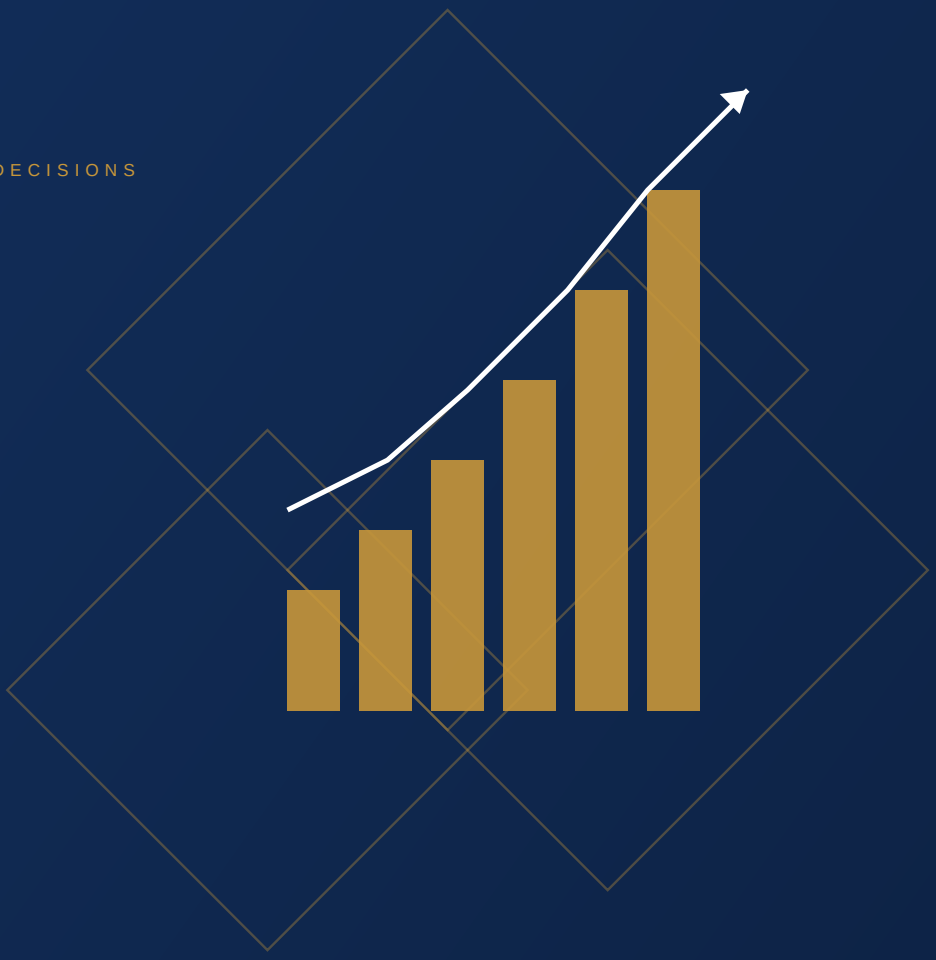
Dawgen GLOBAL

SMARTER AND MORE EFFECTIVE DECISIONS



GROWTH & RECOVERY · FINANCE & BPO

CARIMETRIX–CARIVANCE™

Performance Measurement and Improvement

Dawgen Global's proprietary system for measuring what matters, fixing what falls short and making the gains last.

THE CHALLENGE

Most organisations measure performance. Few measure it in ways that change decisions.

Board packs grow thicker, dashboards multiply and improvement projects are launched every year, yet results stall. The problem is rarely effort. It is the absence of a disciplined system that links strategy, measurement and improvement into one loop.

Six patterns we see across the region

Strategy says one thing, the scorecard another

Plans promise customer focus and resilience; the board pack remains almost entirely financial.

Too many measures, too few decisions

Dozens of indicators, inconsistent definitions, and figures that two departments report differently.

Results arrive too late to act

Lagging measures reported weeks after period end, with no leading indicators to warn of trouble.

Improvement by initiative

Projects launched, few finished, benefits rarely verified by Finance and seldom visible in results.

Gains that fade

Improvements slip back within months because no one owns the process or monitors the controls.

