



# ibi Golden Summit

## Data Visualization

Porter Thorndike & Alex Homer

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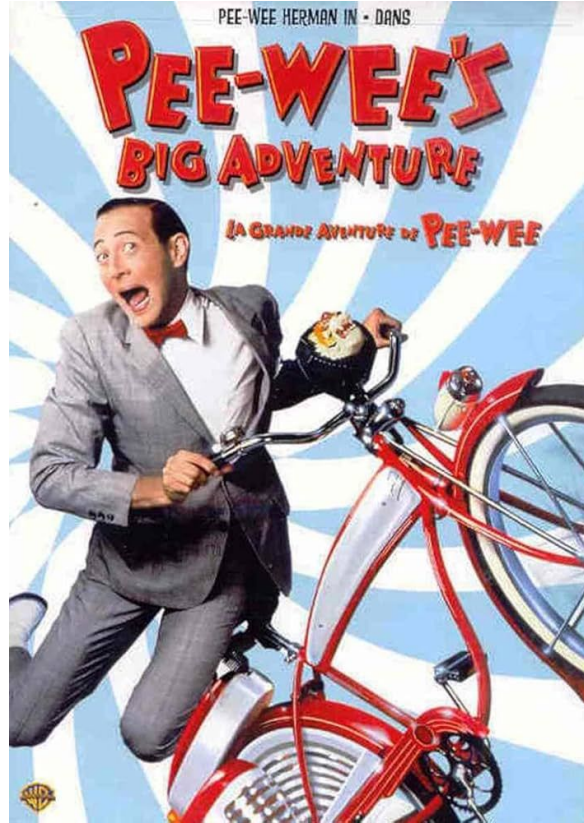
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# TWINS



# THE STORY OF STEPHANIE'S MONEY

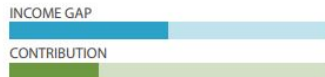
## FALL 2020

275K ACCOUNT BALANCE



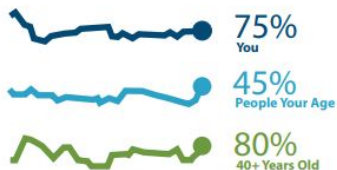
### ARE YOU ON TRACK?

Great job this quarter! You are on track to produce income that meets 85% of your goal. Remember you can easily adjust your strategy from conservative to aggressive.



### YOUR BENCHMARKS

You are currently on track to reach your retirement goal with a current performance of 75%. In general other people your age have reached 45% of their annual goal.



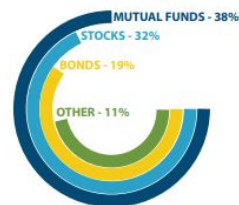
### TOP POSITIONS

Mastercard and China Unicorn made significant gains with increases of 300K and 450K respectively while GE and Nike reported losses of nearly 100K each.



### ASSET ALLOCATION

You have a well diversified portfolio with largest allocations currently in Mutual Funds of 38% and Stocks at 32%. Remaining allocations exist in Bonds of 19% and Other at 11%.



### HOLDINGS BY EXCHANGE

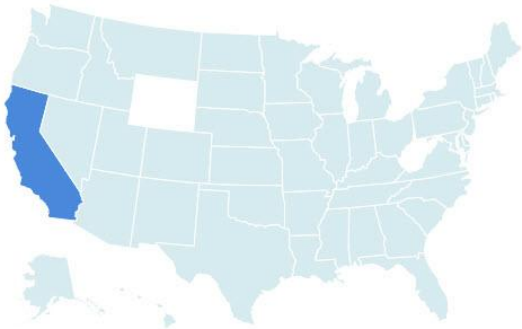
Your holdings are distributed between:

1. Tokyo Stock Exchange (82K)
2. New York Stock Exchange (63K)
3. Bombay Stock Exchange (43K)
4. London Stock Exchange (27K)



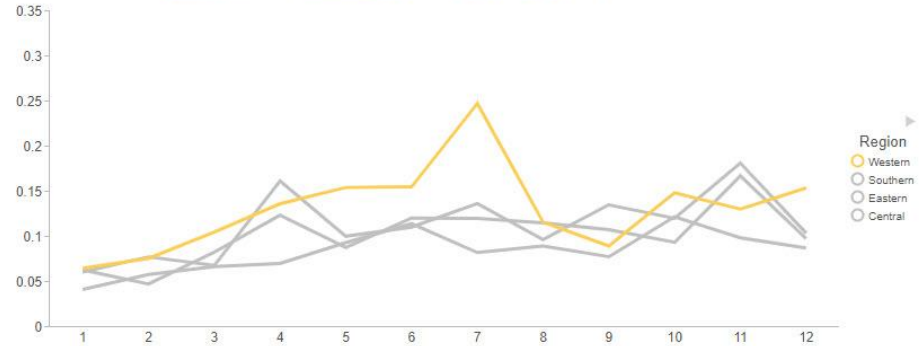
Where is the most activity?

