

Procurement, Logistics, Distribution



TM: Abe Copple

DRIVERS

- Objectives
- Preparation
- Execution
- Environment
- Resilience
- Result

Are there forces in the surrounding Environment that will impede or help the Execution?

Add Driver

Are there stoppage points that require double-handling?

Supporting Variables

Number of Warehouse Stoppage Points

Current Response

Are receiving and shipping located such that throughput is maximized?

Supporting Variables

Proximity of Receiving to Shipping

Appears after a response has been selected. (could also be most likely in success, equally, etc.

Current Response

Are lane depth and width appropriate? **SUCCESS**

Supporting Variables

ORG:
 Lane Depth: 5 SKUS Lane Width: 10 FT Lane Length: 25 SKUS

INDUSTRY:
 Lane Depth: 3 SKUS Lane Width: 10 FT Lane Length: 20 SKUS

- Current Response
- No
 - Likely no
 - Equally likely
 - Likely yes
 - Yes

Is rent per square foot higher or lower than market?

Supporting Variables

Rent Sq/Ft Market Rent Sq/Ft

Current Response

What percentage of storage capacity is utilized?

Supporting Variables

Percentage Utilized

Current Response

Are lane depth and width appropriate?

Supporting Variables

Current Response

The Deal Manager looks at the drivers of the deal. There an option to take action and address potential vulnerabilities defined by the conditions characterized by the drivers. In this space there is a new navigation from which the deal manager can select a driver category to assess and address the potential impediments. Here the DM sees that the information for one of the drivers has been entered, and responds appropriately.

Human Resource Management

Add Advisor to Team



TM: Lily Baez

Technology and Process Development

Add Advisor to Team



TM: Alex Katz

Operations

Add Advisor to Team



TM: June Thomas

Procurement, Logistics, Distribution

Add Advisor to Team



TM: Abe Copple

General Management and Infrastructure

Add Advisor to Team



TM: Charles Jencks

Customer and After Sales Service

Add Advisor to Team



TM: Rem Koolhaas

Product and/or Service Development

Add Advisor to Team



TM: Marcy Lott

The Deal manager wants to check the progress of the teams. They can also switch the heat map view which is currently set to view the Profiles created in the review so far, but can be changed to look at the tasks completed and remaining in the review

Deal Teams:

Profiles

Drivers

Tasks

Conference

Advisors

DEAL: Chesnut

- Risk Value
- Risk Value
- Mitigation Value
- Residual Value
- Opportunity Value
- Resultant Value

Human Resource Management

Add Advisor to Team



Technology and Process Development

Add Advisor to Team



Operations

Add Advisor to Team



TM: June Thomas

Procurement, Logistics, Distribution

Add Advisor to Team



TM: Abe Copple

General Management and Infrastructure

Add Advisor to Team



TM: Charles Jencks

Customer and After Sales Service

Add Advisor to Team



TM: Rem Koolhaas

Product and/or Service Development

Add Advisor to Team



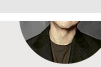
TM: Marcy Lott

The Profiles can be viewed through multiple measures

The Risk Value as is viewed currently, The value of mitigations against those risks, The residual value of the risks – that is the Risk Value minus the compensating Mitigation Value, The Opportunity Value – that is the “upside” impacts along with their probabilities. This is in contrast to the Risk “downside” impacts, The Resultant Value – the difference between the Opportunity Value and the risk mitigated Residual Value.

