

# Portfolio Intelligence

Fuel your decisions with data.



Switch's Portfolio Intelligence module enables data aggregation, visualization and analysis to support intelligent business decision-making.

Whether you're a business analyst, sustainability manager, energy analyst or facility management professional, Switch Portfolio Intelligence helps you connect and utilize building data so you can streamline reporting and improve performance from day one.



# Building data at your fingertips



## Save time on data wrangling

- ▲ Aggregate, store, visualize and analyze unlimited data from across your building portfolio
- ▲ Automate data uploads
- ▲ Focus on your most important and actionable data – let the Platform filter out the rest



## Gain real-time, on-demand business intelligence

- ▲ Configure custom dashboards tailored to each user's needs
- ▲ Apply filters and advanced data analytics to extract actionable insights across your portfolio
- ▲ Expedite sustainability, corporate, energy and building performance reporting



## Analyze & improve portfolio performance

- ▲ Perform advanced analysis using the Platform's robust reporting functionality and its seamless integration with Microsoft PowerBI and Excel
- ▲ Create configurable key performance indicators to track, alert and report on performance in real time
- ▲ Validate and quantify performance impacts from implemented building projects, operational changes and outside vendor services
- ▲ Benchmark building performance and prioritize capital investments, repairs and energy efficiency upgrades to maximize return on investment

# Leverage a proven solution

There's data integration, and then there's Switch Portfolio Intelligence. Here are a few things that set us apart:



## Secure

Hosted on Microsoft Azure, the Switch Platform passed data security tests for top technology and banking companies.



## Configurable

Managing a building portfolio is hard work, and it takes a diverse team to make it happen. That's why Portfolio Intelligence has **configurable views and tools designed to accommodate different users** – from sustainability managers and energy analysts to facility management professionals and business analysts.



## Scalable

Switch pulls in **unlimited building data in common industry protocols** such as CSV, FTP and API, and we can even automate data uploads. The Platform can **quickly deploy automated reports and visualizations** across your building portfolio to give you the visibility that you need right now.



## Complete

It's hard to diagnose and resolve issues without all the pieces to the puzzle. Portfolio Intelligence **combines all your building portfolio data and normalizes it to common metrics** (e.g., weather, building type, etc.), enabling you to create meaningful KPIs to rank and track building performance across your entire portfolio.



## Supported

Our team is an extension of your team. We don't outsource support, and our Engineering Services professionals are here to **provide training, answer questions and help you** make the most of Switch Portfolio Intelligence.

"We were able to combine data from our utility bills, work orders, Energy Star Portfolio Manager and capital projects. We leveraged Switch Portfolio Intelligence to evaluate the impacts of over 500 HVAC projects completed in 2016 across our entire building portfolio. Not only did we validate the expected energy savings, we also saw dramatic reductions in work order activity and were able to justify and deploy a more aggressive HVAC strategy for 2017 based on the results."

- Portfolio Energy Manager, Commercial Real Estate, Chicago

# Get results right away

As easy as 1, 2, 3. Here are the steps to implementing Switch Portfolio Intelligence:



## 1 Strategy Development & Project Kick Off

The Switch Team works with you to set project goals and objectives, quantify immediate and long-term benefits and determine which data sources to integrate.

## 3 Portfolio Intelligence & Opportunity Identification

As soon as the Platform is configured, you'll be able to access, visualize and analyze your building portfolio data like never before. You'll gain actionable insights to continuously improve portfolio performance.

STEP  
1

STEP  
2

STEP  
3

## 2 Platform Configuration & Training

Switch pulls your data into the Platform, cleans it up and organizes it. We help you create tailored dashboards, key performance indicators and automated reports for your team; and ensure each team member has exactly what they need, when they need it. Our goal is to make sure you're comfortable navigating the Platform and generating on-demand reports.



# About Switch



Switch Automation is globally recognized as a leader in customer-centric smart building program development. We'll help you figure out where to start with smart building technology and develop a strategy that fits and grows with your organization. We're experts at quickly identifying improvement opportunities that will lead to significant return on investment for enterprise real estate portfolios.