



Release Notes: Introducing the ESM AI Assistant

ESM 10.1 Release Notes

We're excited to introduce the ESM AI Assistant, the first of many AI-powered capabilities coming to the ESM suite. Built to make your job easier, the AI Assistant helps reporting owners move quickly from a blank page to board-ready outputs — surfacing insights from your scorecard data, drafting Performance Analyses and Recommendations, generating creative improvement ideas on demand, and polishing the text you write yourself.

The AI Assistant is designed to support your thinking, not replace your judgment. You stay in control at every step: every draft is reviewed, refined, and approved by you before it becomes part of your report. It's built to accelerate your work, not take it over — helping you move faster and see more, while the final call always remains yours.

New features summary:

1. **Generate a Performance Analysis draft:** for any Objective, Measure, or Initiative. Written directly from your scorecard data based on best practices developed over 20+ years
2. **Generate a Recommendations draft:** thoughtful proposals based on underperforming elements in your strategy, and generate creative ideas that break out of incremental thinking
3. **Improve Writing:** turn your own text in the Performance Analysis, Recommendations, and Definition fields into clear, concise, leadership-ready prose

Release Overview

1. Generate Draft: AI-written Performance Analysis

Feature Summary:

Writing period-over-period analysis is one of the most time-consuming parts of the reporting cycle. With Generate Draft, the AI Assistant reads the scorecard data behind an Objective, Measure, or Initiative — statuses, actuals, targets, and trends across the review window — and produces a structured first-pass Performance Analysis in seconds. The draft appears in a side panel next to your reporting field, so you can compare it against the underlying data before deciding what to keep.

Benefits:

- **Faster reporting cycles:** a data-grounded first draft replaces the blank page, so owners spend their time on judgment and context rather than on assembling numbers.
- **Consistent quality:** every analysis follows the same structure: status, trend over the review window, and performance of each underlying measure against target
- **Nothing is inserted automatically:** the draft only enters your reporting field when you click Insert.

F1. Achieve positive EBITDA contributions Period: Q1'26

The screenshot displays the 'AI Generated Draft' interface for a performance analysis. The main window shows a draft analysis for the objective 'Achieve positive EBITDA contributions'. The draft text is as follows:

The objective "Achieve positive EBITDA contributions" is currently rated Green as of Q1'26. Status has been volatile over the four-period review window: Green in Q2'25, Yellow in Q3'25, Green in Q4'25, and Green in Q1'26. Three measures were reviewed across four periods.

EBITDA (F1a) has fluctuated around target over the review window. In Q2'25, actual EBITDA was \$56.16M against a target of \$52.5M (7.0% above target). In Q3'25, actual was \$55.7M against a target of \$57.0M (2.3% below target). In Q4'25, actual was \$64.3M against a target of \$61.5M (4.6% above target). In Q1'26, actual was \$55.2M against a target of \$57.0M (2.3% below target).

Below the draft, there are 'Recommendations' and a 'Rate' button. The 'Rate' button is highlighted in blue.

On the right side, there is a 'Close' button.

1.1 Refine the draft: “This but...” and Advanced Settings

Feature Summary:

The first draft is rarely final. Two controls let you shape the output before inserting it “This but...” and “Advanced Settings.”

How It Works: “This but...”

- Adjusts the draft with one click — make it shorter, longer, or more casual, or start over. Retry generates a fresh draft at any time.

