Combo Benchmark Demonstration Manual

Welcome to this demonstration of Combo Benchmark

The benchmark software specially designed for **Trade Associations** and Advisory Companies who want to do benchmarking among members resp. clients efficiently and effectively.

All necessary benchmark functionality in one comprehensive online system to save you time, add more value and avoid annoyance in benchmark your members and clients.
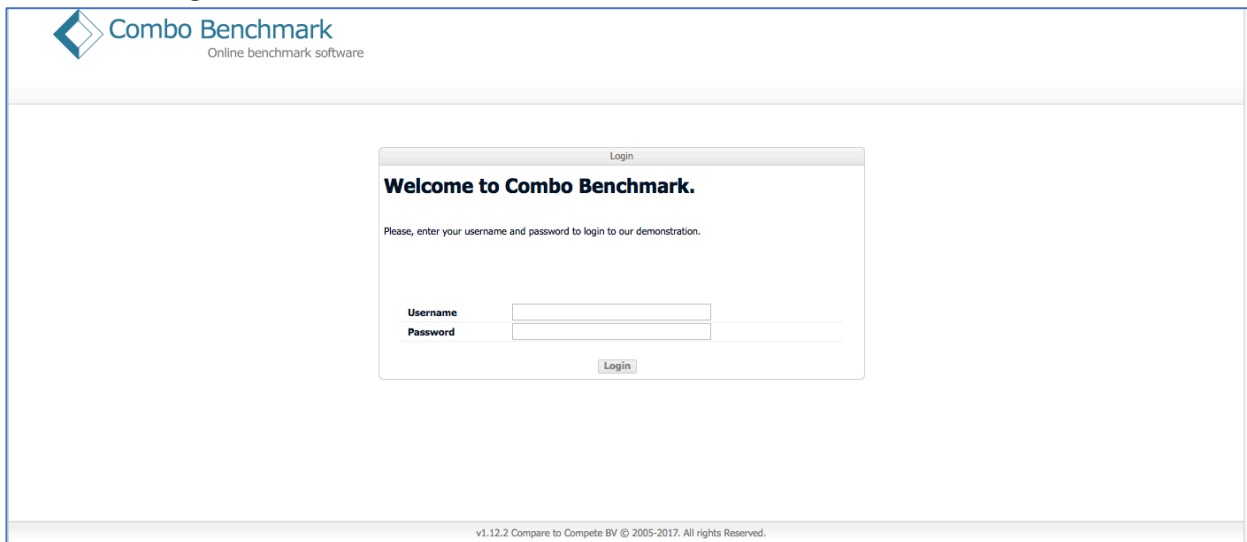
First you create or implement the benchmark in the system. In this demonstration this is already done for you. This includes the questionnaire, the workflow, the screens, the output/reports, the calculations, user roles, memberships and much more. Please request a personalized demonstration to see how easy a benchmark is setup.

After implementation of the benchmark, you can add participants (your members) and users (employees of participants). Users can login to the benchmark and submit data for a participant. This demonstration benchmark already includes participants and connected users.

You can login as a user of one of the participants using the login details provided you by email.

Login

Start on the login screen

Enter the username and password and click 'login'.

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You will arrive at the 'Home' screen of the benchmark. The first benchmark and participant have already been selected. For demonstration it is better to stay with these, but you are able to switch to another participant and/or benchmark if you are entitled to that (based on the rights of a user).

You can switch to another participant using this drop-down box.

You can switch benchmarks using this drop-down box.
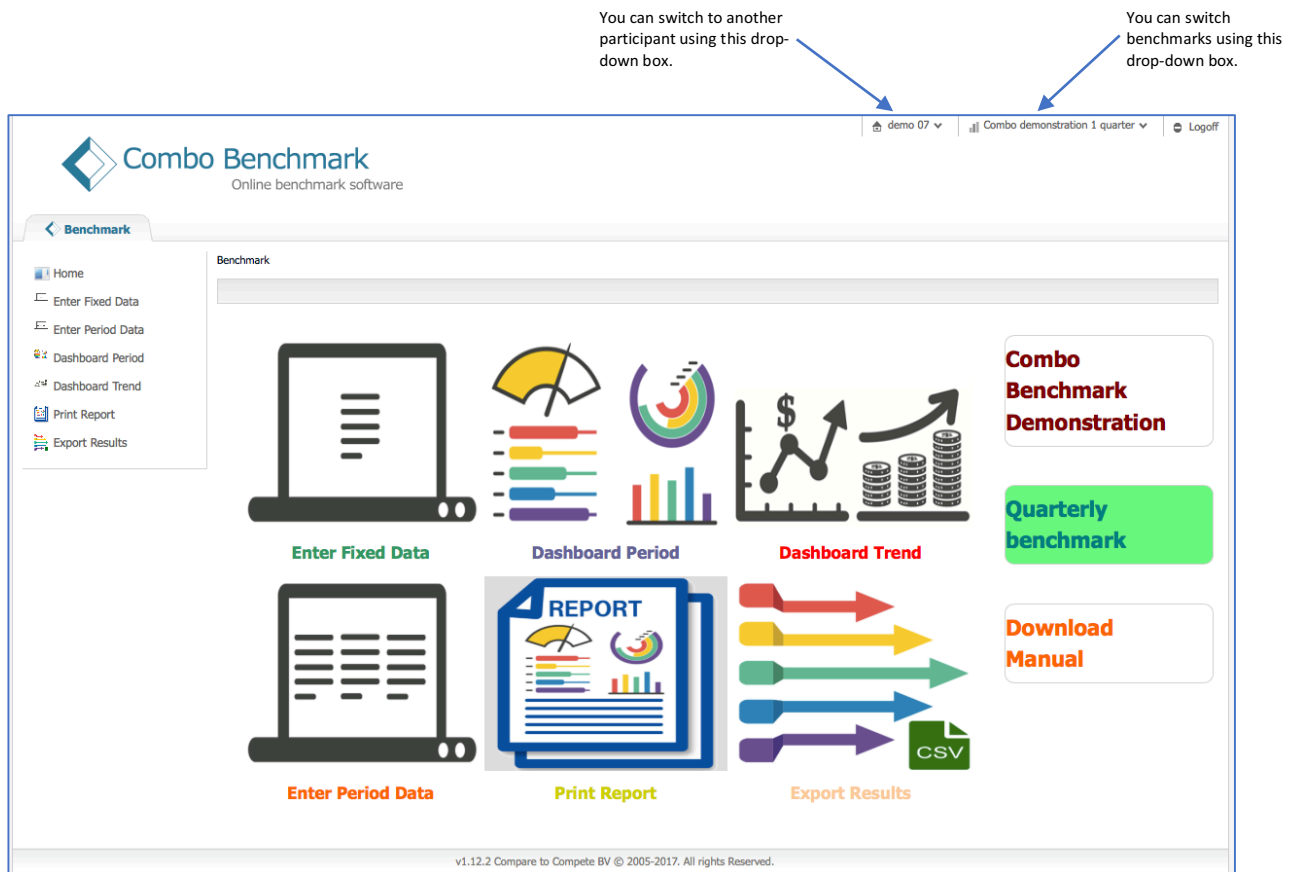
Data entry

