



Global Investor Calendar: UX concepts & process flows

May 24, 2013

Purpose

- Share preliminary artifacts for future-state definition of the Global Investor Calendar user experience:
 - Conceptual directions
 - User process flows

Objectives

- Obtain feedback on concept directions
- Agree on process for revising/socializing/selecting concept with admins
- Agree on how to validate user process flows

Agenda

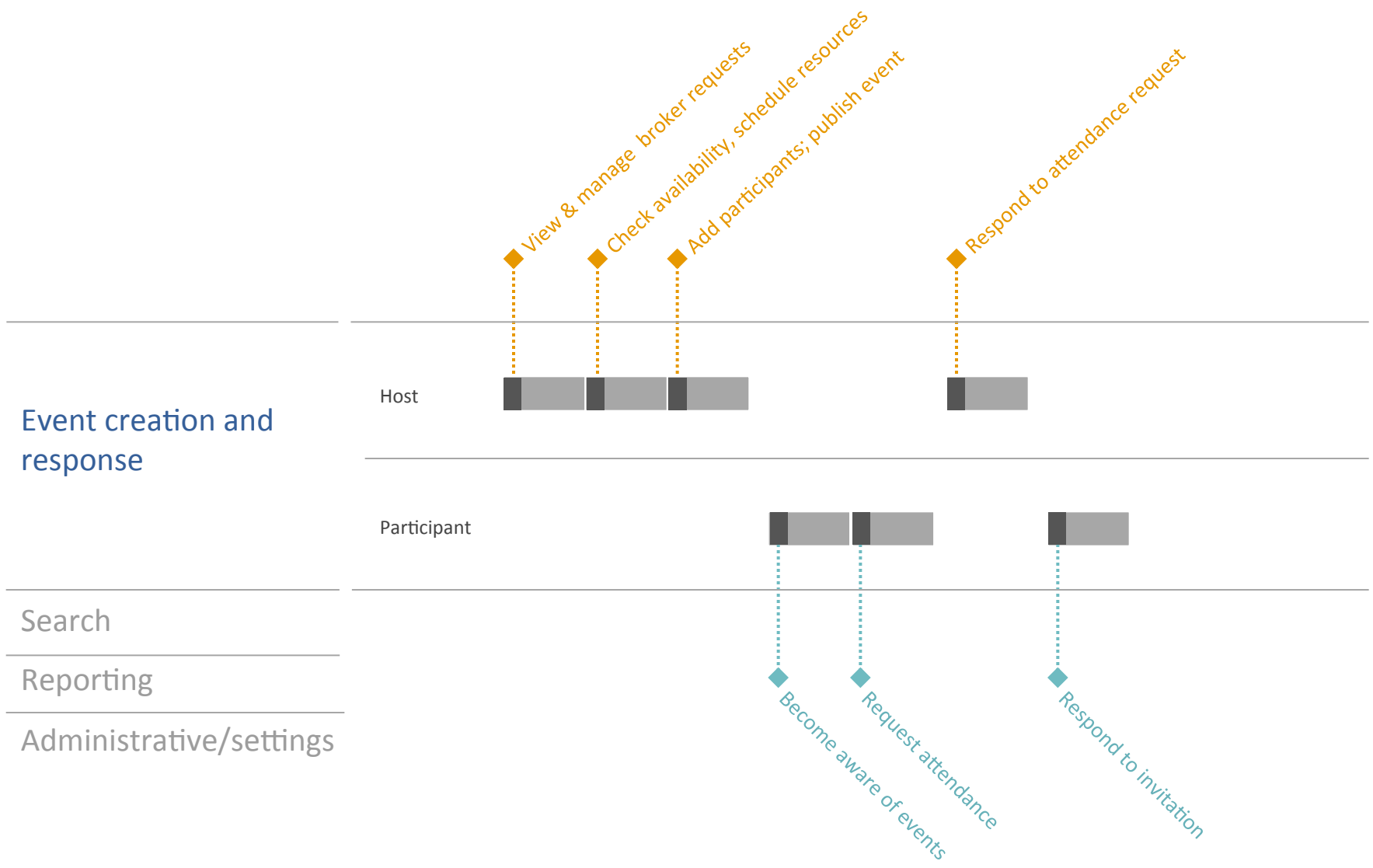
- Conceptual directions
- Revising, socializing & selecting concepts
- User process flows

Goals for an Improved User Experience

- Increase investors' **awareness of relevant** upcoming events
- Ensure administrators' **accuracy & efficiency** in the creation and modification of events
- Enable event **reporting** for internal regulatory and GRG marketing purposes



Use cases considered



Concepts under development

1

Calendar Lens

Manage and view events in the context of a specific investor's schedule.

2

Task Lens

Manage hosting & participation tasks investor-by-investor.

