

# ARchitect Event Management: EY Success Story

Patricia Wind, Analyst Relations

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# EY – Company Overview



## People

SERVICE LINE	FY17
Assurance	86,562
Advisory	53,525
Tax	49,386
TAS	13,654
Practice Support	44,443
<b>Total</b>	<b>247,570</b>


Advisory Service Areas Include: Customer Experience, Cybersecurity, Finance, People Advisory Services, Program Management, Risk Assurance, Strategy, Supply Chain, and Technology.

# Background – EY Analyst Relations Team

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- ▶ A team of 3 analyst relations professionals covering a wide variety of topics for the firm, with the list growing daily
- ▶ Several events throughout the year including a Global Analyst Summit and additional specialized Technology Summit
- ▶ A large number of major reviews throughout the year: MQs, Waves, Marketscapes, Vanguards, etc.

**Gartner**®

 Magic Quadrant



 **IDC**  
Analyze the Future

MarketScape Report

# Background – A Tale of Two Events

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▶ **Global Analyst Summit (March 2017):**

- Large budget, very high profile
- 60 analysts attending
- 25 executives attending
- 10 clients attending
- External event company hired to assist
- Scheduling software via event company
- Large support team



▶ **Technology Summit (June 2017):**

- Small budget
- Event grew to be larger than initially planned
- No external event company
- Planning to build agendas manually
- Minimal support team
- Still high profile with 25 VIPs attending, many of whom also attended the Global Summit



# Logistical Details of Technology Summit

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- ▶ 25 analysts from 10 different firms
- ▶ 15 key executives and 10 clients in attendance
- ▶ Approximately 70 analyst 1-1 meetings (5 rounds) to schedule with the key executives, based on analyst preferences
- ▶ Needed customized agendas for each attendee: analysts, executives, and clients
- ▶ Agendas were complex with multiple breakout session assignments, varied 1-1 meetings, etc.

# Summary of Challenges

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We needed to meet the standards we set at the Global Summit for managing logistics and providing easy to follow, custom agendas

## **BUT...**

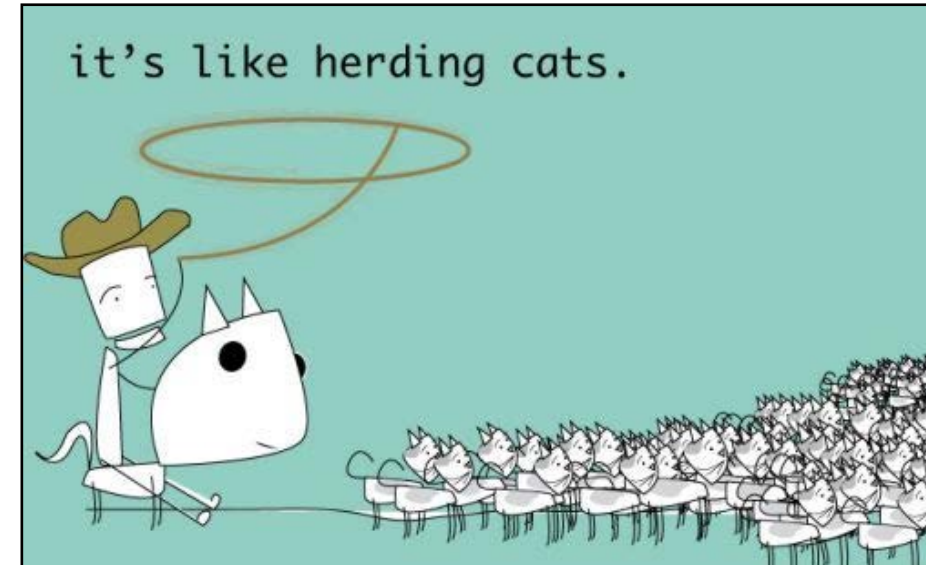
We were working with far less budget, resources, and time

