Global Investment Calendar



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



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)



Screen comps

USER EXPERIENCE DESIGN DIRECTION: FLIGHT DECK

GLOBAL INVESTOR CALENDAR Log Off / Switch User Welcome AMANDA BAUMAN **Upcoming Events** Search Settings Batgos, Marianne K. Create event • Fixed Income Trader, MKB 1-617-951-5587, 280 Congress V **CALENDAR** LIST Time Zone: ▼ SYD BOS Outlook Show: Hosting ✓ Attending TUESDAY 30 APR TUESDAY 30 APRIL 2013 2PM - 1AM SUN 28 30 Apr 2013, 6:00 AM Boston Private Financial Holdings (BPFH) - Host: Jon Ashe Unibail-Rodamco Se (UNBP.AS) Poole, Melanie 3 PM 2 AM Apr 30 Apr 2013, 5:00 AM Ubisoft Entertainment Post Earnings Call hosted by Brian... 2:30 AM Outlook Entertainment Boston Private Finl (BPFH) Patrone, Betsy 5PM 4AM 22 30 Apr 2013, 8:00 AM Breakfast Briefing- Luis Rubio, President, CIDAC Ubisoft Entmt (UBIP.PA) Chisholm, Kathryn 5:00 AM Outlook Entertainment APRII 23 24 29 30 Apr 2013, 9:00 AM A Urban Outfitters (URBN) Post Earnings Call Urban Outfitters Inc (URBN) Batgos, Marianne K. 30 Apr 2013, 9:00 AM Hologic, Inc. Conference Call Hologic Inc (HOLX) Wilson, Ann B. 25 8:00 AM Breakfast Louis Rubio... 30 Apr 2013, 9:30 AM Autoliv, Inc. call hosted by Brian Barbetta AUTOLIV INC (ALV) Patten, Regan 26 M- 9AM 9:00 AM Urban Outfitters 30 Apr 2013, 9:30 AM Summer Infant CEO & CFO Summer Infant Inc (SUMR) McGill, Katherine A. (URBN) Post Earnings TUE 30 30 Apr 2013, 10:00 AM Briefing: Rogelio Ramirez de la O, President, Ecanal Moody's Corporation (MCO) Chisholm, Kathryn 11 PM - 10 AM 29 10:00 AM Outlook Louis Rubio. 30 Apr 2013, 10:30 AM Briefing: Manuel Ramos Francia, Deputy Governor, CBM NetApp Inc (NTAP) Curtis, Jane S. 10:30 AM Outlook Louis Rubio... 30 Apr 2013, 11:00 PM Branch briefing, President, Ecanal Analog Devices Inc (ADI) Patten, Regan Mdnt - 11 AM 1 11:00 AM Further emerging Branch briefing, President, Ecanal Ubisoft Entmt (UBIP.PA) 30 Apr 2013, 11:30 PM Briefing: Ernesto Revilla, Chief Economist Intuit Inc (INTU) Patten, Regan 30 Apr 2013, 11:30 PM Moody's Managing Director, Simon Harris Trimble Navigation (TRMB) Patten, Regan WED Noon Intelsat Call: 30 Apr 2013, 12:00 PM Lunch Briefing, Roberto Newell, Director General Institute... Cisco Systems Inc (CSCO) Beyer, Jessica K Josh Lewis M - 1PM 30 Apr 2013, 12:00 PM Intelsat Call: Josh Lewis & Dianne VanBeber, IR Batgos, Marianne K. Actavis Inc (ACT) 30 Apr 2013, 12:30 PM Lunch briefing at the hotel, Luis Rubio, President, CIDAC Ruckus Wireless Inc (RKUS) Timperio, Amanda AM - 2PM 30 Apr 2013, 2:30 PM Briefing- Emilo Lozoya, CEO PEMEX Symantec Corp (SYMC) Patten, Regan 30 Apr 2013, 2:30 PM Homex or Infonavit Pandora Media Inc (PANDR) Chisholm, Kathryn 2:30PM Briefing-Emilo Lozoya, CEO PEMEX Diversified Financial Services, Financials ¥ 10 30 Apr 2013, 3:00 PM Briefing- Alfreddo Penetre, Director of Investments Inbursa Tarkett (TRKT) Patten, Regan 30 Apr 2013, 4:00 PM Banorte Regeneron Pharm Inc (REGN) Wilson, Ann B. M - 4PM 30 Apr 2013, 7:00 PM Zendesk Durect Corporation (DRRX) Patten, Regan 30 Apr 2013, 8:00 PM Google Google Inc (GOOG) McGill, Katherine A. M - 5PM 5:00 PM Outlook Louis Rubio.. 30 Apr 2013, 8:00 PM LinkedIn LinkedIn Corp (LNKD) Chisholm, Kathryn 15 30 Apr 2013, 9:00 PM Coca-Cola Amatil Coca-Cola Amatil Ltd (CCL.AX) Curtis, Jane S. 7:00PM Zendesk Net App Inc ... 30 Apr 2013, 11:00 PM Aruba Networks Aruba Networks Inc (ARUN) Morris, F. Halsey 30 Apr 2013, 11:30 PM Cheil Industries - KIS Cheil Industrial Inc (001300KS) Kieffer, Nathan A. 10 AM - 9 PM -

