

**All Data Models and Visualizations designed and developed by Jose Molares****Table of Contents**

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## Common Current Executive Dashboard sample

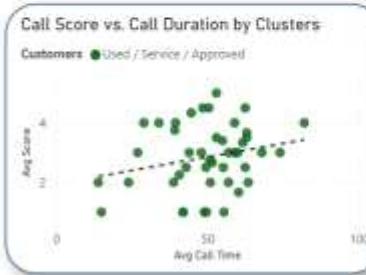
### Summary Dashboard



Vehicle:  All  Used  New  Contract  Approved  Denied  Claim Type  All  Open  Closed  Client Desc  All  Male  Female  Call Type  All  Service  Sales  Support  Technical  Other  Year Month  All  Jan  Feb  Mar  Apr  May  Jun  Jul  Aug  Sep  Oct  Nov  Dec  Multi-selectors  Advanced Search



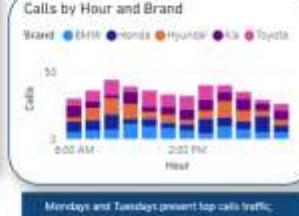
Car / Claim	Calls	% Total Calls	Avg Hold	Avg Handle	Avg ACW	Call Time	Avg Score
Used	397	95%	10.81	25.98	13.56	50	2.95
Kia	77	18%	11.61	26.35	14.51	52	3.33
BMW	77	18%	10.70	27.09	14.06	52	2.75
Toyota	83	20%	11.39	24.89	14.40	51	3.06
Honda	81	19%	10.56	27.20	12.69	51	2.89
Hyundai	79	19%	9.78	24.33	12.14	46	2.84
New	23	5%	9.61	22.39	13.39	45	2.70
Total	420	100%	10.74	25.78	13.55	50	2.94



Year / Month	January			February			March		
	Calls	% PM	% PV	Calls	% PM	% PV	Calls	% PM	% PV
Toyota	12	33%	3%	27	-16%	-16%	28	7%	32%
Honda	10	-8%	-12%	23	-27%	-8%	35	-39%	-30%
Engine	12	67%	50%	11	10%	57%	4	-84%	-30%
Tires	15	67%	0%	3	-70%	-25%	8	100%	0%
Suspension	1	-62%	-42%	1	-27%	-50%	12	-30%	-40%
Electrical	1	-50%	-32%	1	67%	-77%	8	-20%	-20%
Transmission	4	-43%	-33%	1	-75%	-67%	4	100%	0%
Hyundai	23	-18%	3%	28	-13%	-7%	34	21%	17%
BMW	19	33%	-10%	32	14%	-6%	22	-31%	16%
Total	148	0%	2%	135	-8%	-9%	138	3%	21%

Customers of used cars with Service Calls Approved show Increasing Satisfaction Score with longer Calls  
Lower Customer satisfaction from Toyota, new cars. Average Call duration in 50 seconds with low variance  
Significant growth of calls for Honda from February to March in 3 out of 5 Services types

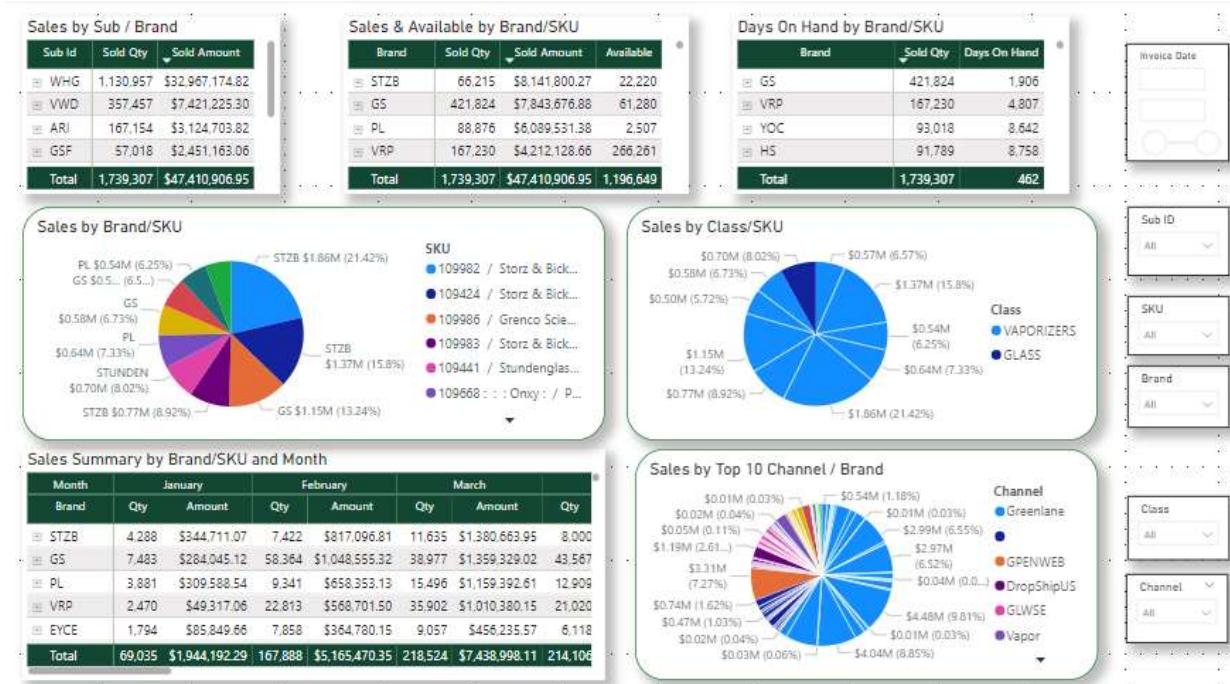
Year Month  All  Jan  Feb  Mar  Apr  May  Jun  Jul  Aug  Sep  Oct  Nov  Dec  Multi-selectors  Advanced Search



Monday and Tuesday present top calls traffic.  
Hourly overall pick are 10AM and 4PM.

## Consumer Goods B2B and B2C

### Sales & Inventory Analysis



### Year and current Sales Budget Track



## Products Groups and Sales Reps Track

InvoiceDate: 7/1/2022 | E&O SKU: All | Employee Name: All | Employee Responsiblity: All | InvoiceNumber: All | Subsidiary: All | Brand: All | Class: All | Area: All

Invoices: Summary by Sales Responsible					Invoices: Summary by E&O SKU					
Employee Responsible	Amount	Quantity	E&O Profit	Co.	E&O SKU	Variant Number	Amount	Inv. Qty	E&O Profit	Prod.
Bradley Macdonald	\$88,688.56	7,664	30,117.91	Intl	109728	WHIG-005637	\$23,690.84	1547	9,508.53	Yocan
Andy Hayes	\$27,189.18	2,351	17,021.70	US	109309		\$12,654.94	309	7,302.25	Marie
Alyson Alexander	\$37,016.09	5,918	15,888.02	US	109527	WHIG-004820	\$11,724.95	850	7,664.75	Boun
Chad Freling	\$26,463.02	1,131	14,882.03	US	109770	WHIG-005773	\$8,932.45	936	6,368.00	Aeros
Dani Mora	\$20,723.14	1,684	12,728.02	US	109770	WHIG-005773	\$8,326.14	849	6,254.00	Aeros
Bradley Macdonald	\$23,156.21	2,120	14,527.60	US	109320		\$8,247.70	277	4,109.77	Aero
<b>Total</b>	<b>\$317,892.11</b>	<b>28,601</b>	<b>158,828.22</b>		<b>Total</b>	<b>\$317,892.11</b>	<b>28,601</b>	<b>158,828.22</b>		