Technology and Process Development

Add Advisor to Team



Messenger

Procurement, Logistics, Distribution

View Current Monitoring Report



TM: Abe Copple

Show all task profile summary instances

exists only in the full team space (not team member space)

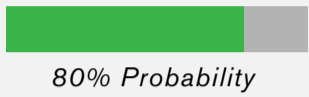
Packing Process Profile

Report Segment



PACKP-101

\$30,000



80% Probability



Sara Wilkins

Packing Process Profile 1

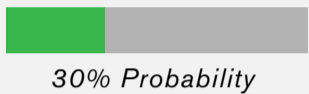
MM/DD/YYYY

HH:mm

- Risk
- Mitigations
- Remediation

PACKP-102

\$36,000



30% Probability



Sara Wilkins

Packing Process Profile 2

MM/DD/YYYY

HH:mm

- Risk
- Mitigations
- Remediation

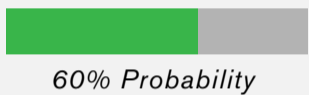
Key Metrics Profile

Report Segment



KEYM-101

\$39,000



60% Probability



Sara Wilkins

Key Metrics Profile

MM/DD/YYYY

HH:mm

- Risk
- Mitigations
- Remediation

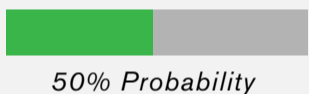
Warehouse Layout Profile

Report Segment



WAREL-101

\$15,000



50% Probability



Charles Walker

Warehouse LO Profile 1

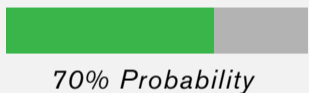
MM/DD/YYYY

HH:mm

- Risk
- Mitigations
- Remediation

WAREL-102

\$40,000



70% Probability



Sara Wilkins

Warehouse LO Profile 2

MM/DD/YYYY

HH:mm

- Risk
- Mitigations
- Remediation

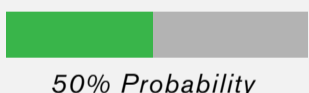
Inventory Control Profile

Report Segment



INVEC-101

\$220,000



50% Probability



Charles Walker

Inventory Control Profile

MM/DD/YYYY

HH:mm

- Risk
- Mitigations

Add Report Segment

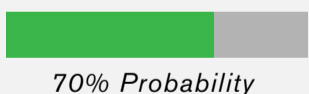
Shipping Process Profile

Report Segment



SHIPP-102

\$35,000



70% Probability



Sara Wilkins

Shipping Process Profile 1

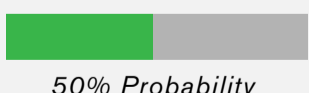
MM/DD/YYYY

HH:mm

- Risk
- Mitigations
- Remediation

SHIPP-102

\$90,000



50% Probability



Sara Wilkins

Shipping Process Profile 2

MM/DD/YYYY

HH:mm

- Risk
- Mitigations

Add Report Segment

Shipping Process Profile

Report Segment



The Deal Manager wants a more detailed view of the Procurement profile, they click the Procurement band. Here they are provided with a list of profile summaries. The list is arranged by profile type, under each type there is a numbered list of the associated profiles.

Procurement, Logistics, Distribution

Back to profiles list...



TM: Abe Copple

Actions

Edit

Notes

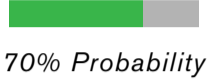
History

WAREL-102



Sara Wilkins

\$40,000



Warehouse Layout Profile 2 Title
(Warehouse Layout)

MM/DD/YYYY
HH:mm

- Risk
- Mitigations
- Remediation

Observations	% Probability	
Stoppage Points/ Double handling	60% Complete	◀
Shipping/Receiving Proximity	30% Complete	◀
Lane Size	45% Complete	▼
Width: 10 FT Depth: 5 SKUS Length: 25 SKUS		Comment
Rent Sq/Ft	40% Complete	◀
Utilization of Storage	15% Complete	◀

The Deal manager takes a closer look at a profile; they scan the observations of the profile and the items addressed in the observations. They have an option to make notes on each of the observations, and look at the history of data entry/updates made by the team member.

