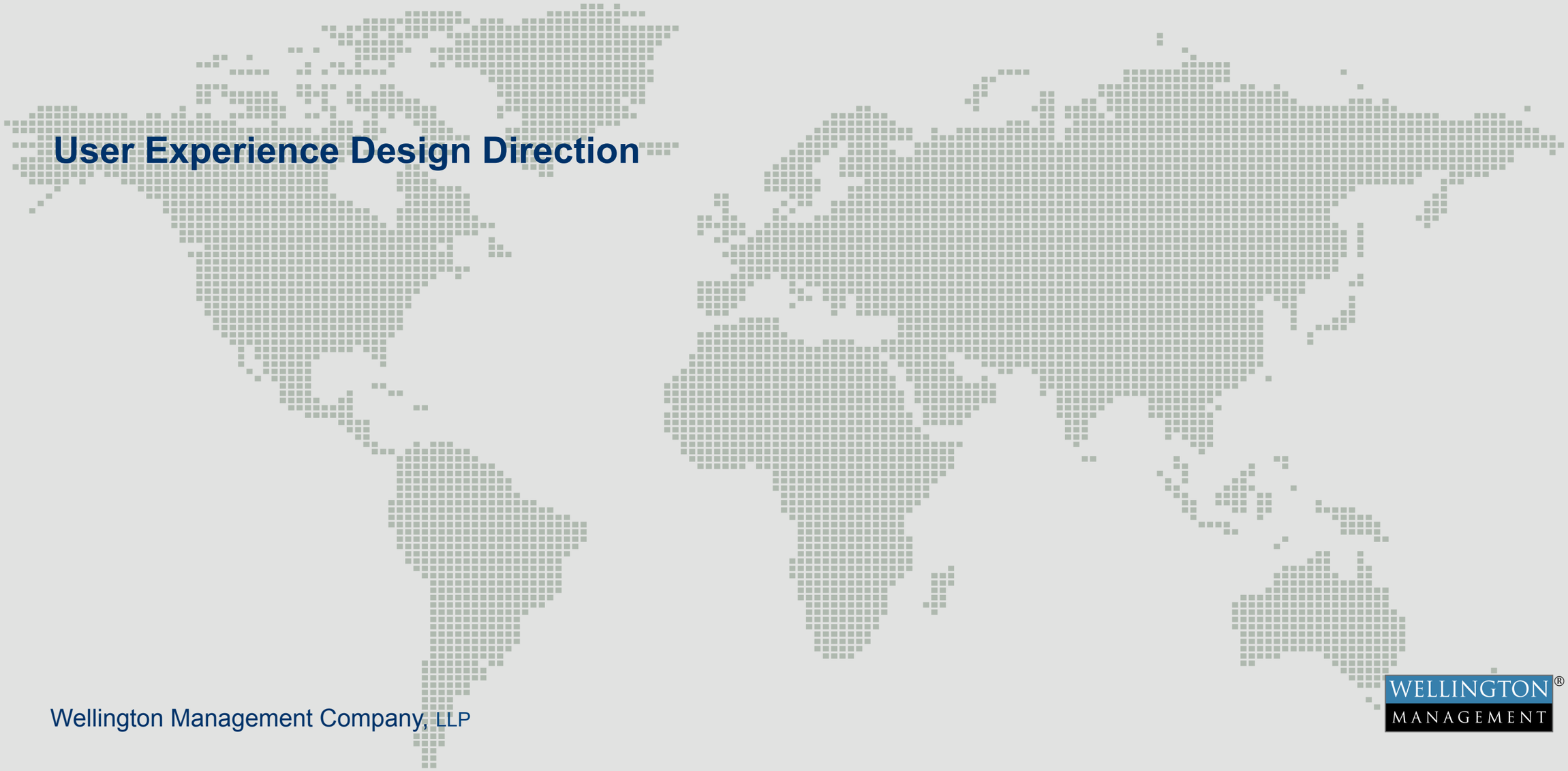
Global Investment Calendar



User Experience Design Direction

Wellington Management Company, LLP

WELLINGTON® MANAGEMENT

Redesign Goals

- Increase investors' **awareness** of upcoming events
- Increase **relevance** of upcoming events as they pertain to investors
- Ensure administrators' **accuracy & efficiency** in creating and managing events
- Enable event **reporting**

GIC Primary Use Cases

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- Hosting activities
  (Admin or Investor)
- Participation activities
  (Admin or Investor)
- Reporting activities
  (Any user)

- Schedule/modify/cancel an event
  Meetings, trips, conferences
- Manage day-of logistics
- Track attendance
- View events in context of Outlook
  Assess current commitments
- Manage Investors' awareness of upcoming events
- Get notified of relevant events
  Holdings/coverage/watchlist; ad hoc searches
- Search for relevant events
- Sign up / accept invitations for events
- Ad-hoc searches

Inputs

- Admin Assistant observation sessions/interviews (8 discussions in Boston, 1 London, 1 Radnor, approx 5 Asia)
- Multiple design reviews (Business Owners)
- Multiple design reviews (Admin Assistants)