Invoices Detail

Sub Id	Country	Area	E&O SKU	InvoiceDate	InvoiceNumber	Employee Responsible Name	Employee Name	Inv. Amount	Inv. Qty	Unit Price	Floor Price	E&O Profit	Prod.
WHIG	US	Channel & Dropship	109509	11/23/2022	INV000101829	Chad Freling	Chad Freling	\$67.00	1	\$67.00	0.00	67.00	10950
WHIG	US	B2B	109896	11/23/2022	INV000101933	Genna Fisher	Genna Fisher	\$70.00	5	\$14.00	8.96	25.20	10989
WHIG	US	B2B	108316	11/23/2022	INV000101713	Dani Mora	Dani Mora	\$7.65	1	\$9.00	3.00	6.00	10831
WHIG	US	B2B	109872	11/23/2022	INV000101678	Genna Fisher	Genna Fisher	\$80.00	2	\$40.00	12.00	56.00	10987
WHIG	Intl	LatAm	109006	11/23/2022	INV000101676	Guillermo Soto Marquez	Guillermo Soto Marquez	\$15.00	1	\$15.00	4.00	11.00	10900
WHIG	US	B2B	109006	11/23/2022	INV000101683	Alyson Alexander	Alyson Alexander	\$85.74	6	\$14.29	4.00	61.74	10900
WHIG	Intl	LatAm	109309	11/23/2022	INV000101676	Guillermo Soto Marquez	Guillermo Soto Marquez	\$180.00	4	\$45.00	17.41	110.36	10930
WHIG	US	B2B	109309	11/23/2022	INV000101678	Genna Fisher	Genna Fisher	\$45.00	1	\$45.00	17.41	27.59	10930
WHIG	Intl	LatAm	110254	11/23/2022	INV000101676	Guillermo Soto Marquez	Guillermo Soto Marquez	\$78.00	2	\$39.00	0.00	78.00	11025
<b>Total</b>								<b>\$317,892.11</b>	<b>28,601</b>			<b>158,828.22</b>	

## Annual Sales Track by Brands, Item Groups, Items, Companies

InvoiceDate: 4/30/2021 - 11/24/2022 | Subsidiary: All | Brand: All | Class: All | Area: All | InvoiceNumber: All | ProductNumber: All | Product: All

Brand / Item	January	February	March	April	May	June	July	August	September	October	November	Dec	
14R						\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
420C	\$105.00		\$3,194.00			\$50.00		\$420.00		\$75.00		\$660.00	
SDS	\$304.05	\$10.33	\$80.30	(\$20.39)	\$227.68	\$44.41	\$0.00						
7PL					\$60.00								
<b>Total</b>	<b>\$21,102.16</b>	<b>\$1,943,990.15</b>	<b>\$5,179,766.15</b>	<b>\$7,473,265.66</b>	<b>\$7,003,747.28</b>	<b>\$5,097,771.99</b>	<b>\$7,390,936.27</b>	<b>\$1,716,277.76</b>	<b>\$4,026,801.78</b>	<b>\$2,323,783.46</b>	<b>\$2,900,489.73</b>	<b>\$2,035,948.46</b>	<b>\$538</b>
Class / Brand	January	February	March	April	May	June	July	August	September	October	November	Dec	
ACC	\$418.40	\$32,617.24	\$114,667.05	\$94,766.12	\$109,707.41	\$83,008.04	\$81,778.03	\$54,834.37	\$84,371.13	\$39,980.65	\$31,146.39	\$28,257.13	\$10,
14R							\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
420C	\$105.00		\$3,194.00			\$50.00		\$420.00		\$75.00		\$660.00	
AVV	\$503.46	\$1,085.46	\$7,352.65	(\$71.97)		\$1,750.50	\$905.40	\$83.48	\$632.70	\$19.28			
<b>Total</b>	<b>\$21,102.16</b>	<b>\$1,943,990.15</b>	<b>\$5,179,766.15</b>	<b>\$7,473,265.66</b>	<b>\$7,003,747.28</b>	<b>\$5,097,771.99</b>	<b>\$7,390,936.27</b>	<b>\$1,716,277.76</b>	<b>\$4,026,801.78</b>	<b>\$2,323,783.46</b>	<b>\$2,900,489.73</b>	<b>\$2,035,948.46</b>	<b>\$538</b>
Sub Id / Brand	January	February	March	April	May	June	July	August	September	October	November	Dec	
ARI	\$174,405.88	\$326,060.88	\$229,292.44	\$293,527.87	\$374,736.98	\$232,151.70	\$207,680.31	\$251,070.09	\$220,758.90	\$548,270.40	\$97,211.46	\$1,	
GSF	\$104,849.55	\$348,997.34	\$353,339.65	\$438,178.86	\$296,419.93	\$286,394.03	\$322,446.30	\$158,809.50	\$138,539.33	\$3,398.47		(\$209.90)	
HSCM	\$876.46	\$49,663.89	\$35,945.89	\$47,666.12	\$66,437.98	\$41,215.73	\$39,923.25	\$34,323.90	\$31,113.73			\$26,314.21	
HSMV		\$11,123.62	\$10,584.23	\$10,457.79	\$11,379.38	\$5,099.70	\$10,979.47						
SHVT	\$129,835.78	\$107,704.19	\$106,582.26	\$123,813.61	\$147,576.76	\$129,928.41	\$107,752.21	\$131,515.13	\$75,436.36	\$57,471.05		\$137,734.71	
<b>Total</b>	<b>\$21,102.16</b>	<b>\$1,943,990.15</b>	<b>\$5,179,766.15</b>	<b>\$7,473,265.66</b>	<b>\$7,003,747.28</b>	<b>\$5,097,771.99</b>	<b>\$7,390,936.27</b>	<b>\$1,716,277.76</b>	<b>\$4,026,801.78</b>	<b>\$2,323,783.46</b>	<b>\$2,900,489.73</b>	<b>\$2,035,948.46</b>	<b>\$538</b>

## Pocket margin (Cost to Serve) & Benchmarking Analysis

### Client or Site Benchmarking

**Profitability & Benchmark**

**Key Metrics:**

- Ingresos: \$174,315
- Costo de Servir: \$155,800
- Margen: 11%
- Volumen: 2,175
- Clientes: 9

