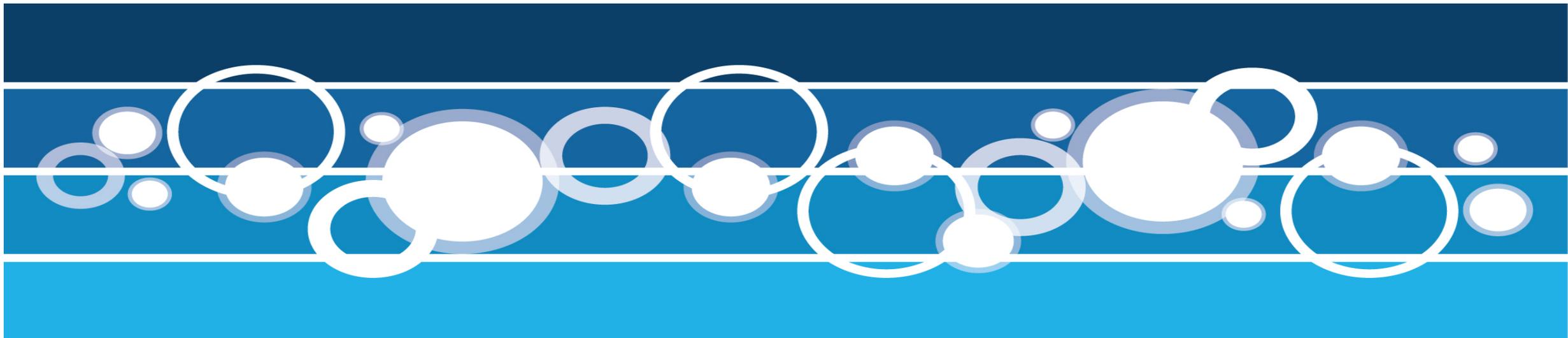

Implementing ARchitect in a Large-Scale Enterprise

Glenn Hintze & Kelly Laverty, IBM

ARchitect User Forum

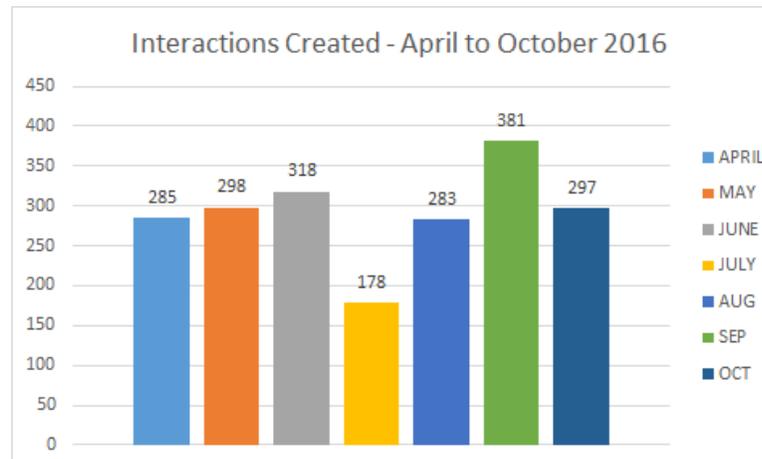
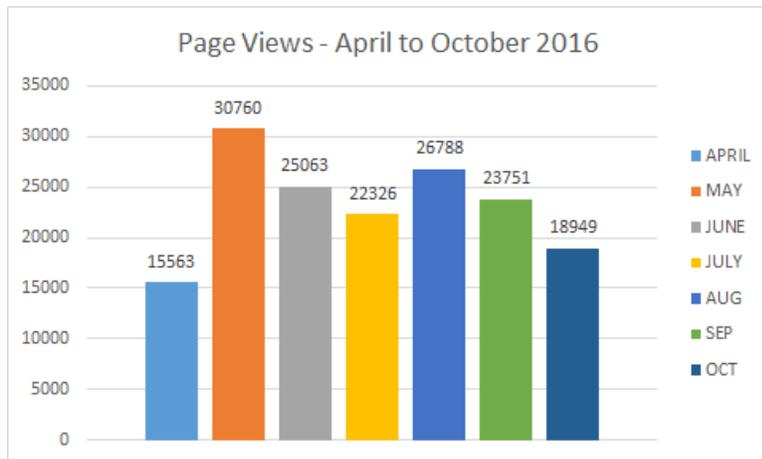
November 17, 2016