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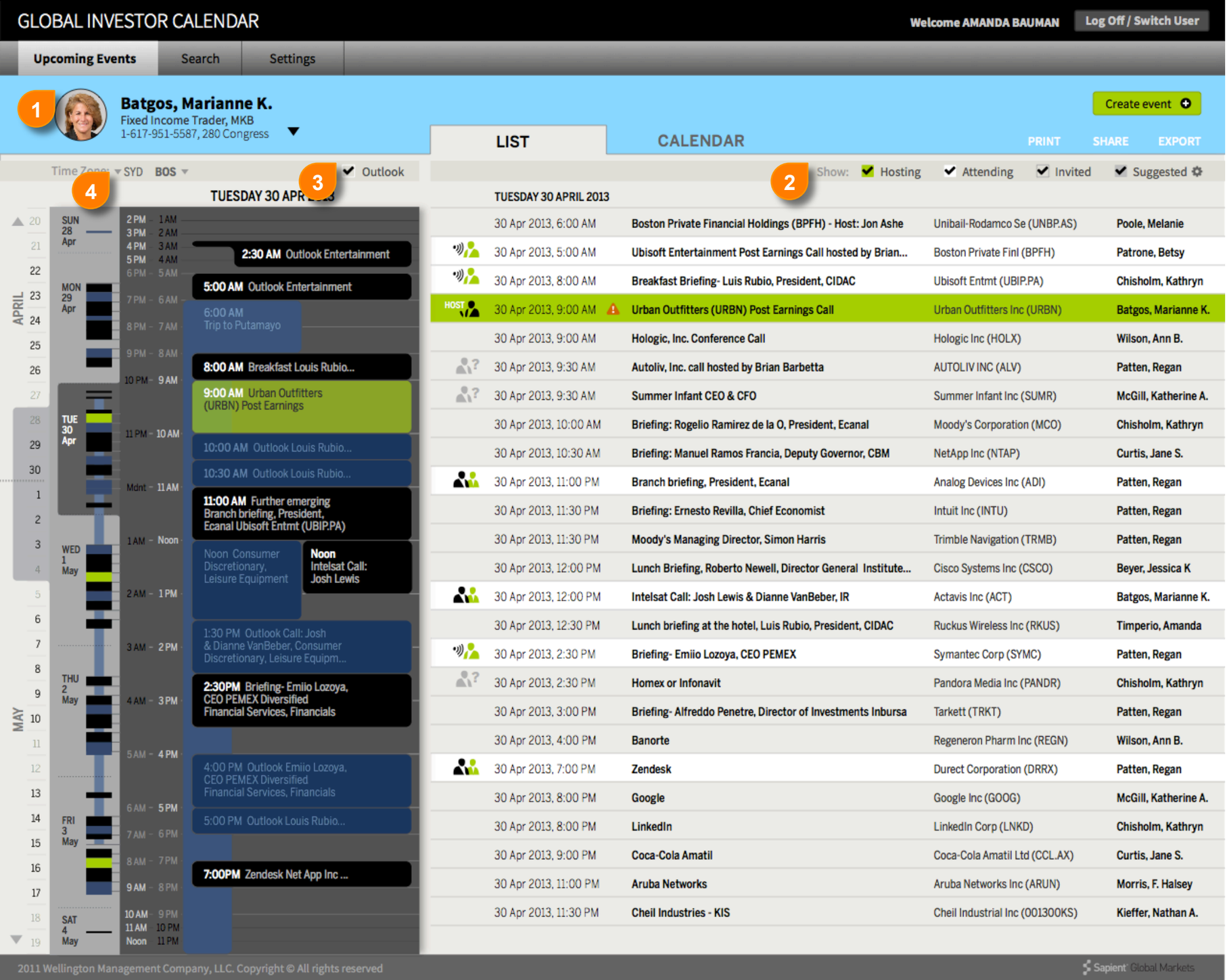
Screen comps

USER EXPERIENCE DESIGN DIRECTION: FLIGHT DECK



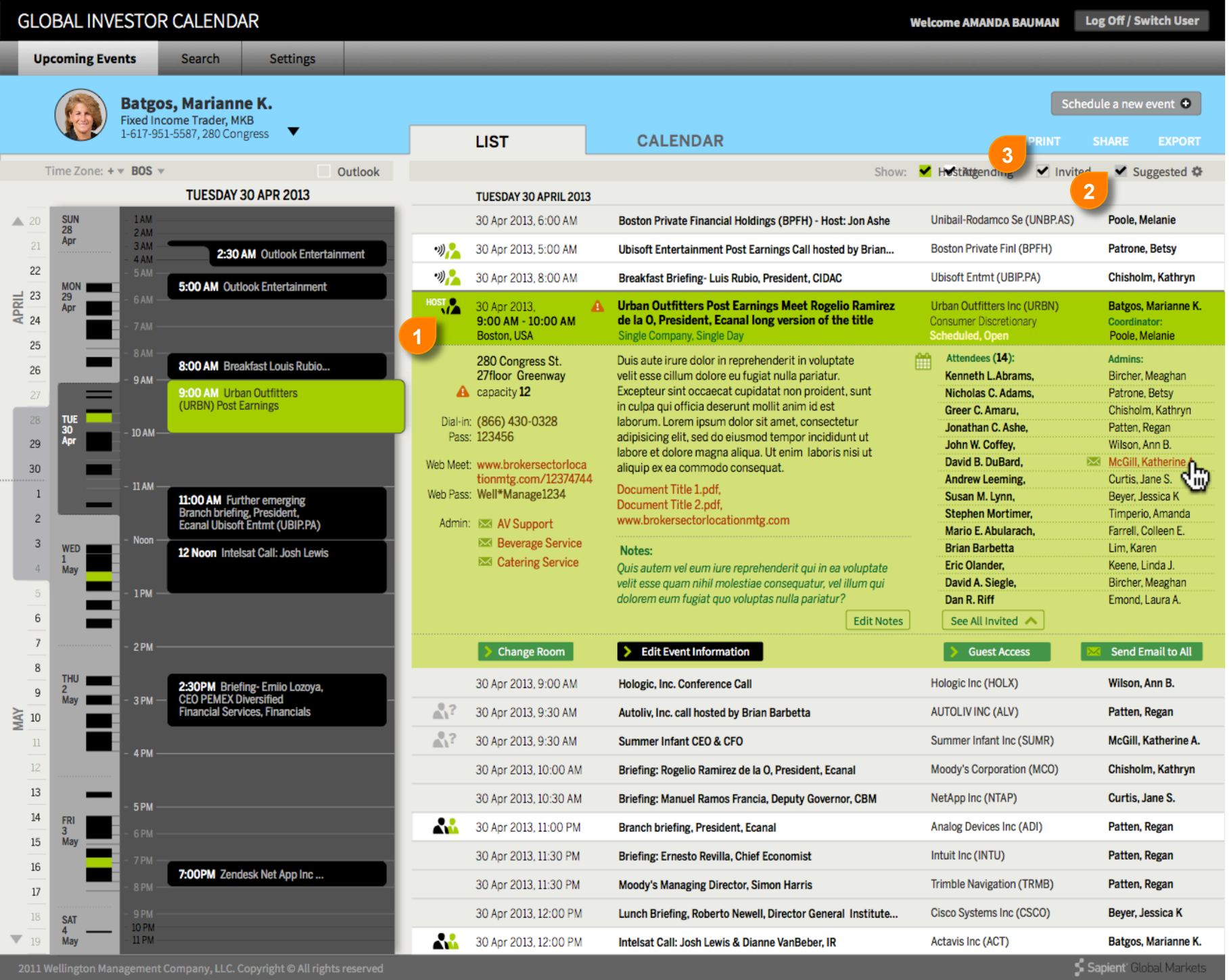
Efficiency in event management

1. Optimized for the Investor Admin and organized by manager, this view provides a view of upcoming GIC commitments (today + next 6 days). This allows the Admin to manage day-of and near-future details for the Investor's events.

2. Events can be viewed according to selected investor's participation :
   - What are they hosting (green rows)?
   - What are they attending (white rows)?
   - What are they not yet committed to (grey rows)?