**Profitability Ranking**

Cliente	Volumen	% Total Volumen	Unit Margen	Facturado	% Total Facturado	Margen	Margen %	% Margen Total
C5	150	7%	26%	\$14,250	8%	\$3,750	26%	20%
C7	120	6%	18%	\$10,200	6%	\$1,800	18%	10%
C8	370	17%	11%	\$28,760	16%	\$5,860	20%	32%
C3	355	16%	8%	\$31,055	18%	\$2,605	8%	14%
C4	230	11%	8%	\$14,950	9%	\$1,150	8%	6%
C2	450	21%	5%	\$39,350	23%	\$3,600	9%	19%
C6	250	11%	3%	\$16,750	10%	\$500	3%	3%
C1	250	11%	-4%	\$19,000	11%	(\$750)	-4%	-4%
<b>Total</b>	<b>2,175</b>	<b>100%</b>	<b>8%</b>	<b>\$174,315</b>	<b>100%</b>	<b>\$18,515</b>	<b>11%</b>	<b>100%</b>

**Dynamic Segments**

Estrato	Clientes	Facturado	Margen	Margen %	Volumen	% Total Volumen
Estratégicos	2	\$14,950	\$1,150	8%	230	11%
Margen < 0	1	\$19,000	(\$750)	-4%	250	11%
Margen < 10%	3	\$87,155	\$6,705	7%	1,055	49%
Margen < 25%	2	\$38,960	\$7,660	19%	490	23%
Margen > 25%	1	\$14,250	\$3,750	26%	150	7%
<b>Resumen</b>	<b>9</b>	<b>\$174,315</b>	<b>\$18,515</b>	<b>11%</b>	<b>2,175</b>	<b>100%</b>

**Region**: All  
**Segmento**: All  
**Cliente**: All  
**Mes**: All  
**Producto**: All

**Pocket Margin**

Precio Base	Descuento	Flete Facturado	Precio Neto	Flete Pagado	Costo Producción	Otros Costos	Pocket Margin
10%	-17%	10%	100%	-12%	-10%	-8%	

### Pocket margin waterfall

**Key Metrics:**

- Volumen: 2,175
- Facturado: \$174,315
- Margen%: 11%

**Pocket Margin por Unidad**

Cliente	Volumen	Precio Base	Descuento	Flete Facturado	Precio Neto	Costo Financ.	Pocket Price	Flete Pagado	Costo Produccion	Otros Costos	Total Costo	Pocket Margin	Pocket Margin %
C1	100	\$100	\$15	\$0	\$85	\$5	\$80	\$5	\$70	\$5	\$80	\$0	0%
C2	50	\$100	\$28	\$15	\$87	\$87	\$25	\$70	\$95	(\$8)	\$95	-9%	
C3	120	\$100	\$12	\$20	\$108	\$10	\$98	\$20	\$70	\$90	\$8	7%	
C4	235	\$80	\$3	\$0	\$77	\$77	\$5	\$65	\$70	\$7	\$7	9%	
C5	250	\$80	\$15	\$2	\$67	\$67	\$0	\$65	\$65	\$65	\$2	3%	
C6	70	\$80	\$12	\$0	\$68	\$68	\$5	\$65	\$70	(\$2)	\$70	-3%	
C7	150	\$90	\$25	\$5	\$70	\$70	\$5	\$60	\$10	\$75	(\$5)	-7%	
C8	200	\$88	\$10	\$10	\$88	\$88	\$18	\$60	\$78	\$10	\$10	11%	
C9	300	\$90	\$15	\$5	\$80	\$80	\$0	\$60	\$60	\$60	\$20	25%	
<b>Media</b>	<b>220</b>	<b>\$88</b>	<b>\$15</b>	<b>\$9</b>	<b>\$82</b>	<b>\$15</b>	<b>\$81</b>	<b>\$10</b>	<b>\$63</b>	<b>\$15</b>	<b>\$74</b>	<b>\$7</b>	<b>8%</b>

**Region**: All  
**Segmento**: All  
**Cliente**: All  
**Producto**: All  
**Mes**: All

**Contribución Margen por Cliente**

**Volumen por Región y Segmento**

**Fact. por Producto y Fecha**

**Facturado y Margen por Mes**

## Telemarketing Business

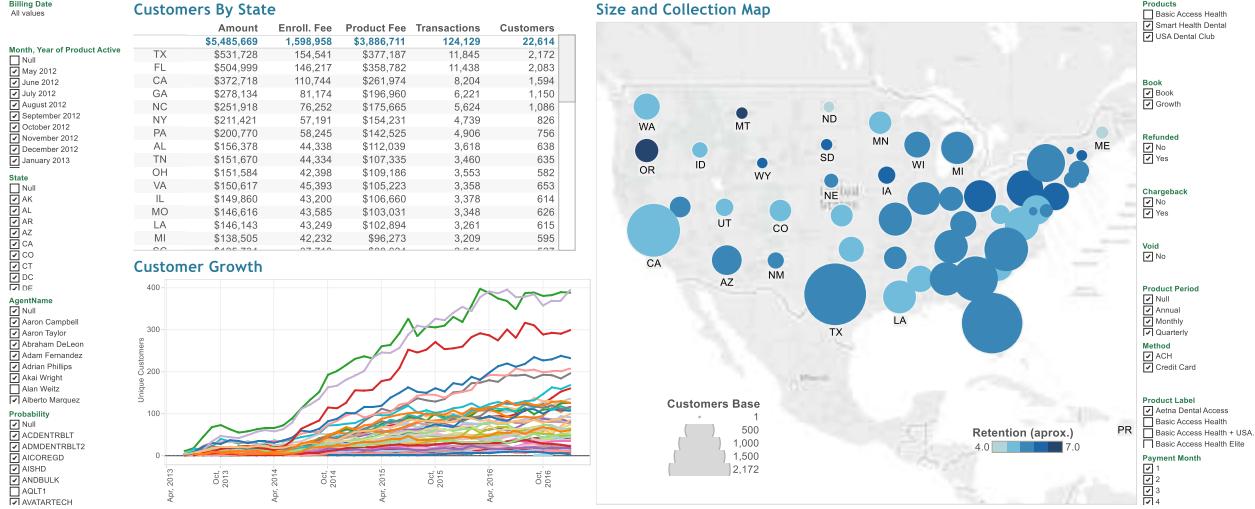
Telemarketing Agents promote Health monthly subscription Products, out of Potential Customers Lead Vendors, across all USA. Data is gathered from at least 8 different systems or Databases.

### Customers Earnings and Retention across USA States

Several dimensions available to filter: Subscription Sales Dates, recurring Billing Months, Sales Agents, Lead Source, Products.