Implementing ARchitect at IBM---A Timeline



- March 2016: Decision made to invest in Architect—more than 60 licenses worldwide + access to Premium Content
- April 1, 2016: ARchitect goes “live” in IBM AR—master training call held
- April 2016: Five in-person training sessions held for dozens of U.S. AR professionals (Austin, Boston, New York, Raleigh, San Jose), plus three “virtual” group sessions by phone/web for remaining team members.
- April-June 2016: Migrate content, including 18 months of engagement data covering thousands of analysts, from existing IBM AR database to ARchitect
- May-June 2016: ARchitect at IBM AR expands globally to Asia, Europe & Latin America. Five virtual training sessions held for nearly 20 employees.
- July 2016-present: Small group & individual “advanced” training sessions held for more than 20 employees; basic training for every new employee
- October 2016: Expansion to Events Management; currently testing & scaling in prep for early 2017 events



ARchitect has Helped IBM AR Improve!



- Master Calendar: all IBM and non-IBM analyst events, plus all teleconferences and newsflashes, displayed and accessible in one place.
 - *Updated and sent by COE to all managers weekly*
- Event, teleconference and newsflash requests submitted directly into ARchitect for quick queueing and assignment to COE professionals
- Many AR finances & audit controls are now tracked in Architect
 - *Paid analyst consult & inquiry time used, charts & other documents used with analysts, analyst reports purchased.*
- Briefing/bio books for our many events are now collated/assembled in hours, not days!

ARchitect Use Case: Commercial segment wins email

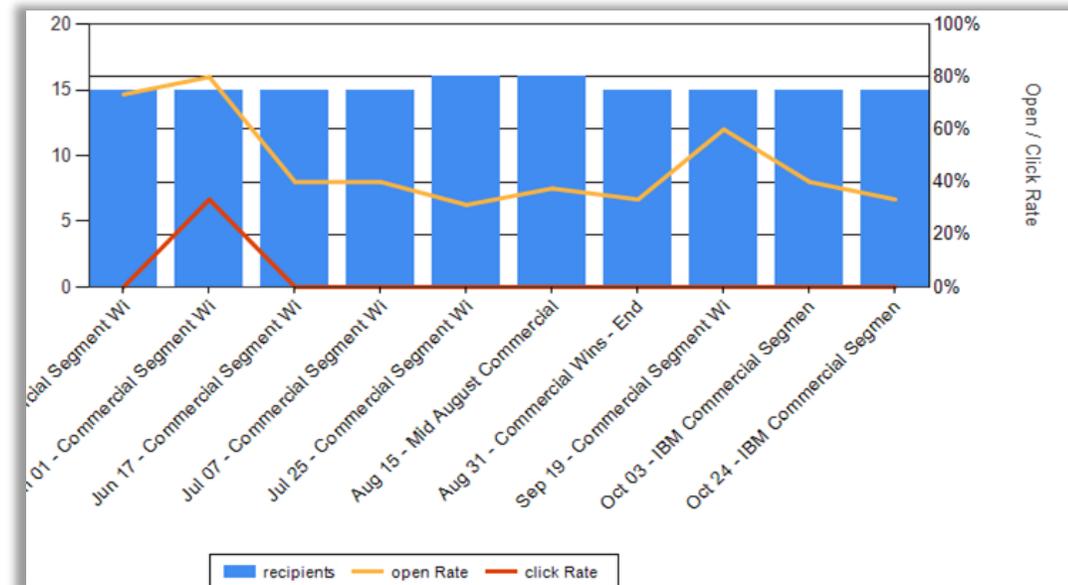


AR manager used the ARchitect email feature to launch a new analyst outreach program with a monthly email sent to a targeted list.

Email includes 3-5 client wins and is sent to a list of 15 analysts

ARchitect features used:

- Email personalization seems to improve the effectiveness
- Reload from previous feature simplifies email creation
- Ability to track stats on multiple emails over time allows team to adjust frequency, timing and distribution list for future emails.



ARchitect Use Case: Premium content for competitor news



- Competitor acquisition had significant impact on market
- AR manager tracked analyst response, sentiment for Product Marketing teams

ARchitect features used:

- Conducted two searches on the announcement:
 - the first immediately following the announcement for tweets and blogs
 - the second thirty days after included reports
- Saved and tagged to articles library, tracked analyst perception in article.

ARchitect Use Case: Audit tracking with follow-up function



- All paid interactions with analyst firms need to be fully documented for internal auditing.
- CoE validates that all required documentation is included and utilizes follow-up feature to inspire AR lead to complete documentation.

