



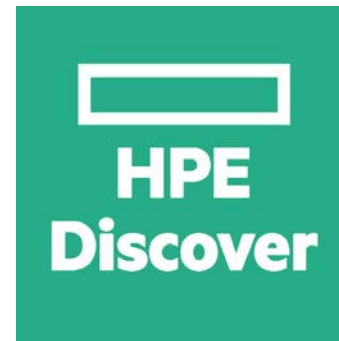
# ENHANCING EVENTS FOR ANALYST RELATIONS

Crystal Golightly

Director, Client Development

November 2018

# WHO'S USING ARCHITECT EVENT MANAGEMENT?



# TRYING TO ORGANIZE AN EVENT?

- Analysts
- Journalists/ Media/ Influencers
- Executives
- Journalist
- Staff
- Travel & accommodations
- Social meetings & gathering
- Meeting spaces
- Keynotes
- General sessions
- Breakouts
- 1 on 1's
- Building agendas & briefing books



# THE INEVITABLE

**LAST MINUTE CHANGES & CANCELLATIONS!!!**



# ARCHITECT EVENT MANAGEMENT

## ARchitect User Forum 2018

[Edit Event](#)[+ New Interaction](#)

Wednesday, November 14, 2018 - Thursday, November 15, 2018

(UTC-08:00) Pacific Time (US and Canada); Tijuana

ARchitect User Forum

Hyatt SFO  
1333 Bayshore Highway  
Burlingame, California 94010  
United States

Analysts

Participants

Locations

Interactions

RSVPs

CONFIGURE AGENDAS

RUN GAP REPORT

[View in Finder](#)

Analyst	Firm	Interaction Count	
Patricia Cooper	ARInsights, LLC	15	<a href="#">RSVPs</a> <a href="#">Interactions</a>
Ed Capps	ARInsights, LLC	15	<a href="#">RSVPs</a> <a href="#">Interactions</a>
Shashank Kulkarni	ARInsights, LLC	15	<a href="#">RSVPs</a> <a href="#">Interactions</a>
Crystal Golightly	ARInsights, LLC	15	<a href="#">RSVPs</a> <a href="#">Interactions</a>
Eric Nahmani	ARInsights, LLC	15	<a href="#">RSVPs</a> <a href="#">Interactions</a>
Aaron Avallon	ARInsights, LLC	15	<a href="#">RSVPs</a> <a href="#">Interactions</a>



100 items per page

1 - 6 of 6 items

# SCHEDULING

## Edit Interaction

View Rsvps View Interaction

Cancel Delete Save & Invite Save

### Title & Description

Title \*

Description \*

### Basics

Event

Type \*

Start Date \*   PT

End Date \*

Initiator

ARPrimary

Location \*  + New

### Details

Presenter

### Analysts (6)

Analyst Name

Choose Analyst...

No Grouping • By Firm • By Last Name

- Aaron Avallon**  
ARINSIGHTS, LLC
- Ed Capps**  
ARINSIGHTS, LLC
- Patricia Cooper**  
ARINSIGHTS, LLC

### Participants (4)

Participant Name

Choose...

- Jane Executive
- Michael Jones
- Joe Smith
- Mary Williams

### Coverages

Coverage Name

### Priority

## Interactions

+ Add New Interaction CALENDAR GRID REPORT

Add Filter(s) 11/14/2018 - 11/17/2018 Begin typing for results Search Load View Save View Quick Search

