periods	Enables examination of progress versus historical performance. View performance comparing specific dates (as defined by user); relative dates (e.g., latest day, previous day, latest seven days, previous month, etc.), latest date vs. previous equivalent (e.g., current month vs. same month prior year, etc.).
Unique time templates	Enables users to perform custom time analyses without having to redefine their data set.
Web-based Excel add-in capability	Allows for analysis of Pilot's multi-dimensional performance data in the familiar Microsoft® Excel interface wherever users access the Web.
Report descriptions	Allows report owners to provide context to other users by indicating what a report is about and the source of its information.

Entry and Approval Tab



Unique in the industry, Pilot's distributed and delegated entry, approval and publishing component streamlines the process of populating metrics into a performance management system. An easy-to-follow workflow system provides structure around a traditionally labor-intensive process, alleviating costly errors and significantly reducing the amount of time spent on metrics collection and approval. Additionally, this approach allows organizations to quickly collect metrics without having to spend time integrating transactional systems or establishing a data warehouse just for one or two metrics.



FEATURE	WHY IT MATTERS
Single interface for metrics management	Streamlines the process of collection, entry, approval and publishing of metrics across multiple users and data models.
Manual metrics assignment	Assigning metrics owners provides control over how the process is managed.
Progress screen	Provides status of entry, approval and publishing process.
E-mail notification	Apprises users of next steps, keeping the metrics process moving forward.
Easy-to-use Web forms and Excel templates	Display only data relevant to metrics owner, ensuring focus on the task at hand.
Historical log of values from previous records	Can be used as a reference for future metrics creation.
Full audit trail	Captures detailed user interactions, including time stamps for approval, rejection and submission of metrics.
Notes	Attach notes, previously communicated via e-mail or telephone, to any specific step within the process to create a complete snapshot of workflow best practices for future use.
Create templates and assign metrics	Creating templates and assigning metrics to various users enables a streamlined approach to metrics data entry workflow.

Modeling

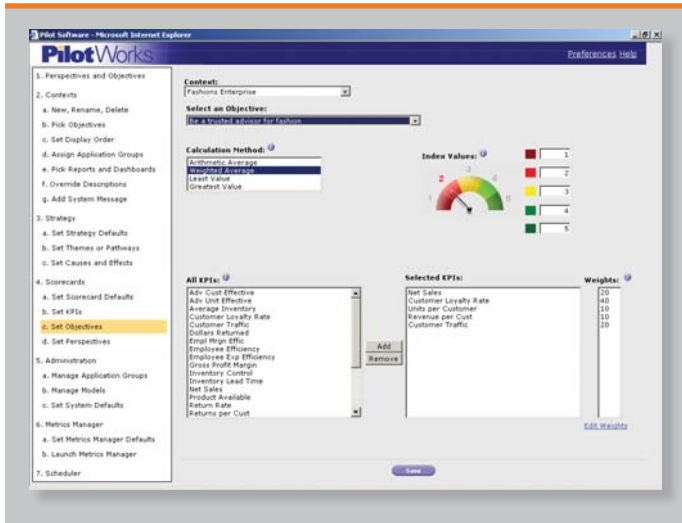


PilotWorks’ modeling capabilities help organizations design a performance-centric data model. With the ability to create a standardized performance management data repository, Pilot’s modeling ensures that a consistent set of metrics is used to align operational execution with strategy.

FEATURE	WHY IT MATTERS
Shared data repository	Provides an accurate, consistent understanding of data — such as data origin and dimension definitions.
Enhanced automated documentation	Ensures a clear understanding of data sources, metrics definition and calculation processes across the organization.
Intuitive interface for analytic modeling	Guides users through rapid development, deployment and management of powerful performance analysis applications.
Consistency and repeatability of data	Supports effective execution, while minimizing errors and IT involvement.

Administration

PilotWorks is an open framework built in J2EE with superior administrative functionality, maximizing benefits to users while fitting easily within existing IT environments.



FEATURE	WHY IT MATTERS
Distributed administration	Provides the flexibility to assign specific administrative permissions and roles, such as user set-up, metrics updates, and strategy plan creation.
LDAP/active directory integration	Integrates with organizations’ own authentication systems to import users and user details, and support single sign-on access.
Audit trails	Enhances system integrity by keeping track of who did what when.
Role-based security	Enables organizations to specify and control which activities can be done by which users, granting rights to perform certain types of activity (e.g., create reports or define performance thresholds) without having to specify for each object.
Scheduling capabilities	Drives automation, ensuring consistency and repeatability for performance management solutions.
Security API	Allows for integration with home-grown authentication systems.
Portal API	Allows data from PilotWorks to be used in portals and portlets based on JSR 168.
Documentation toolkit	Enables customization of documentation based on specific implementations.

PilotWorks



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