In Combo Benchmark it is possible to have two kinds of data entry. The first is about fixed data. This is data which won't change so much over time, e.g. region of the participant's company, currency of data entry, etc.
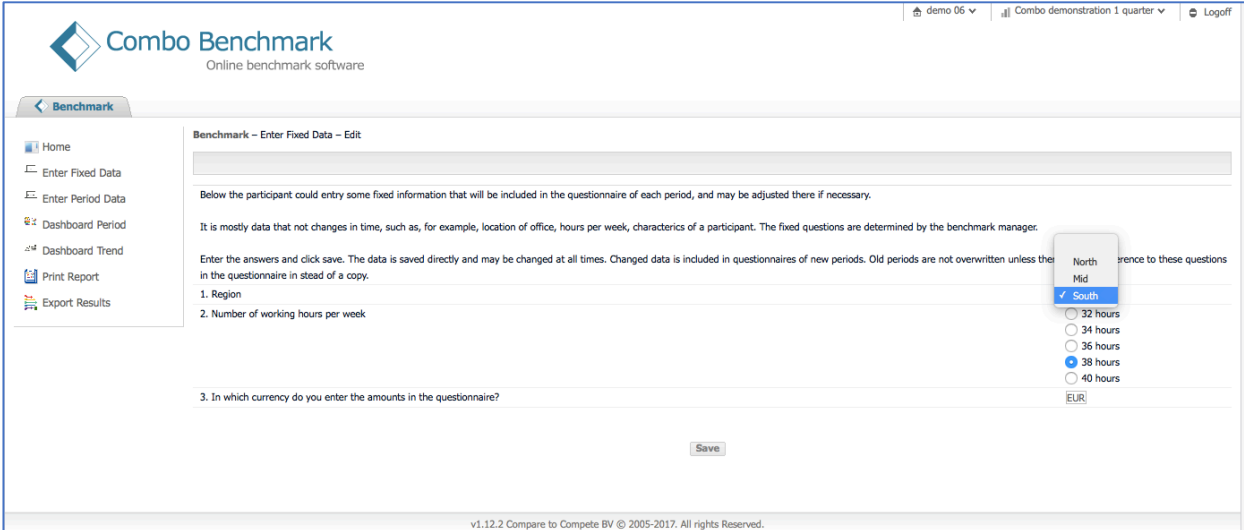The second one is about period data, which will mostly change from period to period. In Combo Benchmark several frequencies are possible, ranging from month, to quarter, half year and year. Also ad hoc frequencies are possible, like bi-annual.

For both kinds of data entry the benchmark manager sets up the questionnaire in the 'Management' part of Combo. Fixed data only has one page with questions, period data can have several questionnaires, and each questionnaire can have several pages with questions.

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Enter fixed data

Click on 'Enter Fixed Data' in the left side menu or on the button in the middle part of the screen. The fixed data questionnaire is opened directly.
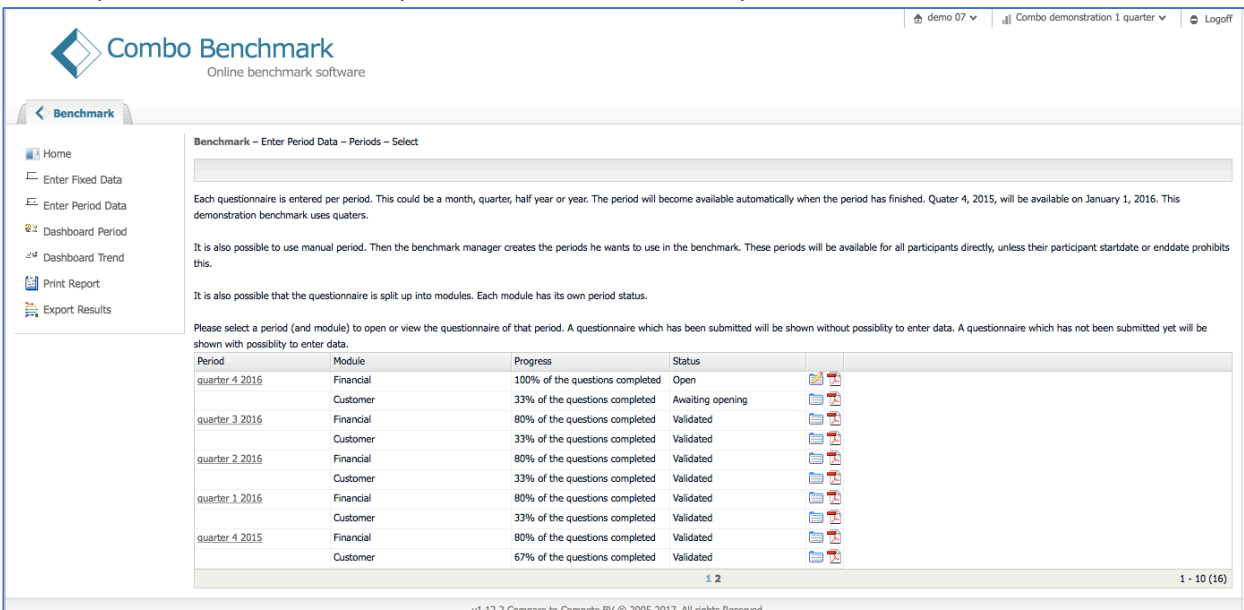

