



## TSR Performance Monitor

Our customizable tool for monitoring the performance of your Total Shareholder Return based long-term incentives

# How Can TSR Performance Monitor Provide Value to You?



## Provides Daily Performance Updates

- ✓ **Focus on key results:** See a summary of important Award metrics updated daily on your Dashboard, including TSR for your company and the peers, the associated percentile rankings and current vesting levels
- ✓ **Inform Board and Management on award performance:** Extract information needed for Board and Management meeting materials on current performance for all outstanding Awards
- ✓ **Respond to Participant Queries:** Provide award participants with current performance of their Awards
- ✓ **Produce and share reports:** Download reports in Microsoft® Excel and PDF formats or subscribe to receive reports via email daily, weekly or monthly.



## Eliminates Surprises

- ✓ **Stay informed:** Receive notifications when your current performance levels cross custom thresholds and subscribe to your Dashboard to receive updates daily, weekly or monthly.
- ✓ **Monitor potential share usage:** Analyze potential vesting outcomes to project the number of shares to be issued as the Award nears the end of the performance period
- ✓ **Analyze impact of stock market fluctuations:** Review how fluctuations in your stock price or in the stock market impact your TSR and percentile ranking



## Supports Financial Reporting and Award Design

- ✓ **Provide financial reporting and forecast information:** Determine current vesting levels to use in calculating contingently issuable shares for dilutive share purposes and improve forecasts of excess / shortfall tax benefits at settlement
- ✓ **Review Award Design:** Evaluate current and historical performance to see the linkage between company performance, shareholder returns and participants rewards

## TSR Performance Monitor Details

- Access provided through secure OnePlace platform to only requested users
- All stock price information is downloaded from S&P Capital IQ
- TSR is calculated for your company and each peer daily
- Current rankings and vesting outcomes are determined from the TSR calculations
- Historical information available throughout the performance period
- Willis Towers Watson provides ongoing support

# TSR Performance Monitor: An Overview

TSR Performance Monitor is a fully integrated and customizable model, with all awards combined into a single tool. Its automation capabilities ensure the model is always up to date with the latest information, and its analytical tools allow you to dig deeper into the numbers to oversee and manage your awards.

## Fully Automated Award Monitoring



**Dashboard:** Via a quick summary of selected Monitor views, you have access to up-to-date information on short notice for discussions with stakeholders. Dashboards are customizable, with tiles that can be viewed on tablets and mobile devices.



**Notifications and Subscriptions:** You can subscribe to your Dashboard tiles and create custom threshold notifications that alert you to changes in estimated payout levels. Automated updates of performance will keep you current and help streamline dilutive share calculations after month or quarter end when deadlines are tight.

The model is always up to date for further analysis.



You can monitor performance with different tools.

## Tools to Analyze Performance



**Tracking:** Analyze performance for each award through Monitor views of the Estimated Payout, Total Shareholder Return and Peer Summary. These Monitor views provide both current and historical results displayed graphically and in charts. You can easily toggle from award to award to view the results. If historical performance information is needed another toggle is available to select any historical date in the performance period.



**Reporting:** You can create reports of the TSR Calculation Detail, Historical TSR Results and Ranking and Peer TSRs and Rankings. These reports can be generated for historical dates. You can also subscribe to your reports and receive them through email.

# Fully Automated Award Monitoring: Dashboard

TSR Performance Monitor’s customizable Dashboard tiles provide a quick summary of selected Monitor views and the ability to drill down into additional details.

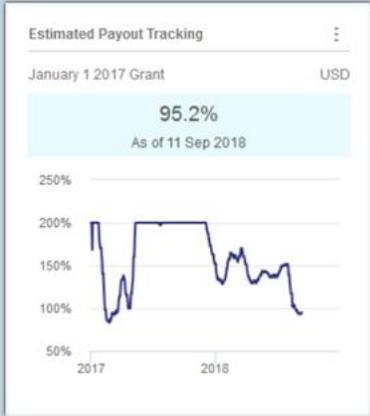
## Tile Monitoring

Dashboard tiles provide real-time monitoring of award performance, which is updated on a daily basis with the most recent data from the Monitor view. You can access an expanded view of the results directly from a tile — including calculation details and tracking graphs — for a deeper understanding of the award’s performance.

## Custom Experience

Dashboard tiles can be selected individually, so each user can create a custom experience. You choose the awards and performance details that are most important and get only the information you need. You can view Dashboard tiles on a tablet, smartphone or computer.