3. Shows relationship of these events to manager's Outlook calendar (in blue)

4. Calendar can be viewed against another timezone for comparison



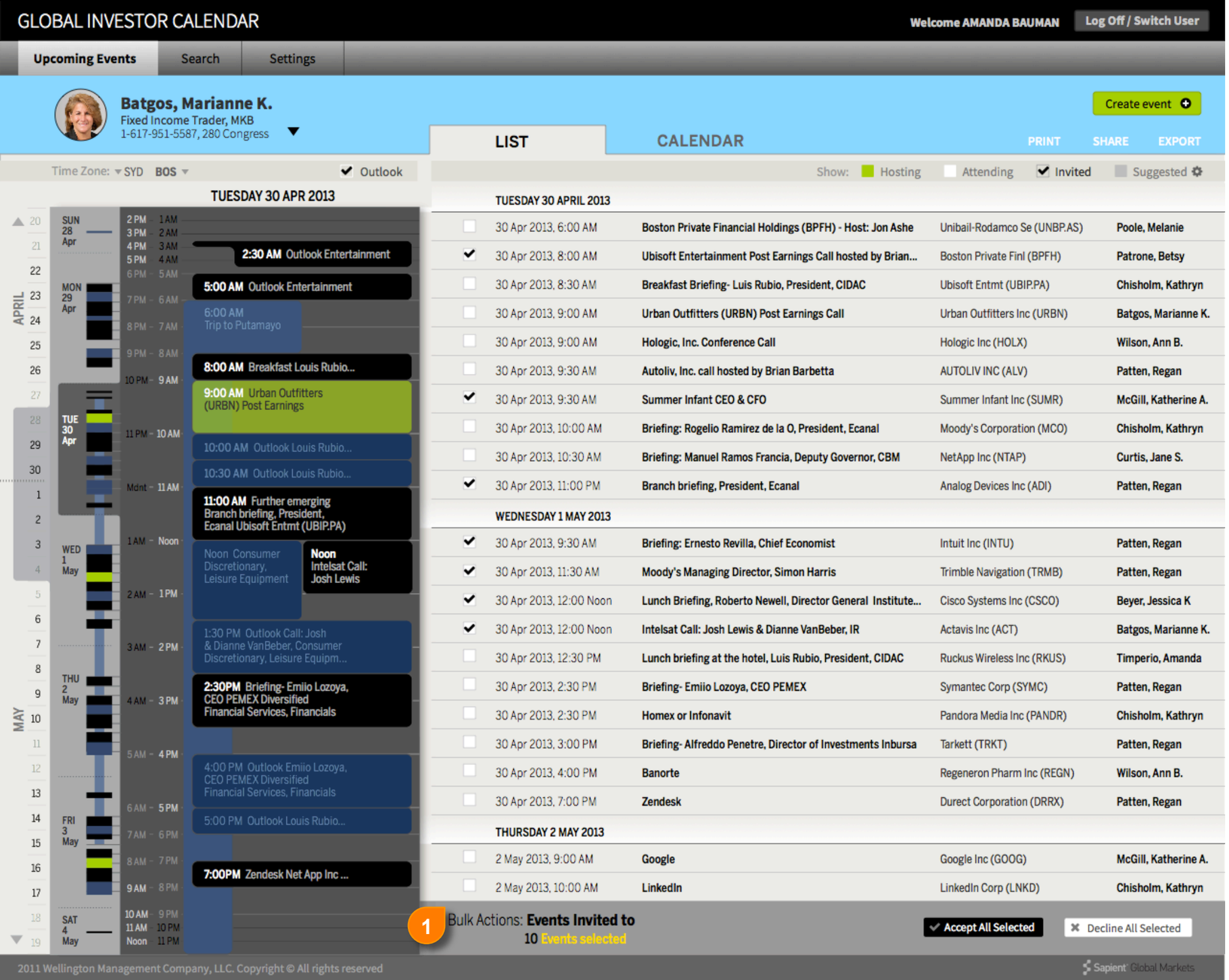
Efficiency in event management

1. At-a-glance view of hosting logistics, once event is expanded:
   - Room capacity alert
   - Indication of whether participants may be remote attendees
   - Links to meeting support services
   - Meeting notes visible only to Admin
   - Link to facilitate guest access
   - Ability to communicate to participants and their admins