UPCOMING EVENTS | Supported goals

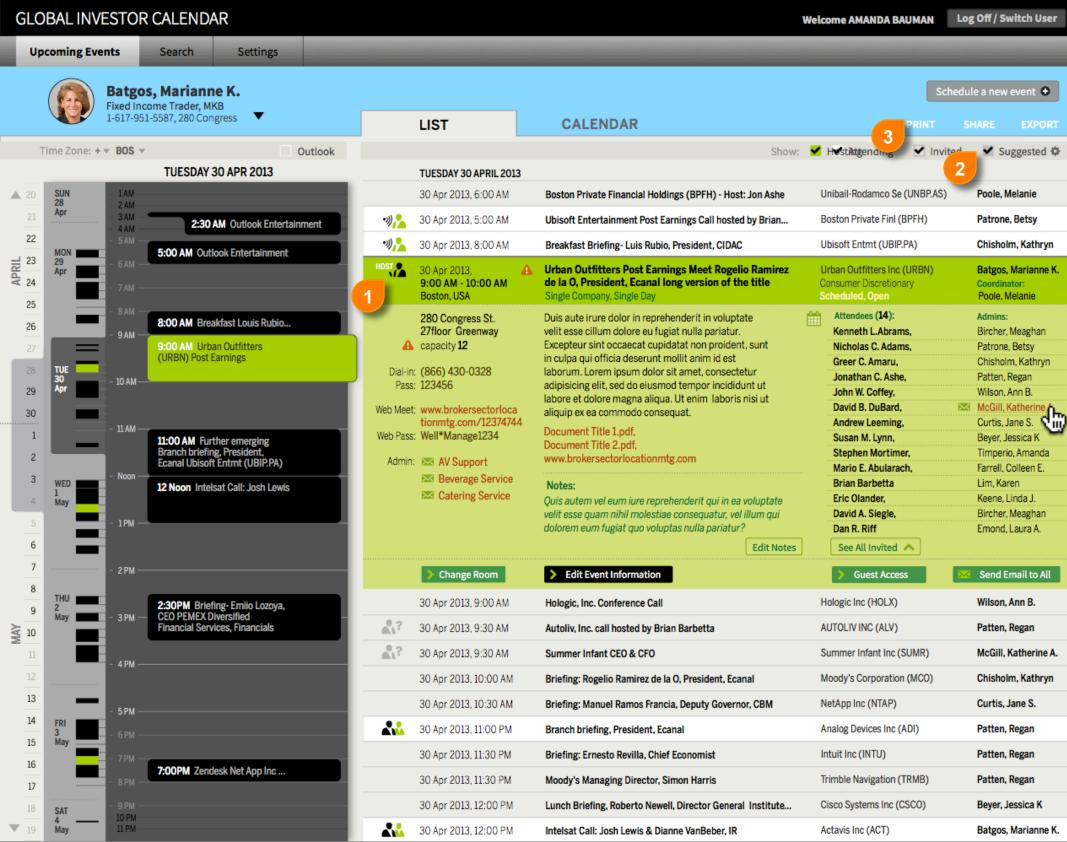
Efficiency in event management

- 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 dayof and near-future details for the Investor's events.
- 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)?
- Shows relationship of these events to manager's Outlook calendar (in blue)
- Calendar can be viewed against another timezone for comparison