Figure 1. Tile Monitoring



*Dashboard tiles contain an overview of important award performance details with results updated daily. They also include a tracking graph with changes since the beginning of the performance period.*

*Your customizable Dashboard tiles can be viewed on a tablet, smartphone or computer. You can also subscribe to a periodic Dashboard update via email.*



Figure 2. Customizable Dashboard



# Fully Automated Award Monitoring:

## Notifications and Subscriptions

In addition to standard system notifications (e.g., when report documents are completed), TSR Performance Monitor will notify you when Dashboard tile thresholds have been crossed and send content-rich subscription emails.

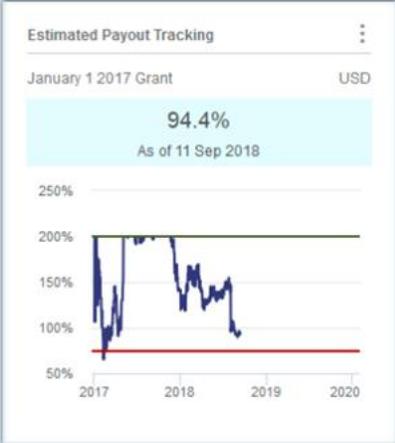
### Tile Notifications

You can create a custom threshold notification to alert stakeholders to changes in estimated payout levels. When an estimated payout level threshold has been crossed you will automatically receive an email with the performance details of the award.

### Subscriptions

You can stay on top of award performance by subscribing to your Dashboard tiles and receiving daily, weekly or monthly updates automatically via email.

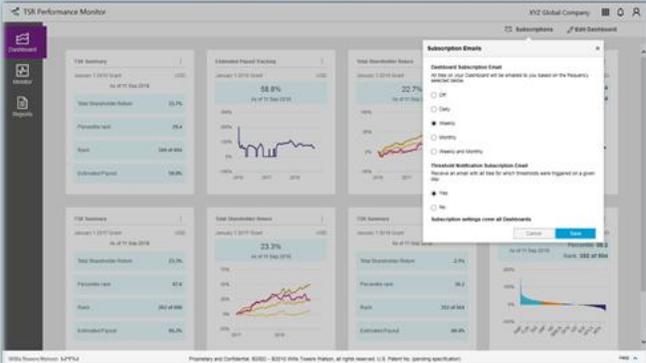
Figure 3. Threshold Notifications



*To help monitor your award's performance, you can create custom thresholds and receive notifications via email when thresholds are exceeded.*

Figure 4. Report Subscription Email

*You may elect to receive periodic emails containing your Dashboard tiles with the updated performance details of your awards.*



# Tools to Analyze Performance

## Tracking

TSR Performance Monitor's tracking capabilities allow you to analyze performance for each award through Monitor views containing both current and historical Total Shareholder Returns, Rankings, Estimated Payouts and Peer Summaries.

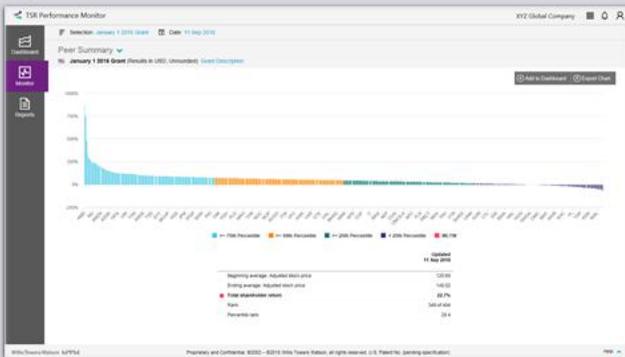
### Content-rich Monitor views

TSR Performance Monitor contains three content-rich Monitor views to give you all the performance details needed to track your awards. Toggle between performance details on Estimated Payouts, Total Shareholder Returns and Peer Summaries. You can also easily toggle from award to award. Finally you can add tiles to your Dashboard of the performance details you want readily accessible.

### Historical Performance Details

TSR Performance Monitor contains the historical performance of your awards from the beginning of the performance period. You can easily select any historical date in the performance period to see what the estimated performance was as of that date.

