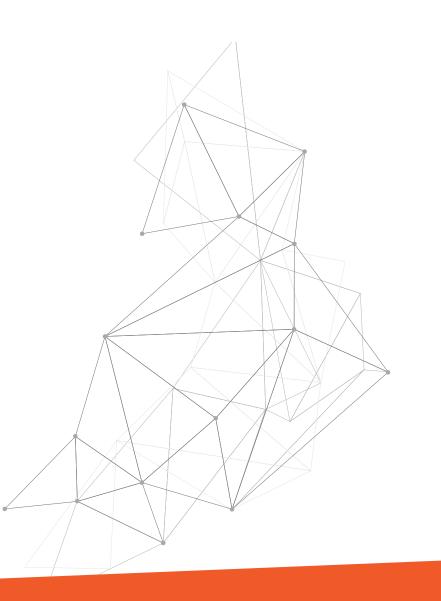
# Plansmith Lunch 'n Learn Executive Dashboard



Presenters: Jenny Mello & Bill Smith



## This session is design for:

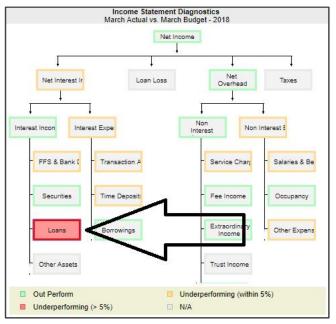


**All Compass Users** 

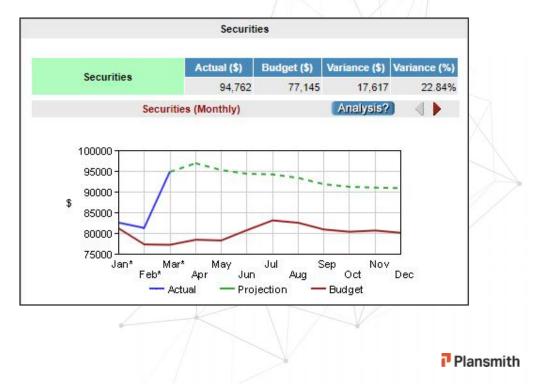
- Financial Compass
- Budget Compass Plus
- Budget Compass

