Founded in 1995 and currently with more than 2,000 customers and 300,000 users worldwide, SoftExpert solutions are used by leading corporations in all kinds of industries, including manufacturing, automotive, life sciences, food and beverage, mining and metals, oil and gas, high-tech and IT, energy and utilities, government and public sector, financial services, transportation and logistics, healthcare, and many others.

SoftExpert, along with its extensive network of international partners, provides hosting, implementation, post-sales support and validation services for all solutions to ensure that customers get the maximum value from their investments.

Mission

Boost the competitiveness and sustainability of organizations through innovative software solutions for excellence and enterprise compliance.

Vision

Be recognized worldwide as a provider of leading solutions in enterprise excellence and compliance.
SoftExpert Software enables organizations of all sizes and industries to think and act strategically, promote innovation and improvement, align processes and resources, engage the workforce and customers, and focus on key results: products and services, customers, financials, the workforce, processes and leadership. From the back office to boardroom, operations to supply chain, internal workforce to external parties, SoftExpert empowers people and organizations to work together more efficiently and use business insight more effectively to stay ahead of the competition.

SoftExpert is an innovative and forward-thinking organization with an established history of exceeding customer requirements. Every day, SoftExpert's web-based applications help businesses around the globe ensure the highest standards of efficiency, quality and innovation for their products, services and processes by streamlining and integrating all organizational levels and operations. These applications also enable organizations to address an ever-increasing variety and number of international standards, laws and regulations that affect business operations by delivering enhanced compliance capabilities based on industry-specific best practices.

"DeKalb Metal Finishing was able to conquer the process approach, as required in IATF 16949, through the use of SoftExpert Excellence Suite. Not only did this solution allow us to easily map our processes, but it was essential in allowing us to understand how our business was working, and where the inefficiencies were. This solution has allowed us to reduce costs for both our organization and for our customers, through the continual improvement derived from its use.

Paul Fry - Manager"
SoftExpert offers an integrated suite of modules that leverage the collaborative business management processes to support the continuous improvement and optimization of today's heterogeneous enterprise. The solution helps leading companies gain a competitive edge through replicable and predictable management processes and compliance execution involving people across departments, business units, suppliers and customers.

SoftExpert Excellence Suite automates the controls required for each of the management process steps [planning, implementing, monitoring, measuring and improving]. Furthermore, the product fully complies with current international standards, such as ISO 9000, ISO 14000, ISO 45001, ISO 37001, IATF 16949, FDA, etc.

SoftExpert Excellence Suite also complements and optimizes enterprise management systems, integrating them with the main ERPs on the market through built-in connectors, or through customized connectors developed based on the client’s specific needs.
**Business and Operational Performance Excellence**

The 12 critical management elements collaboratively integrated across the organization into **SoftExpert all-in-one multi-application suite**

<table>
<thead>
<tr>
<th>Performance</th>
<th>Products</th>
<th>Processes</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to align strategic and operational objectives and targets to fully achieve future business performance?</td>
<td>How to foster continuous innovation and deliver the right products and services faster with superior quality and value?</td>
<td>How to streamline and control business and production processes to achieve new levels of daily operations excellence?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Projects</th>
<th>Competencies</th>
<th>Assets</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to effectively manage resources and projects to improve customer services and business initiatives?</td>
<td>How to ensure the right workforce skills and competencies required to increase overall performance?</td>
<td>How to manage and maintain high-performance assets to greater operational and production productivity?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Risks</th>
<th>Quality</th>
<th>Knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to minimize business, financial and operational exposure to risk to ensure legal governance and compliance?</td>
<td>How to leverage business and operational quality standards to increase efficiency while minimizing failure costs?</td>
<td>How to collaboratively manage documents and records to support and leverage organizational knowledge?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IT</th>
<th>Ecosystem</th>
<th>Excellence</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to keep all software, hardware and information technology current with business and operation needs?</td>
<td>How to sustain workplace health and safety initiatives to much better care for employees, community and ecosystem?</td>
<td>How to join all these challenges together in a unified collaborative workplace to a much better business performance excellence?</td>
</tr>
</tbody>
</table>
ARCHITECTURE

Since its inception, SoftExpert has been a technological innovator, constantly improving products through new practices, design principles and technologies, with focus on customers' real needs and on simplifying problems.