## **SO...**

Everything was going to have to be done manually

## **AND...**

With fewer hands to handle details of the event, we didn't have the bandwidth to manage cascading edits to our complex, interdependent schedules caused by last minute changes



# The Solution – Enter ARchitect Event Planning Tool

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- ▶ A conversation with AR Insights on another topic two weeks before the event led to awareness of the Event Management Tool, which sounded like the answer to our problem
- ▶ Crystal promised to be a guide throughout the process, and was a true partner
- ▶ Scheduling was very easy, as Crystal will detail in her presentation
- ▶ All of our 1-1 meetings were automatically recorded in ARchitect, so we saved the time that would have been spent in record keeping after the event

# Scheduling

Cancel Delete Save

### Title & Description

Title \* 1:1 Business Development - {Milos Milojevic}

Description \* 1:1 Edwina Fitzmaurice - {Milos Milojevic}

### Basics

Type \* Event 1:1

Date 6/8/2017 5:15PM

End Date 6/8/2017 5:45PM

Initiator Wind, Patty

ARPrimary O'Sullivan, Alexia

Location 8.2047, Right Room

### Details

Presenter Edwina Fitzmaurice

### Analysts (1) Pick

Analyst Name

Choose Analyst...

No Grouping • By Firm • By Last Name

Milos Milojevic  
PAC

### Participants (1) + New Pick

Participant Name

Choose...

Edwina M Fitzmaurice

### Coverages (1) + New Pick

Coverage Name

Big Bets...

EY Coverage...

EY Coverage...

Regions...

Business Development

### Project + New

EY Tech Summitt - 2017



# Scheduling / Resolving Conflicts

Cancel Invite Save

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 #520233
- Scheduling Conflict for Analyst Milojevic, Milos. Already scheduled at this time for Interaction #520233
- Scheduling Conflict for Participant Edwina M Fitzmaurice. Already scheduled at this time for Interaction #520233

Override Conflict Error(s) and Save with Conflicts

## Title & Description

Title \* 1:1 Business Development - {Milos Milojevic}

Description \* Business Development - {Milos Milojevic}

## Basics

Type \* Event 1:1

Date 6/8/2017 5:15PM

End Date 6/8/2017 6:15PM

## Analysts (1)

Pick

Analyst Name

Choose Analyst...

No Grouping • By Firm • By Last Name



Milos Milojevic  
PAC



## Participants (1)

+ New Pick

Participant Name

Choose...



Edwina M Fitzmaurice



## Coverages

+ New Pick

Coverage Name

# Personalized Analyst Agenda

Agenda for: Liz DeVito, ALM

Thursday, June 08, 2017				
Start	End	Session	Presenter	Location
7:30 AM	8:00 AM	USQ Network Center Immersion Time	Center Network Staff	Experience Center
8:00 AM	8:10 AM	Q&A	Dan Higgins	Experience Center
8:15 AM	8:45 AM	Client Centricity	Edwina Fitzmaurice	Experience Center
8:45 AM	9:45 AM	Enterprise and Emerging Tech	Kim Ramko	Experience Center
9:45 AM	10:00 AM	Break (breakout preview)	N/A	Various
10:00 AM	10:35 AM	EY+Microsoft	Greg Cudahy, Client A	8.1049, XLarge Room
10:40 AM	11:15 AM	Oracle Solutions	Don Kisiday, Client B	8.2051, Left Room
11:20 AM	11:55 AM	Accelerating a Data Driven Culture	Michael Yadgar, Client C	8.1051, Large Room
12:00 AM	12:55 AM	Lunch	N/A	Various
1:00 PM	1:35 PM	RPA / Business Transformation	Weston Jones, Client X	8.2051, Left Room
1:40 PM	2:15 PM	Cyber Security	Paul van Kessel, Henry Burgess, Client Y	8.2047, Right Room
2:20 PM	2:55 PM	Customer Experience / AI	Beatriz Sanz Saiz, Keith Strier, Client Z	8.1049, XLarge Room
3:00 PM	3:10 PM	Break	N/A	Various
3:10 PM	3:15 PM	Summary and staying connected	Dan Higgins	Experience Center
3:15 PM	3:45 PM	1:1 Analytics - {Liz DeVito}	Beatriz Sanz Saiz	Table 11
3:45 PM	4:15 PM	1:1 RPA - {Liz DeVito}	Weston Jones	Table 3
4:15 PM	4:45 PM	1:1 Digital - {Liz DeVito}	David Deane, Woody Driggs	8.2049, Center Room
4:45 PM	5:15 PM	1:1 Business Development - {Liz DeVito}	Edwina Fitzmaurice	8.2047, Right Room
5:15 PM	5:45 PM	1:1 Analytics & Emerging Technology - {Liz DeVito}	Chris Mazzei	8.2051, Left Room