Appraisals detached from results

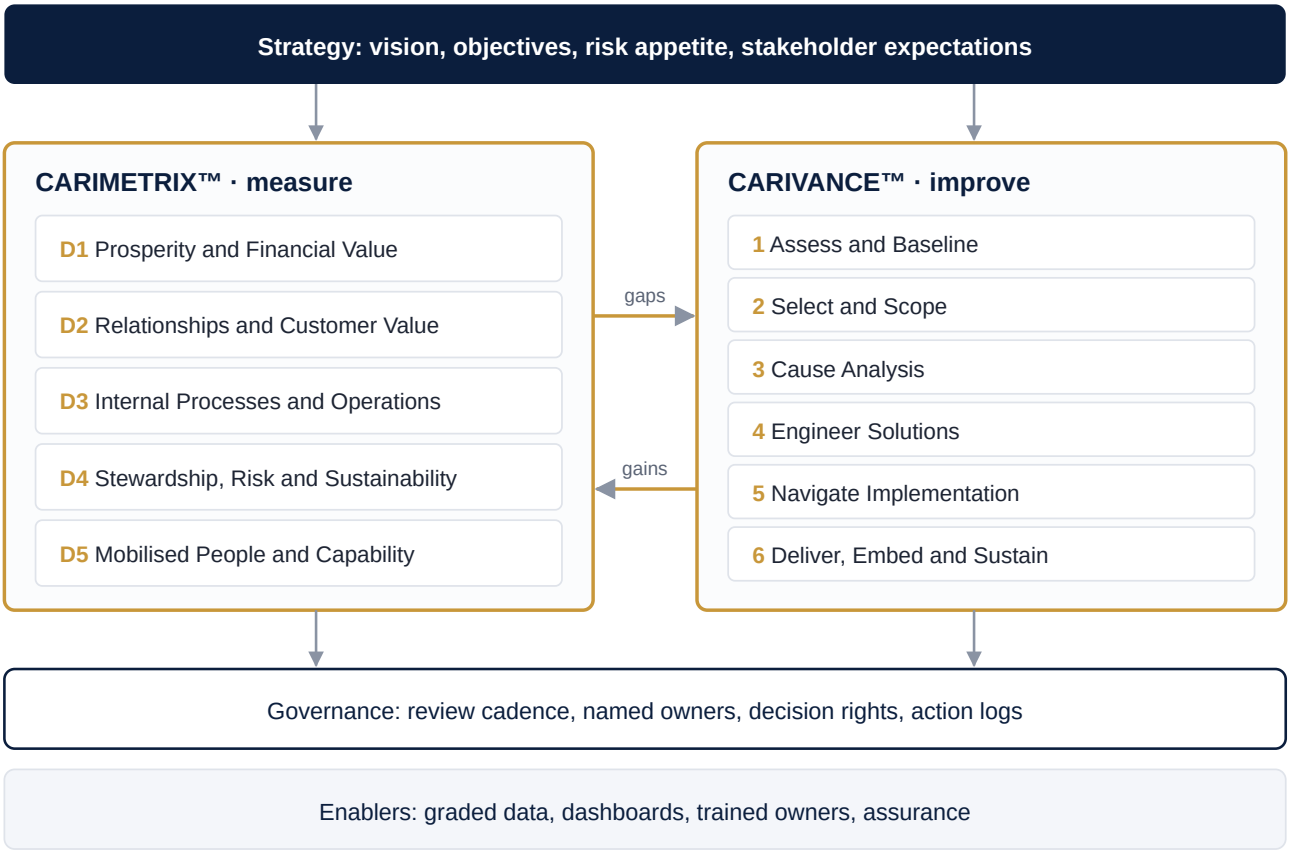
Individual objectives bear little relation to enterprise performance, so effort and reward drift apart.

Why it matters more in the Caribbean. Small markets leave little room for error. Lean management teams, multi-territory groups, rising regulatory and accountability demands, and exposure to climate and economic shocks all raise the cost of measuring the wrong things, or measuring the right things too late.

THE SYSTEM AT A GLANCE

One closed loop: measure, improve, sustain

CARIMETRIX™ shows leadership where performance stands and why it matters. CARIVANCE™ turns the gaps it reveals into funded, owned and verified improvements. Governance and enablers keep the loop running, year after year.



The CARIMETRIX–CARIVANCE™ architecture.

Strategy first

Every measure traces to an objective; measures without an owner or a decision are retired.

Evidence before action

No improvement starts without a baseline, and none closes without verified, sustained results.

Built for the region

Designed for thin data, lean teams, multi-territory groups and exposure to shocks.