SoftExpert Excellence Suite provides increased productivity for teamwork, based on an efficient control mechanism called “Team Workflow.” This mechanism automatically sends e-mail notifications of pending tasks to users, displaying crucial tools to resolve issues quickly. Results assure simple and effective control for achieving objectives and priorities across company departments, optimizing the meeting of deadlines and conformity according to previously established quality results.

SoftExpert Excellence Suite furnishes diverse options for search screen visualization, data, charts, and report generation, displaying detailed or summarized data on vital management system elements to therefore ensure a clear assessment of the effectiveness achieved through the management system, adding top-notch quality and guaranteeing strategic decisions for your company.

GENERAL FEATURES

- 100% web-based access.
- Multiple user interface with user-based access right settings.
- Electronic signature mechanism validated through password sign-on.
- Attaches all kinds of files (Word, Excel, Autocad, PDF, etc.).
- Integrates with Microsoft Office, Office365 and Google Docs.
- Integration interfaces with ERP systems.
- Provides audit trail from all system user access operations.
- Compatibility with cloud environments and network servers, such as: Windows and Linux.
- Direct communication with e-mail servers, such as: MS-Exchange, Lotus Notes, etc.
- Compatibility with such databases as: Oracle, MS SQL Server, PostgreSQL and Db2.
- Interfaces with MS Active Directory and LDAP for managing system users.
- Several different language interfaces.
**Services**

**Implementation**
SoftExpert Implementation Services is committed to helping clients achieve successful implementation and deployment of the software solution to maximize business benefits. As a technology and business partner, SoftExpert can help organizations mitigate risk, maximize ROI, and implement a solution on-time, on-budget, and within scope. To deliver on this commitment, SoftExpert has developed a framework of services that covers the entire lifecycle of a project – from solution planning and implementation to business improvement. It provides a flexible range of services designed to help clients make the most of their investment. Regardless of the type of deployment, companies can choose the right level of engagement to suit their unique needs and business challenges.

**Consulting**
Beyond implementation, SoftExpert also offers a range of additional consulting services options, which allow clients' ongoing needs to be met as the business grows. To help organizations efficiently and cost-effectively exploit the functionality embedded within SoftExpert solutions, the client can take advantage of expert advice offered through consulting services.

**Validation**
Guarantee the use of electronic technology instead of high-cost, time consuming paper systems. This is the objective of the validation services offered by SoftExpert. As part of its methodology, SoftExpert provides confirmation by examining and providing objective evidence that the specifications of clients' computer system conform to user needs and intended uses and that all requirements are able to be consistently fulfilled in accordance with regulatory compliance.

**Education**
SoftExpert provides a variety of educational opportunities to help familiarize clients with the software and improve productivity. SoftExpert offers a rich variety of instructional materials and courses designed to help both users and administrators get the most from SoftExpert's products and services. Instruction on best practice guidelines is provided by professionals with years of experience, providing organizations with the knowledge necessary to implement and use SoftExpert applications throughout the company, thereby making every department more effective and efficient.

Training goes beyond lectures. Each of the courses is designed to help professionals acquire the skills they need – swiftly and effectively. Because training is job-focused, clients can apply newly acquired skills immediately and begin to directly reaping the benefits of what they have learned.

**e-Learning**
On-Demand Web-Based Courses – SoftExpert’s on-demand web courses put clients in control: courses are accessible online 24 hours a day and can be paused, restarted and replayed. When users can’t attend classroom training, on-demand web courses are there to quickly get them up to speed.
When your company is looking to access new business processes quickly and cost-effectively, application hosting can be the answer. With SoftExpert Application Hosting, clients can leverage the leading applications that can help reduce time to market or boost user satisfaction without the usual upfront infrastructure costs - or the ongoing implementation and management headaches. By handing over day-to-day technical management of SoftExpert applications, clients gain comprehensive application expertise and reliable e-business infrastructure that is designed to keep mission-critical operations running smoothly and dependably.

