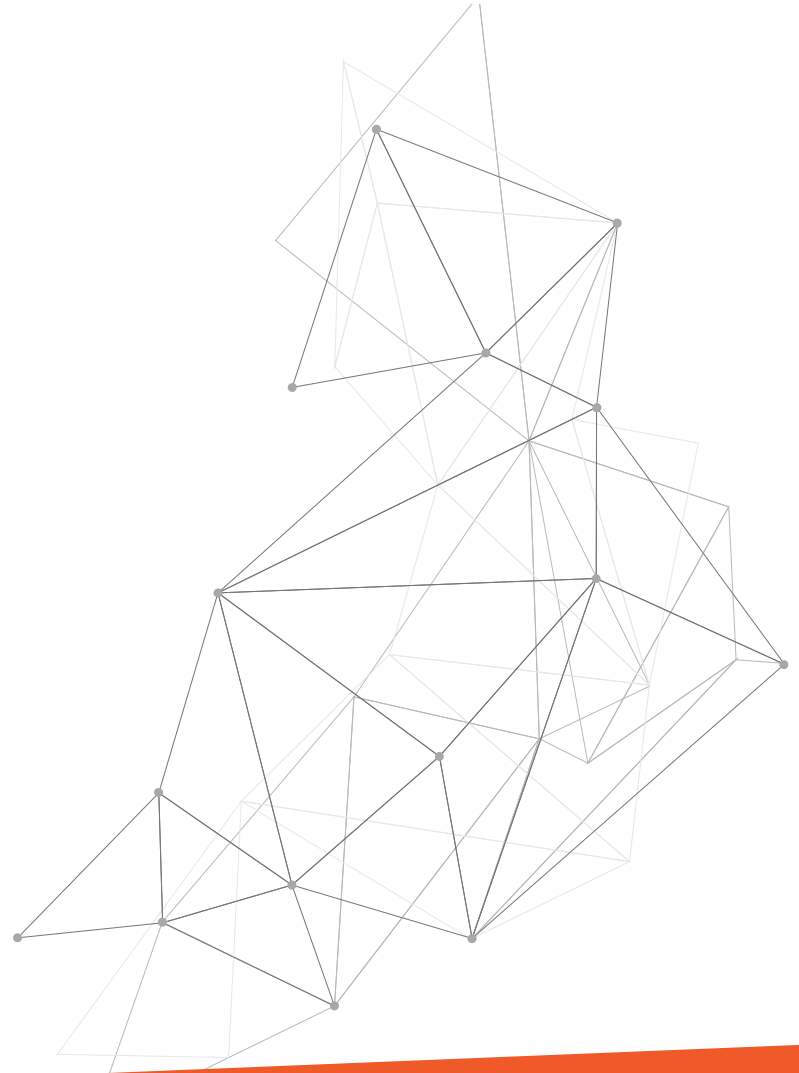
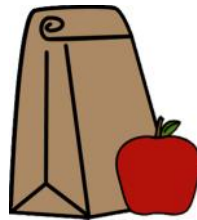


 Plansmith

Lunch 'n Learn

Executive Dashboard



Presenters: Jenny Mello & Bill Smith

This session is design for:

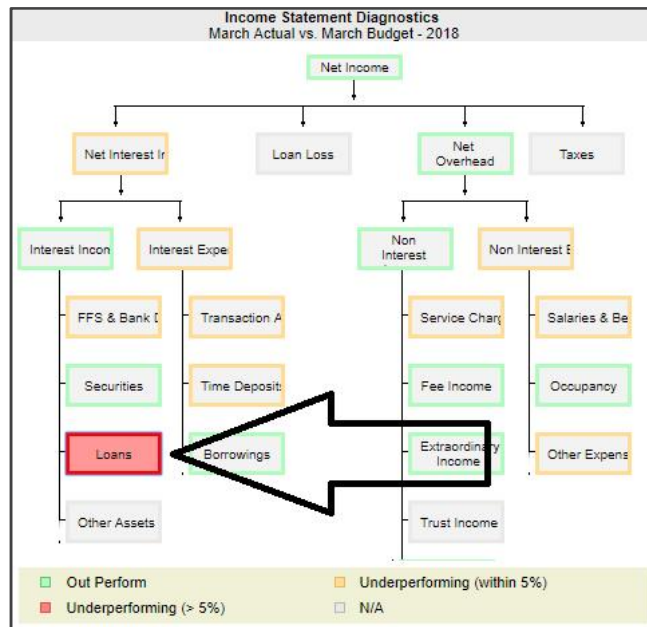


All Compass Users

- Financial Compass
- Budget Compass Plus
- Budget Compass

Why use Executive Dashboard?