Event awareness/relevance

2. Suggested events (also available via email) are driven by ILP holdings/ coverage/watchlist

3. Admins can print, share, or export the filtered list to communicate with the selected Investor.

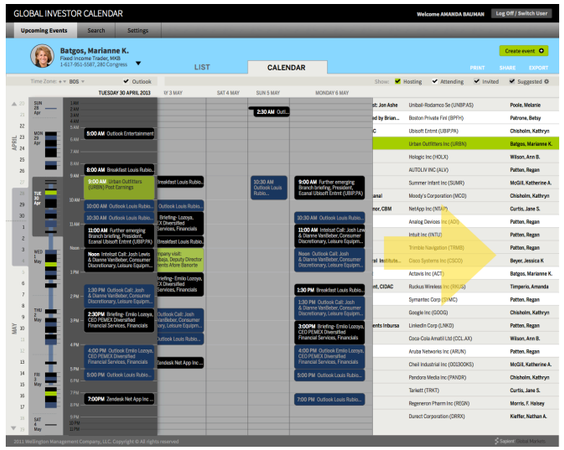


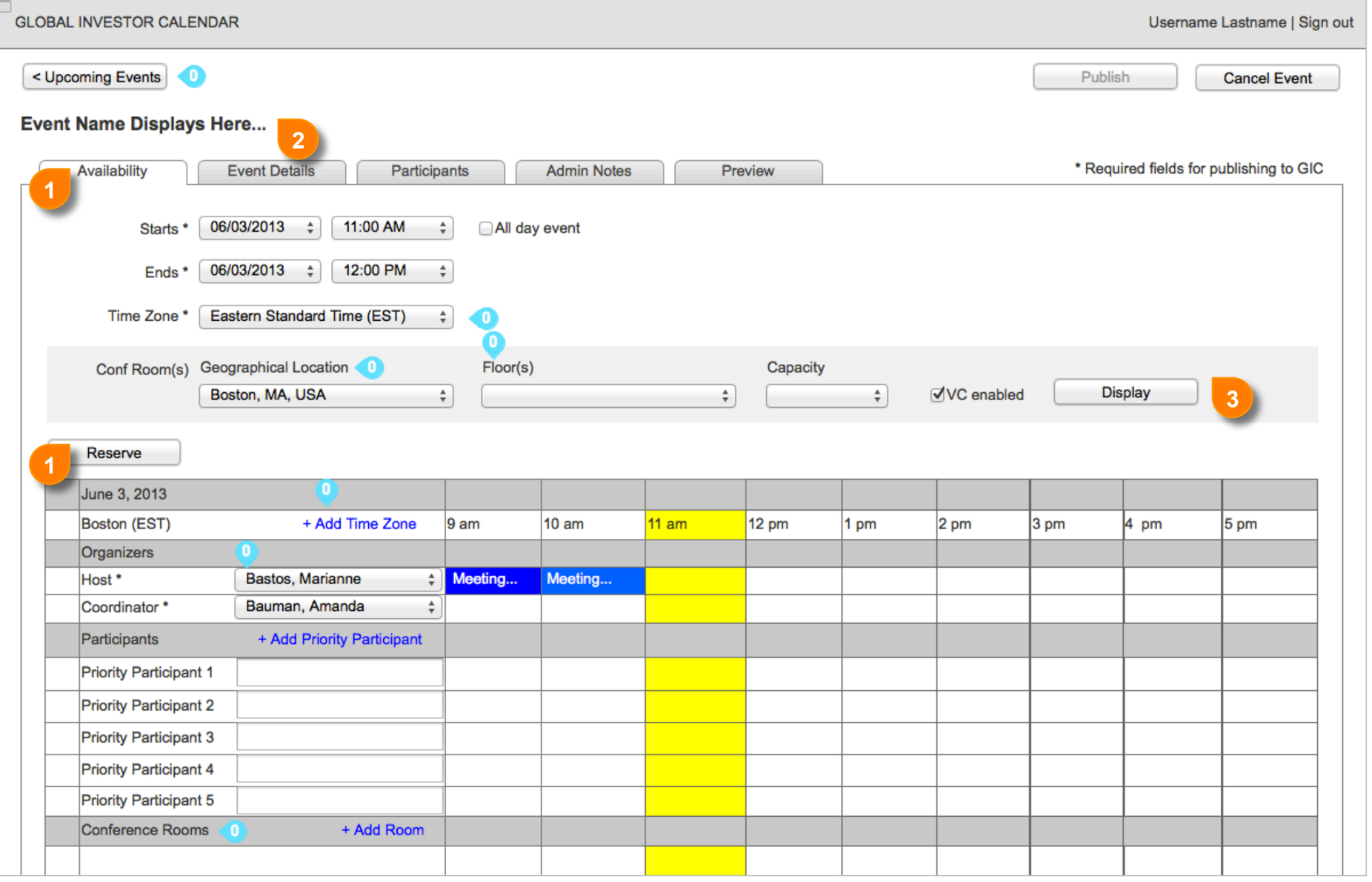
Efficiency in event management

1. Supports bulk actions to request/ accept multiple invitations

Efficiency in event management

Daily calendar slides open to show next 6 days' view of selected Investor's commitment





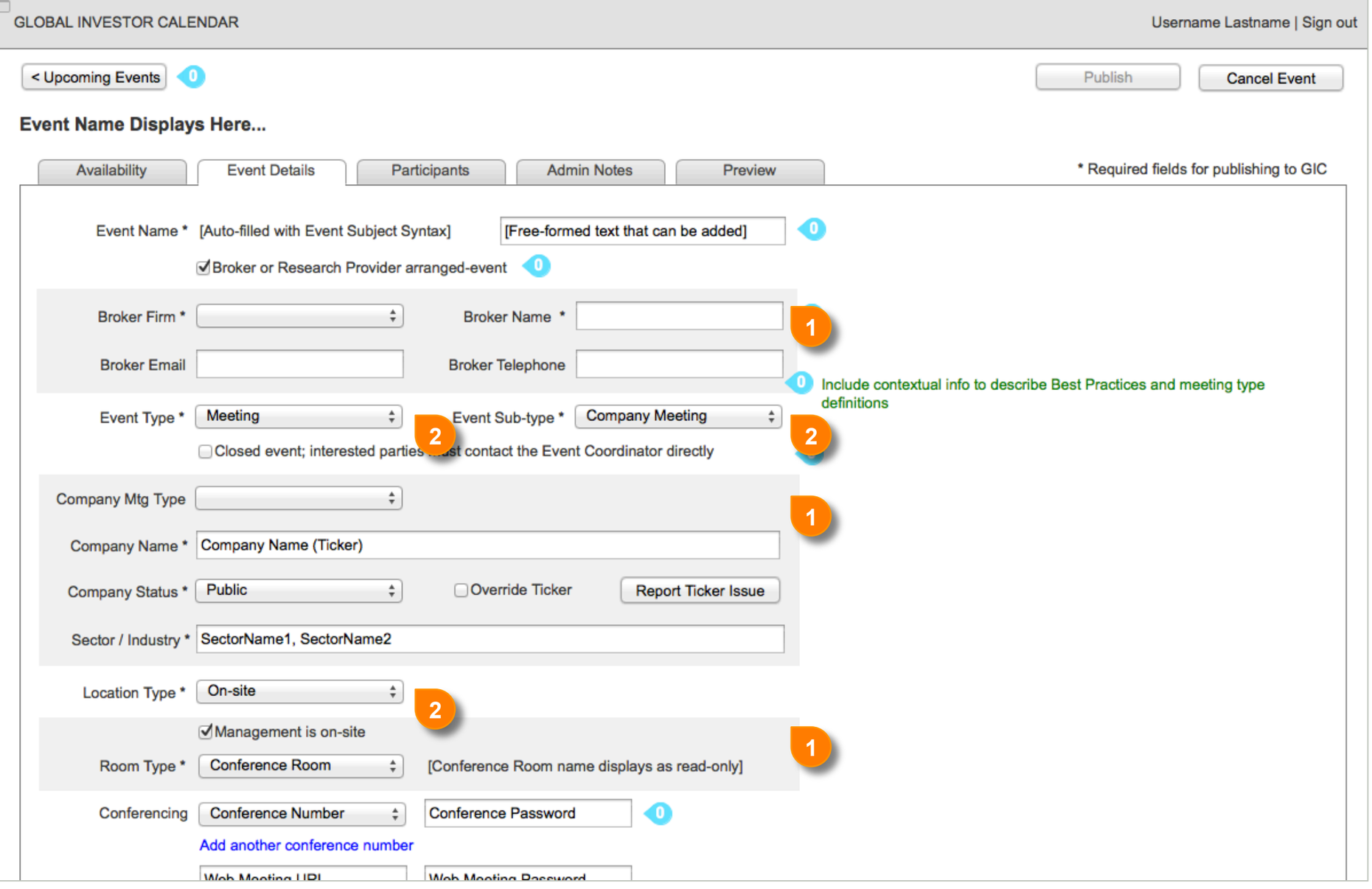
CREATE EVENT | Supported goals

Efficiency & accuracy in event creation

1. "Availability" tab allows for quick reservation of key resources: "Reserve" button holds room and host(s) schedules without publishing event and without requiring all event details.