Earlier entered data is still available. And can be changed. Also in this demonstration.
Fixed data can be copied to the period data questionnaire (this is part of the setup) and so be used in the period data. This data is then copied during first opening of the questionnaire of a period. If the fixed data changes, then former periods won't be changed.
Fixed data can also be used to directly create reference groups. The benchmark manager decides how to use fixed data.

Just click 'save' after changing data. No validation rules apply to fixed data.

Enter period data

To enter period data click on 'Enter Period Data' in the left side menu or on the button in the middle part of the screen. The period data list screen is opened.

This demonstration benchmark consists of two questionnaires (or modules): Financial and Customer. Each can be entered and submitted independent of the other, but it is also possible
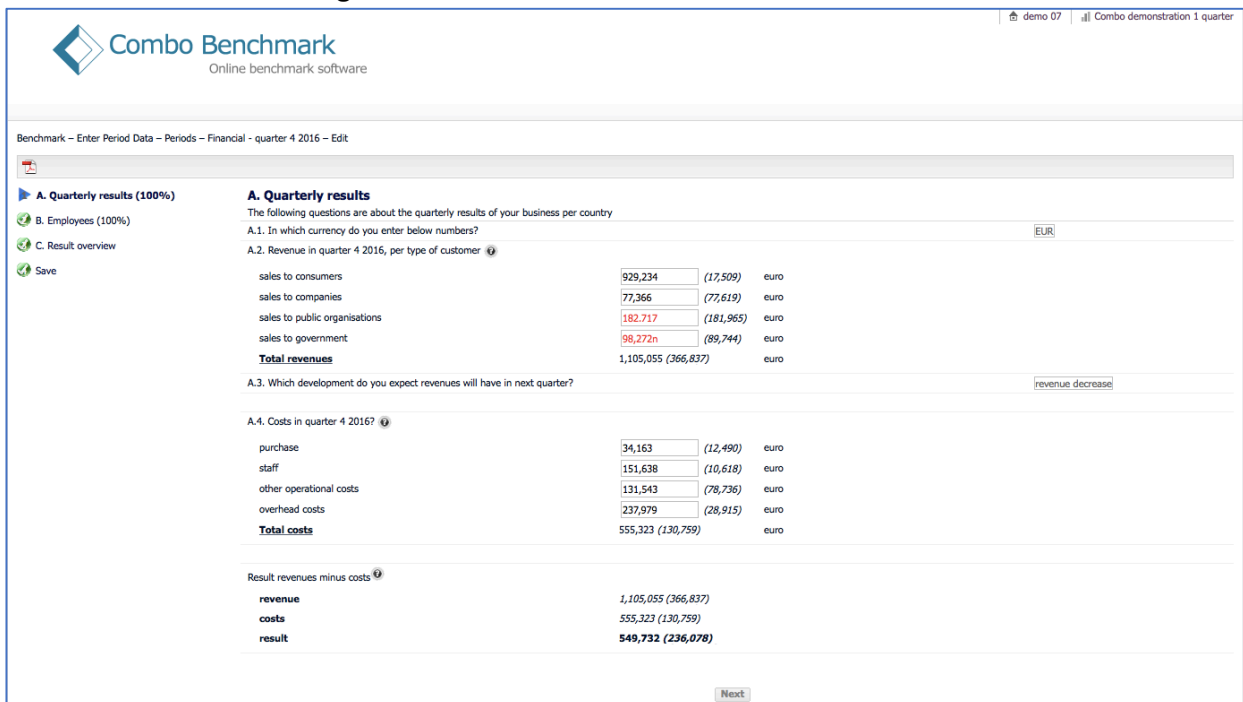
that the benchmark manager sets a condition on opening a questionnaire based on the status of another questionnaire. In above example, you see that the Customer questionnaire cannot be entered and is 'awaiting opening'. Only after finishing the Financial questionnaire, then the Customer questionnaire gets the status 'open' and can be entered.

When a questionnaire of a period has the status 'processing' or 'validated' then the questionnaire of that period has been submitted and is waiting to be validated resp. validated by the benchmark manager.

