

Conference Planner

Plan and manage large-scale investment marketing events and conferences

Embedded within our events management solution, the Conference Planner module is designed to help facilitate large-scale events or symposiums. Plan and manage events, and access thousands of contacts and potential attendees.

Conference Planner allows you to:

- Manage and plan the logistics of a conference on one collaborative online platform.
- Communicate effectively with all those involved in the event planning process.
- Automate high volume event management processes, increasing efficiency and reducing errors.
- Save all conference information in one central repository, facilitating datamining and profitability reporting.

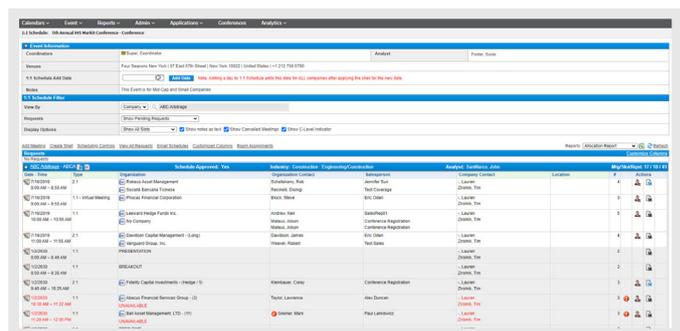
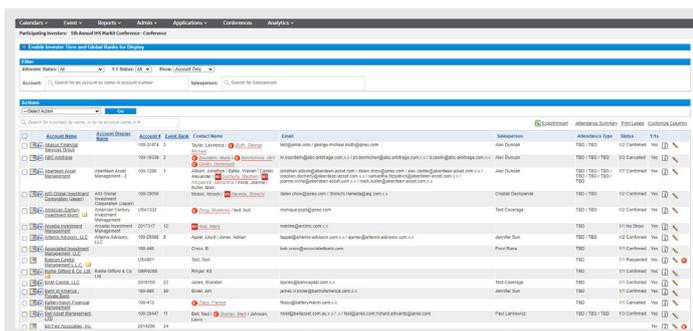
Plan all elements of an upcoming event

- View all firm events—including conferences, deal road shows, and marketing events—in one central calendar.
- Create single-venue or multi-region conferences, and build schedules of presentations on multiple tracks for greater flexibility.
- Control when internal and external users can view the conference details.
- Upload event attachments for users to access.
- Support for virtual and in-person attendee participation.

The screenshot shows a web-based calendar interface for the Conference Planner. The main view is a monthly calendar for December 2019, with a secondary view for January 2020. The interface includes a navigation bar at the top with options like 'Calendars', 'Event', 'Reports', 'Admin', 'Applications', 'Conferences', and 'Analytics'. Below the navigation bar, there are filters for 'Create Event', 'Only My Events', 'Conference +4', 'Location', 'More Filters', and 'Clear all'. The calendar grid shows events for each day, with details for selected events. For example, on Wednesday, December 11, 2019, there is a '5TH ANNUAL IHS MARKIT CONFERENCE' in New York. On Thursday, December 12, 2019, there is a 'MEDIA & TELECOMMUNICATIONS CONFERENCE' in California. On Friday, December 13, 2019, there is a 'PUBLIC ENERGY COMPANY CONFERENCE' in South San Francisco. The interface also shows a 'Show Event Only' dropdown and a 'View All' button.

Plan all elements of an upcoming event

- Easily import and export invitee lists via Excel and reconcile them against CRM data to ensure clean matches.
- Utilize the conference registration module to create a custom website and send out invitations.
- Print labels or name badges for some or all contacts.



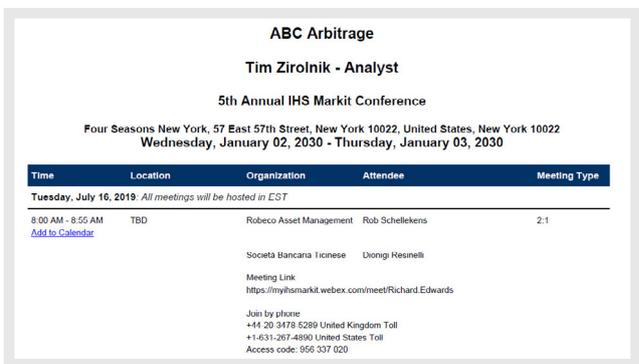
Schedule one-on-one meetings

- Take an individual approach to allocations by company or investor, or a flexible auto-allocation approach allowing a coordinator to set numerous request parameters and allocate hundreds of requests with one click.
- Avoid conflicts by receiving warnings if there is a doublebooked meeting or room, the contact is not available or the room is overbooked.
- Quickly move meetings on the day of a conference and combine it with an email alert to notify the attendee.

- Create bird’s-eye view exports of all company meetings or rooms to facilitate the meeting management throughout the conference lifecycle.
- Provide these exports to sales for added visibility.
- Use allocation statistic reports, open slots reports, and request reports by company and account to ensure your meetings are properly allocated.

Manage communications

- Create custom email templates with variable substitution to pull in event and contact specific information; reuse these templates for consistency across conferences.
- Include investor or company schedules in the body of the email for mobile friendly viewing or attach them in a Word or PDF format.
- Systematically track changes as of a certain date and highlight those changes to an attendee in the body of the email.
- Send out system generated email alerts of any new meetings, cancellations, or updates to existing meetings.



Generate real-time schedules

- Generate company and investors schedules individually or in bulk.
- Mobile views of schedules allowing for real-time updates.

View/access a sales dashboard

- Allow sales to monitor their contacts’ attendance status, submit 1:1 requests, availability and interest in general sessions.
- View a list of requests and confirmed meetings once the coordinator has released the information.

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