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UPCOMING EVENTS | Supported goals

Efficiency in event management

- 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

- Suggested events (also available via email) are driven by ILP holdings/coverage/watchlist
- Admins can print, share, or export the filtered list to communicate with the selected Investor.

UPCOMING EVENTS | Supported goals

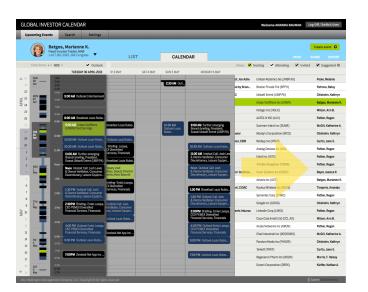
Efficiency in event management

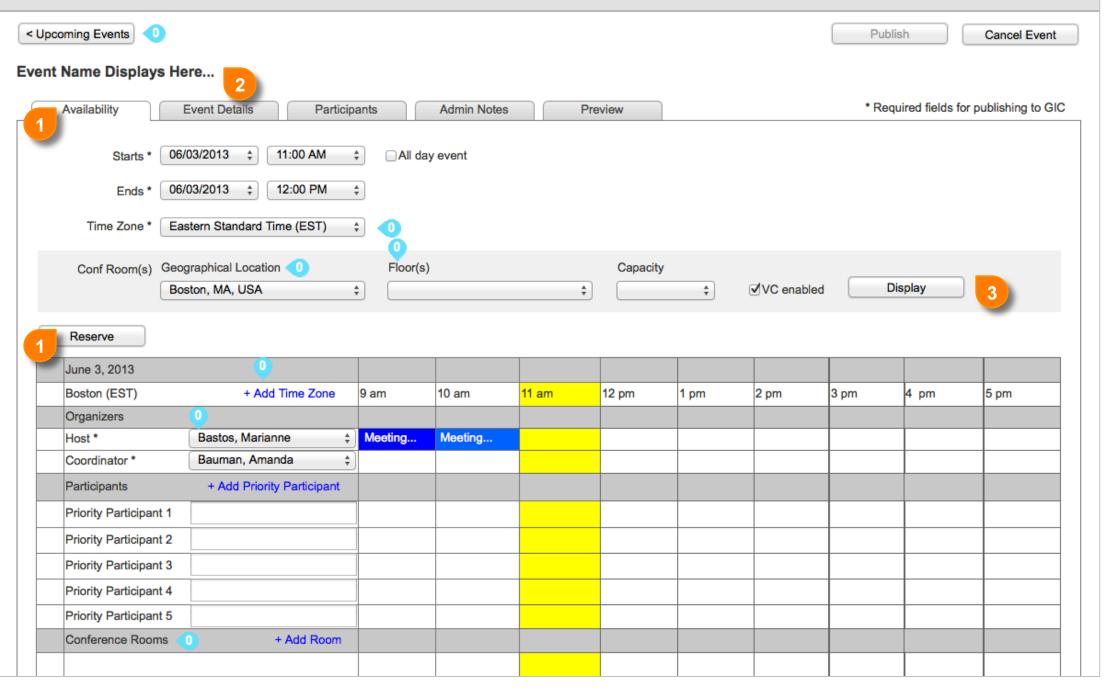
Supports bulk actions to request/ accept multiple invitations

