

ERM Scorecard: Employees Retirement System of Texas						As Of Date:	3/4/2020	
		Client Name	Employees Retirement System of Texas	Total Score:	56/100			
		Enterprise Pipeline	120k Product (Enterprise PORT); 80k data (estimates & NCM)					
		Desktop Pipeline	100 terminals					
		Client Market Cycle	Neutral					
		Key Task (Select Cell for More Information)		Details	Current State	Comments (In-Progress Only)	Firm Score	Potential Score
ACCESS	Senior Engagement 5 / 15	Held C-suite meeting in last 6 months	Date: 2/27/2020 Who: Betty Martin	Yes		5	5	
		Held c-suite to Senior Mgmt. meeting in last 12 months	Date: Who: Outcome:	No		0	5	
		Have executives been participated in engagements for Bloomberg-sponsored events in the last year?	Date Who:	No		0	5	
	User Engagement 3 / 10	Have we managed at risk and low usage terminals?	Date: 3/4/2020 # of terminals: 8	No		0	4	
		Are we ahead of target for users visited YTD? (Prorata number)	Date: 3/4/2020 Percentage: 59% (vs pro rata 13%)	Yes		3	3	
		Percentage change of Power/ Good / Fair / Low users	Date: 3/4/2020 Prior snap vs current: 47.5% (30 P+G / 63 total)	No		0	3	
							8 Out of a Potential 25	
SENTIMENT	Momentum 6.5 / 10	Is the client currently trialing defined enterprise strategic initiatives? (As Agreed by ERM/RM/Management) for Bloomberg?	What: PORT: GDSF ID 1083858; Data: GDSF ID 1112916	In Progress	Currently trialing enterprise PORT and k	1.5	3	
		Adopted Key Desktop Products (As Agreed by ERM/RM/Management) for Bloomberg and this speicfic client(1/1/20: CDE, BQL/BQUANT, RMS)	Example: BQNT app for quant team; CDE for internal and external data; RMS for public equity	In Progress	Currently implementing CDE across firm	2	4	
		Do we have a strong reputation and proven track record with this client?	Example: Good relationships across ops and front office	Yes		3	3	
	Sponsorship 0 / 10	Has a senior client sponsor served as a reference?	Date Who:	No		0	5	
		Do we have change agent(s) within the organization?	Who:	No		0	3	
		Have we co-sponsored an industry event with this client over the past 12 months?	Date:	No		0	2	
							6.5 Out of a Potential 20	
COORDINATED	Alignment 14 / 20	Do we have a regular internal recurring governance call across our peers (AIM,PORT, ETS, Enterprise, MARS, Workflow Specialists, etc.)?	What: Governance call When: Monthly	Yes		3	3	
		Linking Company Strategy with our strategy. Have we delivered a product roadmap session in last 12 months?	Date: 2/27/2020	Yes		3	3	
		Do we know details around the clients competing products?	Documented in PROS2 Y/N: Last Update: 2/28/2020	Yes		3	3	
		Do we understand the clients key direction? And goals?	What: Preserve pension assets through long term investment growth. Want to partner with us to bring down TCO for investment tech	Yes		3	3	
		Do we know the budget and budget cycle?	Enterprise PORT vs YB displacement - aware of dates and costs	Yes		2	2	
		Have we built a workflow schematic within last year and presented it to senior stakeholders?	Date	No		0	3	
		Have we held an innovation day?	Date:	No		0	3	

INCUMBENT	Trusted Provider 27.5 / 35	Primary internal RMS? Back by usage statistics		In Progress	Current RMS for FI, implementing Equi	1	2
		Primary Execution Management System (EMS)?		Yes		3	3
		Primary PMS (PORT, MARS, BRM)	GDSF ID 1083858	In Progress	Working on selling Enterprise PORT to #	2	4
		Are we the firm wide primary OMS (full Equity & FI Penetration)		Yes		5	5
		Are we the a PARTIAL OMS		Yes		3	3
		Primary pricing provider?		Yes		3	3
		Real-time data provider?		Yes		3	3
		Primary Bulk Data Provider?	GDSF ID 1112916	In Progress	In progress via getting estimates and No	1.5	3
		Full Terminal Penetration Across Equity desk?		Yes		3	3
		Full Terminal Penetration Across Fixed Income desk?		Yes		3	3
		Vault/Message compliance?		No		0	1
		Uses our Enterprise Data Management Tool, PolarLake?		No		0	2
		27.5 Out of a Potential 35					