## Why use Executive Dashboard?

#### Troubleshooting



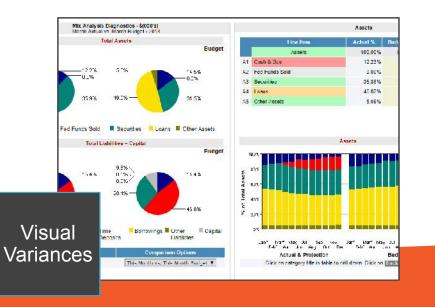
#### Presenting



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€/ 🖬 🖊	FINANCIAL COMPASS							Connects with Compass	
D December 2018. (* stelfter Current Mollin December 2018)									
Performance		Actual	Plan	Ditt	Liquidity		Actual		
Average Assets Pado	+	0.29%	0.62%	-0.04	Liquidity Rallo 1		43.4576		
			111%	0.00	Loa Aleset Happ*		\$1.75%	30.54T%	
Equity Capital Ratio		6.13	0.1170	v					
Equity Capital Ratio	:	6 11% 3 28%	3.45%	-0 15			_	-	
Equity Capital Ratio 14 Mercin (FTF) Botin ead	ŧ				Loan Quelity		Actual	Plan	
Equily Capital Ratio et Mordin (FTF) Roto ead	i	3 28% 2 40%	3.458 25076	-0 15 -0.10	Loan Loss Reserve Rallo 1		0.54%	0.94%	
Equity Capital Ratio 4: Merrin (FTF) Botho ead Growth	:	3 28% 2 40% Alcust	3.45% 2.50% Plan	-0 15 -0.10 Uill		:			
Equity Capital Hario St Mongin (ETF) Botin ead Growth ets	:	3.26% 2.40% Actual 7.70%	3.45% 2.55% Plan 0.45%	-0 15 -0.10 Uni 7.21	Loan Loss Reserve Rallo 1 Loan Loss ProwLoans	:	0.84% 0.01%	0.94% 0.00%	
Equity Capital Ratio 4: Merrin (FTF) Botho ead Growth		3.26% 2.405 Adust 7.705 / 81%	3.45% 2.50% Plan 0.49% 6.11%	-0 15 -0.10 Unit 7.21 0.30	Loan Loss Reserve Rallo * Loan Loss Providoans Efficiency	:	0.54% 0.01% Actual	0.94% 0.00% Plan	
Equity Capital Hario St Mongin (ETF) Botin ead Growth ets		3.26% 2.40% Actual 7.70%	3.45% 2.55% Plan 0.45%	-0 15 -0.10 Uni 7.21	Loan Loss Reserve Rallo ' Loan Lues HowLoans Efficiency Fificiency Tach (FTP)	:	0.94% 0.00% Actual 85.04%	0.94% 0.00% Plan 84.87%	
Equity Capital Hario St Mongin (ETF) Botin ead Growth ets		3.26% 2.405 Adust 7.705 / 81%	3.45% 2.50% Plan 0.49% 6.11%	-0 15 -0.10 Unit 7.21 0.30	Loan Loss Reserve Rallo * Loan Loss Providoans Efficiency	:	0.54% 0.01% Actual	0.94% 0.00% Plan	
Equity Capital Harv & Morele (FTF) Both ead Growth ets K		3.28%, 2.40% 7.70% 7.70% 7.81% 0.50%	3.45% 25578 25578 0.4976 6.11% -0.36%	-0 15 -0.10 Unit 7.2* 0.30 0.85	Loan Loss Reserve Rallo ' Loan Lues HowLoans Efficiency Fificiency Tach (FTP)	-100bp	0.94% 0.00% Actual 85.04%	0.94% 0.00% Plan 84.87%	
Eculty Capital Harve et Marrya (PTF) Bate ead Growth ets 6 5 5 5		3 28%, 2 40% Actual 7 70% / 81% 0 50%, Actual	3.45% 2.50% Plan 0.45% 6.11% -0.36% Plan	-0 15 -0.10 Unit 7.21 0.30 0.85 Ditt	Loan Loss Reserve Rallo 1 Loan Loss Reserve Rallo 1 Loan Loss RowLoans Efficiency Pfificiency Datin (TTP) Dreak Even Med	-100bp	0.94% 0.00% Actual 85.0% 3.44%	0.94% 0.00% Plan 84.87% 2.47%	



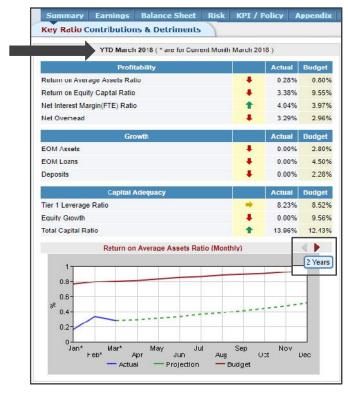
## Login

#### www.plansmith.com\dashboard2



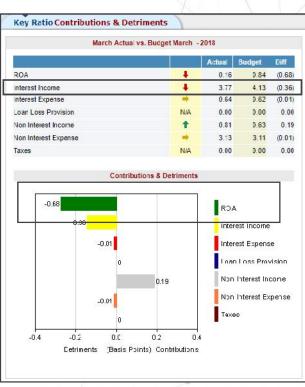
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#### Troubleshoot Graphs with actual performance and 2 year of projections