#### Geo Distribution

(click any row of point to zoom into other charts)



### Customers Earnings per Time, Product, Agent, Vendor

Selection in any panel filters all the others

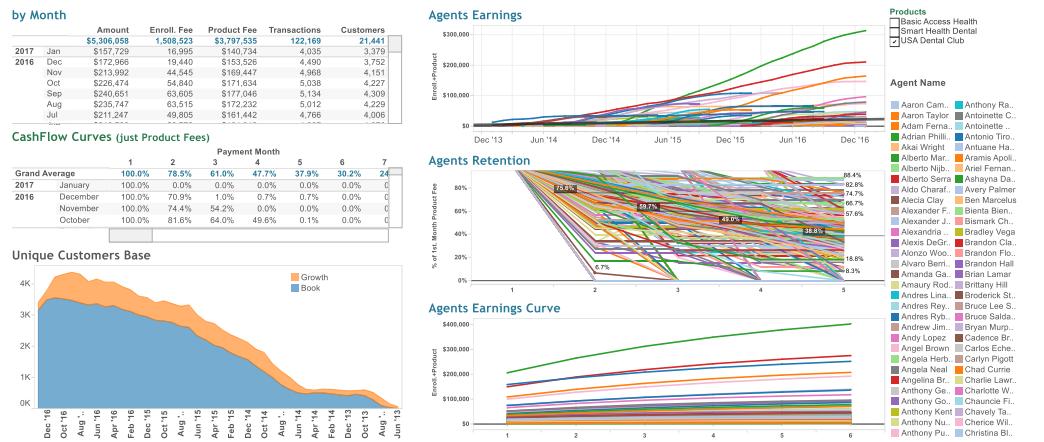
#### Transactions Summary

(click any row of any report to zoom into the others)



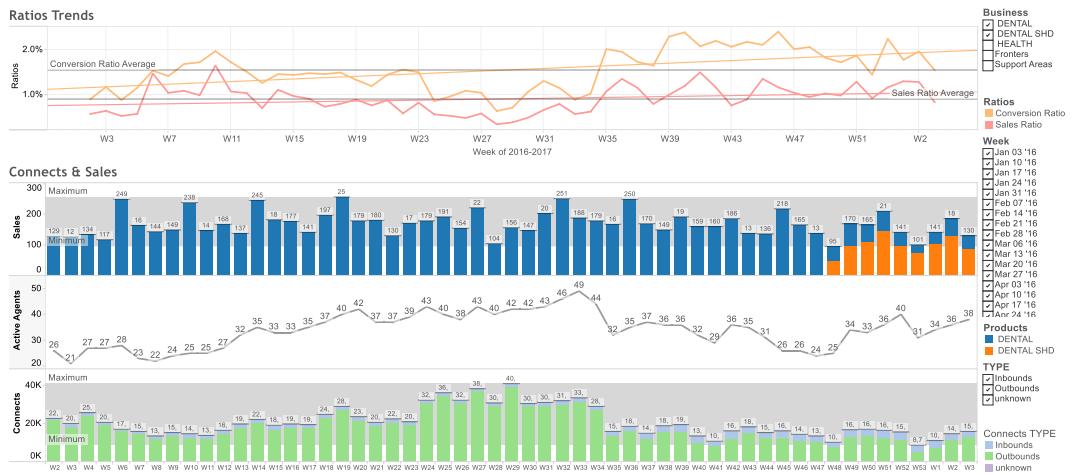
## Agents Earnings Performance

A closer look to Customer Attrition and Agents Performance in time



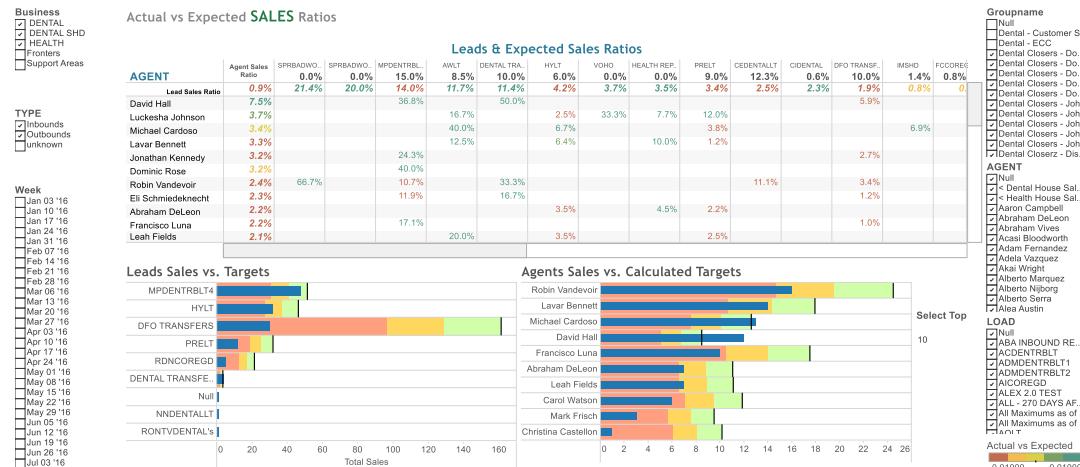
## Sales

Main Sales Performance Metrics along time: Source Leads, Agents and Conversions



## Agents & Products: Goals Achievement Scorecards

Combines Agents and Leads, Sales and Targets



## Insurance (Service Contracts) Business

Sales of Insurance Policies (or any Service Contracts Business) of several Types and Carriers and their Trends along Time

### Executive Sales Summary

#### Executive Summary



Premiums		Premium YoY %		Commissions		Comm. YoY %	
	2022	2023	YoY %		2022	2023	YoY %
Personal	\$1,011,431	\$1,036,862	+2.5%	Personal	\$1,218,438	\$1,232,354	+1.2%
Total	\$6,007,860	\$6,060,548	+0.9%	Total	\$7,114,582	\$7,033,098	-1.1%
Avi & Mar.	1,019,171	1,073,966	+5.6%	Avi & Mar.	1,281,598	1,207,241	-6.0%
Commercial	26,378,884	25,295,858	-4.0%	Commercial	\$105,454	\$76,157	-12.3%
Total	\$3,682,036	\$3,700,398	+0.5%	Total	\$86,739	\$58,726	-33.1%
Avi & Mar.	1,014,324	986,405	-2.8%	Avi & Mar.	1,276,693	1,220,038	-4.5%
Health	13,027,112	13,241,818	+1.6%	Health	392,549	351,469	-10.8%
Total	\$1,320,401	\$124,203	-0.5%	Total	\$104,383	\$87,421	-18.8%
Avi & Mar.	1,013,101	1,017,560	+0.4%	Avi & Mar.	111,562	109,952	-1.4%
Health	9,082,390	9,413,803	+4.0%	Health	342,549	351,469	+2.6%
Total	\$1,006,716	\$1,426,394	+42.4%	Total	\$106,038	\$211,246	+102.7%
Avi & Mar.	875,167	849,218	-3.7%	Avi & Mar.	926,437	931,181	+0.7%
Health	11,422,561	12,877,843	+12.5%	Health	3112,661	\$226,294	-45.8%
Total	\$1,01,167	\$1,167	+100.00%	Total	\$1,01,167	\$1,167	+100.00%
Avi & Mar.	\$1,01,167	\$1,167	+100.00%	Avi & Mar.	\$1,01,167	\$1,167	+100.00%