Event: ARchitect User Forum 2018 x Clear Filters

Export	Columns	Reset Grid	Full Screen On							
Date ↑	Location	Title	Initiator	Type	Analysts	Participants	Presenter			
11/15/2018 8:15 AM to 9:00 AM PT	Conference Room A	Breakfast and Networking	Jane, Crystal	Event - Breakfast	Aaron Avallon, Ed Capps, Patricia Cooper, Crystal Golightly, Shashank Kulkarni, Eric Nahmani	Jane Executive, Michael Jones, Joe Smith, Mary Williams				
11/15/2018 9:00 AM to 9:25 AM PT	Conference Room A	Kick-off	Jane, Crystal	Event Presentation	Aaron Avallon, Ed Capps, Patricia Cooper, Crystal Golightly, Shashank Kulkarni, Eric Nahmani	Jane Executive, Michael Jones, Joe Smith, Mary Williams	Ed Capps - ARInsights			
11/15/2018 9:25 AM to 10:05 AM PT	Conference Room A	Keynote: Rethinking AR Strategy - Time to Reset the Status Quo?	Jane, Crystal	Event Presentation	Aaron Avallon, Ed Capps, Patricia Cooper, Crystal Golightly, Shashank Kulkarni, Eric Nahmani	Jane Executive, Michael Jones, Joe Smith, Mary Williams	Carter Lusher - Informatica			
11/15/2018 10:05 AM to 10:40 AM PT	Conference Room A	"C" change - Using competence, collaboration, courage, curiosity, and confirmation to	Jane, Crystal	Event Presentation	Aaron Avallon, Ed Capps, Patricia Cooper, Crystal Golightly, Shashank	Jane Executive, Michael Jones, Joe Smith, Mary Williams	Ricarda Rodatus - Oracle			

# CONFLICT ALERTS

- Analysts
- Executives
- Locations
- Links to conflicting Interactions
- Override if the conflict is OK

Interaction cannot be saved due to scheduling conflicts. Please resolve the following conflicts in order to save this interaction:

- Scheduling Conflict for Analyst Golightly, Crystal J. Already scheduled at this time for Interaction #[657432](#)

Override Conflict Error(s) and Save with Conflicts

Interaction cannot be saved due to scheduling conflicts. Please resolve the following conflicts in order to save this interaction:

- Scheduling Conflict for Participant Ed Capps. Already scheduled at this time for Interaction #[657433](#)

Override Conflict Error(s) and Save with Conflicts

Interaction cannot be saved due to scheduling conflicts. Please resolve the following conflicts in order to save this interaction:

- There is an interaction set at this location that occurs during this time. Please see Interaction #[657432](#)

Override Conflict Error(s) and Save with Conflicts

# GAP REPORT

Identify the holes or any schedule conflicts

- Analysts
- Executives
- Locations

Interactions

[+ Add New Interaction](#)

[CALENDAR](#)
[GRID](#)
[REPORT](#)

+ Add Filter(s)

📅 11/14/2018 - 11/17/2018

Search

Event:
ARchitect User Forum 2018 ×
[Clear Filters](#)

Interaction Gap Report

[Report Settings](#)
[Export Report ▼](#)
[Save Report](#)
[Close](#)

⏪ ◀ 1 of 1 ▶ ⏩

Analyst Scheduling Gap Report		15 Nov 2018																	
		8:00	8:30	9:00	9:30	10:00	10:30	11:00	11:30	12:00	12:30	1:00	1:30	2:00	2:30	3:00	3:30	4:00	4:30
Analyst	Firm																		
Aaron Avallon	ARInsights, LLC	1	1	2	1	1	2	1	1	1	1	1	1	1	2	1	1	1	1
Crystal Golightly	ARInsights, LLC	1	1	2	1	1	2	1	1	1	1	1	1	1	2	1	1	1	1
Ed Capps	ARInsights, LLC	1	1	2	1	1	2	1	1	1	1	1	1	1	2	1	1	1	1
Eric Nahmani	ARInsights, LLC	1	1	2	1	1	2	1	1	1	1	1	1	1	2	1	1	1	1
Patricia Cooper	ARInsights, LLC	1	1	2	1	1	2	1	1	1	1	1	1	1	2	1	1	1	1
Shashank Kulkarni	ARInsights, LLC	1	1	2	1	1	2	1	1	1	1	1	1	1	2	1	1	1	1

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# SENDING CALENDAR INVITES

- Deliver ICS (calendar invites) to Analysts, Executives and internal staff
- Email name will be from the “Initiator” but the email address is scheduling@arinsights.com