It is possible to get a pdf-print of a questionnaire, including already entered data, by clicking on the pdf-icon ( ) next to the questionnaire of a period. Clicking on a period which has not the status 'open' results in a view of the questionnaire. In that way it is always possible for a participant to see what they have entered earlier.
By clicking on a period with the status 'open' the participants opens the selected questionnaire and is able to enter data. Earlier entered data, while the questionnaire is not submitted, is still available and can be changed.
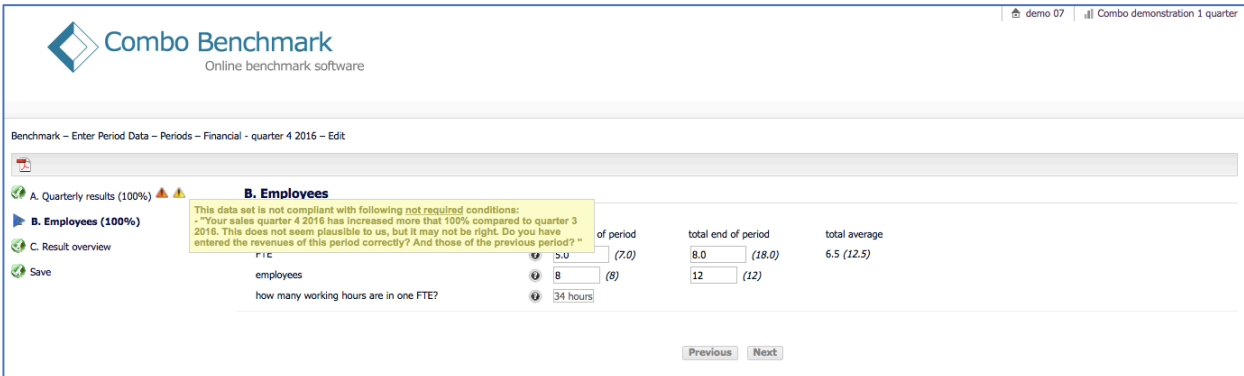

The participant enters the data for each question. It is possible that questions are available or enabled or required based on a condition, e.g. based on the results of another question or calculation.

Entered numerical data is shown red if the number is not possible, based on technical impossibilities (like a text in a number, e.g. '98,272n'), or based on not applying to minimum/maximum values and decimals, e.g. 182.717 has 3 decimals, while 0 is allowed. Numerical data of the previous period is shown next to the entry box, italic and between brackets. This helps the participant to enter the data for this period correctly.
Calculations are done directly on the screen, but can only be done on the background on variable which are not visible by the participant.

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By clicking on 'Next' or the page name in the menu the entered data is saved and validation rules are applied. If messages are applicable, a warning signal will be visible on the page which was just left. By mouse-over the participant can directly read the messages and if applicable return to the page and make corrections.
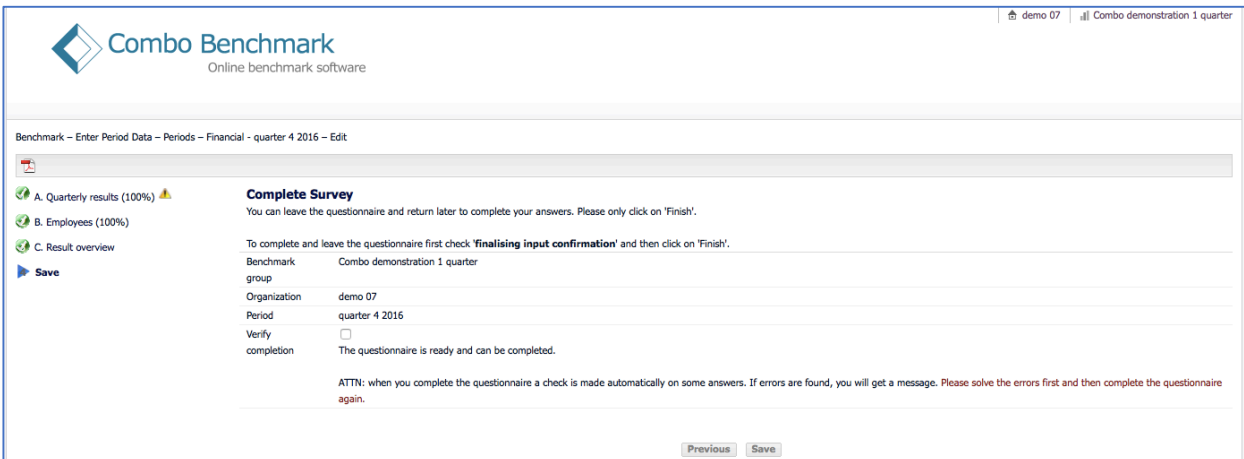

A red warning is a blocking warning. When the participant does not solve the issue, then the participant is not able to submit the questionnaire.
A yellow warning is just a warning. The participant can ignore this warning.

The benchmark manager can set validation rules to check the entered data. This is part of the implementation. The validation rules can range from very simple (e.g. 'a' must be higher than 'b'), to very complicated and conditional (e.g. when 'a' > X, then 'b' > Y, else when 'a'=X, then 'b'<Z, etc.).

When the participant has entered all pages, then the 'Save' page is the last page to enter.


The participant can only choose to check the 'verify completion' box. Then the data will be submitted to the benchmark manager (if no red errors are found any more). When not checked the questionnaire will stay 'open' and the participant can return later to finalize and submit.

Just as for the questionnaire the text of this screen is set by the benchmark manager.

After leaving the questionnaire the participant returns to the home-screen.