The screenshot displays the ARchitect interface for an interaction titled "Forrester Advisory Day". The description is "Session with the key DX analysts and senior DX management at IBM". The interface has two tabs: "Interaction Info" and "Email & Follow-Up", with the latter being active. Under "Analyst Emails", it states "No Analyst Emails Found". Below that is a "Follow-Up Tasks" section with a table:

Title	Due Date	Owner	Complete	Complete Date	Notes
Forrester Advisory Day	10/3/2016	Joe Horine		9/26/2016	ACTION REQUIRED: update record with notes, charts for Audit Purposes

ARchitect features used:

- Attachments, Notes, Analysts, Participants: all required fields are built into interaction
- CoE sends AR contact follow-up email when required documentation is missing. Email notification links directly to interaction. Due date assigned in interaction.

ARchitect Use Case: Event invitations with ARchitect email



- Sent World of Watson invitations to analysts via ARchitect
- Two versions (US and Intl.) were sent to 190 analysts with 106 ultimate attendees

ARchitect features used:

- Personalized emails fit the theme of the event
- Scheduling allowed team to send while event lead was on vacation
- Open rates and click-throughs helped the team discover which analysts required follow-up

Subject	Created	From	Recipie...	Views	Opened	Type	Sent/Sc...
INVITATION AND REGISTRATION: IBM World of Watson 2016, Las Vegas	8/11/2016 8:38 AM	Cynthia Leong	135	47	90	Analyst Email	8/11/20... 9:49 AM
INVITATION, REGISTRATION AND TRAVEL: IBM World of Watson 2016, Las Vegas	8/11/2016 1:52 PM	Cynthia Leong	19	6	14	Analyst Email	8/11/20... 1:56 PM
INVITATION, REGISTRATION AND TRAVEL: IBM World of Watson 2016, Las Vegas	8/11/2016 1:56 PM	Cynthia Leong	3	2	3	Analyst Email	8/11/20... 2:02 PM
INVITATION, REGISTRATION AND TRAVEL: IBM World of Watson 2016, Las Vegas	8/11/2016 3:12 PM	Cynthia Leong	1	1	1	Analyst Email	8/11/20... 3:14 PM
INVITATION AND REGISTRATION: IBM World of Watson 2016, Las Vegas	8/12/2016 12:12 PM	Cynthia Leong	1	1	1	Analyst Email	8/12/20... 12:24 PM
INVITATION, REGISTRATION AND TRAVEL: IBM World of Watson 2016, Las Vegas	8/12/2016 3:22 PM	Cynthia Leong	1	1	1	Analyst Email	8/12/20... 3:36 PM
INVITATION AND REGISTRATION: IBM World of Watson 2016, Las Vegas	8/15/2016 6:10 PM	Cynthia Leong	1	0	1	Analyst Email	8/15/20... 6:16 PM
INVITATION, REGISTRATION AND TRAVEL REMINDER: IBM World of Watson 2016, Las Vegas	8/17/2016 4:36 PM	Cynthia Leong	2	0	1	Analyst Email	8/17/20... 4:48 PM
INVITATION, REGISTRATION AND TRAVEL REMINDER: IBM World of Watson 2016, Las Vegas	8/17/2016 5:15 PM	Cynthia Leong	13	10	11	Analyst Email	8/17/20... 5:36 PM
INVITATION & REGISTRATION REMINDER: IBM World of Watson 2016, Las Vegas	8/23/2016 5:54 PM	Cynthia Leong	96	25	57	Analyst Email	8/24/20... 12:18 PM
INVITATION & REGISTRATION: IBM World of Watson 2016, Las Vegas	8/30/2016 4:11 PM	Cynthia Leong	1	0	1	Analyst Email	8/30/20... 4:17 PM
INVITATION & REGISTRATION: IBM World of Watson 2016, Las Vegas	9/1/2016 5:10 PM	Cynthia Leong	1	0	0	Analyst Email	9/1/2016 5:15 PM
INVITATION & REGISTRATION: IBM World of Watson 2016, Las Vegas	9/9/2016 6:10 PM	Cynthia Leong	6	1	2	Analyst Email	9/9/2016 6:10 PM

Lessons Learned and Takeaways



- Don't rush with transitioning to ARchitect. There's much to absorb. It takes time but with great training, it happens in a good way!
- Import existing interaction data—users need to see their information working in ARchitect!
- Don't over-engineer creating coverage areas and groups—users will ignore or create their own!
- Repetition, repetition—and always offer tips (monthly newsletter) and refresher or advanced training!
- Support received from the ARInsights team is beyond compare! 😊
- Questions and Answers

Thank you! Keep in touch!



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