Messenger

Procurement, Logistics, Distribution

Back



TM: Abe Copple

Actions

Edit

Notes

History

- Inquiry
- Mitigation
- Remediation
- Adjust Escrow
- Valuation Impact

Sara Wilkins



Warehouse Layout Profile 2 (Warehouse Layout)

MM/DD/YYYY
HH:mm

- Risk
- Mitigations
- Remediation

	% Probability	
Stoppage Points/ Double handling	60% Complete	◀
Shipping/Receiving Proximity	30% Complete	◀
Lane Size	45% Complete	▼
<div style="border: 1px solid black; padding: 5px;"> <p>Width: 10 FT</p> <p>Depth: 5 SKUS</p> <p>Length: 25 SKUS</p> </div>		
Rent Sq/Ft	40% Complete	◀
Utilization of Storage	15% Complete	◀

Comment

A given risk can be acted upon

Inquiries can be made about a document or discussion item


Mitigations can be proposed to reduce the impact or likelihood of the risk

A Remediation can be recorded to be addressed if the deal closes

A sum can be put aside in the Escrow to create the incentives to address the risk

Or the valuation itself can be adjusted

Procurement, Logistics, Distribution Back

 TM: Abe Copple

Actions ▼		Edit	Notes	History
<ul style="list-style-type: none"> Inquiry Prioritization Delegation 	<p><i>Sara Wilkins</i></p> <p>Warehouse Layout Profile 2 (Packing Process)</p> <p>ability</p>	<p>MM/DD/YYYY</p> <p>HH:mm</p>	<ul style="list-style-type: none"> ● Responsiveness ● Information Flow ● Information Clarity 	

Tasks	% Complete
Stoppage Points/ Double handling	25% Complete ◀
Shipping/Receiving Proximity	80% Complete ◀
Lane Size	100% Complete ▼
Width: 10 FT Depth: 5 SKUS Length: 25 SKUS	Comment
Rent Sq/Ft	90% Complete ◀
Utilization of Storage	20% Complete ◀

The deal Manager would like to check how this team is progressing with their task assignments. they click the task tab (which can be clicked at any point in the investment teams workspace) Specific tasks can be examined from the lists associated with the Assessment and again the history of the progress is available for review

And actions can be taken

Inquiries about progress can be submitted to the task owners

Tasks can be prioritized up or down

Or a task can be delegated to a new task owner to load level over burdened reviewers

The capability to “control the flow” of the deal assessment are packaged in a secure, conveniently accessible interface that increase the performance of the review team and focuses the review on deal aspects that will provide the best outcome for the deal. After reviewing the team member’s progress, the team manager would like to view the task fulfillment for the entire investment; they click back to the investment teams to view the heat map for tasks.

Human Resource Management

Add Advisor to Team



TM: Lily Baez

Technology and Process Development

Add Advisor to Team



TM: Alex Katz

Operations

Add Advisor to Team



TM: June Thomas

Procurement, Logistics, Distribution

Add Advisor to Team



TM: Abe Copple

General Management and Infrastructure

Add Advisor to Team



TM: Charles Jencks

Customer and After Sales Service

Add Advisor to Team



TM: Rem Koolhaas

Product and/or Service Development

Add Advisor to Team



TM: Marcy Lott

Marketing, Sales, and Customer Accounts

Add Advisor to Team



TM: Gary Shandling

Technology and Process Development

Add Advisor to Team



TM: Jon Santos

In this view, there is a low task completion ratio of a large block of tasks concerning HR. Deal Manager clicks to investigate.

Investment Teams

Profiles

Drivers

Tasks

Conference

Advisors

Human Resource Management

View Current Monitoring Report



TM: Lily Baez

Show all task profile summary instances

CULTURAL ASSESSMENT TASKS

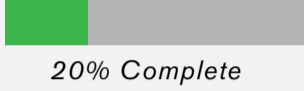
Report Segment

?

Set Task Priority

CULTA-101

49 Tasks



20% Complete



Jim Daniels
Cultural Assessment

MM/DD/YYYY
HH:mm

Add Report Segment

- Information Flow
- Information Clarity

TALENT MGMT. TASKS

Report Segment

?