Liz has 6 different break out sessions

And a full 1-1 schedule

Note: Some agenda details have been removed to protect confidentiality.



# Personalized Executive Agenda

## Agenda for: Michael Yadgar

Thursday, June 08, 2017					
Start	End	Session	Presenter	Firm	Location
7:30 AM	8:00 AM	USQ Network Center Immersion Time	Center Network Staff		Experience Center
8:00 AM	8:10 AM	Q&A	Dan Higgins		Experience Center
8:15 AM	8:45 AM	Client Centricity	Edwina Fitzmaurice		Experience Center
8:45 AM	9:45 AM	Enterprise and Emerging Tech	Kim Ramko		Experience Center
9:45 AM	10:00 AM	Break (breakout preview)	N/A		Various
10:00 AM	10:35 AM	Accelerating a Data Driven Culture	Michael Yadgar, Client C		8.1051, Large Room
10:35 AM	11:15 AM	Accelerating a Data Driven Culture	Michael Yadgar, Client C		8.1051, Large Room
11:20 AM	11:55 AM	Accelerating a Data Driven Culture	Michael Yadgar, Client C		8.1051, Large Room
12:00 AM	12:55 AM	Lunch	N/A		Various
1:00 PM	2:55 PM	Breakouts 2nd Session -- Open	N/A		Various
3:00 PM	3:10 PM	Break	N/A		Various
3:10 PM	3:15 PM	Summary and staying connected	Dan Higgins		Experience Center
3:15 PM	3:45 PM	1:1 SAP - {Gard Little}	Michael Yadgar	IDC	Table 13
4:15 PM	4:45 PM	1:1 SAP - {Miriam Deasy}	Michael Yadgar	Ovum	Table 13
4:45 PM	5:15 PM	1:1 SAP - {No Meeting}	Michael Yadgar		Table 13
5:15 PM	5:45 PM	1:1 SAP - {Patrick Heffernan}	Michael Yadgar	Technology Business Research, Inc. (TBR)	Table 13

Michael is presenting 3 back-to-back sessions

He is free during this breakout period

And has several 1-1 meetings

Note: Some agenda details have been removed to protect confidentiality.

# Personalized Client Agenda

## Agenda for: Vijay Singh

Thursday, June 08, 2017					
Start	End	Session	Presenter	Firm	Location
7:30 AM	8:00 AM	USQ Network Center Immersion Time	Center Network Staff		Experience Center
8:00 AM	8:10 AM	Q&A	Dan Higgins		Experience Center
8:15 AM	8:45 AM	Client Centricity	Edwina Fitzmaurice		Experience Center
8:45 AM	9:45 AM	Enterprise and Emerging Tech	Kim Ramko		Experience Center
9:45 AM	10:00 AM	Break (breakout preview)	N/A		Various
10:00 AM	11:55 AM	Breakouts 1st Session -- Open	N/A		Various
12:00 AM	12:55 AM	Lunch	N/A		Various
1:00 PM	1:35 PM	IoT Update	Aleksander Poniewierski, Vijay Singh, Client X		8.1051, Large Room
1:40 PM	2:15 PM	IoT Update	Aleksander Poniewierski, Vijay Singh, Client X		8.1051, Large Room
2:20 PM	2:55 PM	IoT Update	Aleksander Poniewierski, Vijay Singh, Client X		8.1051, Large Room
3:00 PM	3:10 PM	Break	N/A		Various
3:10 PM	3:15 PM	Summary and staying connected	Dan Higgins		Experience Center

Vijay is free during this breakout period

He is presenting 3 back-to-back sessions

And has no 1-1 Meetings

Note: Some agenda details have been removed to protect confidentiality.