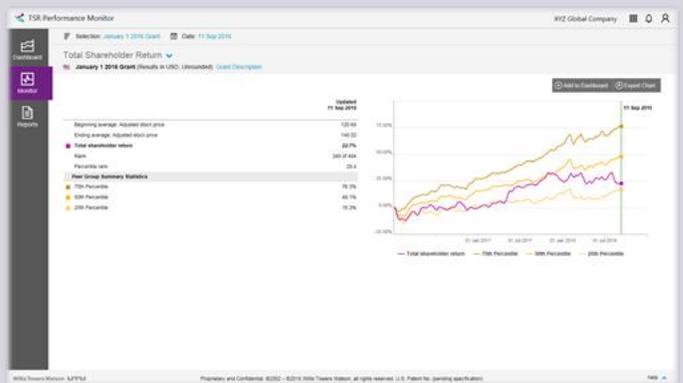
Figure 5. Content-rich Monitor views



*The Peer Summary Monitor view shows the TSR of your company and all peers. Toggle over the peers to see their current TSR.*

*The Total Shareholder Return Monitor view contains a chart allowing you to track your company TSR versus the minimum, target and maximum threshold historically*

Figure 6. Historical Performance Details



# Tools to Analyze Performance: Reporting

The flexible report preparation features allow users to create custom reports from TSR Performance Monitor directly.

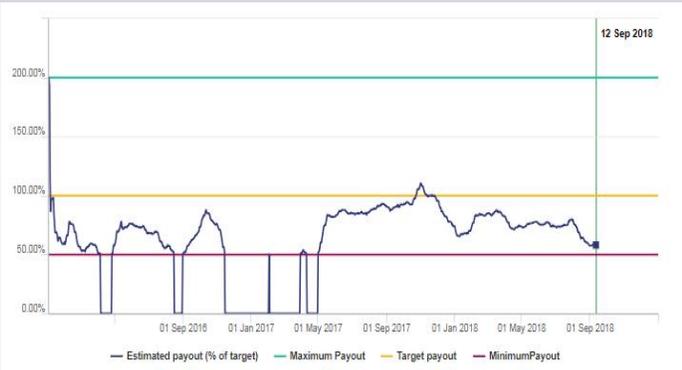
## Data Exports

You can export reports from TSR Performance Monitor in both Microsoft® Excel and PDF formats. Charts and data can be exported from the Monitor areas directly; the same Monitor views that you see online can be inserted easily into a report or presentation.

## Report Generation

You can generate reports in Microsoft® Excel and PDF formats containing information on the TSR Calculation Detail, Historical TSR Results and Ranking and Peer TSRs and Rankings. These reports can be run for any historical date. Also subscribe to receive the report details through email daily, weekly or monthly.

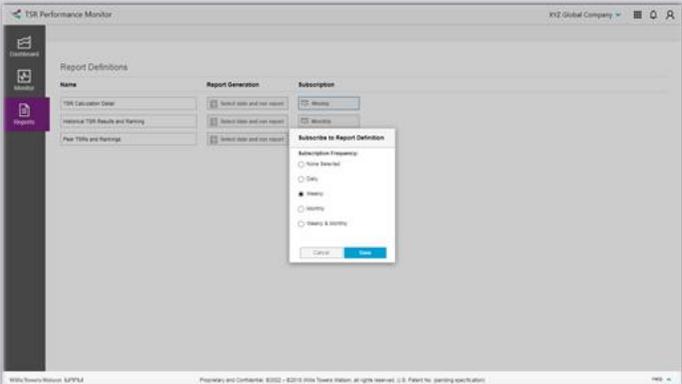
Figure 7. Export Charts from Monitor Views



*Export charts and data from the Monitor views to easily access information needed for your reports and presentations.*

Figure 8. Report Generation

*Generate reports to receive all the details you need to evaluate performance awards and setup subscriptions to receive this information daily, weekly or monthly.*



## About Willis Towers Watson

Willis Towers Watson (NASDAQ: WLTW) is a leading global advisory, broking and solutions company that helps clients around the world turn risk into a path for growth. With roots dating to 1828, Willis Towers Watson has 40,000 employees in more than 140 countries. We design and deliver solutions that manage risk, optimize benefits, cultivate talent, and expand the power of capital to protect and strengthen institutions and individuals. Our unique perspective allows us to see the critical intersections between talent, assets and ideas — the dynamic formula that drives business performance. Together, we unlock potential. Learn more at [willistowerswatson.com](http://willistowerswatson.com).

Willis Towers Watson  
901 North Glebe Road  
Arlington, Virginia 22203

The information in this publication is of general interest and guidance. Action should not be taken on the basis of any article without seeking specific advice.

Copyright © 2018 Willis Towers Watson. All rights reserved.

[willistowerswatson.com](http://willistowerswatson.com)

**Willis Towers Watson** 