F1. Achieve positive EBITDA contributions Period: Q1'26

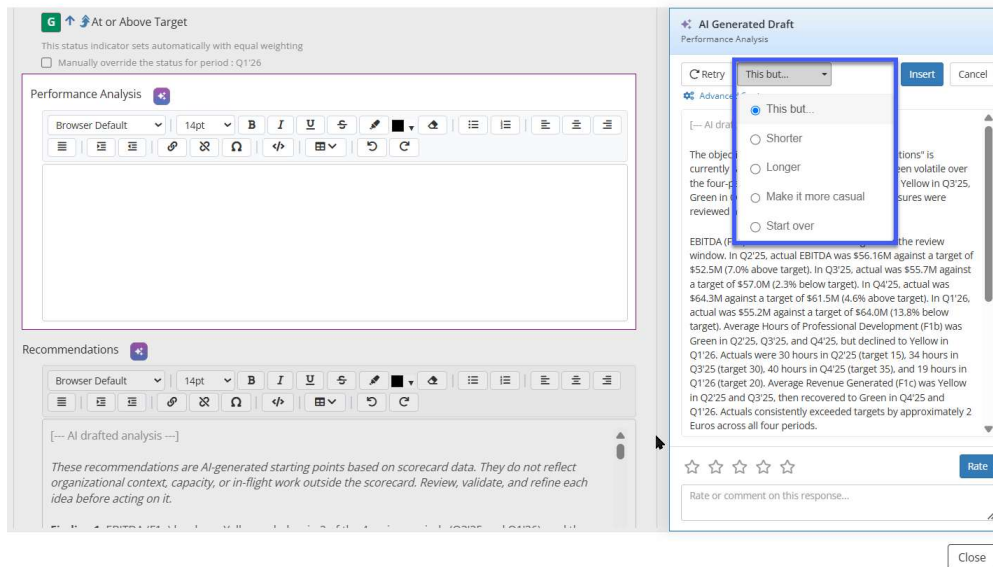


Figure 3: “This but...” offers one-click refinements of the generated draft.

How It Works: “Advanced Settings...”

- Control exactly which data the AI Assistant uses. Choose how many periods to include in the review window (e.g., the last 4 quarters), and whether to include data from all elements mapped to the Objective, from cascaded scorecards, and metrics data for selected mapped elements.

F1. Achieve positive EBITDA contributions Period: Q1'26

At or Above Target
This status indicator sets automatically with equal weighting
☐ Manually override the status for period: Q1'26

Performance Analysis

Earnings have been well below average over the past year and a half. Focus must be placed on obtaining a positive net income, and increased EBITDA. High costs and low profit margins are the two main reasons for our negative net income. Future performance is expected to continue at this level as long as the economic outlook remains favorable.

Recommendations

We must cut costs across the board and look for every possible area to save and increase profits. Increased productivity and saving on direct materials are two areas we should focus on.

☒ Objective Reporting Updated

Nominate For Discussion
No

Don't see a field here that you'd like to track performance data each period for all of your Objectives?

AI Generated Draft
Performance Analysis

Retry This but... Insert Cancel

Advanced Settings

Data to Include
☐ Historical for this Objective, its performance analysis and statuses

Periods to Include
Include Data From Last: Last 4 Quarters

☒ Include data for all elements mapped to this Objective from this scorecard
☐ Include data for all elements mapped to this Objective from cascaded scorecards
☐ Include metrics data for selected mapped elements

Go

Rate

Rate or comment on this response...

Close

Figure 4: Advanced Settings determine which scorecard data and periods the draft is based on.

Insert when ready: once the draft reflects what you want to say, click Insert to add it to the reporting field, where it can be edited like any other text.

2. Draft Recommendations and Brainstorm beyond the obvious

Feature Summary:

The AI Assistant also drafts the Recommendations field, turning the findings of the analysis into concrete, forward-looking proposals. Two modes are available:

How It Works:

- **Generate Draft:** produces grounded recommendations derived from the scorecard data — what to address, based on which measures are missing target and why.
- **Brainstorm – Generate Creative Draft:** produces intentionally bold, cross-disciplinary ideas to break out of incremental thinking. Use it when the same countermeasures keep reappearing period after period and the team needs fresh options to discuss.
- Both modes support “This but...” and Advanced Settings, and every draft carries a visible note reminding readers that recommendations are AI-generated starting points that do not reflect organizational context, capacity, or in-flight work outside the scorecard.