3

Overview Lens

Assess and prioritize tasks; view investor overlaps

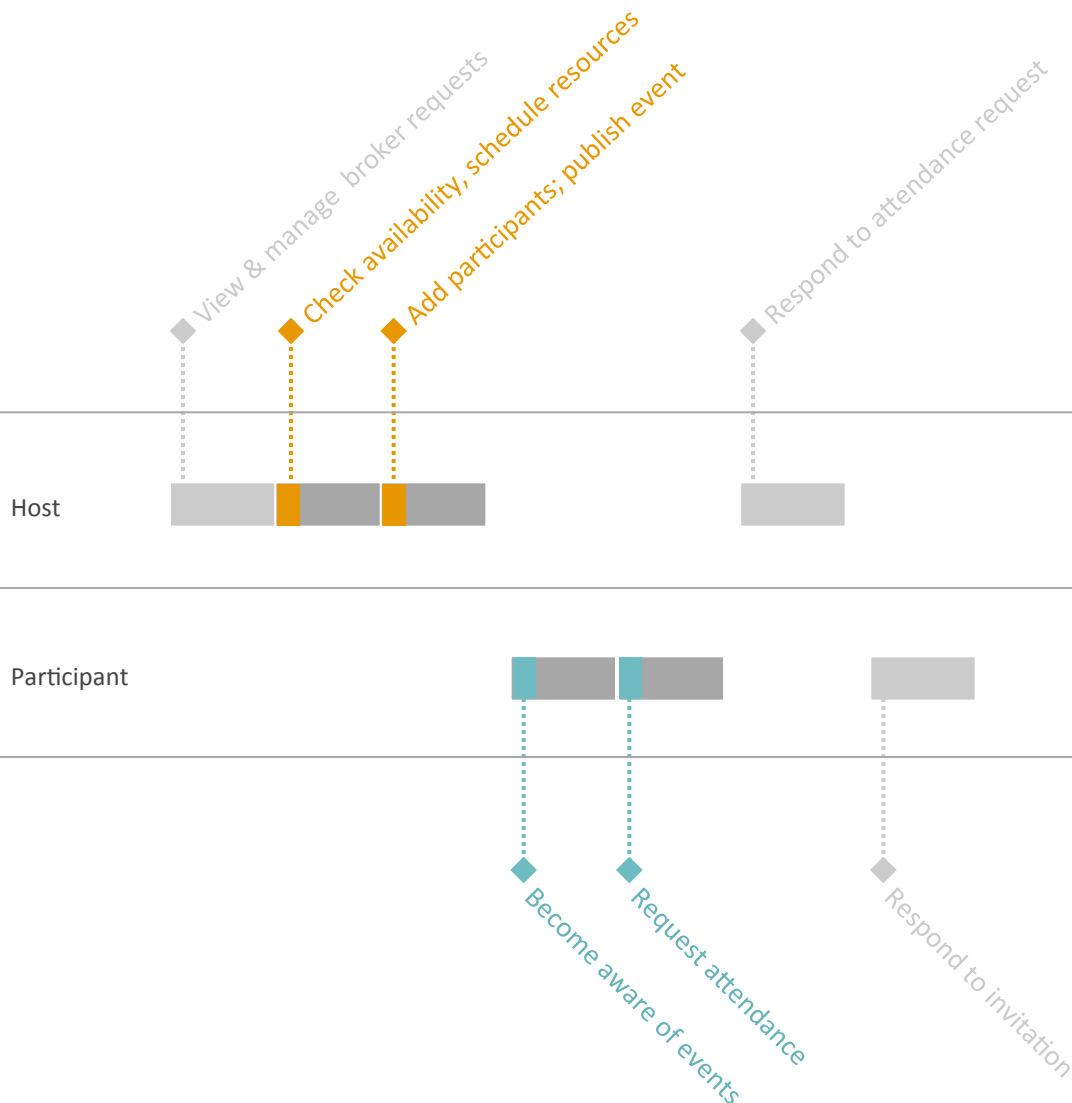
All concepts address goals of

AWARENESS & RELEVANCE | ACCURACY & EFFICIENCY

(CONCEPTS NOT MUTUALLY EXCLUSIVE)