The screenshot displays the 'Edit Interaction' interface. At the top, there are navigation links for 'View Rsvps' and 'View Interaction', and buttons for 'Cancel', 'Delete', 'Save & Invite', and 'Save'. A green notification bar indicates 'Interaction successfully saved.' Below this, there are links for 'Return to Previous Page', 'Create a new Interaction', 'Return to Interaction', and 'Clone Interaction'. The main form area is divided into sections: 'Title & Description', 'Basics', and 'Settings'. The 'Meeting Invite' dialog box is open, showing a list of 'Analysts' (All, Aaron Avallon, Ed Capps, Patricia Anne Cooper, Crystal J Golightly, Shashank Kulkarni, Eric Nahmani) and a 'Participants' list (Joe Smith). The 'Settings' section has a checkbox for 'Make invitee list visible to all invitees'. The background form shows fields for 'End Date \*' (11/15/2018), 'Time' (9:00AM), 'Initiator' (Jane, Crystal), 'ARPrimary' (Jane, Crystal), and 'Location \*' (Conference Room A). A list of participants is visible at the bottom right, including Jane Executive, Michael Jones, Joe Smith, and Mary Williams.

# RSVP: TRACK AND MANAGE

- Automated Tracking
- Manual updates
- Single source of “truth”

ANALYSIS | INTERACTIONS | CONTENT | EMAIL | PROJECTS | SITE | HELP

RSVPs

+ Add New Event CALENDAR GRID

Add Filter(s) 11/13/2018 - 11/16/2018 Begin typing for results Search Load View Save View Quick Search

Event: Architect User Forum 2018 x Interaction Type: Event - Breakfast x Clear Filters

Export	Columns	Reset Grid												Full Screen Off	
Invitee	Invitee Type	Email	Firm	Interaction Ty...	Initiator	Interaction	Event	Start Date	End Date	RSVP Status	RSVP Email	RSVP Comment			
<input type="checkbox"/>	Cooper, Patricia	Analyst	pcooper@arin...	ARInsights, LLC	Event - Breakfast	Jane, Crystal	Breakfast and Networking	Architect User Forum 2018	11/15/2018 8:00 AM PT	11/15/2018 9:00 AM PT	Not Invited Yet				
<input type="checkbox"/>	Capps, Ed	Analyst	sales@arinsig...	ARInsights, LLC	Event - Breakfast	Jane, Crystal	Breakfast and Networking	Architect User Forum 2018	11/15/2018 8:00 AM PT	11/15/2018 9:00 AM PT	Not Invited Yet				
<input type="checkbox"/>	Kulkarni, Shashank	Analyst	shashank.kulk...	ARInsights, LLC	Event - Breakfast	Jane, Crystal	Breakfast and Networking	Architect User Forum 2018	11/15/2018 8:00 AM PT	11/15/2018 9:00 AM PT	Not Invited Yet				
<input type="checkbox"/>	Golightly, Crystal	Analyst	crystal.golight...	ARInsights, LLC	Event - Breakfast	Jane, Crystal	Breakfast and Networking	Architect User Forum 2018	11/15/2018 8:00 AM PT	11/15/2018 9:00 AM PT	Not Invited Yet				
<input type="checkbox"/>	Nahmani, Eric	Analyst	enahmani@ar...	ARInsights, LLC	Event - Breakfast	Jane, Crystal	Breakfast and Networking	Architect User Forum 2018	11/15/2018 8:00 AM PT	11/15/2018 9:00 AM PT	Not Invited Yet				
<input type="checkbox"/>	Avallon, Aaron	Analyst	aavallon@arin...	ARInsights, LLC	Event - Breakfast	Jane, Crystal	Breakfast and Networking	Architect User Forum 2018	11/15/2018 8:00 AM PT	11/15/2018 9:00 AM PT	Not Invited Yet				
<input type="checkbox"/>	Smith, Joe	Participant	joe@abc.com		Event - Breakfast	Jane, Crystal	Breakfast and Networking	Architect User Forum 2018	11/15/2018 8:00 AM PT	11/15/2018 9:00 AM PT	Not Invited Yet				
<input type="checkbox"/>	Executive, Jane	Participant			Event - Breakfast	Jane, Crystal	Breakfast and Networking	Architect User Forum 2018	11/15/2018 8:00 AM PT	11/15/2018 9:00 AM PT	Not Invited Yet				
<input type="checkbox"/>	Jones, Michael	Participant			Event - Breakfast	Jane, Crystal	Breakfast and Networking	Architect User Forum 2018	11/15/2018 8:00 AM PT	11/15/2018 9:00 AM PT	Not Invited Yet				
<input type="checkbox"/>	Williams, Mary	Participant			Event - Breakfast	Jane, Crystal	Breakfast and Networking	Architect User Forum 2018	11/15/2018 8:00 AM PT	11/15/2018 9:00 AM PT	Not Invited Yet				