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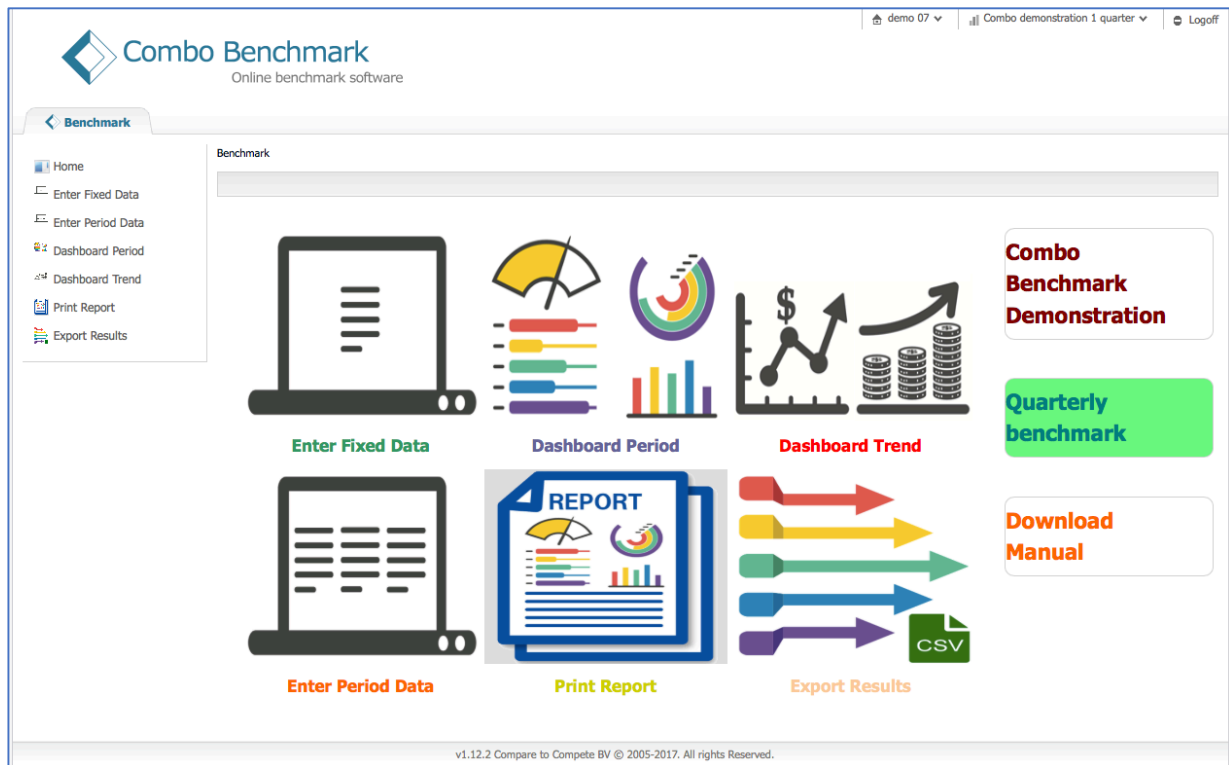
Output

Combo Benchmark has several ways to compare the results of a participant with that of the total group and relevant reference groups. All output needs to be defined by the benchmark manager.
The simplest way of output is 'Export results'. The most comprehensive way is 'Print Report'. In between it is possible to create several dashboards.
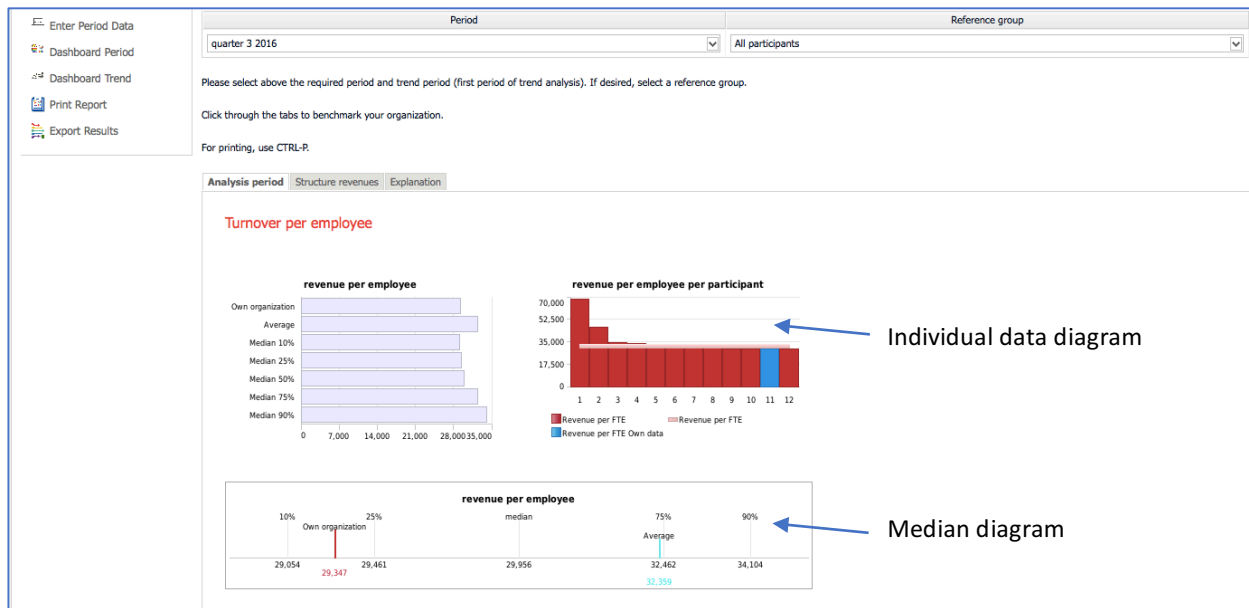
Dashboard period

In a dashboard the benchmark manager sets up a dashboard template with graphs, tables, text and pictures. It is possible to create several tabs with different information on it. It is also possible to use videos for additional explanation. Elements of the dashboard can be shown conditionally, based on realized results.

The participant selects 'Dashboard Period' to compare his results with that of the group. It is possible to select the period which the participant wants to analyze. And it is possible to select a reference group, which whom the participant wants to compare his results. It is also possible to select several reference groups together. Then the cross section of these reference groups is calculated as group values.
A reference group is a cross section of the total group of validated questionnaires, based on the same condition. E.g. same region, same number of employees (in groups), same level of revenue, etc.

The benchmark manager defines the conditions of the reference groups.