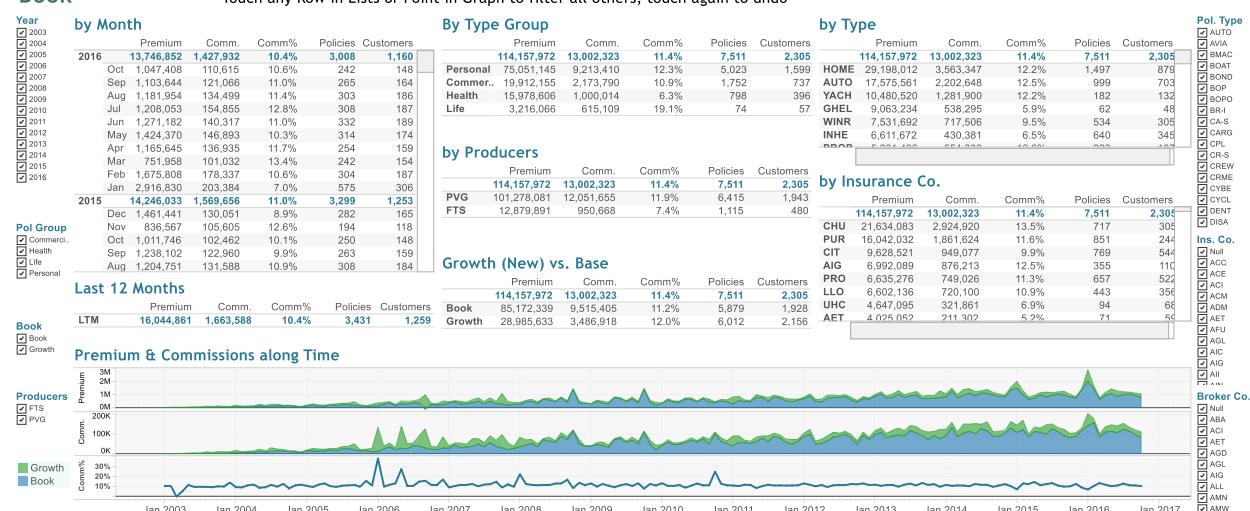
Policies		Policies YoY %		Customers		Customers YoY %	
	2022	2023	YoY %		2022	2023	YoY %
Personal	1,336	1,472	+10.4%	Personal	731	734	+0.3%
Commercial	893	846	-5.4%	Commercial	273	278	+1.8%
Avi & Mar.	111	145	+29.5%	Avi & Mar.	55	58	+5.4%
Health	139	228	+65.2%	Health	116	117	+0.9%
Life	1	1	0.0%	Life	1	1	0.0%
Total	3,682,036	3,700,398	+0.5%	Total	2,030	2,035	+2.4%
Avi & Mar.	1,014,324	986,405	-2.8%	Avi & Mar.	1,281,598	1,207,241	-6.0%
Health	13,027,112	13,241,818	+1.6%	Health	392,549	351,469	-10.8%
Life	1	1	0.0%	Life	1	1	0.0%
Total	\$1,006,716	\$1,426,394	+42.4%	Total	\$1,01,167	\$1,167	+100.00%
Avi & Mar.	875,167	849,218	-3.7%	Avi & Mar.	926,437	931,181	+0.7%
Health	11,422,561	12,877,843	+12.5%	Health	3112,661	\$226,294	-45.8%
Life	1	1	0.0%	Life	1	1	0.0%
Total	\$1,01,167	\$1,167	+100.00%	Total	\$1,01,167	\$1,167	+100.00%

### Sales

Actionable Touch and Zoom Panels by any dimension.

#### Book

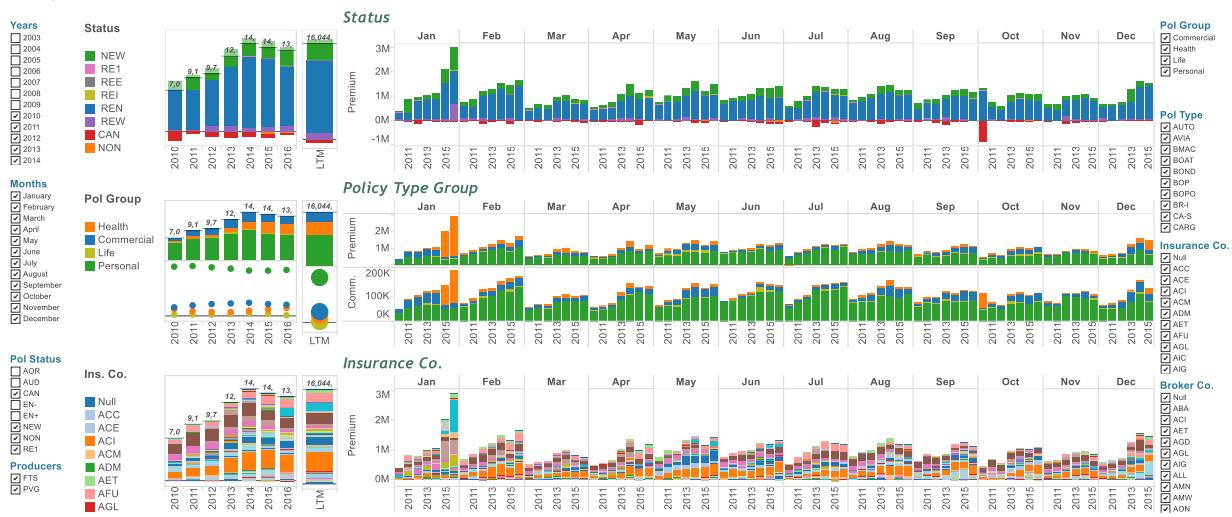
Touch any Row in Lists or Point in Graph to filter all others; touch again to undo



## History & Projections

Actionable Touch and Zoom Graph by any dimension.

### Graph Distributions



## Digital Marketing

### Google / Adobe Analytics

Sourced straight from Google or Adobe Analytics, and other sources.

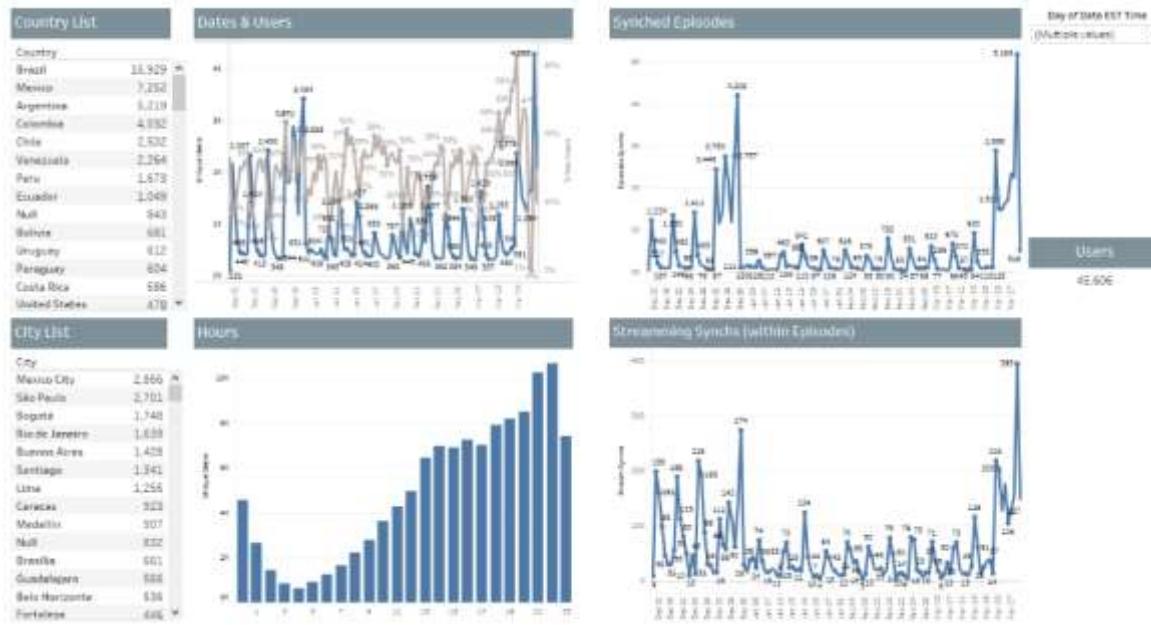


## Entertainment Business

A Top-Tier High End player developed a Second Screen App to be used synchronized to Top Series. These Dashboards samples are part of monitoring and evaluating results.