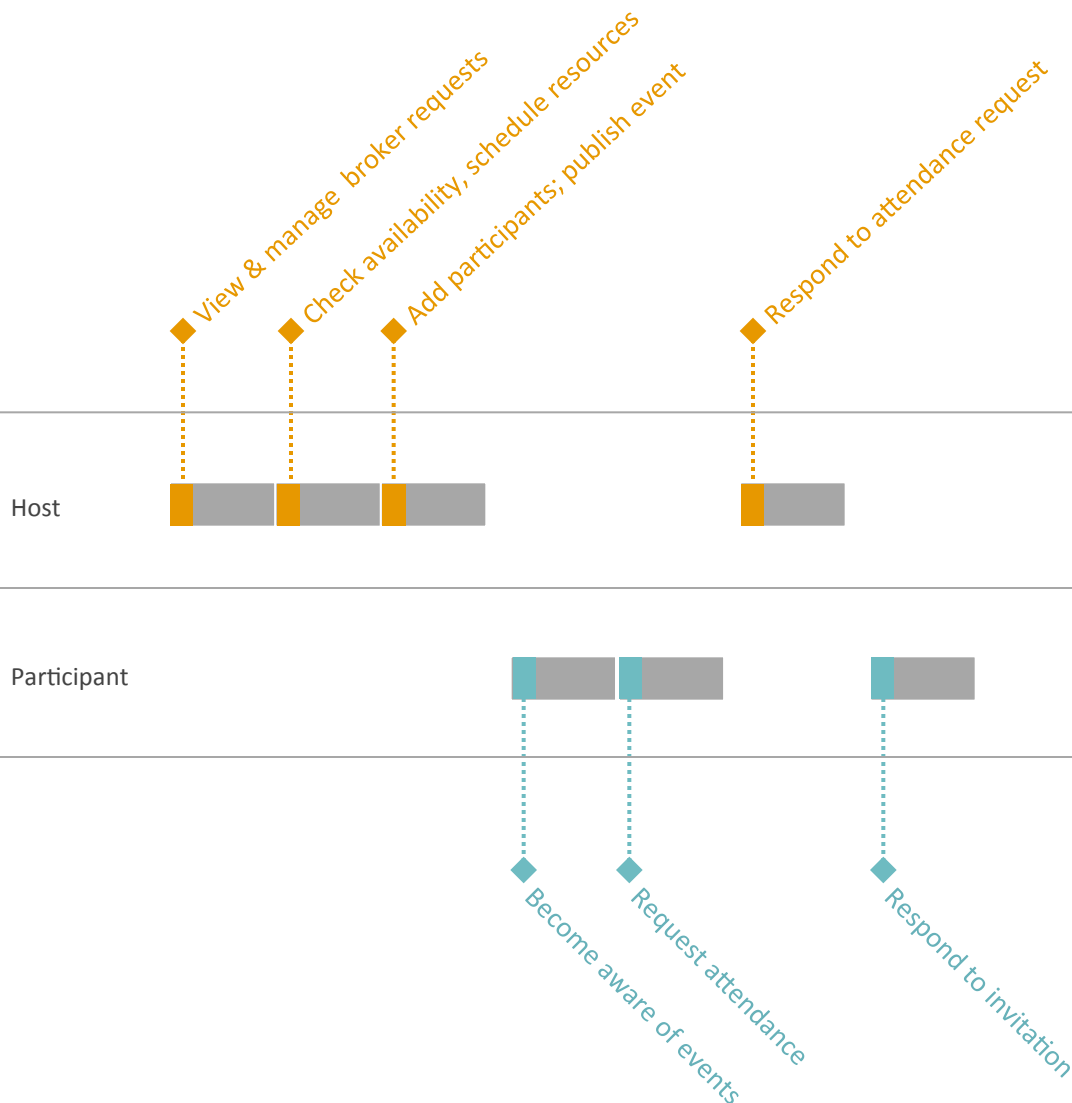
Concept 1

Event creation and response flow



Concepts 2 & 3

Event creation and response flow



1. Calendar Lens

The screenshot displays the 'GLOBAL INVESTOR CALENDAR' interface. At the top, it says 'Welcome AMANDA BAUMAN' with a 'Log Off / Switch User' link. Below this is a navigation bar with 'Calendar', 'Investor Settings', and 'Reporting' tabs. A search bar labeled 'Search All Events' is on the right. The main header shows the user's profile: 'Batgos, Marianne K. (Marianne)', 'Fixed Income Trader, MKB', and '1-617-951-5587, 280 Congress'. Below the header is a row of investor avatars. The main content area features a calendar for 'MAY 2013' with tabs for 'MONTH', 'WEEK', 'DAY', and 'TODAY'. A 'Show Outlook' button and a 'Filter By...' dropdown are present. On the left, an 'Event Feed' sidebar lists events with buttons for 'Request Invitation', 'Delete', and 'Share'. The calendar grid shows dates from 29 to 31, with various event bars. A right-hand pane titled 'EVENT DETAILS' shows information for a meeting on '28 MAY 2013' with 'Rosetta Stone Inc. Catch Up Call' at 11:15am-12pm. Details include company information, a description, URL, location (Fontainebleau Hotel), dial-in information, and participants.

GLOBAL INVESTOR CALENDAR

Welcome AMANDA BAUMAN Log Off / Switch User

Calendar Investor Settings Reporting Search All Events

Batgos, Marianne K. (Marianne)
Fixed Income Trader, MKB
1-617-951-5587, 280 Congress

Event Feed Filter These Events

Request Invitation Delete Share

15 MAY 2013 | Meeting
Unball

15 MAY 2013 | Meeting
Boston Private Financial Holdings (BPFH) ...

16 MAY 2013 | Meeting
Ubisoft Entertainment Post Earnings Call ...

16 MAY 2013 | Meeting
Breakfast Briefing- Luis Rubio, President, ...

17 MAY 2013 | Meeting
Urban Outfitters (URBN) Post Earnings Call

17 MAY 2013 | Meeting
Breakfast briefing at the hotel Rpgogelo ...

17 MAY 2013 | Meeting
Hologic, Inc. Conference Call

17 MAY 2013 | Meeting
Autoliv, Inc. call hosted by Brian Barbeta

17 MAY 2013 | Meeting
Summer Infant CEO & CFO

17 MAY 2013 | Meeting
Briefing: Rogelio Ramirez de la O, ...

17 MAY 2013 | Meeting
Briefing: Manuel Ramos Francia, Deputy ...

17 MAY 2013 | Meeting
Briefing: Ernesto Revilla, Chief Economist

17 MAY 2013 | Meeting
Moody's Managing Director, Simon Harris

17 MAY 2013 | Meeting
Lunch Briefing, Roberto Newell, Director ...

17 MAY 2013 | Meeting
Intelsat Call: Josh Lewis & Dianne ...

MONTH WEEK DAY TODAY Show Outlook Filter By... Create a New...

< > MAY 2013

MON TUE WED THU FRI SAT SUN

29 30 1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

HOLIDAY* 27 28 29 30 31

(UTC) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London

EVENT DETAILS

28 MAY 2013 | Meeting
Rosetta Stone Inc. Catch Up Call
11:15am-12pm

Details
Company: Rosetta Stone Inc (RST)
Sector: Information Technology, Software
Host: Abularach, Mario E.
Coord: McGill, Katherine A.
Type: Single Company/Single Day

Description
Captain weekend friendzoned always
avenger essay troll eat dummies. Tank
puking rainbows I see what you did there
cool lois in strangers donut I'm watching
u. Creepy Me Gusta superhero venenatis
grin oboma hulk rebecca black all the
things games.

URL & Documents
www.brokersectorlocationmtg.com

Location

Fontainebleau Hotel
4441 Collins Ave,
Miami Beach, FL, 33140,
United States

Dial in - 617-289-3400/x63400
Passcode - x65421#, United States

Participants
✓ Angeli, Steven C.; Glazer, Bruce;
McGill, Katherine A.

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Manage and view events in the context of a specific investor's schedule.

This concept shows Investors' suggested and scheduled events immediately within the context of the individual investor's calendar, making "The Investor" and "The Date" the primary organizing principles around which the events are presented.