SoftExpert Cloud Computing

With SoftExpert Excellence Suite’s Cloud Computing model, companies can complement and optimize the use of enterprise management systems with well-integrated excellence and compliance management applications. The Cloud Computing model also provides access to all of SoftExpert Excellence Suite resources and components in a complete and integrated solution, regardless of the size of your business, area of operation or geographic location.

Integration

In addition to using SoftExpert software to automate internal processes, companies frequently deploy a variety of other third-party software applications. Examples may include enterprise resource planning (ERP), customer resource management (CRM), and manufacturing execution systems (MES) applications. SoftExpert integrates nicely with many of the major software applications typically used by companies. In some cases there are many connection points between SoftExpert's system functionality and the functionality of other applications. When properly configured, these connection points can vastly improve a company's overall performance and automation. SoftExpert offers a variety of connection tools that enable companies to bridge that functionality by integrating SoftExpert with third-party systems.

"We have achieved improved dependability as well as standardization in our processes to assure measurement consistency and the required monitoring to verify conformity in our products. This adds enhanced safety and quality to our customers."

Claudimar Faria - SPC Technical Support
Support Service Levels

Standard Support
Provides your organization with essential, high-quality remote technical support. Standard Support allows you to obtain assistance from SoftExpert for suspected defects and product-specific, task-oriented questions regarding installation of product updates. This level of support is recommended for organizations that use SoftExpert applications in non-critical processes, restricted to a single department and a reduced number of users.

Gold Support
Provides both additional and specialized support for SoftExpert products. Gold Support offerings focus on the vertical depth of support, and feature a personalized relationship with our technical experts and knowledge transfers. Gold support is the best choice for those organizations that use SoftExpert applications in processes with a medium degree of criticality and running across several departments.

Platinum Support
In addition to services at the Gold level, Platinum Support provides priority remote service and allocation of professionals with different specialties. Additionally, advisory service and priority service within the evolutionary product roadmap are provided for new customer requirements found during continuous use of the application. This level is recommended for companies that use SoftExpert products in a corporate manner for critical processes requiring high availability, reliability and operating efficiency.

Advanced Support
In addition to the Platinum level, Advanced Support provides remote services and solutions (workaround). This level of service allows for an agreement on the maximum time for resolving a problem (workaround), based on its criticality. This level is recommended for companies that use SoftExpert products in a corporate manner for critical processes requiring high availability, reliability and operating efficiency, where the infrastructure available for SoftExpert products complies with the strict requirements established by SoftExpert's manufacturer.

<table>
<thead>
<tr>
<th>SERVICE LEVEL (SLA)</th>
<th>STANDARD</th>
<th>GOLD</th>
<th>PLATINUM</th>
<th>ADVANCED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to latest bug fixes and minor updates.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Major upgrades and enhancements.</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Access to Support Knowledge Base.</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Unlimited corrective maintenance support up to product's end-of-life date.</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Online helpdesk system to report, track, and follow-up on pending incidents and tasks.</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Customer-approved contacts.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>Technical assistance with application usage.</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Technical assistance with application environment support.</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Assigned technical support analyst.</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Emergency remote support assistance.</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>What's New online e-learning technical trainings (two major releases per year).</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>New requirements analysis.</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Allows you to set time solution (workaround) on contract</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>
Regardless of a company’s size or market sector, SoftExpert provides the most complete integrated web-based solution to simplify and streamline implementation, execution, control and monitoring of multiple business application demands, including: Business Process Management [BPM], Corporate Performance Management [CPM], Enterprise Asset Management [EAM], Enterprise Content Management [ECM], Enterprise Quality Management [EQM], Enterprise Risk Management [ERM], Environment, Health and Safety Management [EHSM], Governance, Risk and Compliance Management [GRC], Human Development Management [HDM], IT Service Management [ITSM], Product Lifecycle Management [PLM], and Project and Portfolio Management [PPM].

“SoftExpert Excellence Suite has allowed us to streamline and standardize our activities, making everybody speak the same language. This valuable time saving in executing activities was reinvested on analysis and process improvement, as well as getting people trained, making our activities more productive and ahead of our competitors.”

Ciceley Cuadros - Quality Manager
The need for compliance is driven by far more than just the threat of potential fines and penalties from regulatory agencies and customers. Companies want their businesses to be compliant in order to address needs specific to the industries within which they operate. SoftExpert solutions address a growing range of compliance issues that affect business operations by delivering regulation-specific functionalities based on industry best practices.