## Overall Users and Consumption

## Demographics, Users per days and hours, App synchronized (sessions)



## Synchronized Episodes & 2<sup>nd</sup>. Screen Consumption

All panels filter the others, showing Series, Contents and Languages Rankings



## Synchronized Episodes Ranked per Countries, Days and Hours

### Color Highlighted Usage

Syncd Episodes by Country									Syncd Episodes by Day								
	Total	Mar 29	Mar 28	Mar 27	Mar 26	Mar 25	Mar 24	Mar		Total	Mar 29	Mar 28	Mar 27	Mar 26	Mar 25	Mar 24	Mar
Total	59,774	1,119	2,242	2,266	1,718	1,635	1,467	-	BRAZIL	18,774	6,191	2,181	2,095	1,713	1,633	1,467	3,510
Brazil	20,584	1,948	694	676	454	418	399	-	GOT	16,099	3,871	2,043	2,180	1,988	1,474	1,254	2,269
Mexico	7,805	462	106	265	381	162	146	-	COL	8,110	104	32	25	29	34	38	18
Argentina	6,660	635	303	245	389	163	202	-	WAT	3,597	93	32	28	23	22	29	29
Colombia	6,434	635	211	276	208	234	142	-	WES	1,950	1,546	47	34	27	63	58	167
Venezuela	3,889	389	166	171	138	183	80	-	EUP	3,135	76	26	38	24	13	18	18
Chile	3,351	264	192	231	152	193	170	-	CHE	763	23	14	10	8	7	7	18
Peru	2,367	288	193	193	322	59	105	-	ILL	659	96	29	29	21	28	19	18
Bolivia	1,127	166	107	123	72	92	68	-	SLB	415	33	4	7	6	7	4	-
Ecuador	1,049	119	68	48	40	39	46	-	TRL	147	58	18	15	7	2	8	-
Panama	684	50	41	44	32	9	18	-	Series (Multiple values)								
Paraguay	677	84	18	15	16	5	18	-	Selected Hours (Multiple values)								
Guatemala	668	54	40	63	26	13	12	-	Day of Date EST Time (Multiple values)								

Syncd Episodes by Day and Selected Hours													Selected Hours (Multiple values)			
	Total	23	22	21	20	29	18	0	23	22	21	20	19	18	17	Mar 27
Grand Total	31,724	256	154	504	79	64	213	18	3	10	57	11	1	0	0	0
WAT SI 897	3,691															
WAT SI 898	1,416															
WAT SI 899	3,223															
WES SI 801	1,079	3	7	14		24	11		6	1	1	0				
WES SI 802	1,079	62	56	733					1	1	1	1				
TO_12 203	981															
TO_12 204	981															
TO_21 205	875															
WES SI 803	784	1	5	13	35	27	1	0	1	1	1	1	1	1	1	1
GOT 08 006	781															
TO_12 206	745															
TO_12 207	744															

## App Synchronization Quality

All relevant dimensions to find out service health, speed, and Customers preferences.

All panels filter the others. App (Drill to OS and Version), Device, Country (drill to City), Serie (drill to Episode), Day, Hour along the day. Color coded App recognition response quality



## Customer Content Adoption and Preferences

Actual Customer consumption of Series and 2<sup>nd</sup>. Screen contents.

Series, Seasons, Episodes, Categorized Contents, Languages and Timecodes (specific moment along the Episodes). All panels filter the others.



## Industry Specific Metrics

Metrics and Trends, even Customers support interactions.



## Medical Appointments Business

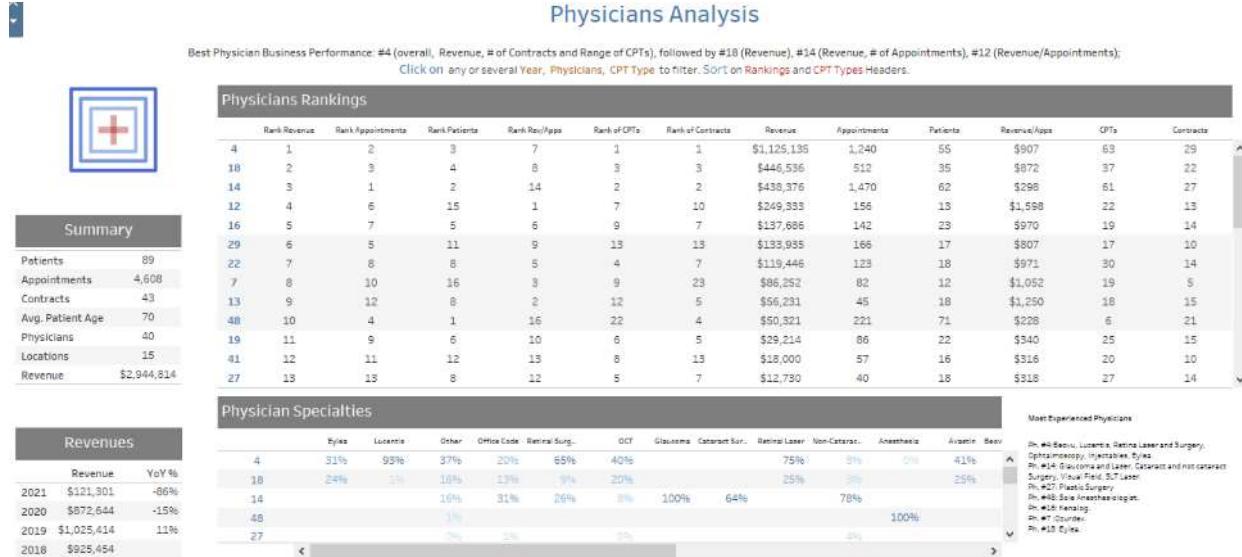
### Executive Summary

#### Executive Summary Dashboard



### Physicians Rankings

#### Physicians Analysis



## Contracts Analysis



## Objectives & Results Management

Executive Objectives and Key Results (OKRs) Dashboards to track advance and accomplishments of Annually set Objectives.

### Objective Summary Dashboards



### Key Results Dashboards



Sources information from Company's Objectives definitions and Structure (in SQL) and a summary Standardized Results file (Excel) populated from diverse sources.