UPCOMING EVENTS | Supported goals

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

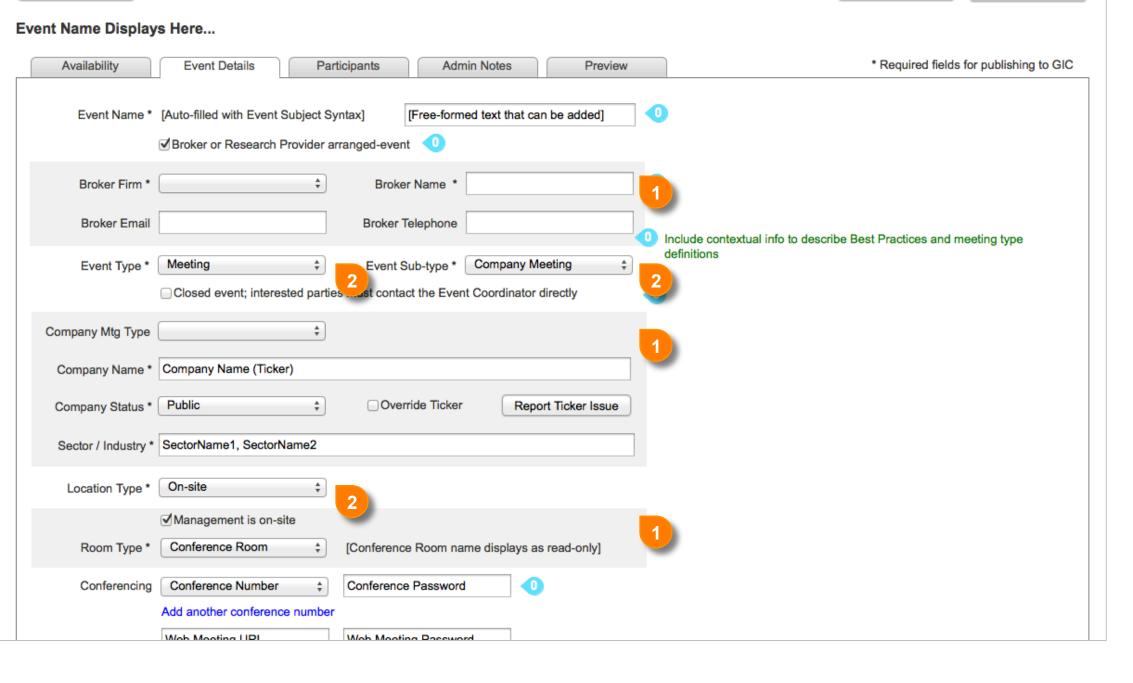
- "Availability" tab allows for quick reservation of key resources:

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

Publish

Cancel Event

< Upcoming Events



CREATE EVENT | Supported goals

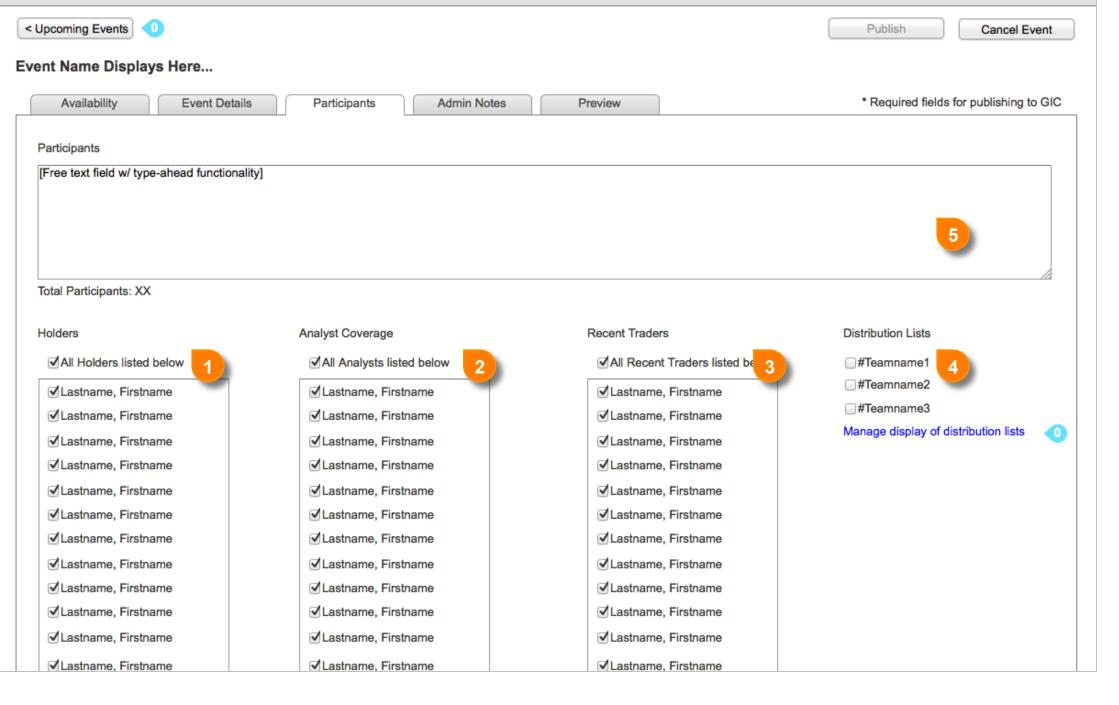
Efficiency & accuracy in event creation

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.
- 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)



CREATE EVENT | Supported goals

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 dataentry:

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

Host

Pelle, Virginie

OR+

✓ Show Cancelled

Type

Meeting

GLOBAL INVESTOR CALENDAR

Settings

New Search

Event Language

AND 😷

Event Name Contains Event Type

Meeting

English

Total results meeting these criteria: 48 Update List OR Sumner

Company

Unibail-Rodamco Se (UNBP.AS)

Boston Private Finl (BPFH)

Urban Outfitters Inc (URBN)

Summer Infant Inc (SUMR)

Moody's Corporation (MCO)

Ubisoft Entmt (UBIP.PA)

Hologic Inc (HOLX)

AUTOLIV INC (ALV)

NetApp Inc (NTAP)

Intuit Inc (INTU)

Actavis Inc (ACT)

Tarkett (TRKT)

Analog Devices Inc (ADI)

Trimble Navigation (TRMB)

Cisco Systems Inc (CSCO)

Ruckus Wireless Inc (RKUS)

Pandora Media Inc (PANDR)

Regeneron Pharm Inc (REGN)

Durect Corporation (DRRX)

Symantec Corp (SYMC)

OR+

OR+

Summer

▼ Date & Time (EDT) Location Name 30 Apr 2013, 6:00 AM Boston Summer Financial Holdings (BPFH) - Host: Jon Ashe Boston, USA 30 Apr 2013, 5:00 AM Boston, USA Ubisoft Entertainment Summer Earnings Call hosted by Brian...

30 Apr 2013, 8:00 AM Breakfast Summer Briefing- Luis Rubio, President, CIDAC Boston, USA 30 Apr 2013, 9:00 AM Boston, USA Urban Outfitters (URBN) Post Summer Earnings Call 30 Apr 2013, 9:30 AM Boston, USA Hologic, Inc. Summer Conference Call

30 Apr 2013, 9:30 AM Boston, USA Autoliv, Inc. Summer call hosted by Brian Barbetta 30 Apr 2013, 10:00 AM Boston, USA Summer Infant CEO & CFO 30 Apr 2013, 10:30 AM Boston, USA Briefing: Rogelio Ramirez de la O, President, Summer Ecanal

30 Apr 2013, 11:00 PM Boston, USA Briefing: Manuel Ramos Summer, Deputy Governor, CBM 30 Apr 2013, 11:30 PM Boston, USA Branch Summer briefing, President, Ecanal

30 Apr 2013, 11:30 PM Boston, USA Briefing: Ernesto Revilla, Summer Chief Economist 30 Apr 2013, 12:00 PM Boston, USA Moody's Summer Managing Director, Simon Harris 30 Apr 2013, 12:00 PM Boston, USA Lunch Briefing, Roberto Summer Newell, Director General...