SoftExpert Solutions comply with the main international regulations for quality, environment, health and safety, the auto industry (including suppliers and subcontractors), food and drugs, technology and others.

- As9100
- ISO 37001
- BPMN
- BSC
- CBOK
- CMMI
- COBIT
- COSO
- FDA 21 CFR Part 11
- FDA 21 CFR Part 820
- FSSC 22000
- IATF 16949
- ISO 10015
- ISO 13485
- ISO 14000
- ISO 15189
- ISO 19011
- ISO 20000
- ISO 22000
- ISO 22301
- ISO 26000
- ISO 27001
- ISO 31000
- ISO 50001
- ISO 55000
- ISO 9000
- ISO/TS 14253
- ITIL
- ISO 45001
- PMBOK
- Six Sigma
- SOX

"SE Suite standardized documents, reducing the repetition of work and of the number of documents printed out. The information is stored in a single system that is easily controlled and which meets ISO certification requirements.

Solange Amaral - Quality and Continuous Improvement Specialist"
SoftExpert's people are the biggest secret to the company's success. When selecting professionals to join the team, SoftExpert respects diversity in culture and opinions. The company offers satisfying rewards and a wide range of benefits.

**SKILLS**

SoftExpert's corporate governance and success lies in the skill and experience of the company's Board and its key corporate managers. This team is responsible for making final decisions in the best interests of the company on matters such as international presence, competitive position, technological direction, ethics and good relations with customers.

**ENVIRONMENT**

SoftExpert Management is based on the principles of social responsibility and the practice of company values, continuous improvement of quality and the environment through minimal use of natural resources, and promotion of recycling through an internal program, as well as encouraging occupational health and safety practices.

**EXECUTIVE MANAGEMENT**

- **Ricardo Lepper**
  CEO
- **Marco Hintz**
  Business Development Director
- **Josiani Silveira**
  Services Director
- **Kelson Lunardelli**
  CEO - SE US Sales Division
- **Fernando Camargo**
  Software Development Director
- **Fernando Engelmann**
  Technology Director
- **Silvana Fuchter dos Santos**
  Financial Director
- **Herminio Walmor Gonçalves**
  Sales Director
Initially, the solution was implemented in the Operations, Drilling and Works divisions, but, with the benefits provided, we decided that the entire organization should adhere to the system.

César Blanco - Chief of Security for the Tecpetrol unit in Mexico
The SoftExpert Partner Program was developed as a unique business alliance program to add harmony and balance among businesses in order to build and maintain a qualified worldwide network of value-added resellers, consulting firms, training providers, enterprise software/solutions providers, data providers and system integrators to ensure a successful market and delivery of complete process control solutions to targeted industries.

The services provided by our Solution Partners are built around their core competencies and the unique capabilities of SoftExpert solutions. Some of these services may include process consultancy aimed at professional services, hardware and/or software installation, customization to meet the unique needs of customers, generic or customer-specific training delivered on-site or through electronic methods, and integration with other applications.

We believe that the integration between SoftExpert solutions and Baker Tilly’s methodologies and models enhances the diagnosis, design and definition of GRC projects, allowing us to offer high value propositions to customers interested in optimizing their business.

Ricardo Vásquez Bernal, GRC director for Latin America at Baker Tilly
STANDARD PARTNERSHIP CATEGORIES
SoftExpert provides the following Standard partnership categories:

**REFERRAL**
Referral Partners are typically consulting or technology-based companies which understand the benefits our solution can bring to their customers or other companies within their network, thus recommending the solution to them.
When opportunities are identified, Referral Partners contact a SoftExpert VAR or Reseller, which will then conduct the next steps in the sales process.
Referral Partners earn referral fees for sales resulting from any new leads they generate.

**VALUE ADDED RESELLER [VAR]**
Value Added Resellers are international industry leaders who want to add value to their current products and/or services portfolio, adding part of the SoftExpert product portfolio to their solutions.
SoftExpert products become part of their solution package.