Set Task Priority

TALM-101

102 Tasks



50% Complete



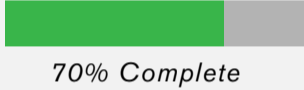
Laura Hendricks
Talent Mgmt. Assessment 1

MM/DD/YYYY
HH:mm

- Responsiveness
- Information Flow
- Information Clarity

TALM-102

34 Tasks



70% Complete



Laura Hendricks
Talent Mgmt. Assessment 2

MM/DD/YYYY
HH:mm

- Responsiveness
- Information Flow
- Information Clarity

COMPENSATION ASSMNT TASKS

Report Segment

?

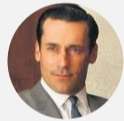
Set Task Priority

COMPA-101

132 Tasks



50% Complete



Don Draper
Compensation Assessment

MM/DD/YYYY
HH:mm

- Responsiveness
- Information Flow
- Information Clarity

BENEFITS ASSMNT TASKS

Report Segment

?

Set Task Priority

CONTRACTS ASSMNT TASKS

Report Segment

?

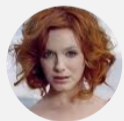
Set Task Priority

CONTA-101

247 Tasks



20% Complete



Laura Hendricks
Contracts Assessment 1

MM/DD/YYYY
HH:mm

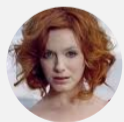
- Responsiveness
- Information Flow
- Information Clarity

CONTA-102

203 Tasks



30% Complete



Laura Hendricks
Contracts Assessment 2

MM/DD/YYYY
HH:mm

- Responsiveness
- Information Flow
- Information Clarity

TRANSITION PLANNING TASKS

Report Segment

?

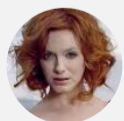
Set Task Priority

TRANSP-101

34 Tasks



80% Complete



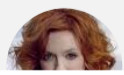
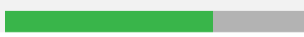
Laura Hendricks
Transition Planning Asse...

MM/DD/YYYY
HH:mm

- Responsiveness
- Information Flow
- Information Clarity

TRANSP-101

31 Tasks



Laura Hendricks

MM/DD/YYYY

- Responsiveness
- Information Flow

Drilling through into the HR task listing shows Assessment areas by task completion rate along with the number of tasks associated with the area. The view can be manipulated to allow the viewer to understand where progress bottlenecks are occurring. Each area can be drilled into to provide further detail

Investment Teams

Profiles

Drivers

Tasks

Conference

Advisors

Human Resource Management

View Current Monitoring Report



TM: Lily Baez

Show all task profile summary instances

CULTURAL ASSESSMENT TASKS

Report Segment



Set Task Priority

CULTA-101

49 Tasks



20% Complete



Jim Daniels

Cultural Assessment

MM/DD/YYYY

HH:mm

- Responsiveness
- Information Flow
- Information Clarity

TALENT MGMT. TASKS

Report Segment



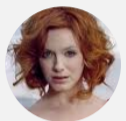
Set Task Priority

TALM-101

102 Tasks



50% Complete



Laura Hendricks

Talent Mgmt. Assessment 1

MM/DD/YYYY

HH:mm

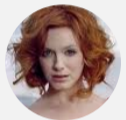
- Urgent Priority
- High Priority
- Ordinary Priority
- Low Priority

TALM-102

34 Tasks



70% Complete



Laura Hendricks

Talent Mgmt. Assessment 2

MM/DD/YYYY

HH:mm

- Information Flow
- Information Clarity

COMPENSATION ASSMNT TASKS

Report Segment



Set Task Priority

COMPA-101

132 Tasks



50% Complete



Don Draper

Compensation Assessment

MM/DD/YYYY

HH:mm

- Responsiveness
- Information Flow
- Information Clarity

BENEFITS ASSMNT TASKS

Report Segment



Set Task Priority

CONTRACTS ASSMNT TASKS

Report Segment



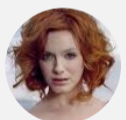
Set Task Priority

CONTA-101

247 Tasks



20% Complete



Laura Hendricks

Contracts Assessment 1

MM/DD/YYYY

HH:mm

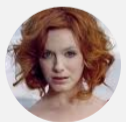
- Responsiveness
- Information Flow
- Information Clarity

