

Success Requires Asking the Right Questions, Getting the Right Answers, and Taking the Right Actions

GMI recently conducted one of the most comprehensive surveys ever undertaken regarding senior management and board-level reporting. The findings stressed that today's reporting needs to be redesigned to include:

- **Holistic Coverage:** Reporting needs to be guided by a comprehensive framework that ensures *all* relevant topics are adequately considered.
- **Sharper Focus:** There needs to be clear focus on the most important topics, with a consistent way in which to prioritize and drill down.
- **Bias for Action:** Appropriate actions must be triggered whenever there are significant opportunities or risks that need to be addressed.

Even as more powerful data visualization/BI tools and board portal presentation software have become increasingly available, there still remains a gap between the two...which is where GMI's Senior-Level Reporting (SLR) Solution fits in.

Frameworks for Reporting

GMI's SLR Solution is capable of reporting on a variety of topics, with the only difference being the content that is included. Our reporting frameworks provide industry-specific (a) reporting categories and topics, (b) insightful questions and associated metrics, (c) sample question responses, and (d) output reporting templates. All content is then tailored by end users, as needed.



Management Operating Systems

Why do bad things happen to good organizations? New disasters surface on an almost daily basis, revealing:

- Flawed strategies
- Poor customer satisfaction
- Ineffective financial management
- Error-prone operations
- Weak risk and compliance processes
- Inadequate remedial actions

GMI believes the root cause of such problems is that today's "*control systems*" have never been properly architected to deal with today's complexity, velocity of change, and unforgiving competitive environment. To address this problem, we have developed 21st century Management Operating System (MOS) solutions that--similar to a GPS--can help stakeholders consistently get from where they are to where they want to go, and assist in "getting back on track" whenever problems occur.

Just as a GPS system without maps would be useless, MOS solutions also require specialized content. Our platform, together with robust GMI-provided content, currently supports the rapid implementation of high-impact solutions related to:

- Senior-Level Reporting
- Strategic Alignment
- Governance Risk & Compliance
- Finance Transformation
- Issue & Action Management
- Self-Developed Apps

GMI's solutions yield results in days and weeks, not months and years.

How GMI's Reporting Solution Works

Our reporting process includes an easy-to-use Setup/Tailoring component and an Ongoing Reporting component:

- **Setup/Tailoring:** Multiple report types can be processed, each with its own initial setup and periodic updates and enhancements. Supporting functionality includes (a) site branding and personalization, (b) updating of taxonomies, terminology, and other reference data, (c) incorporation of the desired prioritization methodology, (d) definition of workflows and roles, and (e) dashboard personalization.
- **Ongoing Reporting:** Each reporting period (e.g., monthly, quarterly), information requests are automatically sent to report contributors based on their subject matter expertise. These individuals review prior period responses, update metrics and graphics to reflect the current situation, and formulate responses to key questions. These updates are then submitted for approval and/or further refinement. Once all report components are complete, our tool produces consolidated report packages, ready for secure distribution in whatever way desired, including via reporting portal tools.

The entire process is made possible by solution-specific content. E.g., users of the ERM Board Reporting Solution for Banks receive:

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|------------------------------|---------------------------------|----------------------------|
| ➤ An Overall Report Design | ➤ Specific Risk Questions (>75) | ➤ Prioritization Aides (3) |
| ➤ Risk Category Framework | ➤ Sample Risk Responses | ➤ Customization Templates |
| ➤ Holistic Risk Topics (60±) | ➤ Suggested Risk Metrics (>100) | ➤ Documentation |
| ➤ Category/Topic Definitions | ➤ Sample Graphics (>80) | ➤ Suggested Reference Docs |

Why Use GMI's Reporting Solution

There are two basic alternatives. If you want to transform your senior management and/or Board-level reporting, you can *either* (a) invest significant time and money to develop the required content and then automate the process yourself, or (b) you can jump-start the process with minimal investment by subscribing to GMI's SLR Solution (thereby ensuring high quality and reducing both one-time and recurring time and cost). Being able to migrate from "*I think*" to "*I know*" reporting will yield the highest possible return on investment.

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For questions or to arrange a demonstration, please contact us:

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GMI's Platform

True innovation is rare these days, but clients tell us our cloud-based platform does in fact represent a major breakthrough. Illustrative "proof points" include:

- The only platform focused exclusively on enterprise-wide management processes.
- The architecture is unique in that it recognizes that all MOS applications are essentially the same, except for the work that is being processed.
- All Solutions work seamlessly with our industry- and topic-specific content.
- Users can easily leverage our software and content to author *their own* apps, in addition to those developed by GMI or third parties.

Our platform is "industrial strength" and highly secure. It currently supports some 35,000 users in 150 countries, and to date has processed well over one million items.

About Gupton Marrs International

GMI was founded in 2001 by O. Bruce Gupton (a former PWC consulting partner and Fortune 100 CIO) and Frank O. Marrs, former Vice Chairman of Assurance Services at KPMG. Our firm is recognized as a global leader in sustainable Management Operating Systems for the 21st century.

GMI's "asset-based consulting model" allows us to leverage our existing frameworks, content, analytics, and enabling technology to significantly reduce our clients' implementation time, cost, and risk.