[\(View PDF for full set of comps\)](#)

2. Task Lens

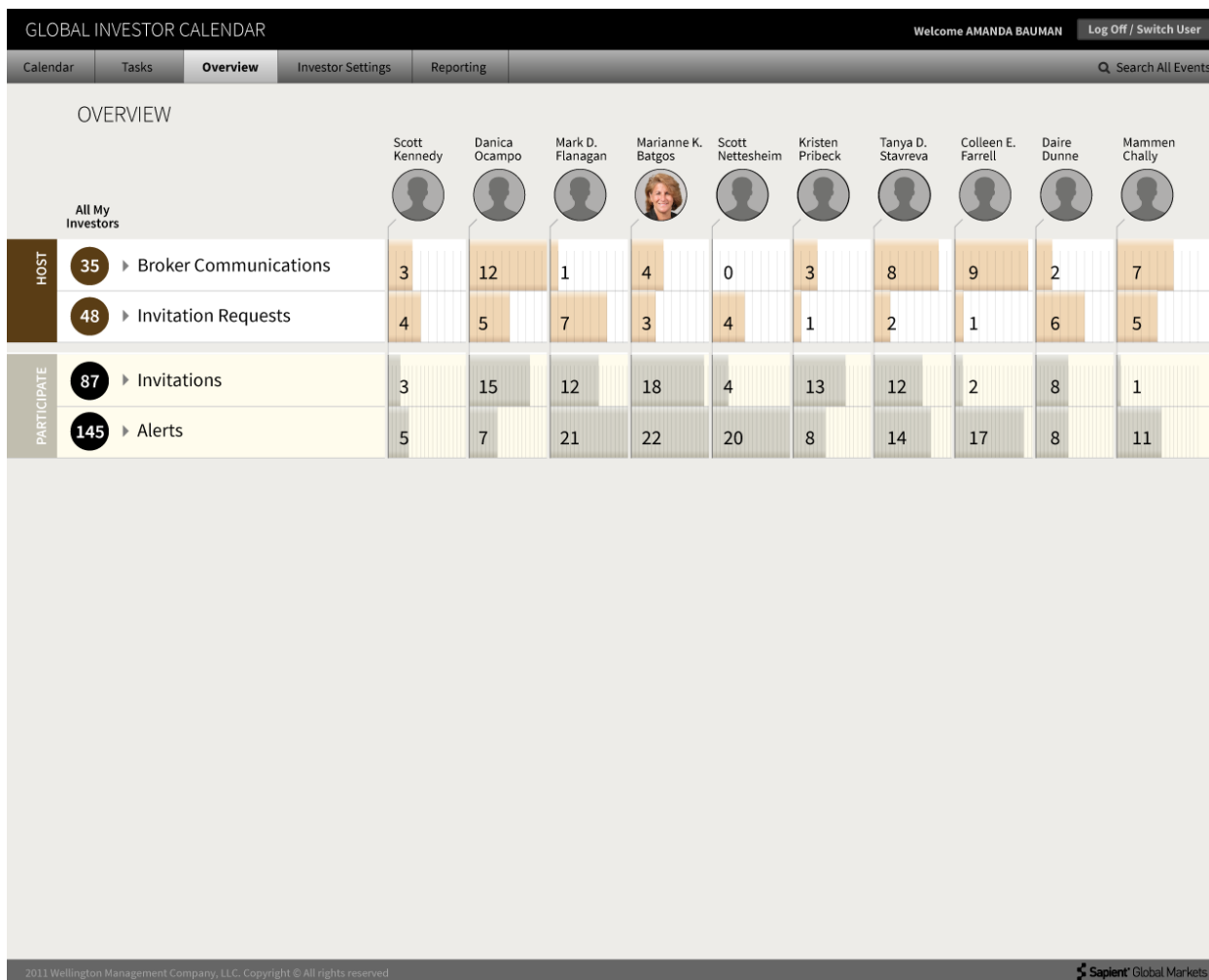
Manage hosting & participation tasks, investor-by-investor.

Highly integrated with the Outlook in-box, this concept groups the Admin's major tasks for hosting and participating in events, organizes them by Investor, and helps the Admin visualize outstanding tasks.

This concept also supports the ability to take bulk actions.

[\(View PDF for full set of comps\)](#)

3. Overview Lens



Assess and prioritize tasks; view investor overlaps.

Similar to concept 2 in its integration with the Outlook in-box, this concept also groups tasks into Hosting or Participation activities. Where it differs from concept 2:

- This concept exposes **all pending tasks for all investors** in a high-level dashboard, so that the Admin can make an informed decision about which tasks to tackle first.
- Tasks are shown in a manner which makes it possible to see any **overlap with other investors**, and to take action on behalf of multiple investors simultaneously.