2. Event names are automatically generated based on entered data, ensuring consistent syntax and better findability.

3. Rooms can be filtered based on location, capacity and VC services



CREATE EVENT | Supported goals

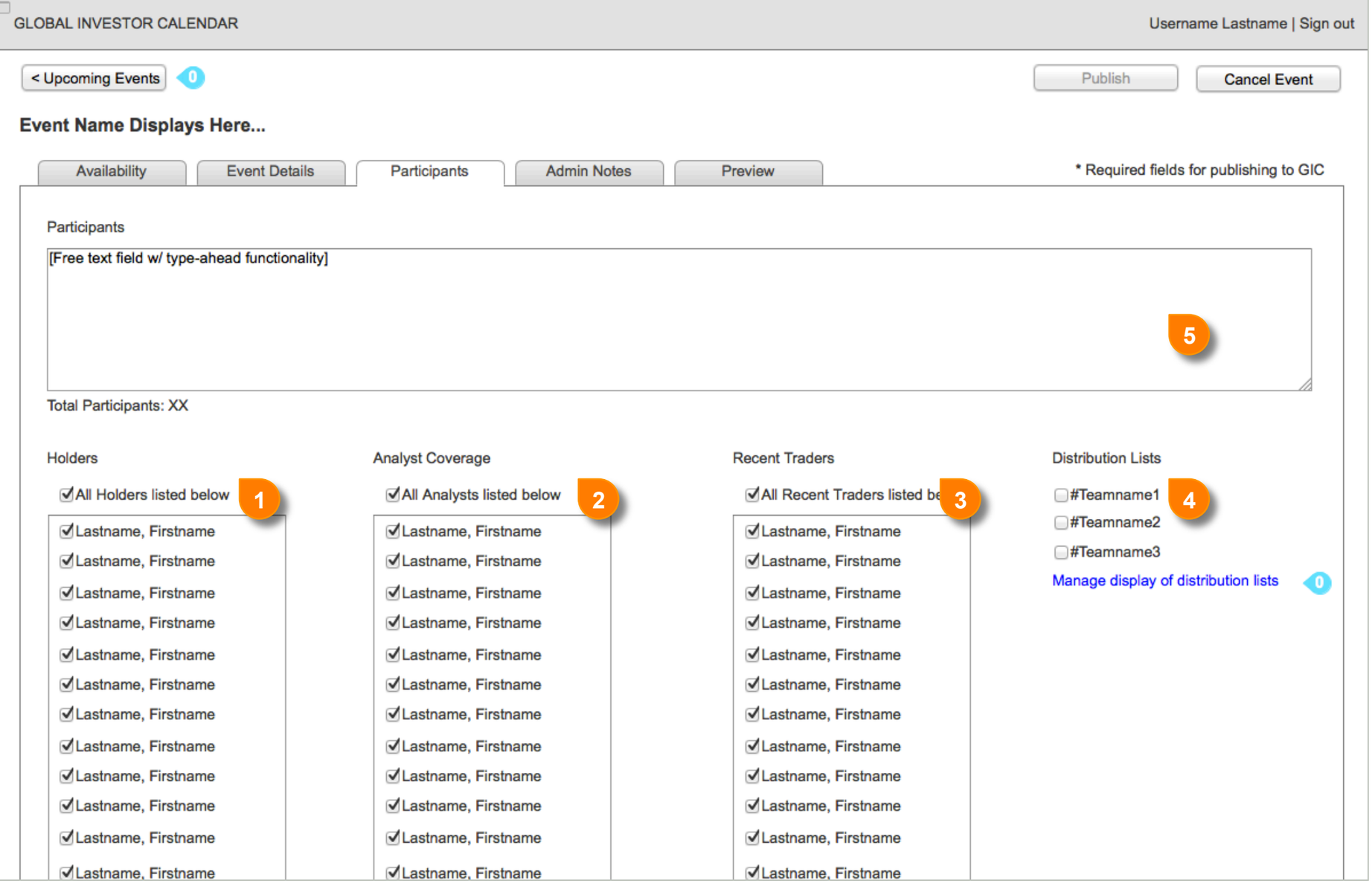
Efficiency & accuracy in event creation

Best practices in form design and connection to data sources reduce potential for human error and increase efficiency:

1. Conditional display of fields, only showing relevant inputs.

2. Default to most common/most recent selections to reduce data entry

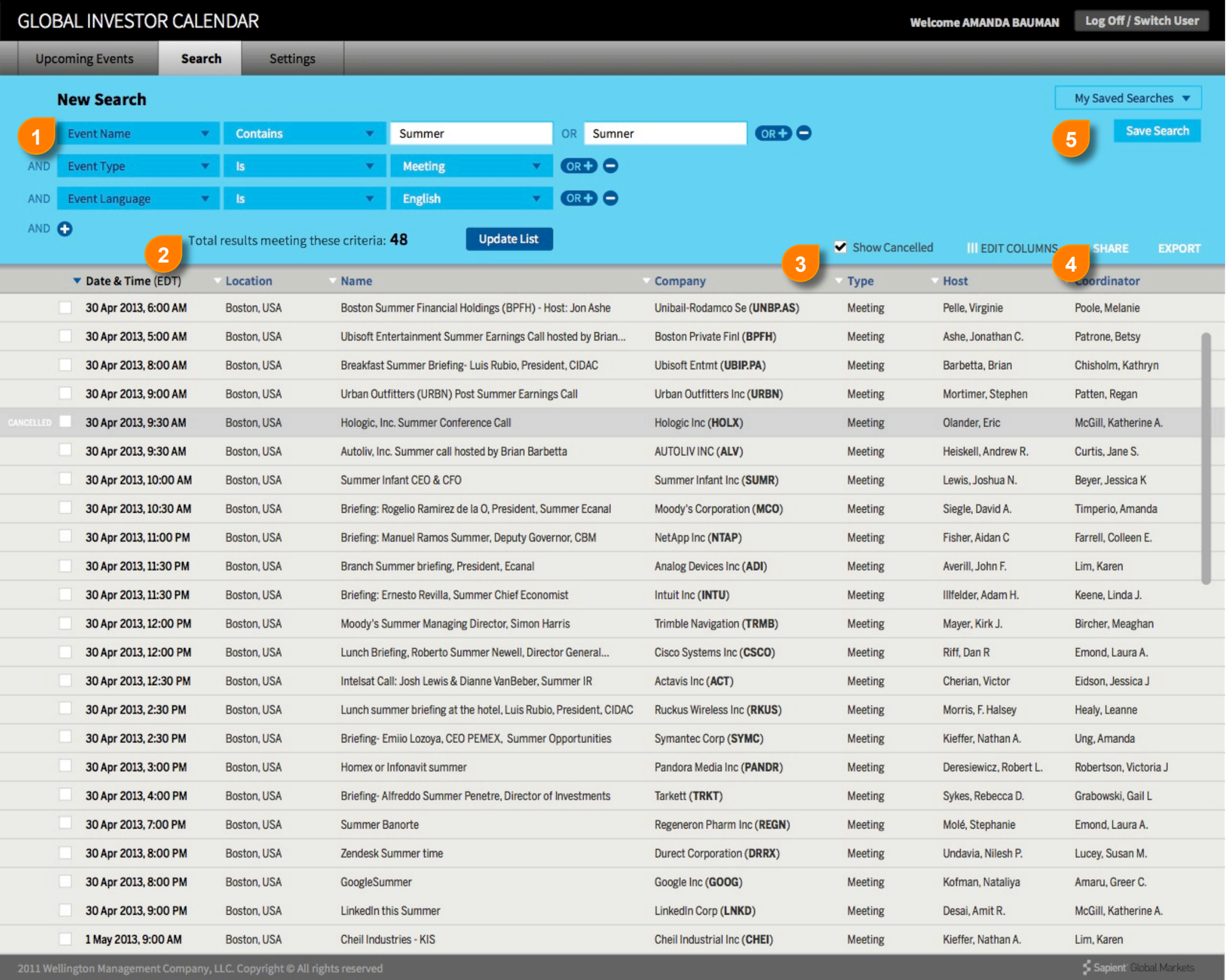
   Intelligent pre-population of fields, eg.:
   - Sector (based on Company)
   - Company description, market cap, domicile, etc (based on Company)
   - Boilerplate meeting descriptions which can be modified (based on user-configured settings)
   - Host's conference code (based on user-configured settings)