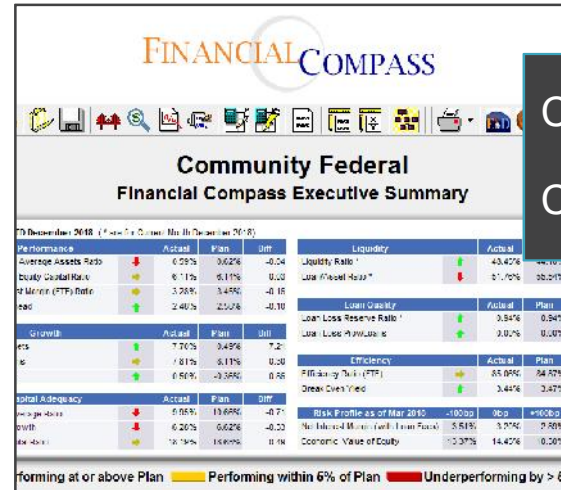
Troubleshooting



Presenting

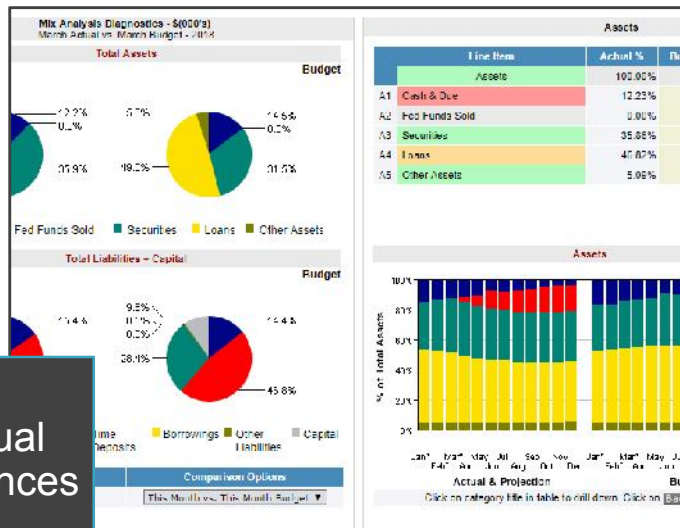


Web-based



Connects with Compass

Visual Variances



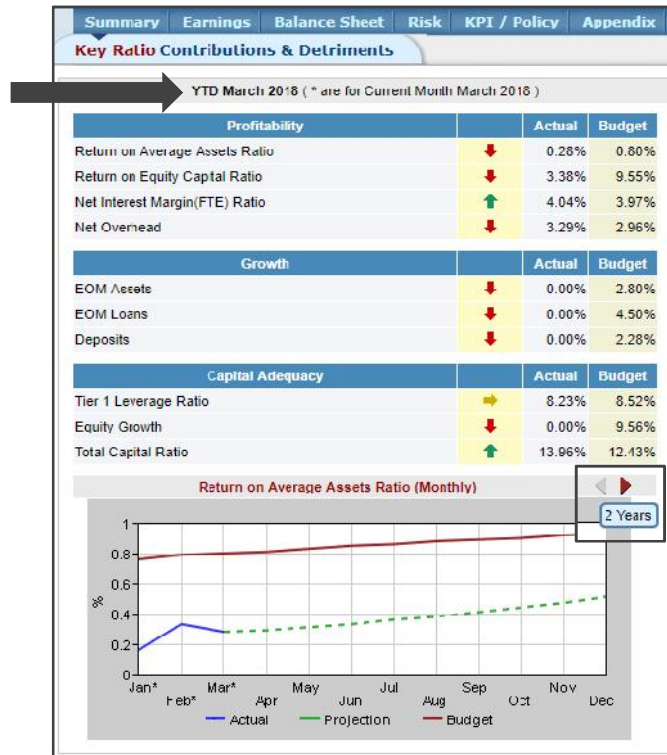
Login

www.plansmith.com\dashboard2

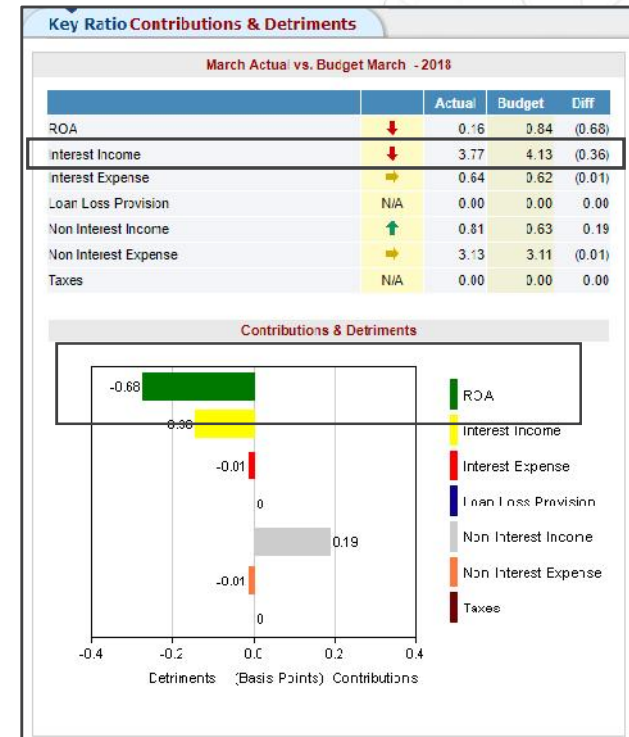


Executive Dashboard

Troubleshoot Graphs with actual performance and 2 year of projections