CONTA-102

203 Tasks



30% Complete



Laura Hendricks

Contracts Assessment 2

MM/DD/YYYY

HH:mm

- Responsiveness
- Information Flow
- Information Clarity

TRANSITION PLANNING TASKS

Report Segment



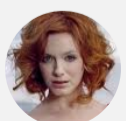
Set Task Priority

TRANSP-101

34 Tasks



80% Complete



Laura Hendricks

Transition Planning Asse...

MM/DD/YYYY

HH:mm

- Responsiveness
- Information Flow
- Information Clarity

TRANSP-101

31 Tasks



Laura Hendricks

Transition Planning Asse...

MM/DD/YYYY

HH:mm

- Responsiveness
- Information Flow

The DM has the option to adjust the task priorities which will rearrange the profile summary list placing more pressing priorities at the top of the list.

Deal Teams:

Profiles

Drivers

Tasks

Conference

Advisors

DEAL: Chesnut

Human Resource Management

View Current Monitoring Report



TM: Lily Baez

Show all task profile summary instances

CULTURAL ASSESSMENT TASKS

Report Segment

?

Set Task Priority

CULTA-101

49 Tasks



20% Complete



Jim Daniels
Cultural Assessment

MM/DD/YYYY
HH:mm

- Responsiveness
- Information Flow
- Information Clarity

TALENT MGMT. TASKS

Report Segment

?

Set Task Priority

TALM-101

102 Tasks



50% Complete



Laura Hendricks
Talent Mgmt. Assessment 1

MM/DD/YYYY
HH:mm

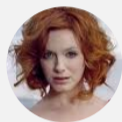
- Responsiveness
- Information Flow
- Information Clarity

TALM-102

34 Tasks



70% Complete



Laura Hendricks
Talent Mgmt. Assessment 2

MM/DD/YYYY
HH:mm

- Responsiveness
- Information Flow
- Information Clarity

COMPENSATION ASSMNT TASKS

Report Segment

?

Set Task Priority

COMPA-101

132 Tasks



50% Complete



Don Draper
Compensation Assessment

MM/DD/YYYY
HH:mm

- Responsiveness
- Information Flow
- Information Clarity

BENEFITS ASSMNT TASKS

Report Segment

?

Set Task Priority

CONTRACTS ASSMNT TASKS

Report Segment

?

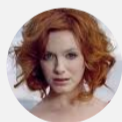
Set Task Priority

CONTA-101

247 Tasks



20% Complete



Laura Hendricks
Contracts Assessment 1

MM/DD/YYYY
HH:mm

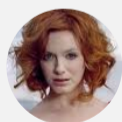
- Responsiveness
- Information Flow
- Information Clarity

CONTA-102

203 Tasks



30% Complete



Laura Hendricks
Contracts Assessment 2

MM/DD/YYYY
HH:mm

- Responsiveness
- Information Flow
- Information Clarity

TRANSITION PLANNING TASKS

Report Segment

?

Set Task Priority

TRANSP-101

34 Tasks



80% Complete



Laura Hendricks
Transition Planning Asse...

MM/DD/YYYY
HH:mm

- Responsiveness
- Information Flow
- Information Clarity

TRANSP-101

31 Tasks



70% Complete



Laura Hendricks
Transition Planning Asse...