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# AGENDAS



## ARchitect User Forum 2018

### Analyst Agenda Prepared for: Crystal Golightly

Thursday, November 15, 2018

Start Time	End Time	Location	Interaction Title	Presenter
8:15 AM	9:00 AM	Conference Room A	Breakfast and Networking	
9:00 AM	9:25 AM	Conference Room A	Kick-off	Ed Capps - ARInsights
9:25 AM	10:05 AM	Conference Room A	Keynote: Rethinking AR Strategy - Time to Reset the Status Quo?	Carter Lusher - <a href="#">Informatica</a>
10:05 AM	10:40 AM	Conference Room A	"C" change - Using competence, collaboration, courage, curiosity, and confirmation to build an AR team for the future	Ricarda Rodatus - Oracle
10:40 AM	10:55 AM	Conference Room A	* Break and Networking *	
10:55 AM	11:30 AM	Conference Room A	Building a Rock Solid AR Program Beyond Gartner	
11:30 AM	12:05 PM	Conference Room A	Internal Promotion of AR	<a href="#">Mamta Shah</a> - TCS
12:05 PM	1:20 PM	Conference Room A	* Lunch and Networking *	
1:20 PM	1:55 PM	Conference Room A	Peer Review Sites - What you need to know and do	Vinay <a href="#">Bhagat</a> - <a href="#">TrustRadius</a>
1:55 PM	2:30 PM	Conference Room A	Samsung's Analyst Portal - One Year Later	
2:30 PM	2:45 PM	Conference Room A	* Break and Networking *	
2:45 PM	3:15 PM	Conference Room A	Event Scheduling with ARchitect	Crystal Golightly - ARInsights
3:15 PM	3:45 PM	Conference Room A	What's New in ARchitect and Roadmap	Lucas Bond - ARInsights
3:45 PM	4:00 PM	Conference Room A	Wrap and Feedback	Shashank Kulkarni - ARInsights
4:00 PM	5:00 PM	Conference Room A	Home, Airport, Network	

Printed 11/7/2018 9:10:42 AM



### Executive Itinerary Prepared for: Mary Williams

Thursday, November 15, 2018

Start Time	End Time	Location	Meeting Title	Presenter
8:00 AM	9:00 AM	Conference Room A	Breakfast and Networking	
9:00 AM	9:25 AM	Conference Room A	Kick-off	Ed Capps - ARInsights
9:25 AM	10:05 AM	Conference Room A	Keynote: Rethinking AR Strategy - Time to Reset the Status Quo?	Carter Lusher - <a href="#">Informatica</a>
10:05 AM	10:40 AM	Conference Room A	"C" change - Using competence, collaboration, courage, curiosity, and confirmation to build an AR team for the future	Ricarda Rodatus - Oracle
10:40 AM	10:55 AM	Conference Room A	* Break and Networking *	
10:55 AM	11:30 AM	Conference Room A	Building a Rock Solid AR Program Beyond Gartner	
11:30 AM	12:05 PM	Conference Room A	Internal Promotion of AR	<a href="#">Mamta Shah</a> - TCS
12:05 PM	1:20 PM	Conference Room A	* Lunch and Networking *	
1:20 PM	1:55 PM	Conference Room A	Peer Review Sites - What you need to know and do	Vinay <a href="#">Bhagat</a> - <a href="#">TrustRadius</a>
1:55 PM	2:30 PM	Conference Room A	Samsung's Analyst Portal - One Year Later	
2:30 PM	2:45 PM	Conference Room A	* Break and Networking *	
2:45 PM	3:15 PM	Conference Room A	Event Scheduling with ARchitect	Crystal Golightly - ARInsights
3:15 PM	3:45 PM	Conference Room A	What's New in ARchitect and Roadmap	Lucas Bond - ARInsights
3:45 PM	4:00 PM	Conference Room A	Wrap and Feedback	Shashank Kulkarni - ARInsights
4:00 PM	5:00 PM	Conference Room A	Home, Airport, Network	

Printed 11/9/2018 8:59:30 AM