![Compare 2 Compete - Whitelabel benchmark software]

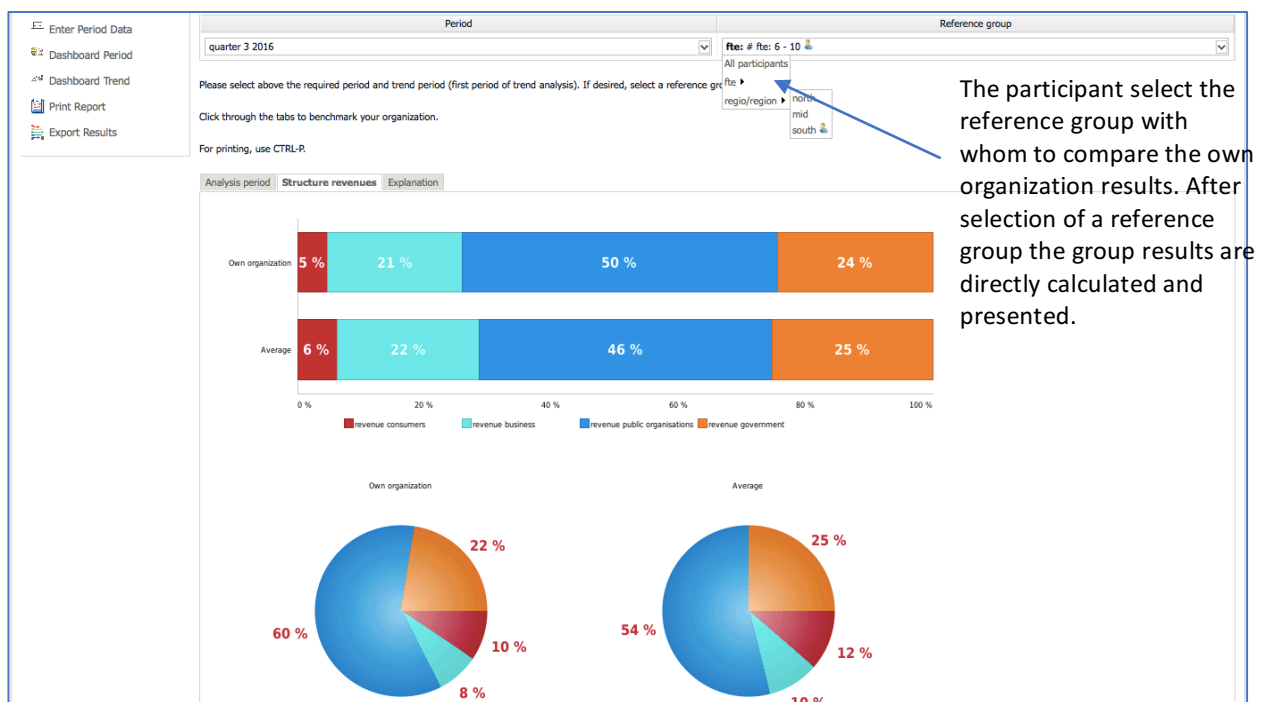# Combo Benchmark Demonstration Manual

Click on 'Dashboard Period' to open the dashboard. Select the required period. And select the required reference group. Without selection of reference group the group values are calculated for the total group of all participants.

Results of the own organization and of the selected group are directly shown on the screen.
Scroll down to see more results. And click on the other tabs to see more results.
Especially powerful is the median diagram. In this diagram the participants sees directly how he performs against the group. His position within the group is directly visible.
Also powerful is the individual data diagram. In this diagram all individual values of participants are shown, highlighting the own participants value. The presenting order can be defined by the benchmark manager.
Both graphs help the participant to analyze the results and to see improvement potential.

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In Dashboard is it possible to show one period and (if implemented) a comparing period. It is only possible to compare with one reference group at the same time.
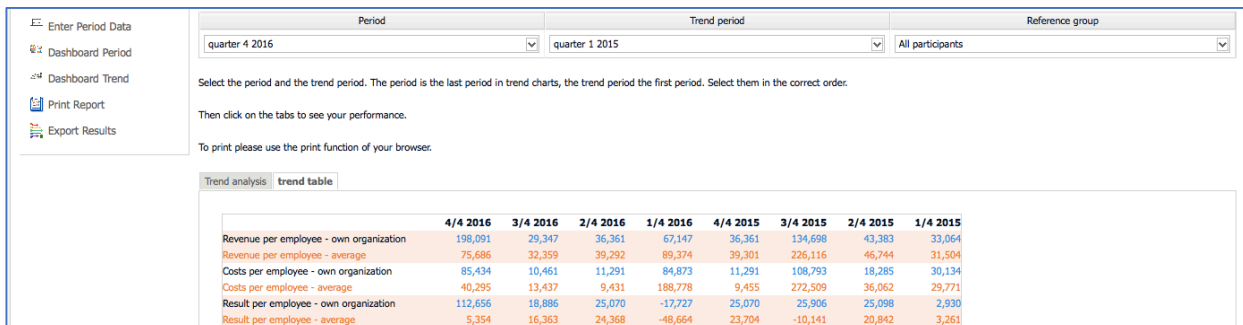It is very easy for a participant to switch to different periods and/or reference groups.