MM/DD/YYYY
HH:mm

- Responsiveness
- Information Flow
- Information Clarity

The DM can produce a monitoring report in each team space. Under each profile category, the DM has the option to view a "report segment"

Human Resource Management

[View Current Monitoring Report](#)



TM: Lily Baez

Report Segment: *TALENT MGMT*



[Back to Task List](#)

TALM-101 *Laura Hendricks* **Talent Mgmt. Assessment 1** (Talent Management) MM/DD/YYYY HH:mm

TASKS: ● Responsiveness ● Information Flow ● Information Clarity

102 Tasks IMPACT: ● Risk ● Mitigations ● Remediation

71 Completed Total Potential Impact: \$70,000

30 Prioritized Probably Impact: \$43,000

12 Incomplete Prioritized *Combines Task/Profile Summaries*

[Publish to Monitoring Report](#) Show Notes ◀

TALM-102 *Laura Hendricks* **Talent Mgmt. Assessment 2** (Talent Management) MM/DD/YYYY HH:mm

TASKS: ● Responsiveness ● Information Flow ● Information Clarity

34 Tasks IMPACT: ● Risk ● Mitigations ● Remediation

24 Completed Total Potential Impact: \$57,000

6 Prioritized Probably Impact: \$21,000

0 Incomplete Prioritized

[Publish to Monitoring Report](#) Show Notes ▼

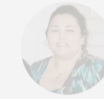
6/18/2012	Additional Attention to Search Process	Click to show/edit	Tasks	Delete
6/14/2012	Watching Damien Spin Plates	<i>Annotation made in Task or Profile view...</i>	Tasks	Delete
6/09/2012	Tracking New Hire Efficacy		Tasks	Delete

[Add Note](#)

The report segment space provides the DM with an isolated view of the Profiles summaries. Here, the DM has a view of the both the profile impact info, and the task completion info. At any point the DM can publish this info to the full monitoring report, to be sent to team members/leads. The collected annotations of both the profile view and the task view up to that point will be attached to each profile summary instance, available for viewing in the complete monitoring report; there is also an option to add additional notes to the list.

Human Resource Management

View Current Monitoring Report



TM: Lily Baez

Report Segment: TALENT MGMT



Back to Task List

TALM-101



Laura Hendricks

Talent Mgmt. Assessment 1
(Talent Management)

MM/DD/YYYY
HH:mm

TASKS:

102 Tasks

71 Completed

30 Prioritized

- Responsiveness
- Information Flow
- Information Clarity

IMPACT:

Total Potential Impact: \$70,000

Probably Impact: \$43,000

- Risk
- Mitigations
- Remediation

Create Profile Note



Enter Note Title

Profile or Task

A A A A A Font

Size

Text area for creating a profile note.

Post

Cancel

6/14/2012 Watching Damien Spin Plates

Tasks

Delete

6/09/2012 Tracking New Hire Efficacy

Tasks

Delete

Add Note

The DM adds a note to the profile summary instance, while developing the Monitoring report.



HUMAN RESOURCE MONITORING REPORT 2

Current Date SEPT. 12, 2012

Back to Task List

Search for Profile

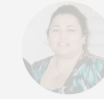


CULTA-101	Jim Daniels	Cultural Assessment (Cultural Assessment)	MM/DD/YYYY HH:mm
TASKS: 49 Tasks 10 Completed 6 Prioritized 4 Incomplete Prioritized	<ul style="list-style-type: none"> ● Responsiveness ● Information Flow ● Information Clarity 	IMPACT: Total Potential Impact: \$21,000 Probably Impact: \$13,000	<ul style="list-style-type: none"> ● Risk ● Mitigations ● Remediation
? Show Notes			
TALM-101	Laura Hendricks	Talent Mgmt. Assessment 1 (Talent Management)	MM/DD/YYYY HH:mm
TASKS: 102 Tasks 71 Completed 30 Prioritized 12 Incomplete Prioritized	<ul style="list-style-type: none"> ● Responsiveness ● Information Flow ● Information Clarity 	IMPACT: Total Potential Impact: \$70,000 Probably Impact: \$43,000	<ul style="list-style-type: none"> ● Risk ● Mitigations ● Remediation
? Show Notes			
TALM-102	Laura Hendricks	Talent Mgmt. Assessment 2 (Talent Management)	MM/DD/YYYY HH:mm
TASKS: 34 Tasks 24 Completed 6 Prioritized 0 Incomplete Prioritized	<ul style="list-style-type: none"> ● Responsiveness ● Information Flow ● Information Clarity 	IMPACT: Total Potential Impact: \$57,000 Probably Impact: \$21,000	<ul style="list-style-type: none"> ● Risk ● Mitigations ● Remediation
? Show Notes			
CONPA-101	Don Draper	Compensation Assessment (Compensation Assessment)	MM/DD/YYYY HH:mm