Efficiency & accuracy in event creation

Based on the identified company, system can provide easy access to the names of relevant investors who are likely meeting participants, significantly speeding up data-entry:

1. Investors who hold the company
2. Investors who cover the company
3. Those who have conducted trades within the last x time period
4. Individuals on commonly-used distribution lists (configurable by user)
5. Any additional attendees



Powerful event search/reporting

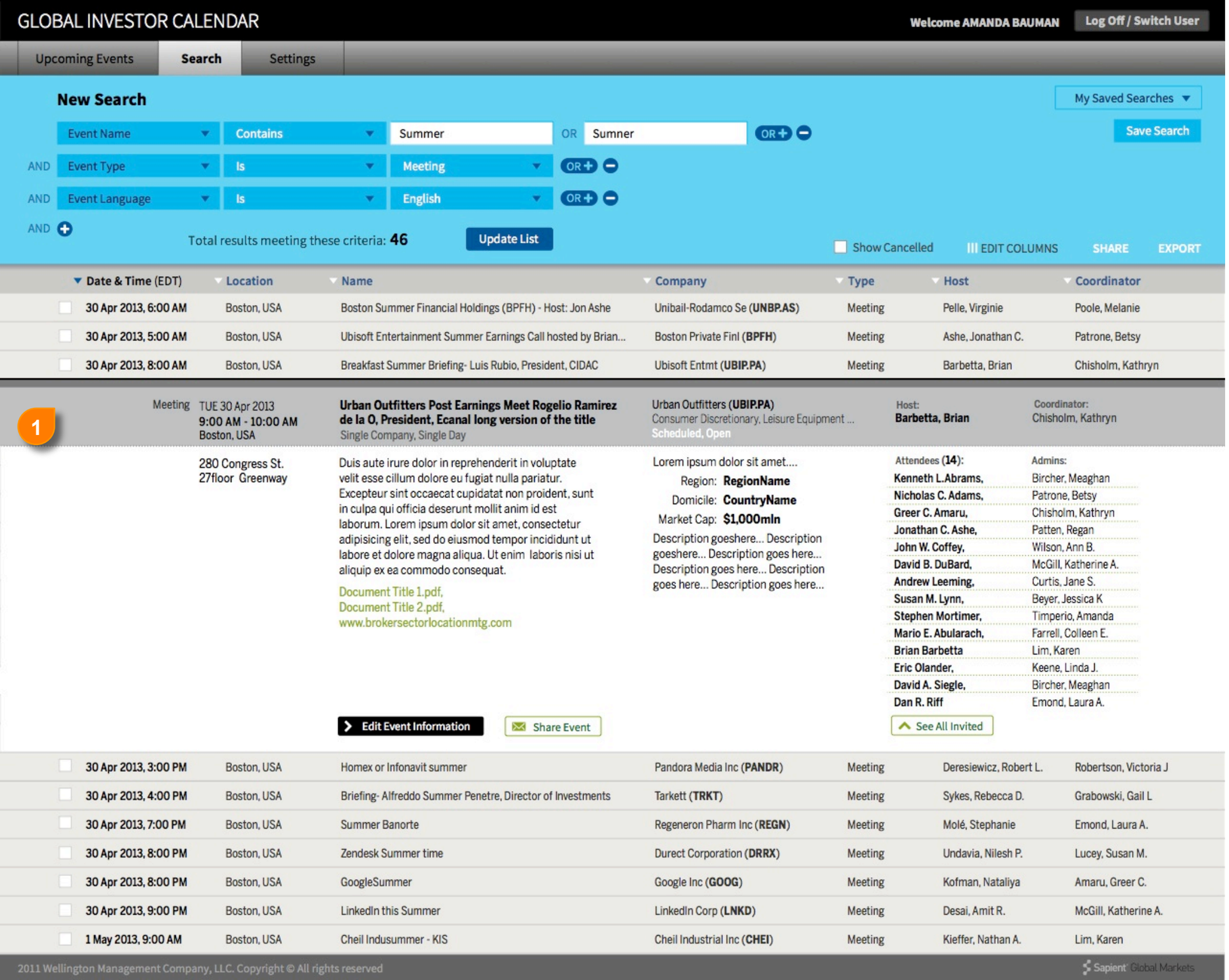
A robust search not only lets users find specific events of interest, but also supports reporting needs:

1. Flexible search criteria supports both unions (and) and intersections (or). Parameters cover all event metadata
2. Easy-to-see total count
3. View controls provide custom configurability
4. Sharing/exporting extends use of data