Dashboard trend

It is also possible to have a trend dashboard. In this dashboard the participant can see his results and the group results over a range of periods, from starting to ending period.
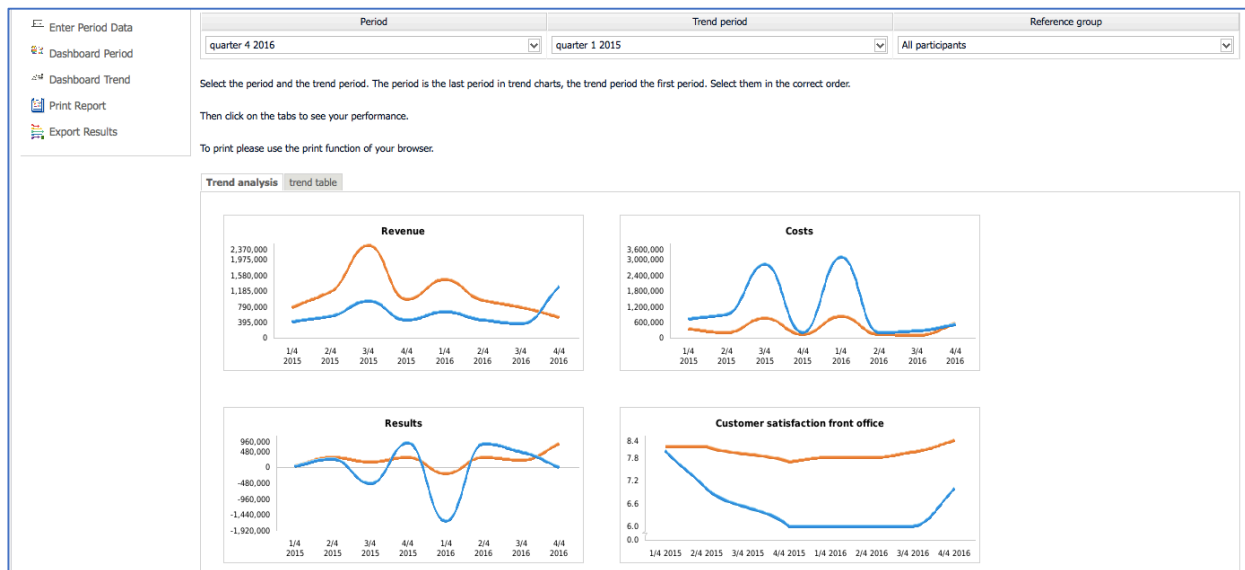
Click on 'Dashboard Trend' to open the dashboard. Select the required period and trend period. The trend period is the starting period of the trend analysis. And select the required reference group. Without selection of reference group the group values are calculated for the total group of all participants.

Results of the own organization and of the selected group are directly shown on the screen. Scroll down to see more results. And click on the other tabs to see more results, e.g. a trend table.

As said, the benchmark manager defines the content of the dashboard in the 'Management' part of Combo. The participant only selects the period(s) and reference group to compare with.
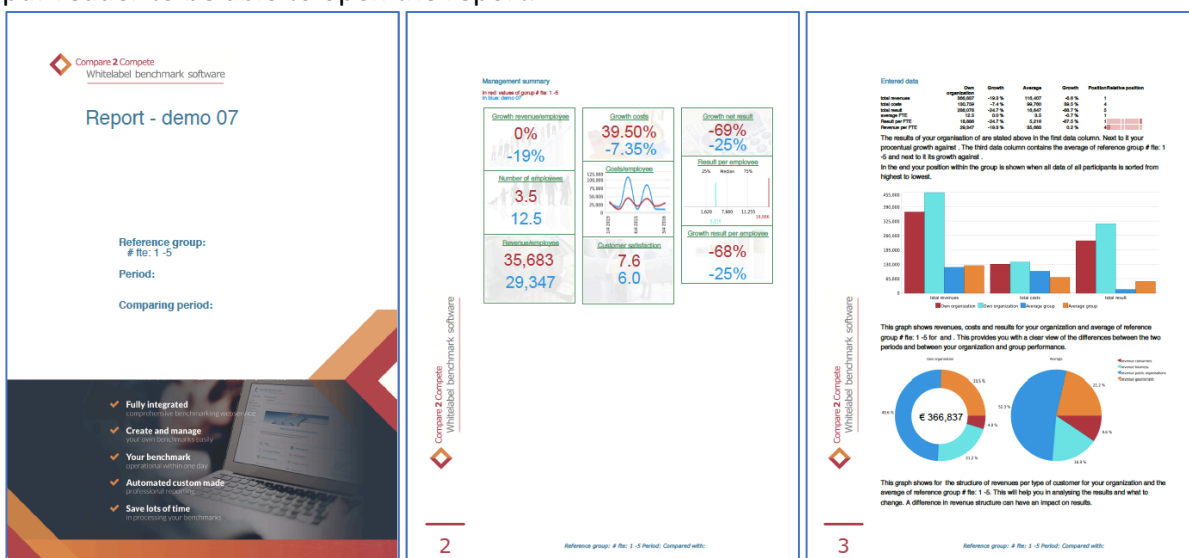
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Print report

Use 'Print Report' to select a report, period and reference group and create a comprehensive pdf-report.

The participant doesn't really create the report. Just as a dashboard, the benchmark manager creates a report template, which the participant only selects and generates.

It is possible to provide the participant with several reports, each with different information. The participant selects the report of his choice (in this demonstration there is only one report). For each report the participant selects the period(s) and reference group(s). Then click 'Next' to generate the report. Download the report when generation is ready. It is necessary to have a pdf-reader to be able to open the report.