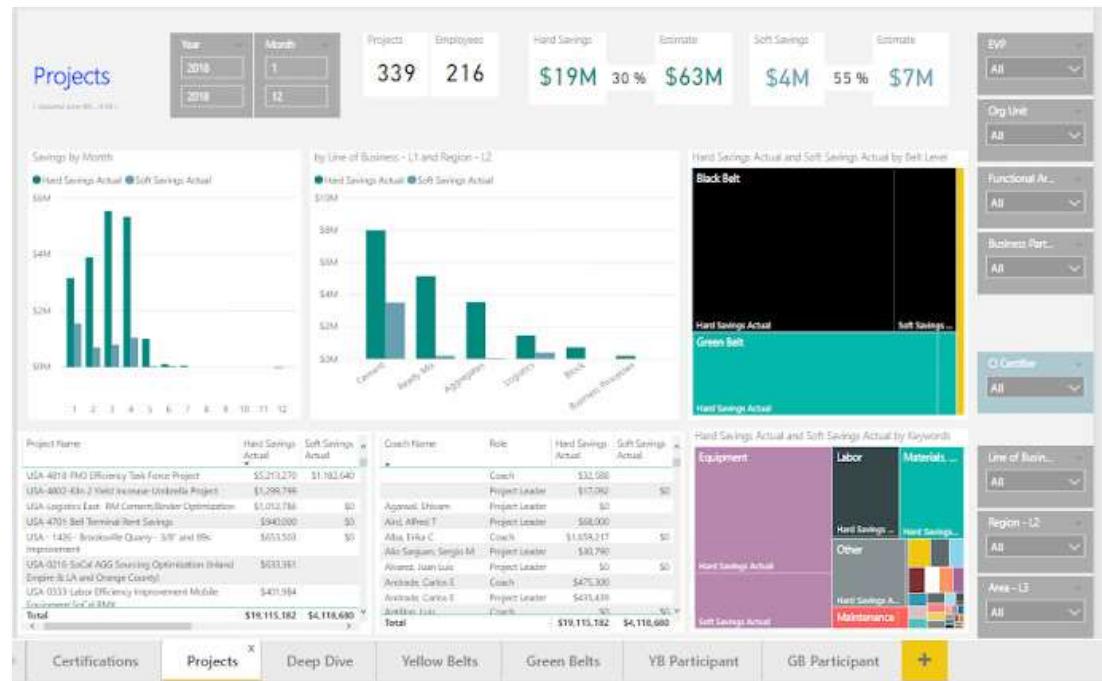
## Human Resources

Executive and Self-Service Dashboards to track advance of nationwide employees along their Continuous Improvement program. Sources information from HR (SF SAP), Projects (Qystone), e-Learning (SABA), in-place trainings, assessments, and Certifications (Sharepoint Lists, excel, SQL files)