California has a **213%** increase in **Lead activity**



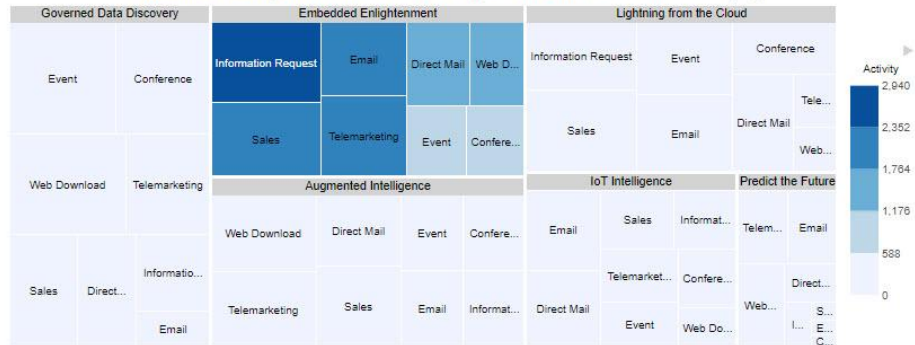
Where are Events most successful?

Event Marketing **Attendance** in the **West** is **59%** higher than other Areas



What is the most effective Campaign?

Embedded Enlightenment has a **78%** higher **Click Rate** than other Campaigns



Where is the most website activity?

Canada has a **76%** increase in **Website activity**



Sales (QTD)

181M

-3% Date Year



Opportunities In Closing

155.7

-3% Date Year



Forecasted (Commit)

206M

+0% Date Year



Forecast (Swing)

267.7M

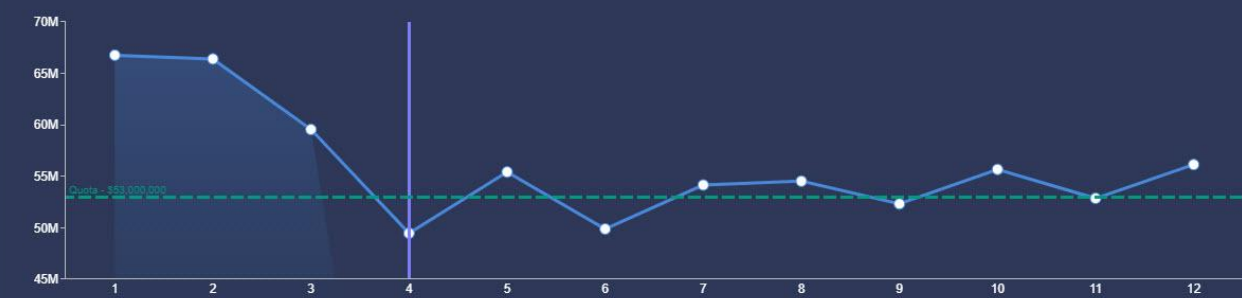
+0% Date Year



### Forecast by Region

Region	1. Qualification	2. Present Solution	3. Technical Fit	4. Closing	5. Deal
Canada	\$10,663,010	\$3,596,665	\$2,887,975	\$2,365,338	\$1,491,050
Central	\$68,237,880	\$20,781,053	\$17,530,903	\$11,935,015	\$10,285,753
Eastern	\$86,486,868	\$30,194,173	\$25,728,093	\$17,156,248	\$15,531,985
Southern	\$65,149,725	\$23,299,660	\$19,930,483	\$15,228,705	\$11,061,318
Western	\$65,073,128	\$20,021,538	\$18,933,895	\$13,029,465	\$13,136,340
TOTAL	\$295,610,610	\$97,893,088	\$85,011,348	\$59,714,770	\$51,506,445