Event awareness/relevance

5. Criteria can be saved and shared

   Users can receive email notifications of events that meet saved search criteria

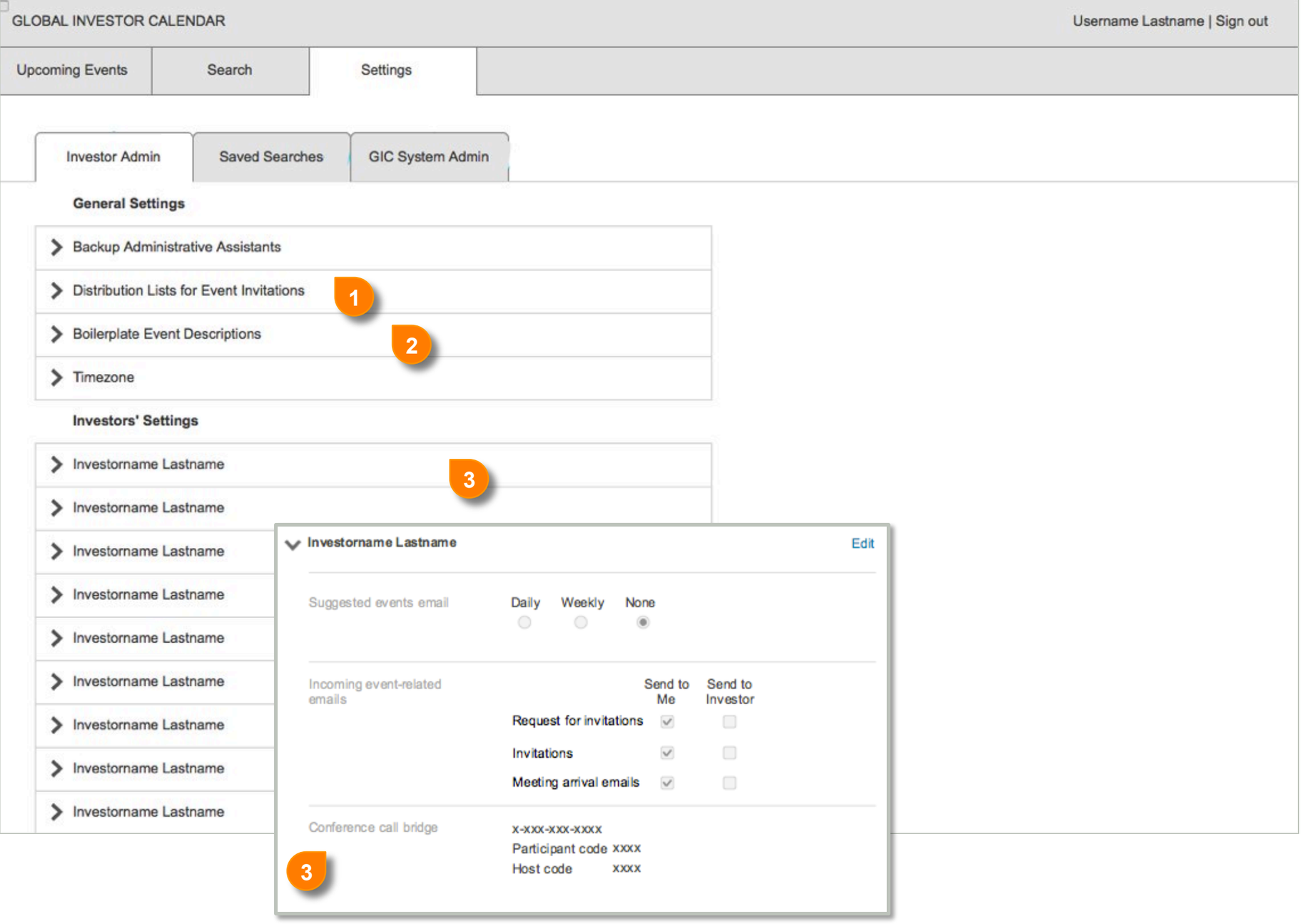


Efficiency in event management

1 Expanded event details show relevant actions, depending upon user's participation status/permissions.

Possible actions:

- Edit event (shown)
- Request an invitation
- Respond to an invitation
- Share event (shown)



Increase efficiency

The following master settings support quicker event creation for Investor Admins by reducing manual data entry:

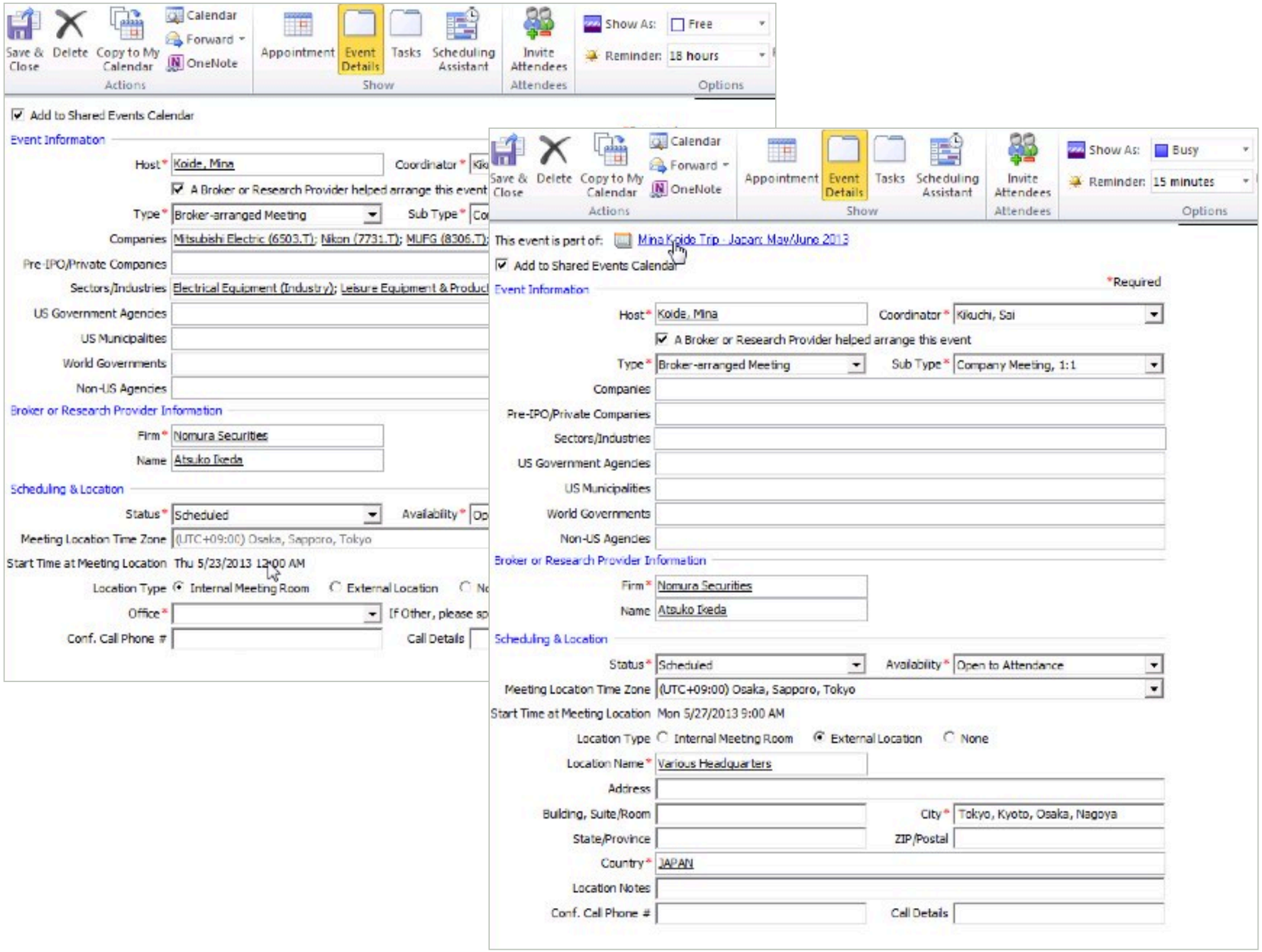
1. A master list of the distribution lists Admins regularly use to send event invitations