### Operational excellence certifications Dashboards

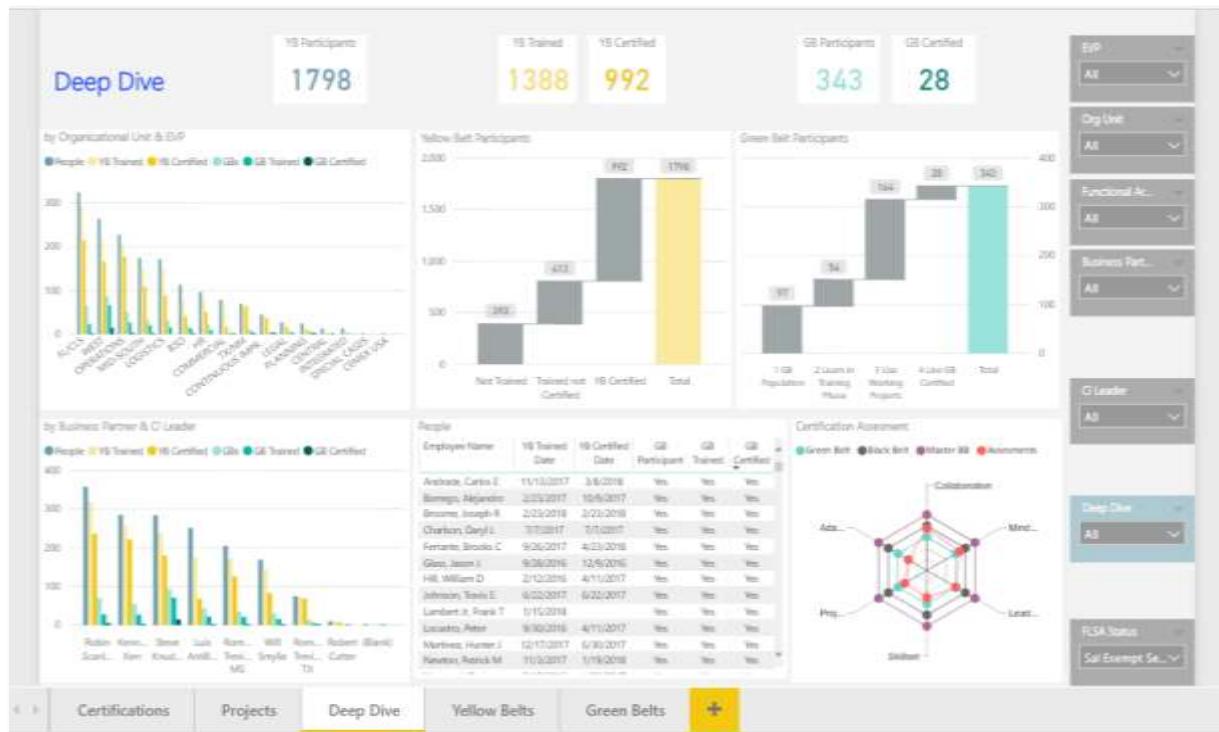


### Track of Improvement Projects and participants

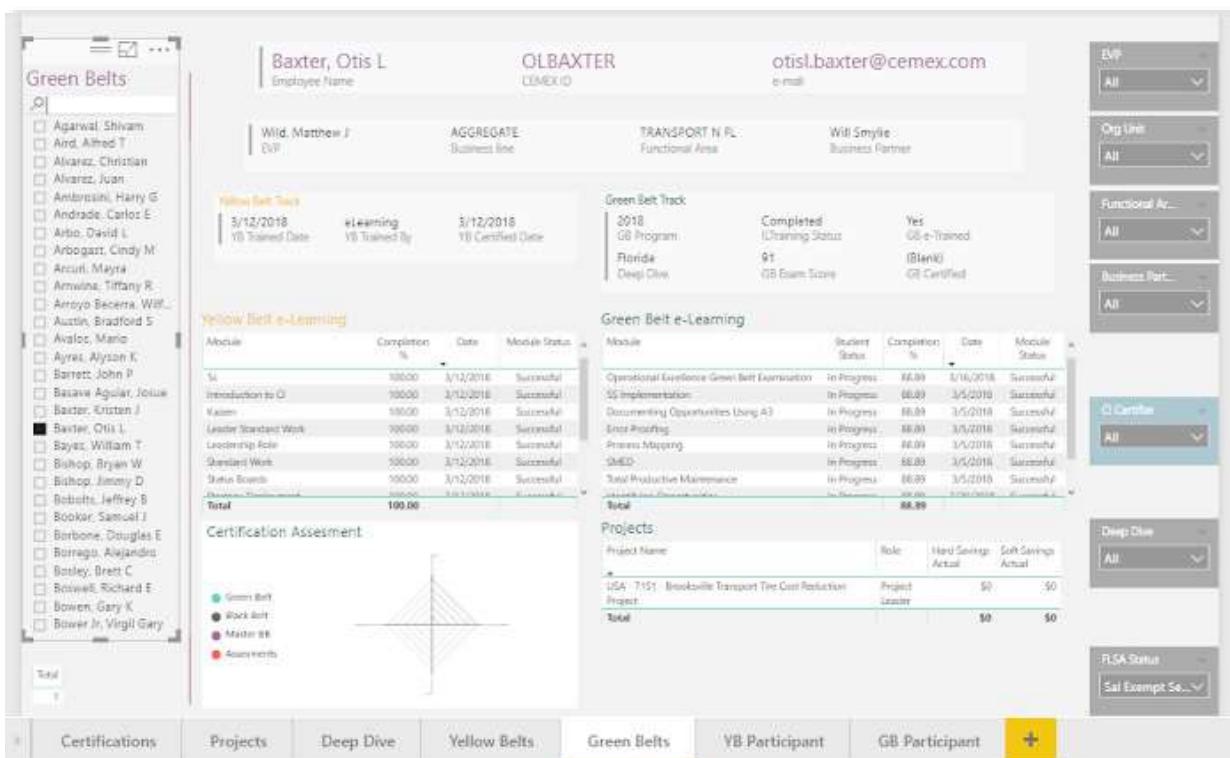


Sets of Dashboards to serve several audiences: Executives, Team Leaders, HR and participants Self-Track. Row Level Security and conditioned Access through an internal portal.

Yellow and Green Belts track per Deep-Dive sessions



## Team Leader views



## Basic Commercial Dashboards

Sales of Products / Contracts of several Types and Vendors, and their Trends along Time

### Earnings

Distribution per Lines of Business, Contribution per New/Book sales/contracts

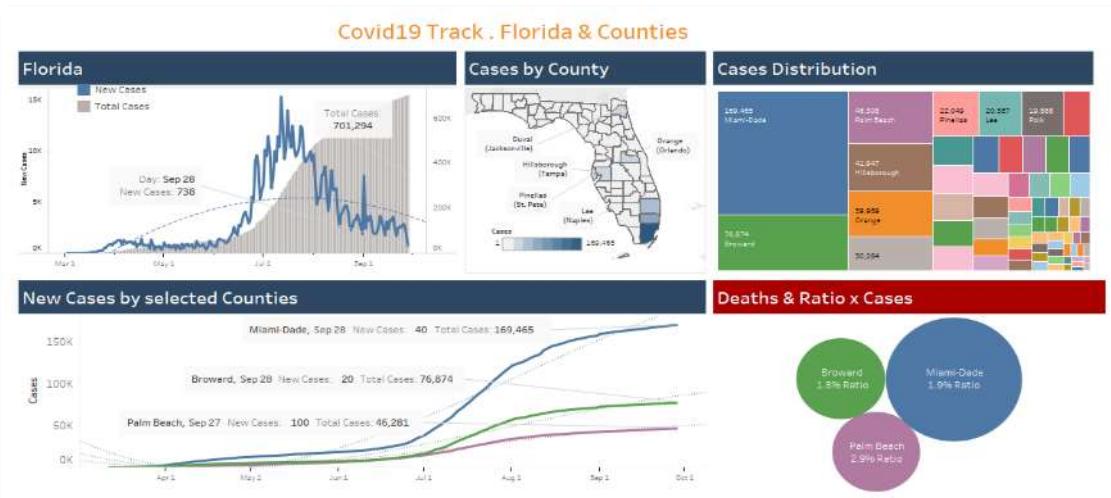
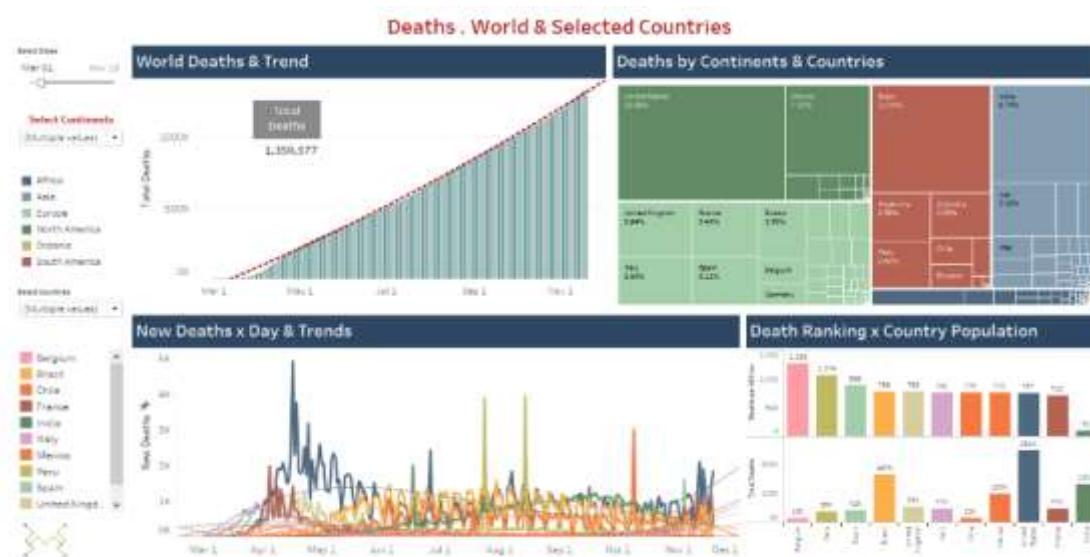
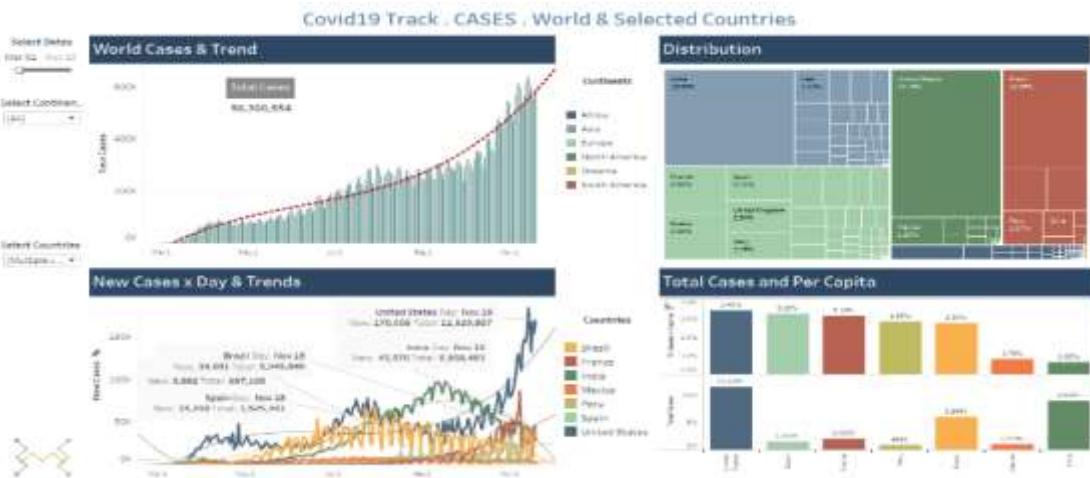


### Profits



## COVID Data Visualizations

Raw input data from public open sources.



## Mobile format versions