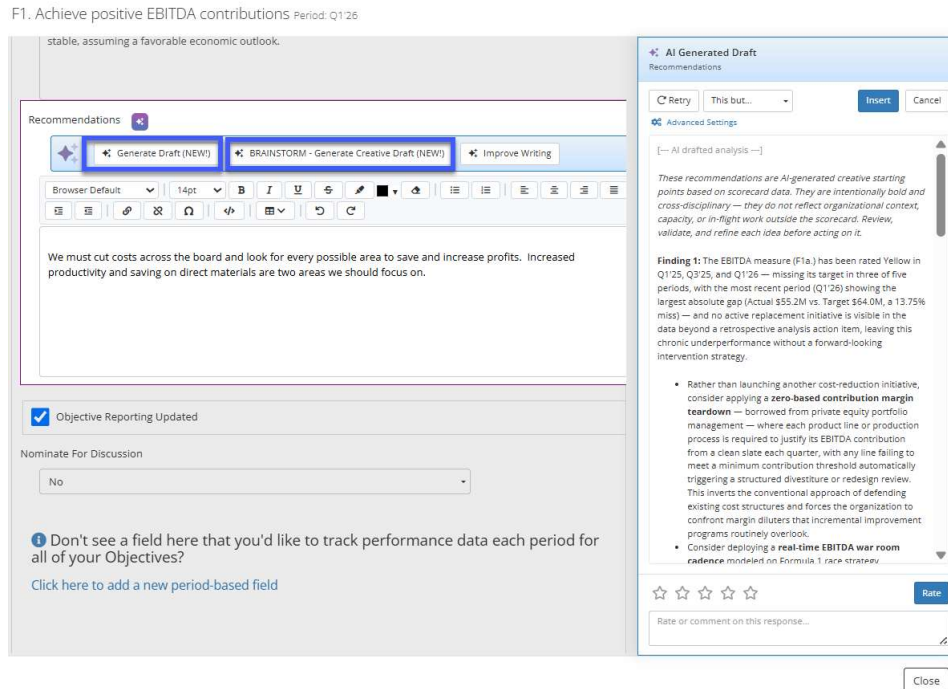


Figure 6: Brainstorm generates creative, cross-disciplinary recommendation ideas for discussion.

3. Improve Writing

Feature Summary:

Not every report starts with AI — often the content is already there, it just needs polish. Improve Writing takes the text you have written in the Definition, Performance Analysis, or Recommendations field and returns a clearer, more concise version in the side panel. Your original text remains untouched until you choose to insert the revision.

Benefits:

- **Sharper reports:** long, winding paragraphs become crisp statements that leadership can scan quickly.
- **A consistent voice:** reports written by many owners across the organization read with one professional standard.
- **Your content, your call:** the suggestion sits side-by-side with your original, and nothing changes until you insert it.

F1. Achieve positive EBITDA contributions Period: Q1'26

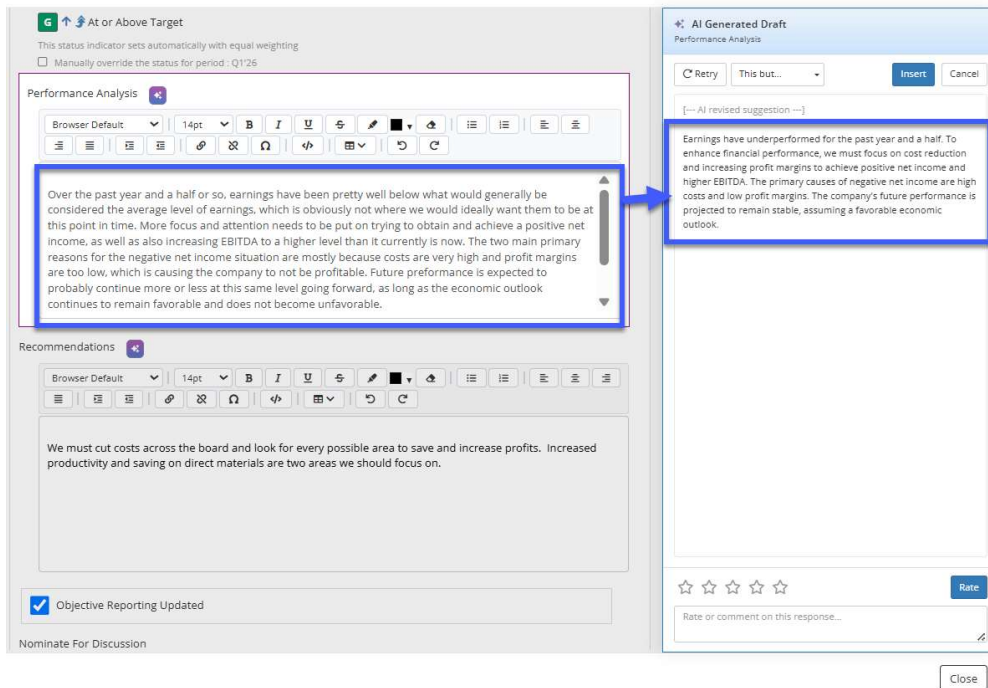


Figure 7: Improve Writing suggests a clearer, more concise version of your own text.

Best practice: review before you save

AI drafts are a starting point, not a finished report. We recommend making review a standard part of the workflow: generate the draft, refine it with “This but...” or Advanced Settings, then read and edit the inserted text before saving. The reporting owner remains accountable for the content. The AI Assistant helps to get started, not the judgment.

Security and data privacy

As with all ESM capabilities, security remains foundational to how the AI Assistant works. Your data remains secure within ESM's existing AWS environment at all times — it is never used to train AI models or shared with model providers.

Availability

The ESM AI Assistant is an optional add-on and is disabled by default. To enable it for your organization, please contact your account manager and we’ll help to get your team started.