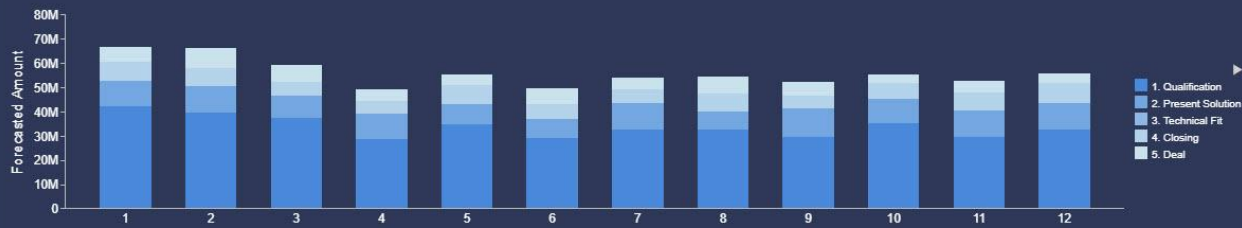
### Achievement vs Quota



### Opportunity Funnel



### Forecasted Amount by Opportunity Stage

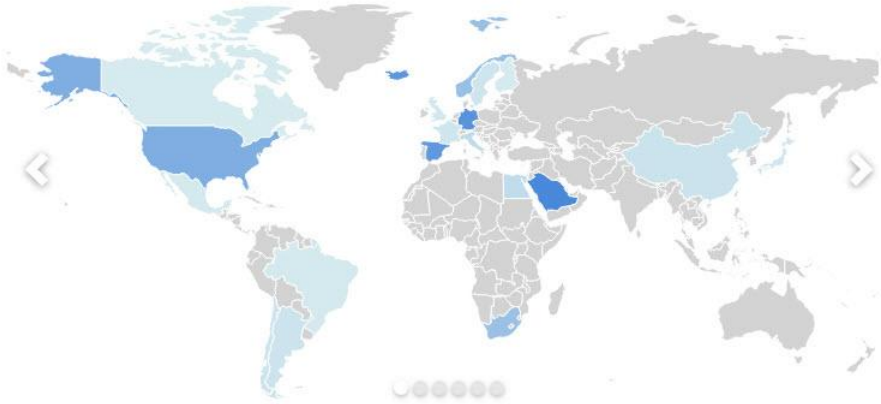




### Global Strategy

795M

Holdings by Country



### Fund Category Performance

7.29%

Average Return



### Fees

9.3M

Year to Date



### Assets Under Management

1.1B

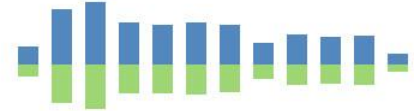
Year to Date



### Money Movement

14.87%

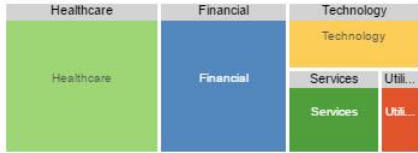
Positive Cashflow



### Sector Performance

113%

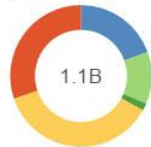
Average Return



### Asset Allocation

\$1.1B

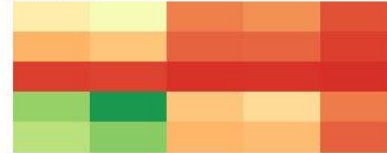
Assets Under Management



### Morningstar Style Box

439.2M

Average Investment



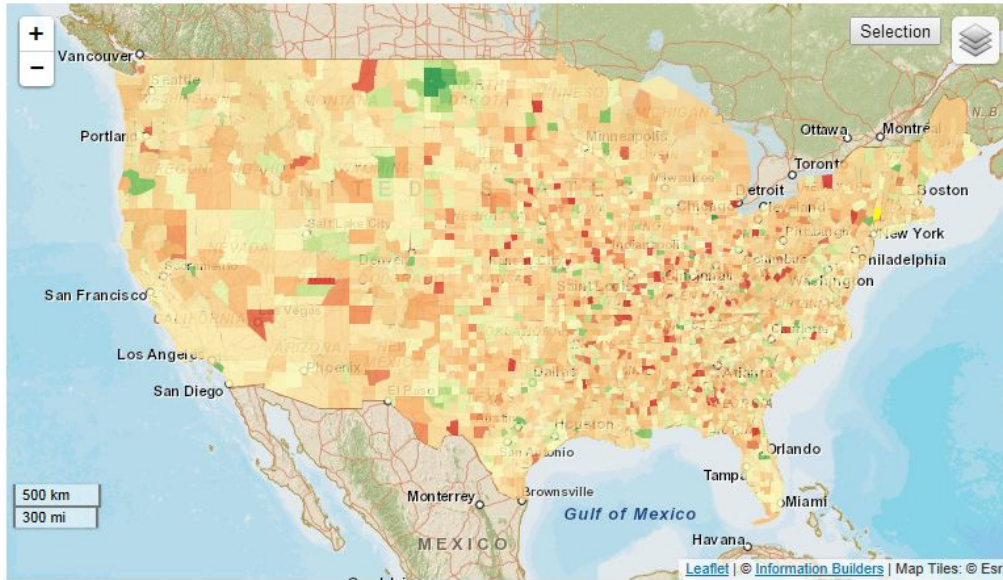
### Fund Hierarchy

7.38%

Average Return



# Population Change Rate by County (2013)



## Population Change Rate



## Net Migration Rate



## Natural Change Rate



## Population Density



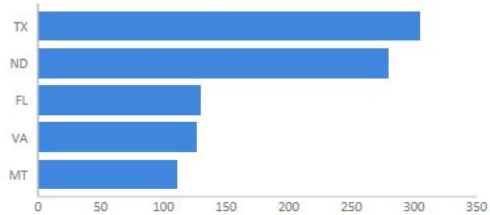
## Total Population



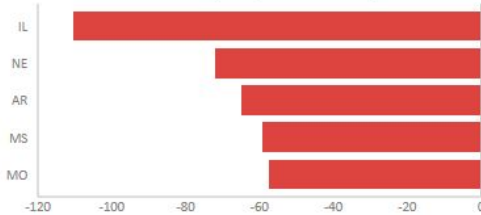
## State

- [All]
- AL
- AR
- AZ
- CA
- CO
- CT
- DC
- DE
- FL
- GA

Top 5 States by Population Change Rate



Bottom 5 States by Population Change Rate



## Good Morning Paige, Your Recommended Meal Kit for Today is...

Your Store: Irvine, CA