30 Apr 2013, 12:30 PM Intelsat Call: Josh Lewis & Dianne VanBeber, Summer IR Boston, USA 30 Apr 2013, 2:30 PM Lunch summer briefing at the hotel, Luis Rubio, President, CIDAC Boston, USA 30 Apr 2013, 2:30 PM Briefing- Emilo Lozoya, CEO PEMEX, Summer Opportunities Boston, USA

30 Apr 2013, 3:00 PM Boston, USA Homex or Infonavit summer 30 Apr 2013, 4:00 PM Boston, USA Briefing- Alfreddo Summer Penetre, Director of Investments 30 Apr 2013, 7:00 PM Boston, USA Summer Banorte

30 Apr 2013, 8:00 PM Boston, USA Zendesk Summer time 30 Apr 2013, 8:00 PM Boston, USA GoogleSummer 30 Apr 2013, 9:00 PM Boston, USA

Boston, USA

Google Inc (GOOG) LinkedIn this Summer LinkedIn Corp (LNKD) Cheil Industries - KIS Cheil Industrial Inc (CHEI) Save Search

EDIT COLUMNS

coordinator

Poole, Melanie Ashe, Jonathan C. Patrone, Betsy

Barbetta, Brian Chisholm, Kathryn Mortimer, Stephen Patten, Regan

Olander, Eric McGill, Katherine A. Heiskell, Andrew R. Curtis, Jane S.

Lewis, Joshua N. Beyer, Jessica K Siegle, David A.

Timperio, Amanda Fisher, Aidan C Farrell, Colleen E.

Averill, John F. Lim, Karen

Illfelder, Adam H. Keene, Linda J. Mayer, Kirk J. Bircher, Meaghan

Riff, Dan R Emond, Laura A. Cherian, Victor Eidson, Jessica J

Morris, F. Halsey Healy, Leanne Kieffer, Nathan A. Ung, Amanda

Deresiewicz, Robert L Robertson, Victoria J Sykes, Rebecca D. Grabowski, Gail L

Molé, Stephanie Emond, Laura A. Undavia, Nilesh P. Lucey, Susan M. Amaru, Greer C.

Kofman, Nataliya McGill, Katherine A. Desai, Amit R.

Kieffer, Nathan A.

Log Off / Switch User

My Saved Searches *

Easy-to-see total count

SEARCH | Supported goals

reporting needs:

Powerful event search/reporting

A robust search not only lets users find

specific events of interest, but also supports

Flexible search criteria supports both

Parameters cover all event metadata

unions (and) and intersections (or).