2. Boilerplate event descriptions from which Admins can pick when they create an event

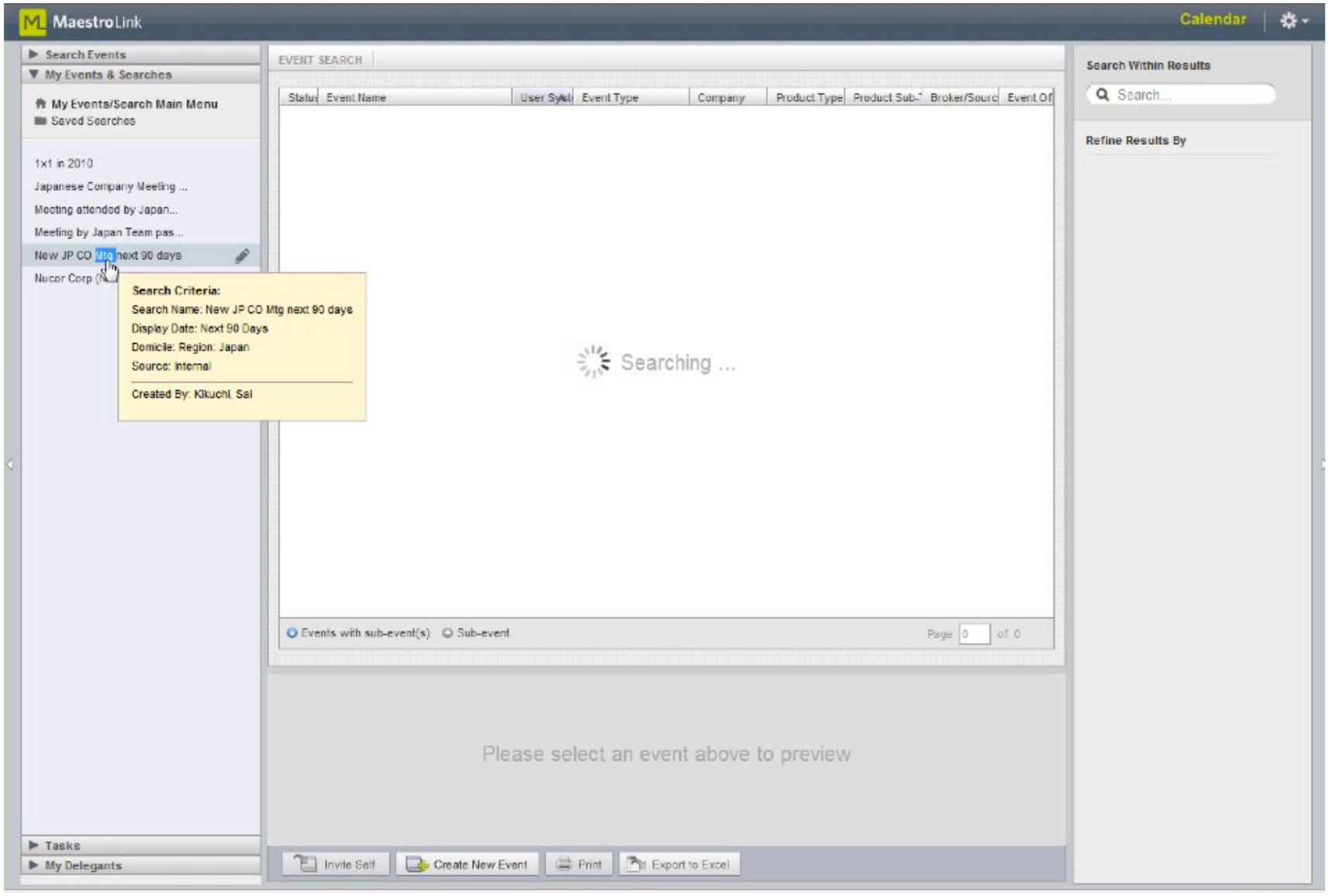
3. Investor-specific conference call numbers

Background material

CURRENT STATE


Save & Close
Delete
Copy to My Calendar
Calendar
Forward
OneNote
Actions
Appointment
Event Details
Tasks
Scheduling Assistant
Show
Invite Attendees
Attendees
Show As: Free
Reminder: 18 hours
Options
Add to Shared Events Calendar
Event Information
Host* Koide, Mina
Coordinator*
A Broker or Research Provider helped arrange this event
Type* Broker-arranged Meeting
Sub Type*
Companies Mitsubishi Electric (6503.T); Nikon (7731.T); MUFG (8306.T);
Pre-IPO/Private Companies
Sectors/Industries Electrical Equipment (Industry); Leisure Equipment & Product
US Government Agencies
US Municipalities
World Governments
Non-US Agencies
Broker or Research Provider Information
Firm* Nomura Securities
Name Atsuko Ikeda
Scheduling & Location
Status* Scheduled
Availability*
Meeting Location Time Zone (UTC+09:00) Osaka, Sapporo, Tokyo
Start Time at Meeting Location Thu 5/23/2013 12:00 AM
Location Type Internal Meeting Room External Location
Office*
If Other, please sp
Conf. Call Phone #
Call Details
Save & Close
Delete
Copy to My Calendar
Calendar
Forward
OneNote
Actions
Appointment
Event Details
Tasks
Scheduling Assistant
Show
Invite Attendees
Attendees
Show As: Busy
Reminder: 15 minutes
Options
This event is part of: Mina Koide Trip - Japan: May/June 2013
Add to Shared Events Calendar
*Required
Event Information
Host* Koide, Mina
Coordinator* Kikuchi, Sai
A Broker or Research Provider helped arrange this event
Type* Broker-arranged Meeting
Sub Type* Company Meeting, 1:1
Companies
Pre-IPO/Private Companies
Sectors/Industries
US Government Agencies
US Municipalities
World Governments
Non-US Agencies
Broker or Research Provider Information
Firm* Nomura Securities
Name Atsuko Ikeda
Scheduling & Location
Status* Scheduled
Availability* Open to Attendance
Meeting Location Time Zone (UTC+09:00) Osaka, Sapporo, Tokyo
Start Time at Meeting Location Mon 5/27/2013 9:00 AM
Location Type Internal Meeting Room External Location None
Location Name* Various Headquarters
Address
Building, Suite/Room
City* Tokyo, Kyoto, Osaka, Nagoya
State/Province
ZIP/Postal
Country* JAPAN
Location Notes
Conf. Call Phone #
Call Details

CURRENT CALENDAR SEARCH



Thank You.

THE END