Five dimensions. Eight build steps. One scorecard the board can act on.

CARIMETRIX balances financial results with the customer, process, stewardship and people drivers that produce them. A typical enterprise scorecard holds 15 to 25 decision-grade measures, each defined on a single KPI card with an owner, formula, thresholds and a visible data quality grade.

D1
Prosperity & Financial Value
Growth, margin, cost, cash and capital efficiency, value for money

D2
Relationships & Customer Value
Acquisition, retention, experience, service quality, stakeholder trust

D3
Internal Processes
Cycle time, right first time, cost to serve, asset use, digital adoption

D4
Stewardship, Risk & Sustainability
Governance, compliance, risk within appetite, resilience, ESG

D5
Mobilised People & Capability
Talent, engagement, productivity, succession, data and technology

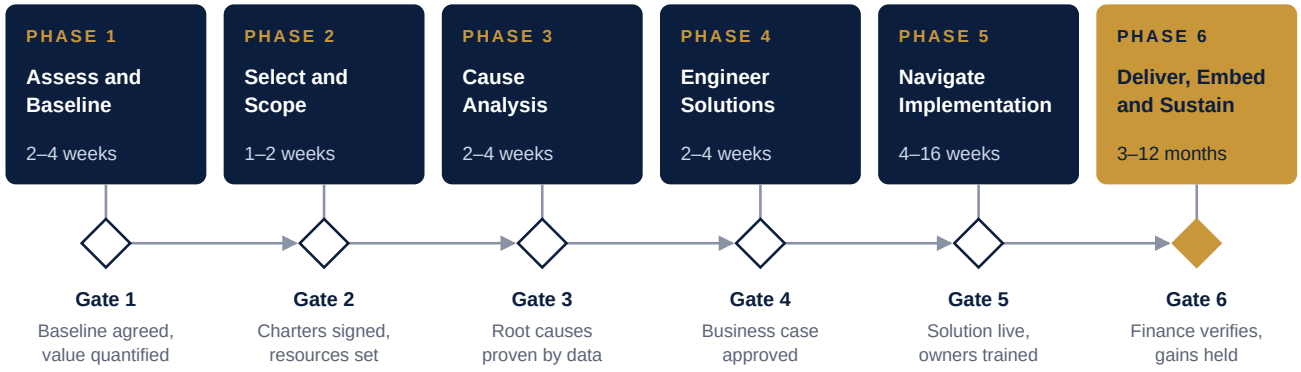
How we build it

Step	What happens	You receive
M1	Executive and board interviews; review of current reports and measures	Strategic Clarity Brief; measurement health check
M2	Strategy translated into 12–20 objectives with cause-and-effect links	CARIMETRIX Strategy Map
M3	Candidate measures tested against seven selection tests	Draft scorecard, leading and lagging balanced
M4	Every measure defined: formula, source, owner, thresholds, counter-measure	KPI Dictionary
M5	Baselines established; targets set by documented method	Baseline and Targets Register
M6	Data flows mapped and graded; dashboards and board pack designed	Dashboard suite; board pack template
M7	Enterprise scorecard cascaded to divisions, processes and teams	Cascaded scorecards
M8	Review cadence installed; two parallel cycles; owners trained	Performance Governance Charter

The CARIMETRIX Index. Measures are scored 0–100 against their thresholds, rolled up into five dimension scores and a single weighted index reported to the board each quarter, always alongside the trend and the data quality grade behind it.

Six phases. Six gates. Benefits that Finance can verify.

CARIVANCE draws on Lean, Six Sigma, theory of constraints and benefits realisation management, adapted for lean Caribbean teams. Every phase ends at a formal gate, and no financial benefit is counted until Finance confirms it and the gains have held.



CARIVANCE phases and stage gates. Durations indicative per improvement wave.

What makes CARIVANCE different

- Root causes proven with data before any solution is chosen
- Every initiative valued in money terms and prioritised on value, ease, speed, fit and risk
- Waves of three to seven initiatives, so projects finish
- Change management, training and control plans built in
- Sustainment checks at 3, 6 and 12 months

How benefits are counted

- Financial benefits signed off by Finance, not the project team
- Classified as cash-releasing, non-cash or risk reduction
- One benefits register prevents double counting
- Capacity freed counts only when redeployed or removed
- The CARIMETRIX scorecard is the final test

HOW WE WORK WITH YOU

Five service modules, taken individually or as one integrated programme

1 **Performance Diagnostic**

Maturity assessment, measurement health check, value-at-stake estimate and priority recommendations. Typically 3–5 weeks.