View controls provide custom configurability

Sharing/exporting extends use of data

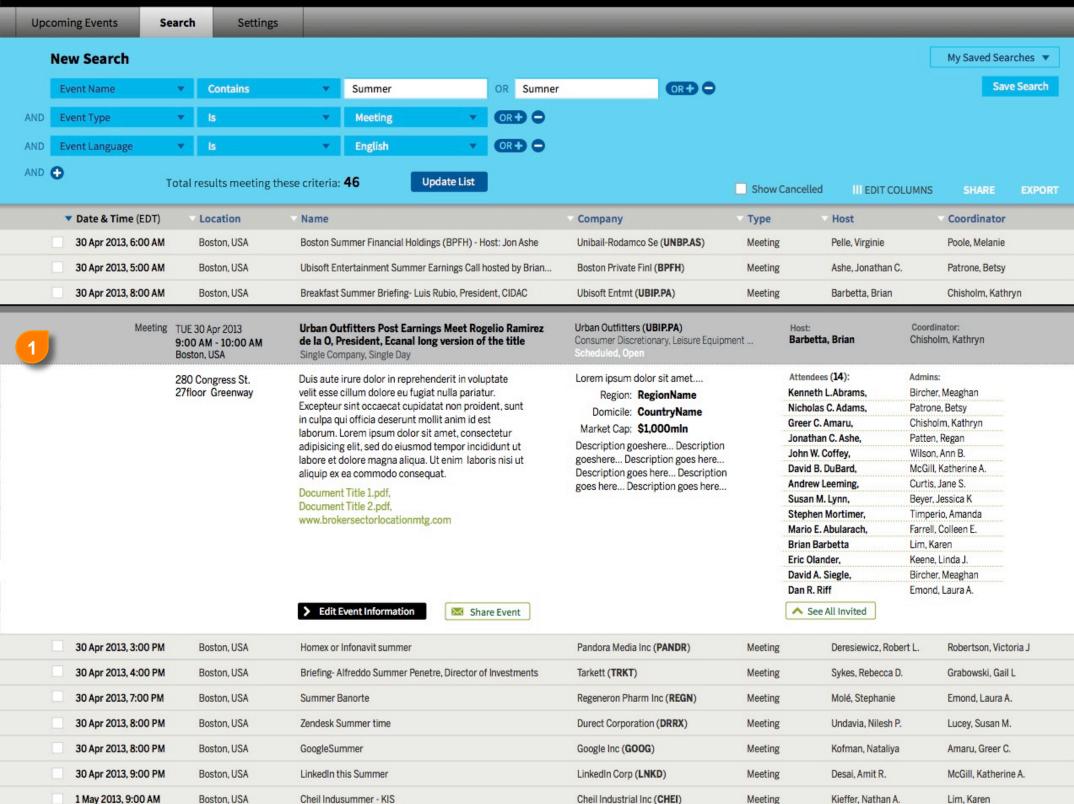
Event awareness/relevance

Criteria can be saved and shared

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

Lim, Karen

1 May 2013, 9:00 AM



SEARCH | Supported goals

Efficiency in event management

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)

14

Settings **Upcoming Events** Search Investor Admin Saved Searches GIC System Admin **General Settings** > Backup Administrative Assistants > Distribution Lists for Event Invitations > Boilerplate Event Descriptions > Timezone Investors' Settings > Investorname Lastname > Investorname Lastname ✓ Investorname Lastname Edit > Investorname Lastname > Investorname Lastname Suggested events email Weekly > Investorname Lastname > Investorname Lastname Incoming event-related Send to Investor Request for invitations > Investorname Lastname Invitations > Investorname Lastname Meeting arrival emails > Investorname Lastname Conference call bridge X-XXX-XXX-XXXX Participant code xxxx Host code XXXX

SETTINGS | Supported goals

Increase efficiency

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

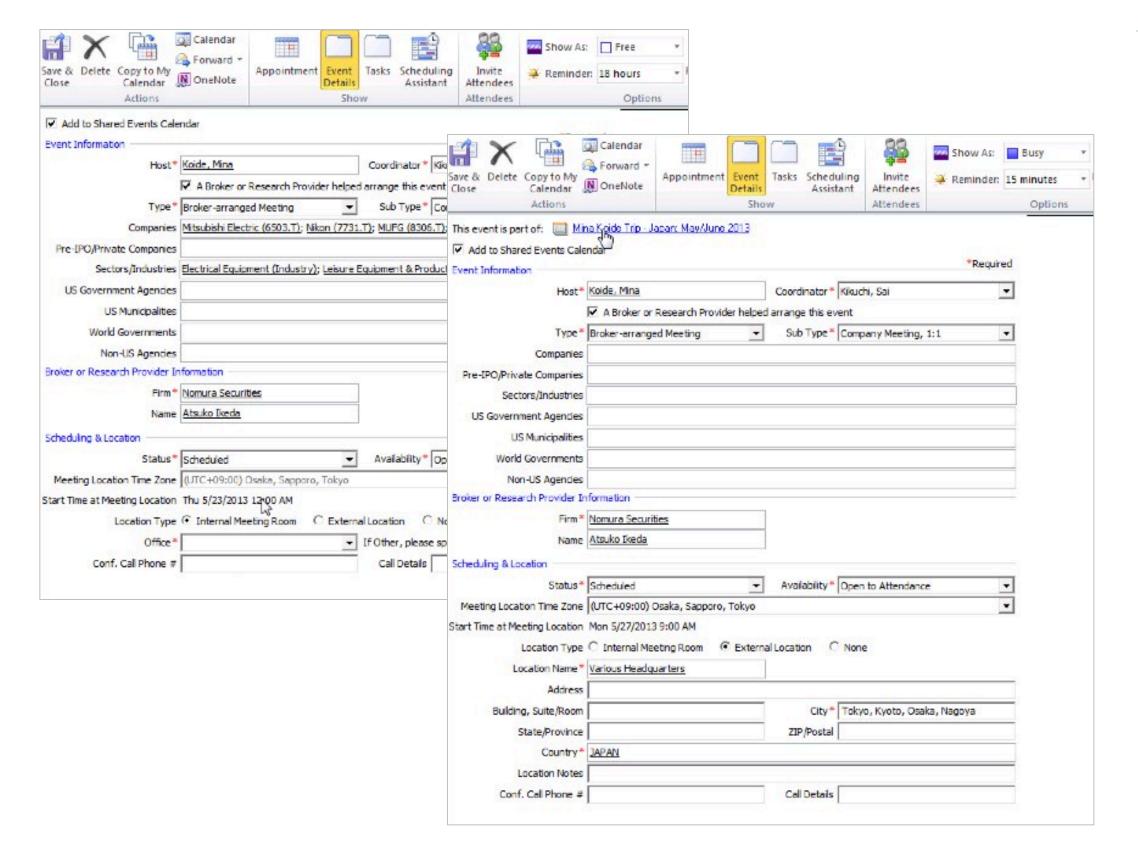
- A master list of the distribution lists
 Admins regularly use to send event
 invitations
- Boilerplate event descriptions from which Admins can pick when they create an event
- Investor-specific conference call numbers