# Post Event Reporting From ARchitect: 1-1 Meetings (\*Representative Sample)

Date	Title	Type	Analyst	Current Firm
6/8/2017	1:1 SAP - {Patrick Heffernan}	Event 1:1	Heffernan, Patrick	Technology Business Research, Inc. (TBR)
6/8/2017	1:1 Cyber Security - {Sean Doherty}	Event 1:1	Doherty, Sean	451 Research
6/8/2017	1:1 Digital - {Miriam Deasy}	Event 1:1	Deasy, Miriam	Ovum
6/8/2017	1:1 Analytics - {De Souza/ Ferrusi Ross/ Reuner}	Event 1:1	Reuner, Thomas	HfS Research
6/8/2017	1:1 Analytics - {De Souza/ Ferrusi Ross/ Reuner}	Event 1:1	Ross, Christine	HfS Research
6/8/2017	1:1 Analytics - {De Souza/ Ferrusi Ross/ Reuner}	Event 1:1	De Souza, Khalda	HfS Research
6/8/2017	1:1 IoT - {Gard Little}	Event 1:1	Little, Gard	IDC
6/8/2017	1:1 Wavespace & USQ Innovation - {David Gautier}	Event 1:1	Gautier, David	PAC
6/8/2017	1:1 Forensic Data Analytics - {Fiona Czerniawska}	Event 1:1	Czerniawska, Fiona	Source Global Research
6/8/2017	1:1 Analytics & Emerging Technology - {Liz DeVito}	Event 1:1	DeVito, Liz	ALM Media
6/8/2017	1:1 Technology - {Stephanie Artigliere}	Event 1:1	Artigliere, Stephanie	Technology Business Research, Inc. (TBR)
6/8/2017	1:1 Business Development - {Milos Milojevic}	Event 1:1	Milojevic, Milos	PAC
6/8/2017	1:1 Cyber Security - {Patrick Heffernan}	Event 1:1	Heffernan, Patrick	Technology Business Research, Inc. (TBR)
6/8/2017	1:1 Digital - {Godfrey Chua}	Event 1:1	Chua, Godfrey	Gartner Inc.
6/8/2017	1:1 Analytics - {Stephanie Artigliere}	Event 1:1	Artigliere, Stephanie	Technology Business Research, Inc. (TBR)
6/8/2017	1:1 IoT - {David Gautier}	Event 1:1	Gautier, David	PAC
6/8/2017	1:1 Wavespace & USQ Innovation - {Sean Doherty}	Event 1:1	Doherty, Sean	451 Research
6/8/2017	1:1 Analytics & Emerging Technology - {De Souza/ Ferrusi Ross/ Reuner}	Event 1:1	De Souza, Khalda	HfS Research