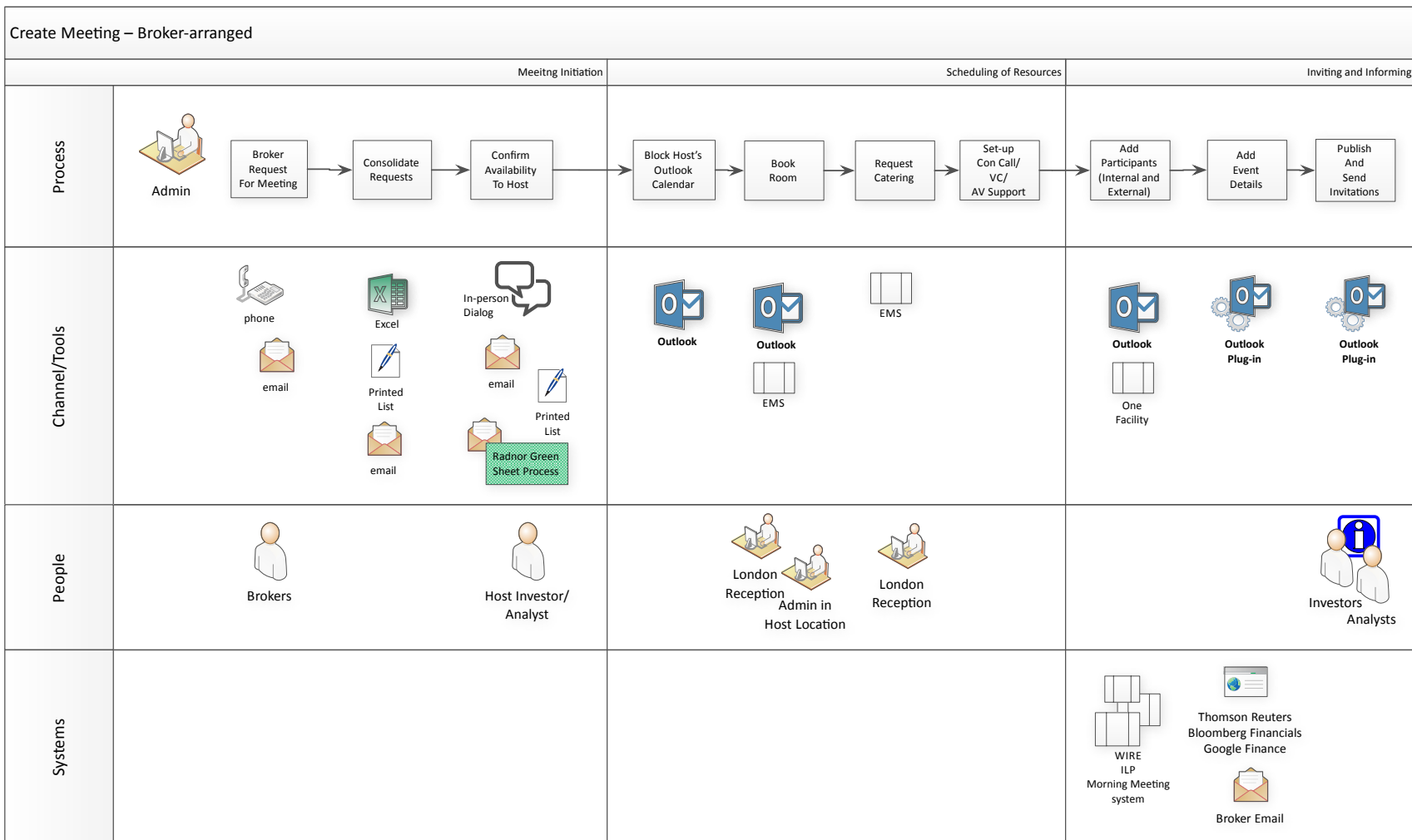
[\(View PDF for full set of comps\)](#)

Socializing & Selecting

- Review 3 concepts in 1-2 group discussion(s) with Admins Tuesday, May 28.
- Consolidate feedback and iterate on design to develop single concept
- Circulate to Admins, Admin Managers, and Business Owners
- Incorporate final feedback
- Present for final sign-off: On or before Meeting 3, June 7