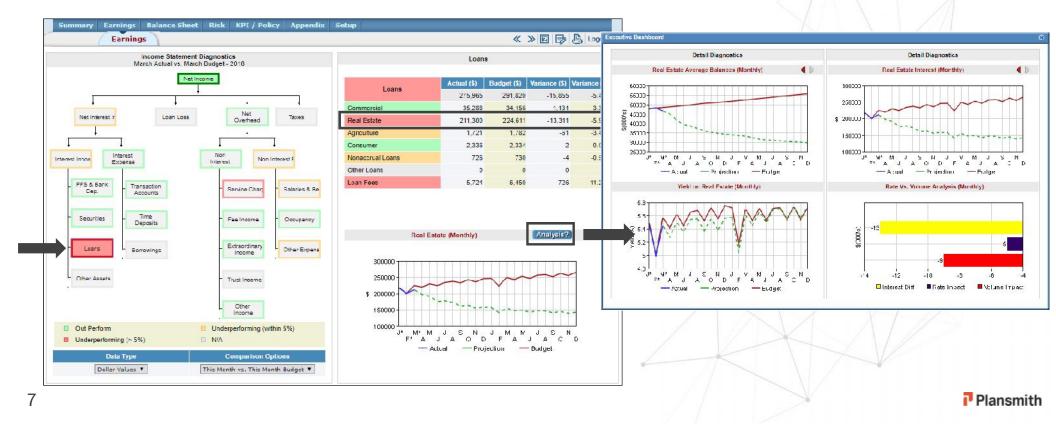


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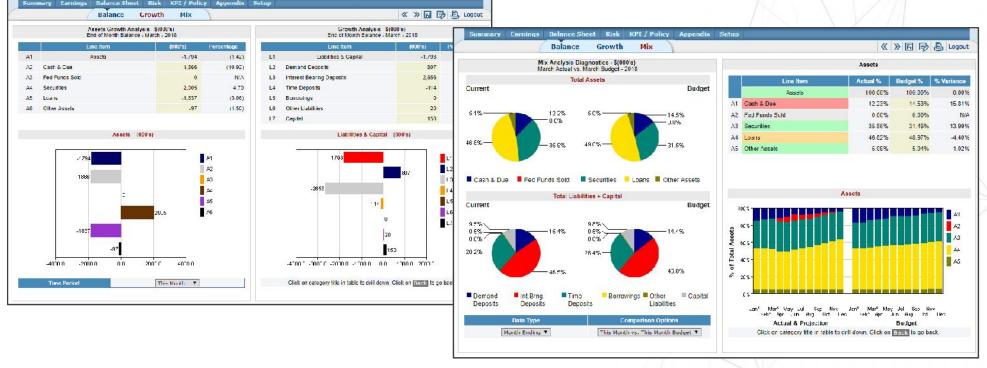
#### Easily identify the contributing category



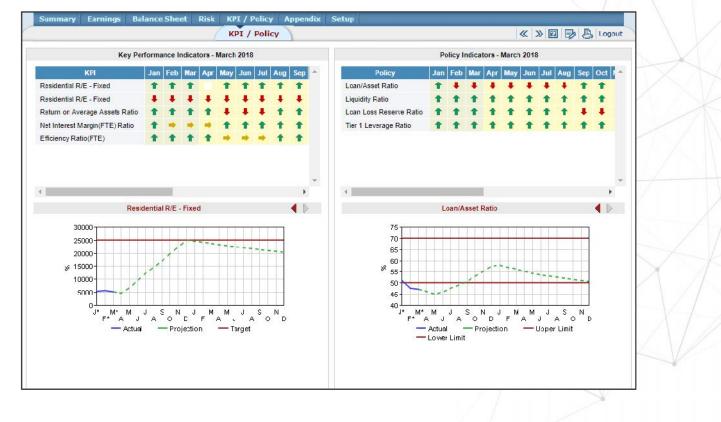
#### Analyze category variances



#### Monitor Balance Sheet Growth and Shrinkage



#### Monitor Performance with KPI's and Policy Indicators



## What's Next?

Thur, June 21<sup>st</sup> - Fri, June 22<sup>nd</sup> 2018 - 2-day Roundtable & Coaching Event Friday, September 14<sup>th</sup> 2018 - Compass Advanced Coaching Friday, December 14<sup>th</sup> 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!**



www.plansmith.com



#### Questions? Jenny Mello

Client Development 800-323-3281 jenny@plansmith.com support@plansmith.com