The DM would like to view the monitoring report, a compilation of the published report segments. Here the DM has the option to publish the report for team viewing. They also have the option to edit the published segments. Now that I think of it, there isn't much the DM has the authority to edit here besides the notes. All the other info is determined by the workflow. Since this info is continually changing, maybe the "report segment" screens are unnecessary, although they do provide an isolated view of a particular profile category, which will probably be helpful... Publishing a segment on a particular day may be problematic; if the DM decides to publish a different segment much later then the team may have a skewed view of their status on the whole. This full view should be continually changing (through the program) and updating itself as the team progresses, that way when the team lead decides to publish the report, all the info is completely current. or perhaps there doesn't need to be a report to be "published" at all...this screen will just be shared with the team for viewing and updated in real time with the DM/TM(?) privileges to edit the notes. Also- Is every profile summay instance in a specific team space to be published in the report or can the DM choose which to include?

Human Resource Management

Publish/Send Monitoring Report



TM: Lily Baez

HUMAN RESOURCE MONITORING REPORT 2

SEPT. 12, 2012

Back to Task List

Search for Profile



CULTA-101 Jim Daniels

Cultural Assessment
(Cultural Assessment)

MM/DD/YYYY
HH:mm

TASKS:

Send To/Notify:



49 Task

Teams:

10 Con

Human Resource Management



Select All Members

6 Priori

Jim Daniels

4 Incon

Laura Hendricks

TALM-101

Don Draper

TASKS:

Sheryl Shapiro

102 Tas

Hurvin Anderson

71 Con

Jim Dine

30 Prio

Technology and Process Development



Select All Members

12 Inco

Operations



Select All Members

TALM-102

Procurement, Logistics, Distribution



Select All Members

TASKS:

General Management and Infrastructure



Select All Members

34 Task

Customer and After Sales Service



Select All Members

24 Con

Product and/or Service Development



Select All Members

6 Priori

Marketing, Sales, and Customer Accounts



Select All Members

0 Incon

Technology and Process Development



Select All Members

Send

Notify

CONPA-101 Don Draper

Compensation Assessment
(Compensation Assessment)

MM/DD/YYYY
HH:mm

TASKS:

- Responsiveness
- Information Flow
- Information Clarity

IMPACT:

Total Potential Impact: \$80,000

Probably Impact: \$48,000

- Risk
- Mitigations
- Remediation

132 Tasks

66 Completed

45 Prioritized

3 Incomplete Prioritized

? Show Notes

After choosing to publish/send the report, the DM chooses the members to notify.

Human Resource Management

Add Advisor to Team



TM: Lily Baez

Technology and Process Development

Add Advisor to Team



TM: Alex Katz

Operations

Add Advisor to Team



TM: June Thomas

Procurement, Logistics, Distribution

Add Advisor to Team



TM: Abe Copple

General Management and Infrastructure

Add Advisor to Team



TM: Charles Jencks

Customer and After Sales Service

Add Advisor to Team



TM: Rem Koolhaas

Product and/or Service Development

Add Advisor to Team



TM: Marcy Lott

Marketing, Sales, and Customer Accounts

Add Advisor to Team



TM: Gary Shandling

Technology and Process Development

Add Advisor to Team



TM: Jon Santos

The Deal manager would like to view the map of driver success/failure rates across the team spectrum. In this map success/failure rate is analogous to the spectrum of green to red, while the size ratio is analogous to completion level

Procurement, Logistics, Distribution

Back



TM: Abe Copple

CONFERENCE POSTS

Search Posts



Post



Gary Shandling **TM** (Marketing, Sales, and Customer Accounts)

Reply

Hello All,

Please let me know when you have completed your distribution assessments for the Fall and Summer Seasons for 12'. Thanks.