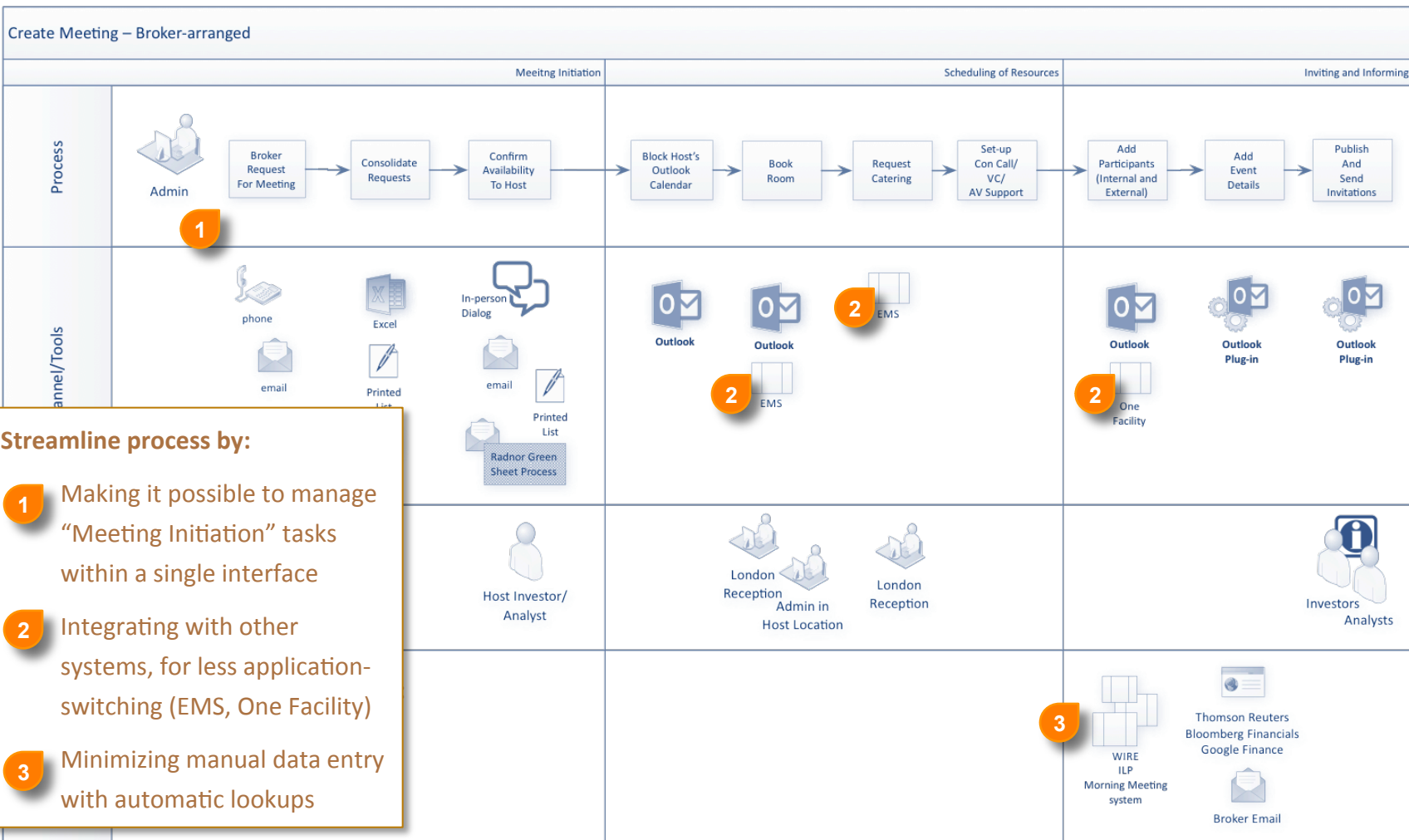
Process flow: Creating a meeting

Current state (to be validated)



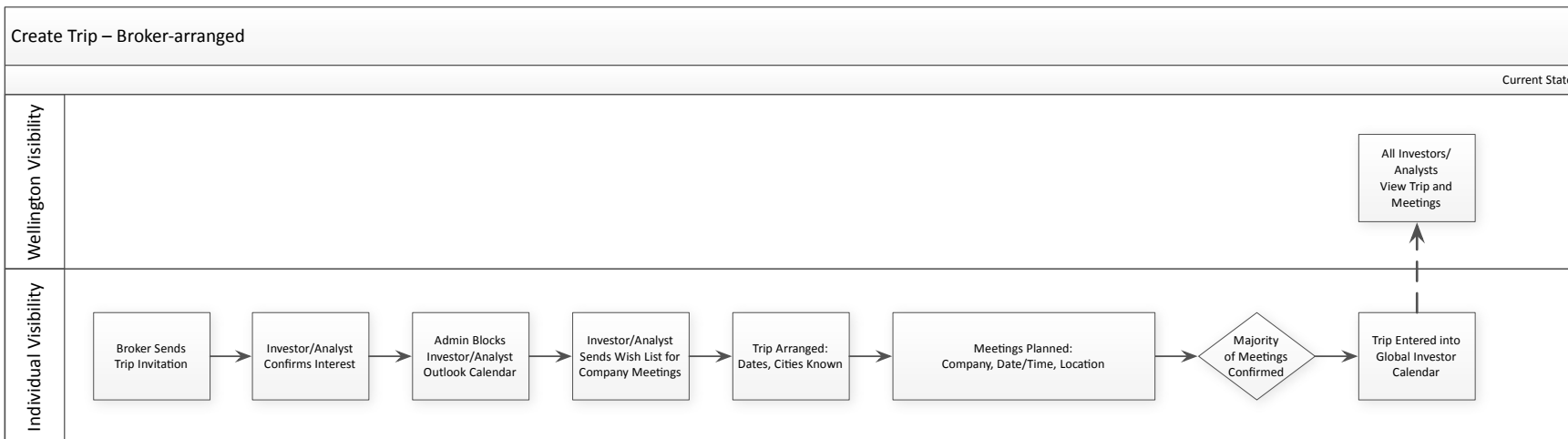
Process flow: Creating a meeting

Opportunities for future state improvements



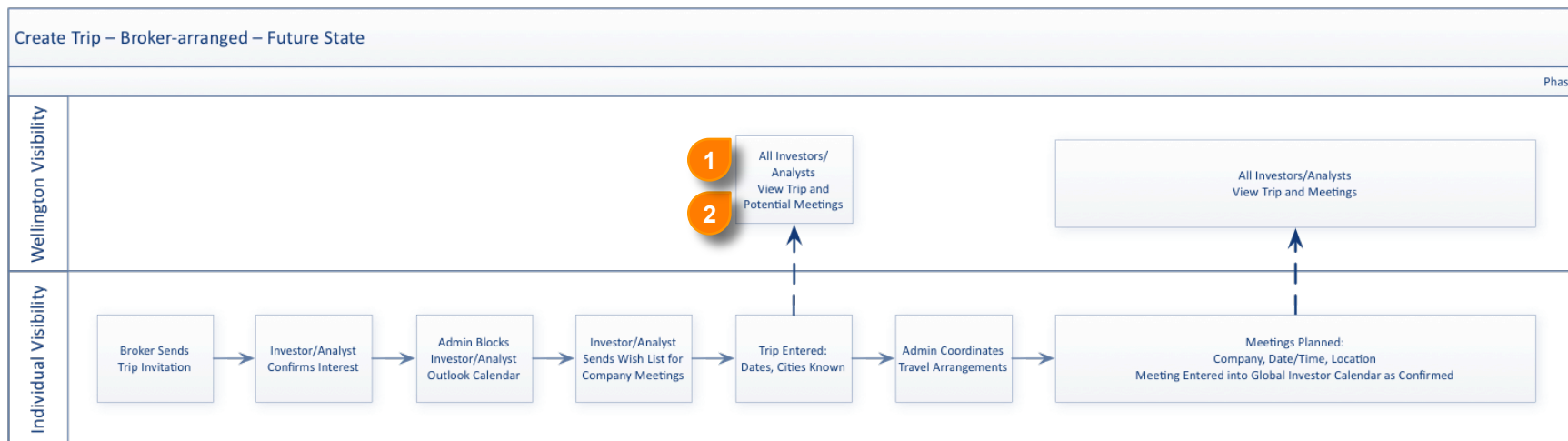
Process flow: Creating a trip

Current state (to be validated)