# Post Event Reporting From ARchitect: Breakouts (\*Representative Sample)

Date	Type	Title	Analysts
6/8/2017 2:20 PM to 2:55 PM ET	Event - Breakout	RPA	Marc Cecere, Khalda De Souza, Thomas Reuner, Michael Versace
6/8/2017 2:20 PM to 2:55 PM ET	Event - Breakout	CyberSecurity	Godfrey Chua, Sean Doherty, Patrick Heffernan
6/8/2017 2:20 PM to 2:55 PM ET	Event - Breakout	Blockchain	David Gautier, Susan Tan
6/8/2017 2:20 PM to 2:55 PM ET	Event - Breakout	IoT	Miriam Deasy, Erin Hichman, Christine Ross
6/8/2017 2:20 PM to 2:55 PM ET	Event - Breakout	Customer Experience / AI	Stephanie Artigliere, Liz DeVito, Gard Little, Milos Milojevic
6/8/2017 1:40 PM to 2:15 PM ET	Event - Breakout	Customer Experience / AI	Khalda De Souza, Miriam Deasy, Erin Hichman
6/8/2017 1:40 PM to 2:15 PM ET	Event - Breakout	IoT	Stephanie Artigliere, Marc Cecere, Patrick Heffernan, Michael Versace
6/8/2017 1:40 PM to 2:15 PM ET	Event - Breakout	CyberSecurity	Liz DeVito, Gard Little, Christine Ross
6/8/2017 1:40 PM to 2:15 PM ET	Event - Breakout	RPA	Sean Doherty, David Gautier, Susan Tan
6/8/2017 1:40 PM to 2:15 PM ET	Event - Breakout	Blockchain	Godfrey Chua, Milos Milojevic, Thomas Reuner
6/8/2017 1:00 PM to 1:35 PM ET	Event - Breakout	RPA	Miriam Deasy, Liz DeVito, Patrick Heffernan
6/8/2017 1:00 PM to 1:35 PM ET	Event - Breakout	Blockchain	Stephanie Artigliere, Christine Ross, Michael Versace
6/8/2017 1:00 PM to 1:35 PM ET	Event - Breakout	CyberSecurity	Fiona Czerniawska, Khalda De Souza, Erin Hichman
6/8/2017 1:00 PM to 1:35 PM ET	Event - Breakout	Customer Experience / AI	Marc Cecere, David Gautier, Thomas Reuner, Susan Tan
6/8/2017 11:20 AM to 11:55 AM ET	Event - Breakout	EY+Microsoft	Patrick Heffernan, Christine Ross, Michael Versace
6/8/2017 11:20 AM to 11:55 AM ET	Event - Breakout	Accelerating a data driven culture	Stephanie Artigliere, Miriam Deasy, Liz DeVito, Gard Little
6/8/2017 11:20 AM to 11:55 AM ET	Event - Breakout	Forensic Data Analytics	Khalda De Souza, David Gautier, Milos Milojevic
6/8/2017 11:20 AM to 11:55 AM ET	Event - Breakout	Insurance System Modernization	Godfrey Chua, Thomas Reuner, Susan Tan
6/8/2017 11:20 AM to 11:55 AM ET	Event - Breakout	Oracle Solutions	Marc Cecere, Sean Doherty, Erin Hichman
6/8/2017 10:40 AM to 11:15 AM ET	Event - Breakout	Forensic Data Analytics	Stephanie Artigliere, Fiona Czerniawska, Patrick Heffernan
6/8/2017 10:40 AM to 11:15 AM ET	Event - Breakout	Oracle Solutions	Liz DeVito, Susan Tan, Michael Versace
6/8/2017 10:40 AM to 11:15 AM ET	Event - Breakout	EY+Microsoft	Marc Cecere, Sean Doherty, Erin Hichman, Thomas Reuner
6/8/2017 10:40 AM to 11:15 AM ET	Event - Breakout	Accelerating a data driven culture	Godfrey Chua, Khalda De Souza, Milos Milojevic, Christine Ross
6/8/2017 10:40 AM to 11:15 AM ET	Event - Breakout	Insurance System Modernization	Miriam Deasy, David Gautier, Gard Little

# Results

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- ▶ A great amount of time, effort, and worry saved with the ARchitect system, versus manual input and agenda building
- ▶ Confidence that all meetings would go smoothly and there would be no confusion with duplicate meetings, knowing the system would catch any double bookings, etc.
- ▶ Post event reporting was incredibly easy, as all data was already in ARchitect and details could be pulled together at the click of a button
- ▶ A very successful event with professional custom agendas and no scheduling issues



# Thank you!

Patricia Wind

Wind Communications

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