### Southwestern Beef Tacos with Bell Pepper, Lime Crema, and Pepper Jack Cheese



NUTRITION | 810 Calories | 51 g Carbs | 39 g Protein | 10 g Sugar | 49 g Fat

What do we want from a taco? We want meat seasoned in warm and smoky spices. We want it to rain cheese, sour cream, jalapeño, and lime. We want the tortilla to exhale steam as we're reaching in for a big bite. These bad boys give us all of that, making this a bona fide taco-night triumph.

### Paige's Rewards Corner

Current Status FEB 01 20XX --- Jan 31 20XX

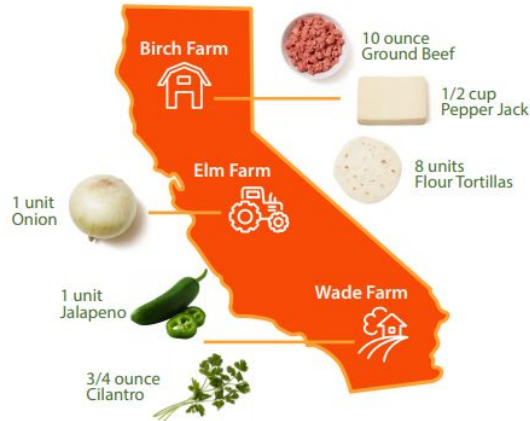
**SILVER STATUS - 40,750 Points**



**3** Exclusive Promotion(s) Available

**Earn Double Points if you pick up your next meal today!**  
Pick up at Your Store in Irvine for a 20% off discount  
Save on Eggs & Milk with your Meal Kit Purchase

## Fresh & Local Ingredients



## Why Should I Enroll?



Dietarily Diverse

**200**

Just buy groceries. With over 200 recipes we will recommend something delicious.



Simplicity

**50%**

Reclaim your evenings with pre-planned meals. Cut your shopping and prep time in half!



Cost Savings

**\$3.5K**

Start saving an average of \$3,500 annually by switching from eating out to a meal kit!



Eco-Friendly

**32**

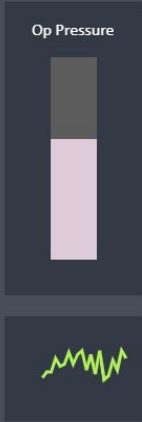
It's easy being green with recyclable materials. Produce 32 fewer bags of trash each year!