Process flow: Creating a trip

Opportunities for future state improvements

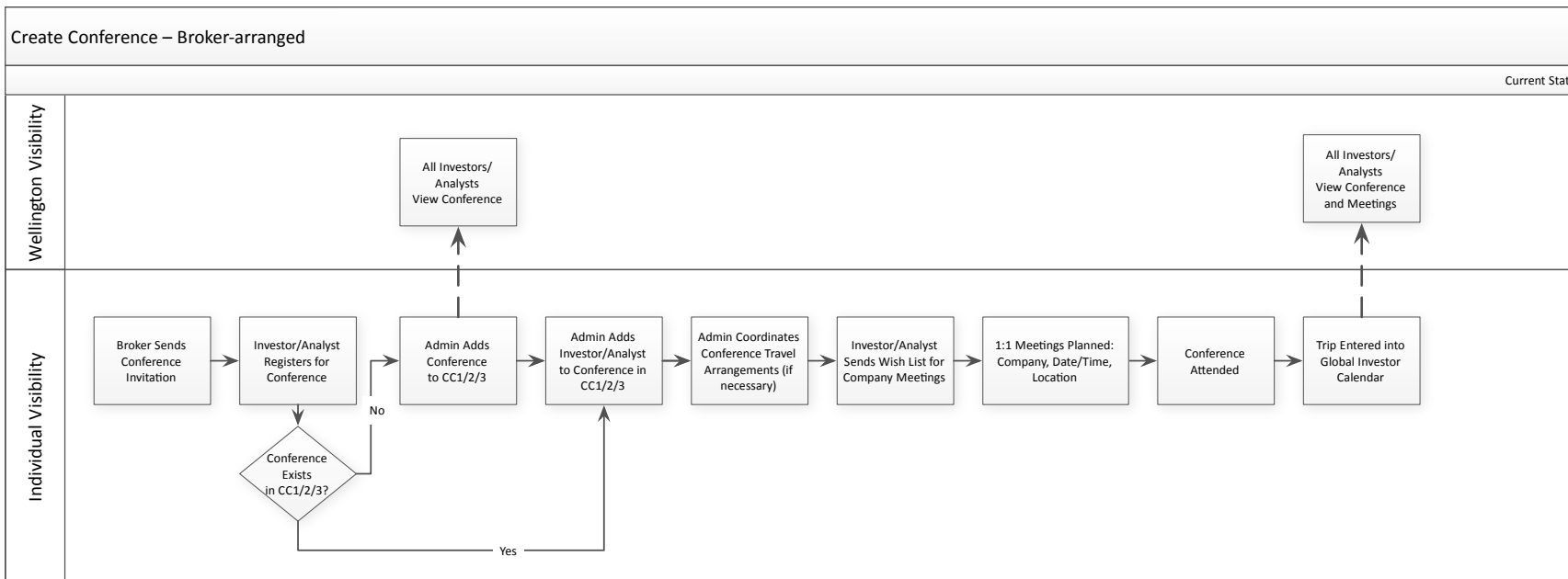


Increase awareness by:

- 1 Publishing trip earlier in process: minimize requirement to have individual meetings firmly scheduled before publishing.
- 2 Offering an “FYI feed” to raise awareness for meetings not (yet) scheduled on a specific time/date

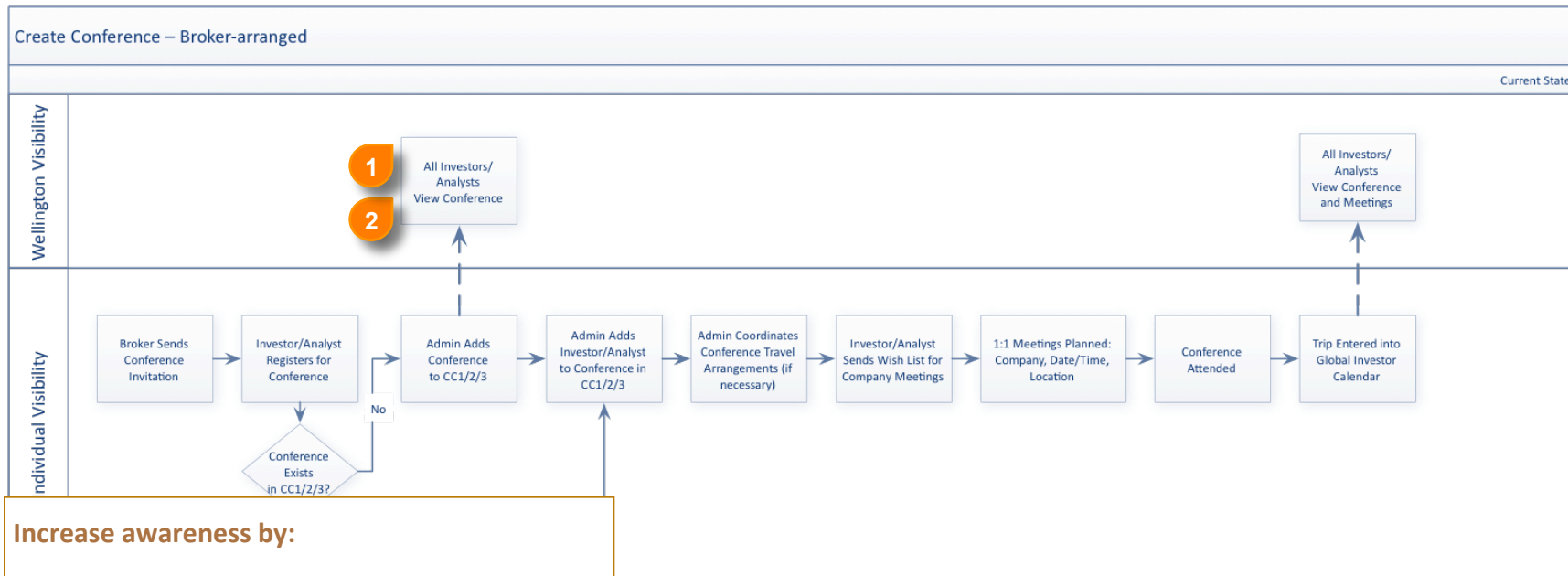
Process flow: Creating a conference

Current state (to be validated)