2 **CARIMETRIX Scorecard Build**

Strategy map, scorecards, KPI Dictionary, targets, dashboards and governance charter (Steps M1–M8). Typically 8–14 weeks.

3 **CARIVANCE Improvement Wave**

Three to seven initiatives taken through all six phases to verified benefits. Typically 12–24 weeks, plus sustainment monitoring.

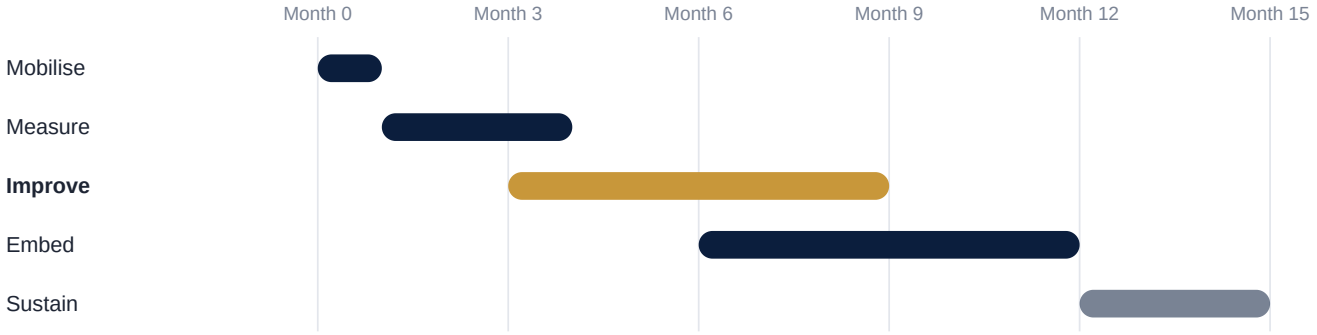
4 **Performance Reporting as a Service**

Monthly scorecard production, board packs and commentary support, delivered through our Finance & BPO practice.

5 **Assurance over Performance Information**

Independent review of KPI data, definitions and published performance statements.

The integrated programme



Indicative programme: measurement live by month 4; first verified gains by month 9.

Our delivery commitment. Dawgen Global owns delivery and sees each module through to completion, then trains your team to run the system. Scope is confirmed through the diagnostic before any fixed-fee commitment, and the project team is sized to meet your deadlines. Fees are customised to each client's circumstances and agreed deliverables.

WHO IT IS FOR

Built for the organisations that carry the Caribbean economy

Sector	Examples of what CARIMETRIX–CARIVANCE measures and improves
Banks, credit unions, microfinance	Cost-to-income, loan turnaround, member retention, non-performing loans, straight-through processing
Insurance and pension plans	Combined ratio, claims settlement time, persistency, solvency, member statement timeliness
Public bodies	Budget execution, service standards, cost per output, statutory reporting, audit findings
Tourism and hospitality	RevPAR, guest scores, labour and energy cost per occupied room, hurricane readiness
Distribution, retail, manufacturing	Margin by category, inventory turns, on-time-in-full, cost to serve by channel
Not-for-profits and charities	Programme spend ratio, beneficiary outcomes, donor retention, restricted-fund compliance

WHY DAWGEN GLOBAL

One integrated firm

Independent and multidisciplinary, combining performance advisory with audit, tax, technology, finance and HR expertise under one roof.

Caribbean-wide reach

Desks across 35 territories in the Caribbean and the Americas, centrally managed from our Caribbean headquarters for consistent quality.

Proprietary method and toolkit

A documented framework and 24 controlled templates, from the KPI Definition Card to the Benefits Tracker.

We finish what we start

We own delivery through to verified results, then transfer the capability to your team.

Dawgen GLOBAL

SMARTER AND MORE EFFECTIVE DECISIONS

START WITH A PERFORMANCE DIAGNOSTIC

Find out where performance really stands, and what closing the gap is worth.

5	6	24	35
measurement dimensions	gated improvement phases	controlled toolkit templates	territories served

To discuss CARIMETRIX–CARIVANCE™ for your organisation, contact our Growth & Recovery and Finance & BPO teams.

info@dawgen.global
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Big Firm Capabilities. Caribbean Understanding.