**RESELLER**
SoftExpert Resellers resell all or part of the SoftExpert product portfolio. Along with a team or a business unit which primarily focuses on selling SoftExpert solutions, they are responsible for the entire sales lifecycle as well as for providing professional services to support training, implementation, technical support and maintenance for products.

**DISTRIBUTOR**
Distributor Partners represent SoftExpert in a country or region. They resell all or part of the SoftExpert product suite, generally through a network of sales partners. They are responsible for development, support (including marketing campaigns) and monitoring processes.
They are also responsible for providing product localization (translation) for their region or country and professional services to support training, implementation, technical support and maintenance of products, directly or through their sales partners.
We have a close working relationship with our Distributors. They often have extensive domain experience and receive ongoing training and technical support, enabling them to deliver high-quality services directly to customers, or through their sales channels.

STRATEGIC PARTNERSHIP CATEGORIES:
SoftExpert provides the following Strategic partnership categories:

**BPO**
SoftExpert's Business Process Outsourcing program is focused on forging relationships with leading companies that have a core competency in this area. BPO partners use SoftExpert solutions to provide their services, thus adding value to their offer and streamlining services to their customers.
SoftExpert establishes a close working relationship with BPO partners. They often have extensive domain experience and receive ongoing training and technical support, enabling them to deliver high-quality services to their customers.

**OEM**
OEM (Original Equipment Manufacturers) Partners integrate SoftExpert software technologies with their own product offerings for commercial resale. These partners may add on, bundle, host or embed our software.
SoftExpert solutions are included in partners' portfolio offerings and are made transparent to the end user. OEM partners receive aggressive resales discounts and technical, development, marketing and sales support to ensure that the offerings in their portfolio will provide market-leading software solutions.

**STRATEGIC ALLIANCE**
These partners are characterized as global leaders across technical, marketing, sales, or services capabilities and typically represent a strong brand in their industry, specialty or vertical market.
Strategic Alliances are also generally multinational, with significant presence in multiple geographic regions. Membership within this category is by invitation only.
Some Customers

Over 2,000 companies in more than 30 countries are using SoftExpert Solutions for Business Performance Excellence.

We value having a vendor that stays current with the ever-changing compliance standards. With SoftExpert Excellence Suite, we’re able to match increased regulatory expectations with our daily practice, while reducing the cost of compliance. I have great deal of faith in the reliability and quality of SoftExpert products.

Gabriela Bueno Scapim - Quality Coordinator

With SoftExpert, we found a solution that helps us to optimize the execution of tasks, by automating routines, reducing physical documents and e-mails. We have significantly reduced the bureaucracy in the administrative processes. The results include time-saving, resource reduction and increased productivity.

Luis Faustino - IT Director for the plastics division

The solution provided us with organizational agility and improved control of records and documents. We have seen a clear saving of time and resources. The consumption of paper is practically inexistent for the related processes, as well as the need of physical space for the storage of printed documents.

Carmen Quiñones - Head of Quality and Processes
SoftExpert is a market leader in enterprise-wide excellence and compliance application software to implement business process excellence, industry-mandated compliance and corporate governance initiatives. From the back office to boardroom, operations to supply chain, internal workforce to external parties, SoftExpert empowers people and organizations to work together more efficiently and use business insight more effectively to stay ahead of the competition.

Founded in 1995, SoftExpert has a rich history of innovation and growth as a true industry leader. SoftExpert solutions are used by corporations of all sizes and types, including manufacturing, automotive, pharmaceutical, food and beverage, medical devices, high tech, energy and utilities, aerospace and defense, oil and gas, government and public sector, retail and distribution, financial services, transportation and logistics, healthcare, education, engineering and construction, IT and software, and many others.

SoftExpert applications and services enable more than 2,000 customers and 300,000 users worldwide to operate profitably, adapt continuously, and grow sustainably. SoftExpert, along with its network of partners, provides hosting, implementation, post-sales support, and validation services for its solutions to ensure that customers achieve maximum value from their investments. We believe that the power of our people, products, and partners unleashes growth and creates significant new value for our customers.

Thinking Globally, Acting Locally

One of the driving forces behind SoftExpert’s growth is its global footprint. With its extensive partnership network throughout the world, SoftExpert develops operations on every continent, offering customers strong service with a local approach specific to their markets.