02/28/13 6:39PM

Comment

Monitoring Report has been assessed as of **2/27/12 12:15PM**; please review [updates](#).



Abe Copple **TM**

Reply

Hi Guys,

Sarah and Charles have requested some additional assistance. Can anybody help them out this afternoon?

02/27/13 9:39AM

Comment



Sara Wilkins 02/27/13 10:23AM

I've got everything under control now. If Charles needs some help I'll be available later this afternoon.



Charles Walker 02/27/13 10:23AM

Nope- I'm all set. Thanks though.

New Advisor added to team: Sarah Patel



Charles Walker

Reply

I've taken some time to compile the warehouse layouts in Sioux Falls and Edgartown, If any body would like to reference them they can be found [here](#)

The DM would like to reference the team conference wall to view the progress/updates of the team. Here team members post comments/data/attachments, and other members reply with additional materials. Members from outside teams/advisors can also view and post on a team wall. Team related updates such as member additions and monitoring report assessments will appear regularly.

Procurement, Logistics, Distribution

Back



TM: Abe Copple

CONFERENCE POSTS

Search Posts



Post

Rich text editor toolbar with options: Bold (A), Italic (A), Underline (A), Strikethrough (A), Font, Size, Link, Image. Below the toolbar is a large text area and buttons for Post and Cancel.



Gary Shandling **TM** (Marketing, Sales, and Customer Accounts)



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Charles Walker 02/27/13 10:23AM



None- I'm all set. Thanks though

The DM would like to post something on this team wall. They have the option to post links, photos and documents as well as comments.

Procurement, Logistics, Distribution [Back](#)



TM: Abe Copple

CONFERENCE POSTS

Search Posts

[Post](#)



Juan Davis **DM**

[Edit](#)

Hi Everybody,

I just want to stress the importance of the last round of notes on the monitoring report. It's imperative that you respond as soon as possible and take the appropriate actions. Please make sure to look them over and reply to me or your team manager with any questions or concerns. Thanks.

03/01/13 9:14AM

[Comment](#)



Gary Shandling **TM** (Marketing, Sales, and Customer Accounts)

[Reply](#)

Hello All,

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02/28/13 6:39PM

[Comment](#)

Monitoring Report has been assessed as of 2/27/13 12:15PM; please review updates

[Message](#)

Select Member(s):

[Human Resource Management](#)

Jim Daniels

Laura Hendricks

Don Draper

Sheryl Shapiro

[Hurvin Anderson](#)

Jim Dine

[Technology and Process Development](#)

[Operations](#)

[Procurement, Logistics, Distribution](#)

[General Management and Infrastructure](#)

[Customer and After Sales Service](#)

[Product and/or Service Development](#)



Abe Copple **TM**

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02/27/13 9:39AM



Sara Wilkins 02/27/13 10:23AM

I've got everything under control now this afternoon.



Charles Walker 02/27/13 10:23AM

The DM would like to message a member of the HR team. They click the messenger tab and select the team(s)/member(s) they would like to send a message to. after they've made their selections a chat box will open.

Procurement, Logistics, Distribution

Back



TM: Abe Copple

CONFERENCE POSTS

Search Posts



Post



Juan Davis **DM**

Reply

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02/27/13 9:39AM

Comment



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I've got everything under control now. If Charles needs some help I'll be available later this afternoon.



Charles Walker

Nope- I'm all set. Thanks though.

Juan: Hey Hurvin

Hurvin: Hey Juan, what's up?

Juan: Have you filled out the procurement stuff I sent over last week?

The DM messages the selected member. A reference tab for the chat will remain on the screen until the DM closes it or closes the program.