

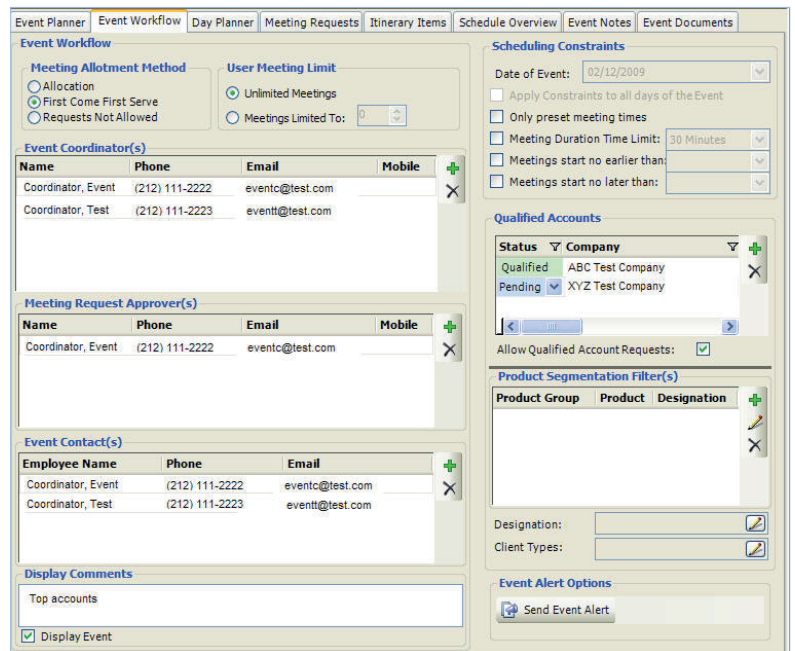
Sales and Marketing Event Management Module

Manage Events More Efficiently

BD Vision's Sales and Marketing Event Management Module facilitates organization and execution of events, including analyst meetings, field trips, road shows and conferences.

Event Workflow

- z Select from different meeting allotment methods
- z Manage event details and control when it is released to the sales force
- z Select event coordinators and sales coordinators
- z Maintain all event notes and comments
- z Enter itineraries items such as flights, travel times, car reservations directly into meeting schedules
- z Notify attendees of all meeting, event, and attendee changes immediately with email alerts
- z Attach event documents that salespeople and research analysts can access



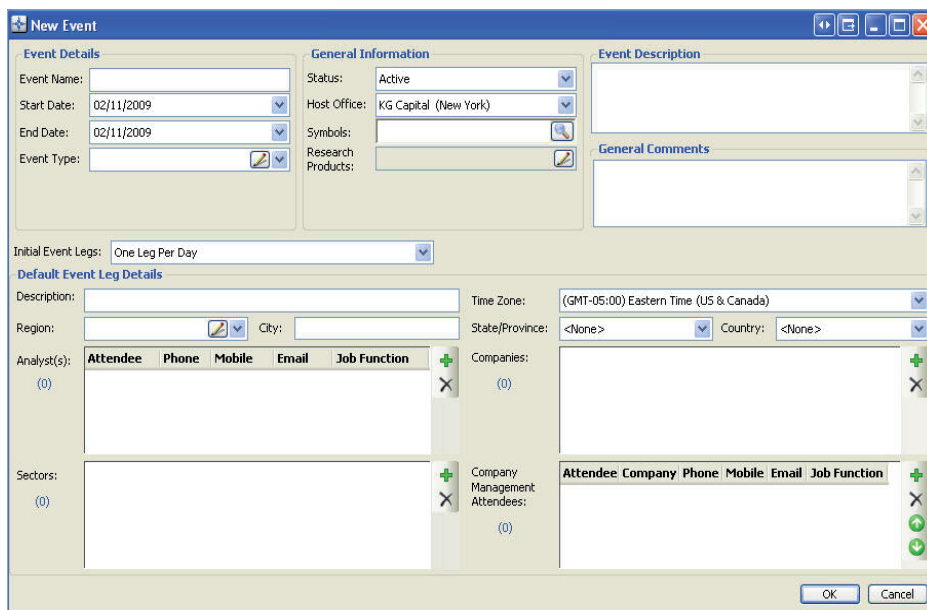
The screenshot shows the 'Event Workflow' configuration screen with several sections:

- Meeting Allotment Method:** Radio buttons for Allocation, First Come First Serve (selected), and Requests Not Allowed.
- User Meeting Limit:** Radio buttons for Unlimited Meetings (selected) and Meetings Limited To: 0.
- Event Coordinator(s):** A table with columns: Name, Phone, Email, Mobile.

Name	Phone	Email	Mobile
Coordinator, Event	(212) 111-2222	eventc@test.com	
Coordinator, Test	(212) 111-2223	eventt@test.com	
- Meeting Request Approver(s):** A table with columns: Name, Phone, Email, Mobile.

Name	Phone	Email	Mobile
Coordinator, Event	(212) 111-2222	eventc@test.com	
- Event Contact(s):** A table with columns: Employee Name, Phone, Email.

Employee Name	Phone	Email
Coordinator, Event	(212) 111-2222	eventc@test.com
Coordinator, Test	(212) 111-2223	eventt@test.com
- Scheduling Constraints:** Date of Event: 02/12/2009. Checkboxes for 'Apply Constraints to all days of the Event', 'Only preset meeting times', 'Meeting Duration Time Limit: 30 Minutes', 'Meetings start no earlier than:', and 'Meetings start no later than:'.
- Qualified Accounts:** Status: Company. Qualified: ABC Test Company. Pending: XYZ Test Company.
- Product Segmentation Filter(s):** Table with columns: Product Group, Product, Designation.
- Event Alert Options:** Checkboxes for 'Send Event Alert'.



The 'New Event' dialog box contains the following sections:

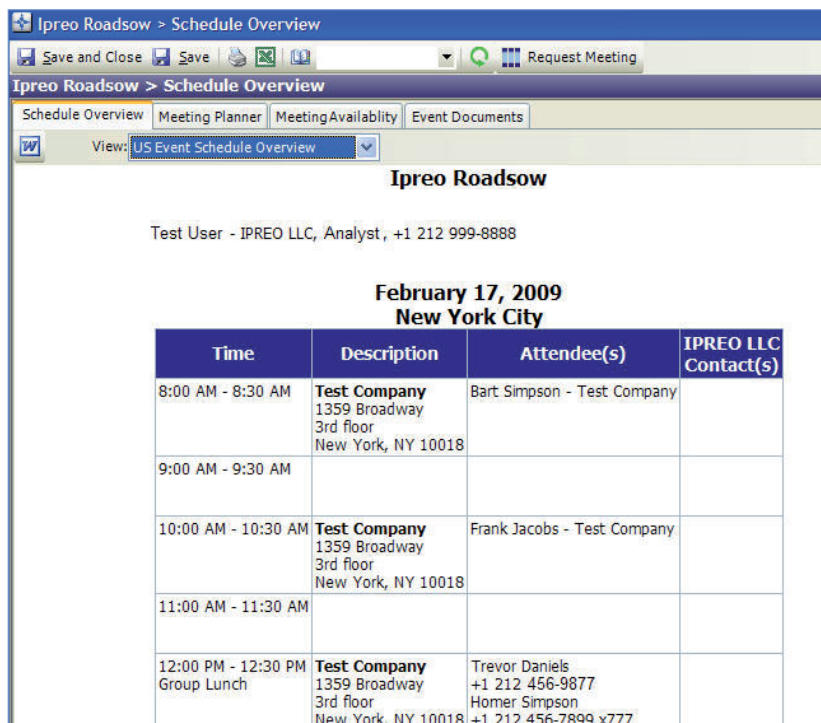
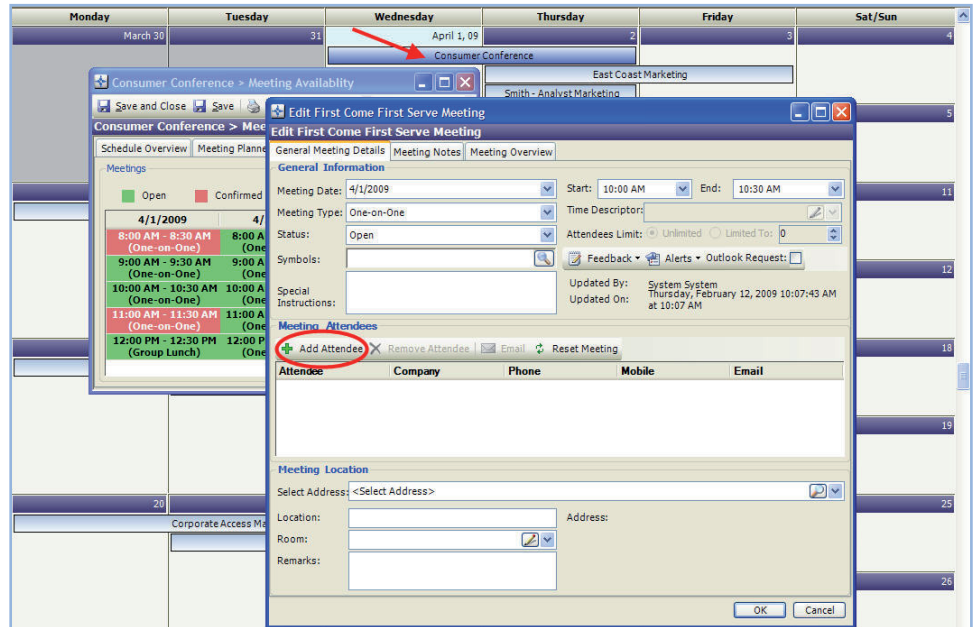
- Event Details:** Event Name, Start Date (02/11/2009), End Date (02/11/2009), Event Type.
- General Information:** Status: Active, Host Office: KG Capital (New York), Symbols, Research Products.
- Event Description:** Text area for description.
- General Comments:** Text area for comments.
- Initial Event Legs:** One Leg Per Day.
- Default Event Leg Details:** Description, Region, City, Time Zone: (GMT-05:00) Eastern Time (US & Canada), State/Province: <None>, Country: <None>.
- Analyst(s):** Table with columns: Attendee, Phone, Mobile, Email, Job Function.
- Companies:** Table with columns: Company, Phone, Mobile, Email, Job Function.
- Sectors:** Table with columns: Sector, Company, Phone, Mobile, Email, Job Function.
- Company Management Attendees:** Table with columns: Attendee, Company, Phone, Mobile, Email, Job Function.

Event Planner

- z Flexible and robust tool for scheduling client meetings, generating meeting schedules, recording attendees, and specifying locations more efficiently
- z Set default event leg details including time zone & region, and add/delete analysts, companies, sectors and company management attendees
- z Associate multiple ticker symbols and research products for each event
- z Automatically generate meeting schedules with pre-defined event templates or set meeting times

Event Calendar

- z Salespeople and research analysts can view schedules in real-time for centrally managed marketing events, request meetings for clients or schedule their own timeslots
- z Monthly, weekly and daily calendar views
- z Drill down to detailed schedules
- z Request meetings directly from the calendar
- z Color-coded status of meeting requests for simple viewing



Meeting Schedule

- z Dynamically create Schedule Overviews
- z One-click print formatting
- z Easily export Schedule Overviews to Word and Excel
- z View event notes and attachments

About Ipreo

The marriage of deep industry expertise and dynamic innovation, Ipreo brings market-leading intelligence, robust technology, and superior customer service to all participants in the global capital markets. Bringing together state-of-the-art new issuance systems and premier global financial and investor data, Ipreo provides innovative technology and superior insights to all participants in the capital-raising process.