# Refrigerator IoT Analytics



### Key Unit Information

Unit: Refrigerator ID # 1133  
Warehouse: A  
Isle: 12  
Slot: 3  
Contents:  
1. Shrimp (50 Units)  
2. Lobster (46 Units)  
3. King Crab (54 Units)  
4. Scallops (47 Units)  
5. Salmon (43 Units)  
6. Tuna (52 Units)



### Legend

- Caution (Pink)
- Medium (Light Purple)
- Optimal (Cyan)

Trend Last 5 Mins



### Cause

Refrigerator ID 1133 in Warehouse A Isle 12 Slot 3 needs maintenance because **Internal Fan is Off**, **Compressor Temp is 360°**, **Energy Consumption is greater than 50 kWh**, and **Condenser Temp is greater than 30°**. This resulted in a **Fail Probability of 65%**.

- ### Prescription
- Replace internal fan with Part # F6Z392Q1
  - Check condenser housing enclosure
  - Verify temperature is within optimal range

- ### Actions Taken
- Slack alert sent to floor technician John Fey
  - Text alert sent to floor supervisor Mike Scott
  - Slack alert sent to parts manager Jane Anne



### Product Shortage Antihistamine

Pollen counts predicted to spike



### Inspection Delay 24-36 Hours

Estimated delay of delivery



### Shipping Delay 1-2 Weeks

Affects 7 Categories of Food



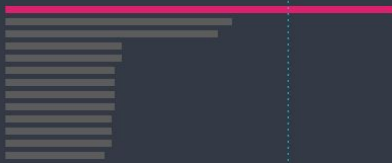
### Product Recall Romaine Lettuce

California FDA found E-Coli



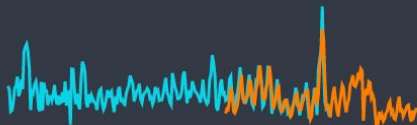
### Refrigeration Fail % 80%

Threshold for preventative maintenance



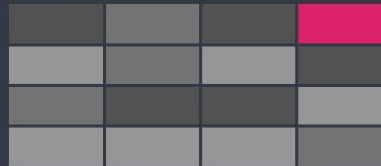
### Demand Forecast 12.7%

Higher than previous period



### Item Location Error Aisle A17

Heavy item at risk for damage



### Demand Variation -48.9%

Compared to forecast



### Available Capacity 9.4%

Below desired threshold of 15%



### Co-Mingled Locations 16.32%

Above desired threshold



### New Product Demand Southwestern Beef Tacos

Meal Kit outperforming forecast by 78%



### Product Forecast Error 24.2%

Compared to forecasted amount





### Asset Allocation

#### Large Growth

Recommend re-balance



### Greatest Risk of Churn

#### Stephanie Quinn

73% risk of Churn



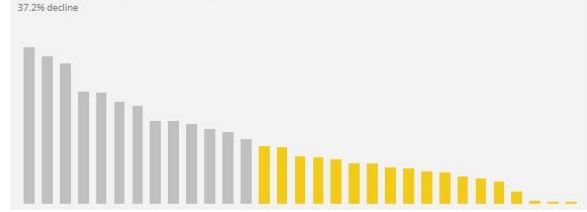
#### Likelihood of Churn



### Predicted Decline

#### US Treasury Securities

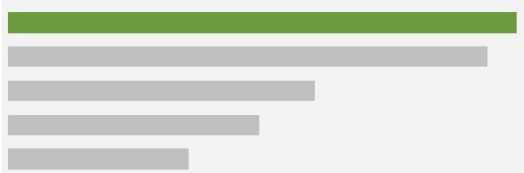
37.2% decline



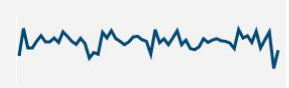
### Position of Interest

#### XOM Exxon Mobile Corp.

Based on recent news event



### Nike



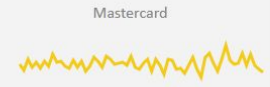
### General Electric



### China Unicom



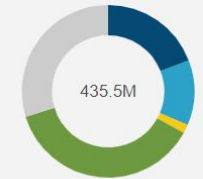
### Mastercard



### Asset Allocation

#### \$83,520,890

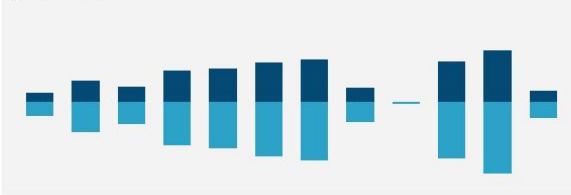
Total Market Value



### Money Movement

#### 5,240,041

Money In - Money out



### Holdings by Country

#### \$7,615,750

Total Market Value



### Revenue

#### \$1,492,305

Total Revenue