Process flow: Creating a conference

Opportunities for future state improvements

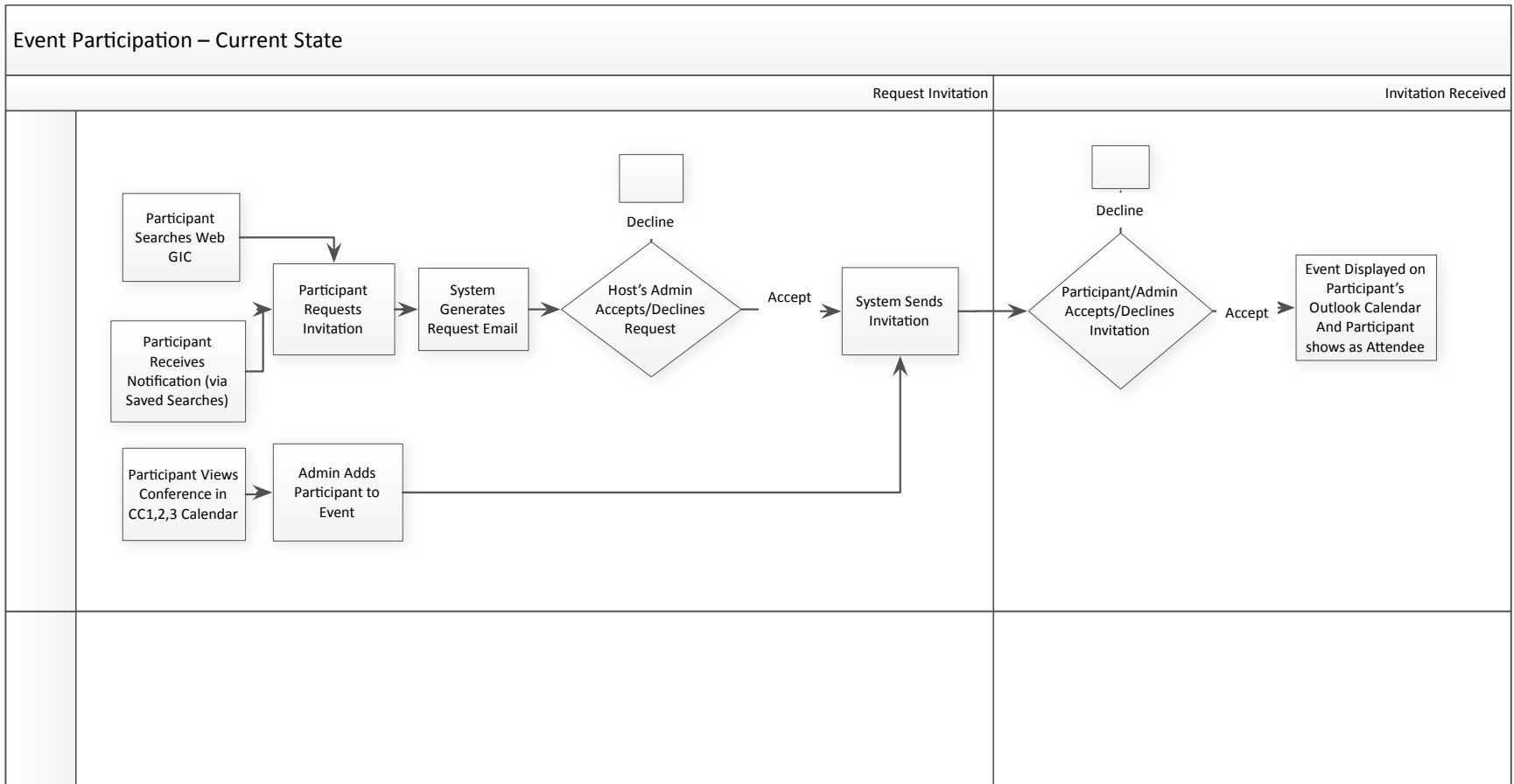


Increase awareness by:

- 1 Publishing conference earlier in process: minimize requirement to have individual meetings firmly scheduled before publishing.
- 2 Offering an “FYI feed” to raise awareness for meetings not (yet) scheduled on a specific time/date

Process flow: Becoming a participant

Current state (to be validated)





Appendix



Awareness & Relevance Themes

1. Admins are the gatekeepers and the first line of defense against information overload
2. Event notifications arrive via various channels
3. Meetings invites serve a dual purpose

Accuracy/Efficiency Themes

1. Significant referencing of existing data sources
2. Low confidence around company name data
3. Lack of integration with EMS
4. Varied practices in syntax for event titles
5. Confusion around meeting sub-types
6. High reliance on customizable visual display
7. Getting guests through security: an unanticipated opportunity

Research Insight Summary

- Opportunities to support awareness of relevant information
 - Systematic capture, flag, and display of Investor preferences
 - Aggregated view that is easy to configure and visually scan as well as share via email or print.
 - Event notification opt in/out
 - Add relevant context around stakeholders in a company
- Opportunities to reduce data-entry errors / number of steps required
 - Automatic data look-up (ILP/Wire, Google Finance, Reuters)
 - Conditional field display
 - Company name field normalization
 - Company search
 - Structured data entry that drives consistent data display
 - Integrate with EMS
 - Integrate with OneFacility
- Opportunities to support individual control of visual display
 - Color-coding
 - Calendar view options: Multiple simultaneously, Monthly/weekly/daily