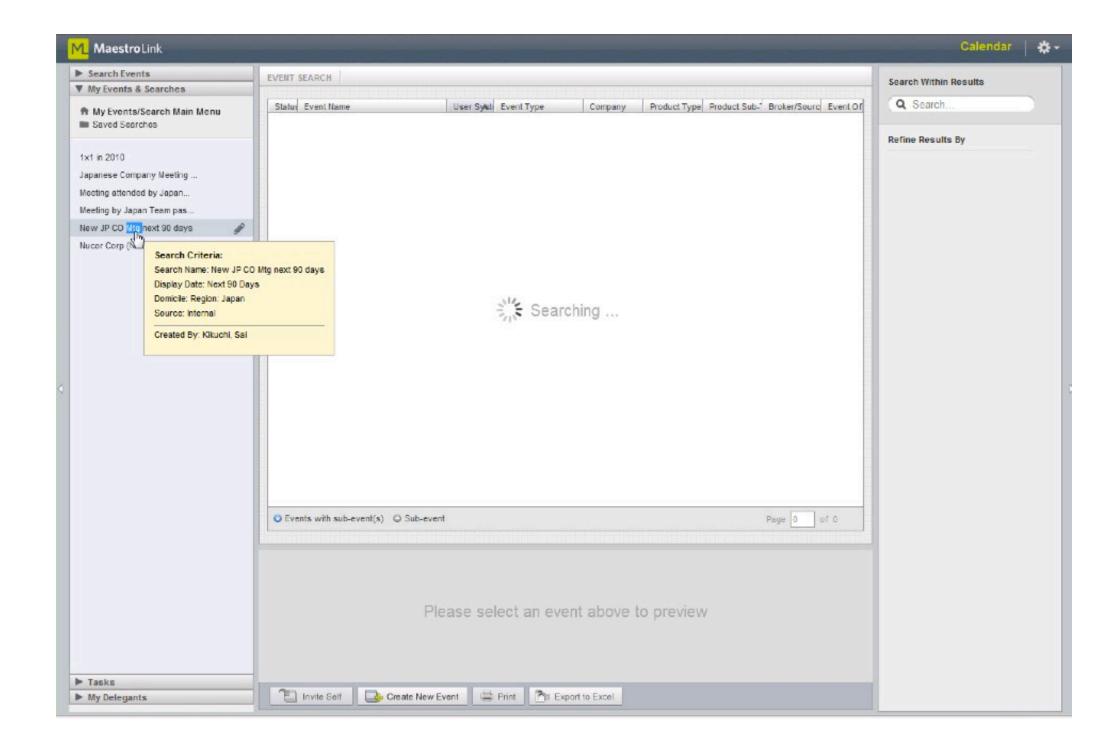


Background material

CURRENT STATE

CURRENT EVENT CREATION PLUGIN





CURRENT CALENDAR SEARCH



Thank You.

THE END