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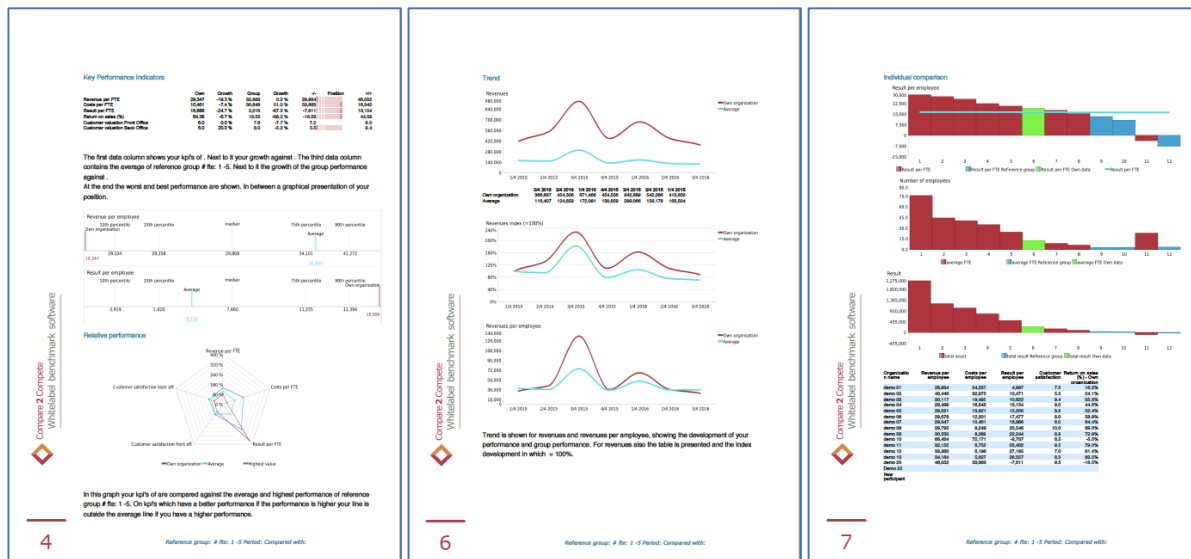
In a report the benchmark manager sets up a report template with graphs, tables, text and pictures. A report can contain many pages. Elements of the report can be shown conditionally, based on realized results. It is possible to show results of more than one period in the report. It is also possible to show results of more than one reference group.

Export results

The simplest way to present results to the participants is 'Export Results'.

Export results is also a way to view results on screen. Results are only numerical, ready to export to CSV (Excel).

Select the view, period, group and reference group. After each selection the results are recalculated and presented. Click on the 'Export to CSV' icon (📊) to export the presented results to CSV.

Compare 2 Compete
Whitelabel benchmark software

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In this output option it is also possible to show more information of other participants. This is the decision of the benchmark manager. The benchmark manager can set the benchmark to 'discrete', 'internal closed' or 'internal open'. In the discrete version, no data of other participants is shown in this screen. In the internal closed version, data of the participants in the selected reference group is shown, for each variable from worst to best value, without showing participants names. In the internal open version, data of each participant in shown in separate columns.

White label

This is a demonstration of Combo Benchmark. This online benchmark software is available for trade associations and advisory companies to organize and manage benchmarks for their members/clients. And it is white label available in your own look and feel.
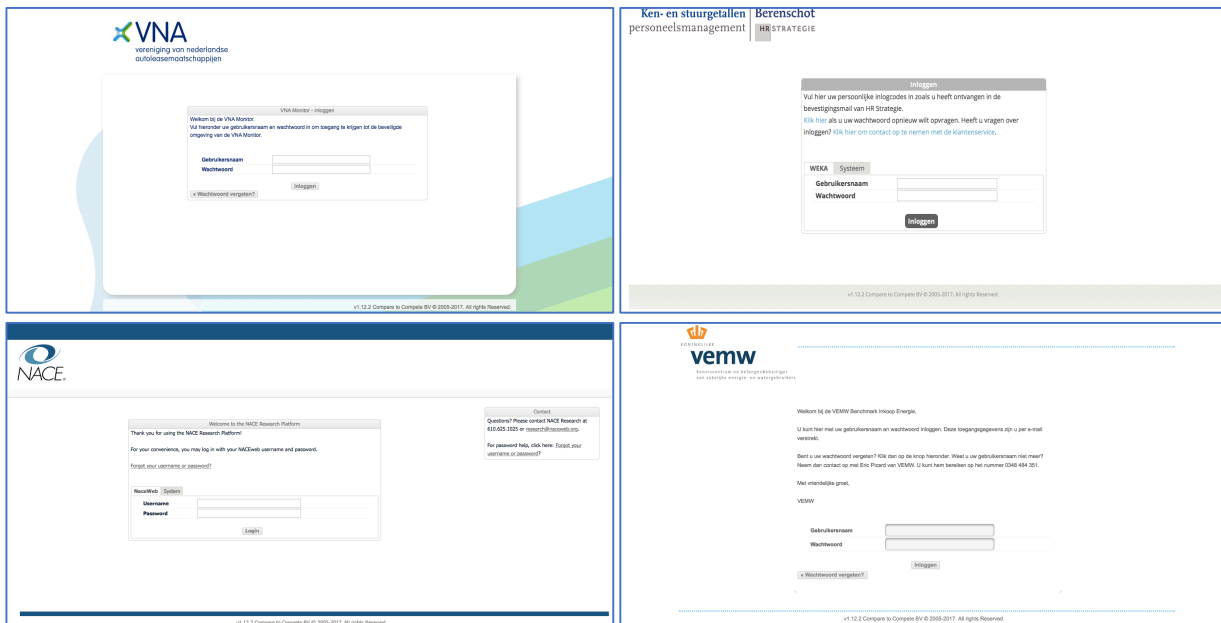
It is also possible to connect Combo Benchmark to your AMS, so you can manage the rights of users in your AMS and these rights are checked during login of the user. A single sign on is even possible, then the user only logs in to your intranet and has direct access to our system.

Personalized demonstration

This demonstration only shows some standard features of Combo Benchmark. Our benchmark software is very comprehensive and has much more functionality than can be shown in this demonstration. This includes mainly benchmark manager functionality, like validation, sending emails, export all data and results, statistics of usage by participants and total implementation.
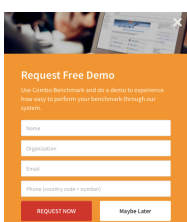
It is possible to request a personalized demonstration. Just go to our website https://www.compare2compete.com/en/ and hit the 'Personalized demo' button. Enter your details in the popup screen and click on 'request now' and we will contact you as soon as possible to discuss your benchmark requirements.

A personalized demonstration is the perfect way to see all advantages of Combo.