Easily identify the contributing category



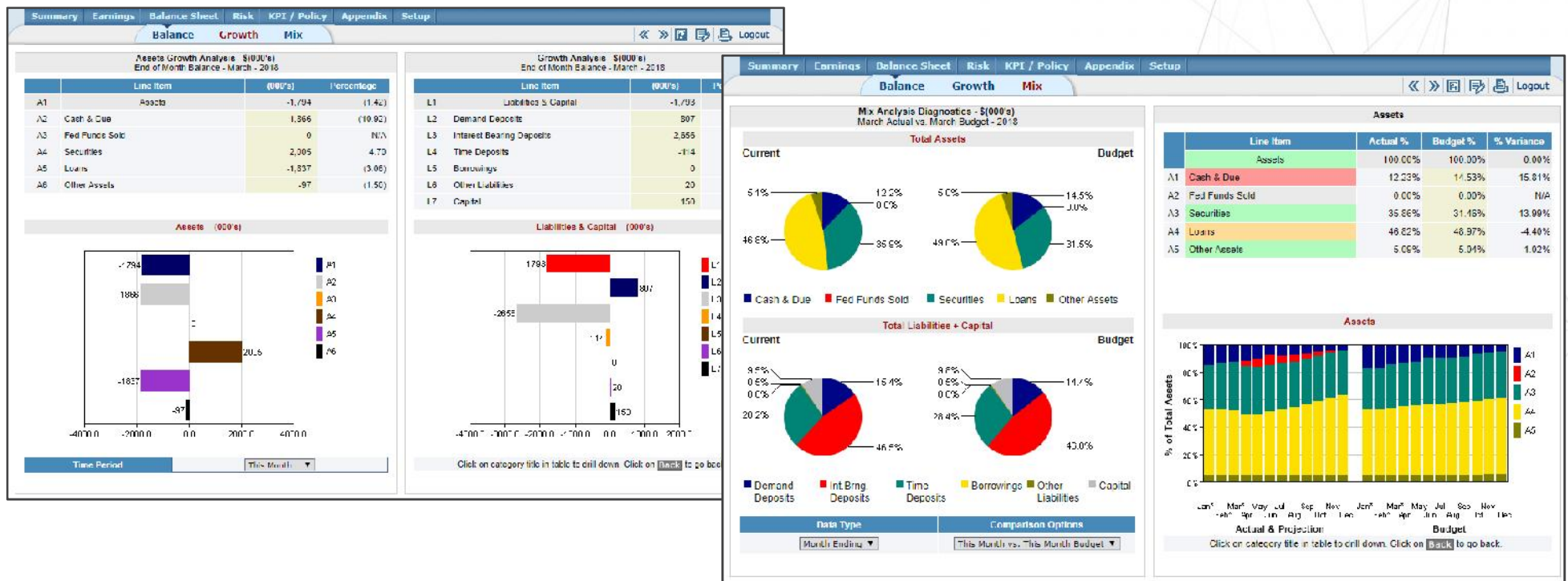
Executive Dashboard

Analyze category variances



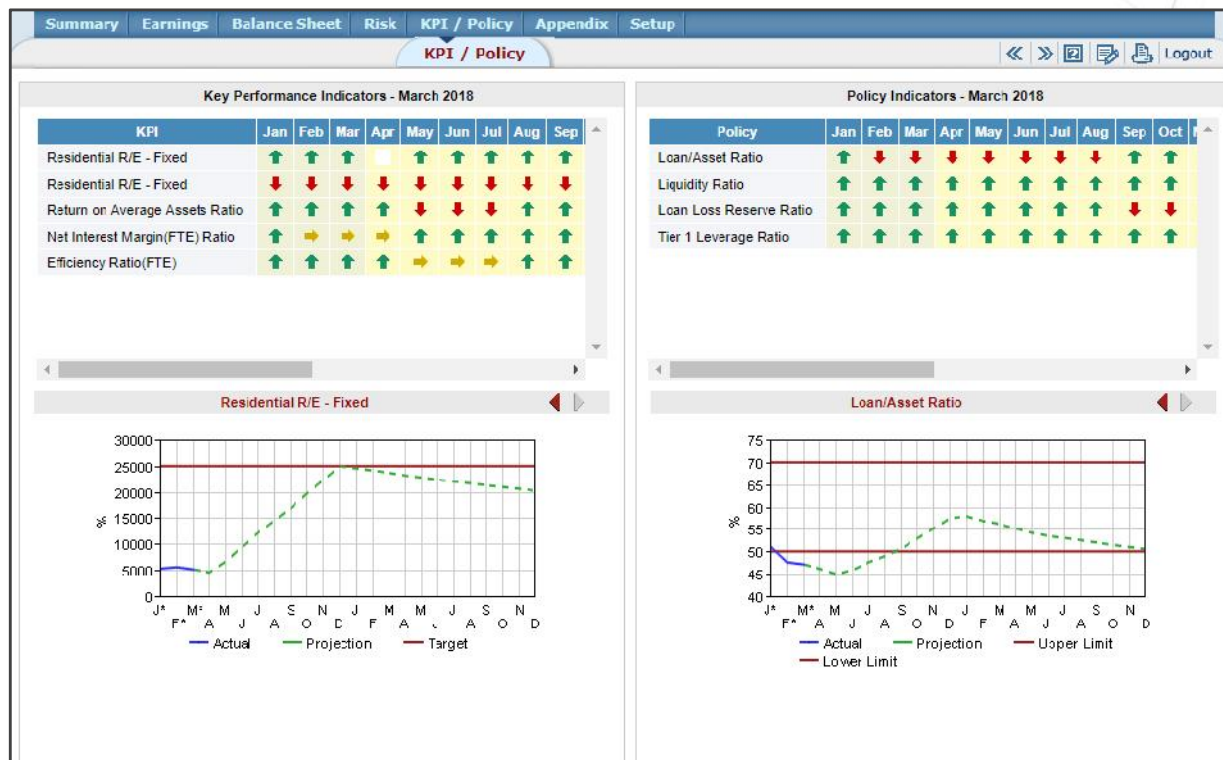
Executive Dashboard

Monitor Balance Sheet Growth and Shrinkage



Executive Dashboard

Monitor Performance with KPI's and Policy Indicators



What's Next?

Thur, June 21st - Fri, June 22nd 2018 - 2-day Roundtable & Coaching Event
Friday, September 14th 2018 - Compass Advanced Coaching
Friday, December 14th 2018 - Compass Roundtable

Upcoming Lunch 'n Learns

May – Risk Compass
July - ??

Check out www3.plansmith.com/events-page for more event info

Thanks for attending!

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www.plansmith.com



Questions?

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