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# Case Study: Running a Large AR Event Enabled by ARchitect Event Manager

November 10, 2022

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**Jeff Williams & Kaitlyn Nguyen**

Oracle Analyst Relations



# Speakers



Jeff Williams  
Director, Digital Transformation



Kaitlyn Nguyen  
Digital Transformation Marketing  
Specialist

# Agenda

1. Oracle Analyst Relations
2. OpenWorld 2014
3. CloudWorld 2022
4. Planning Process
5. How We Use Event Manager
6. Best Practices & Lessons Learned
7. Q&A



# Analyst Relations

Oracle

Analysts Managed

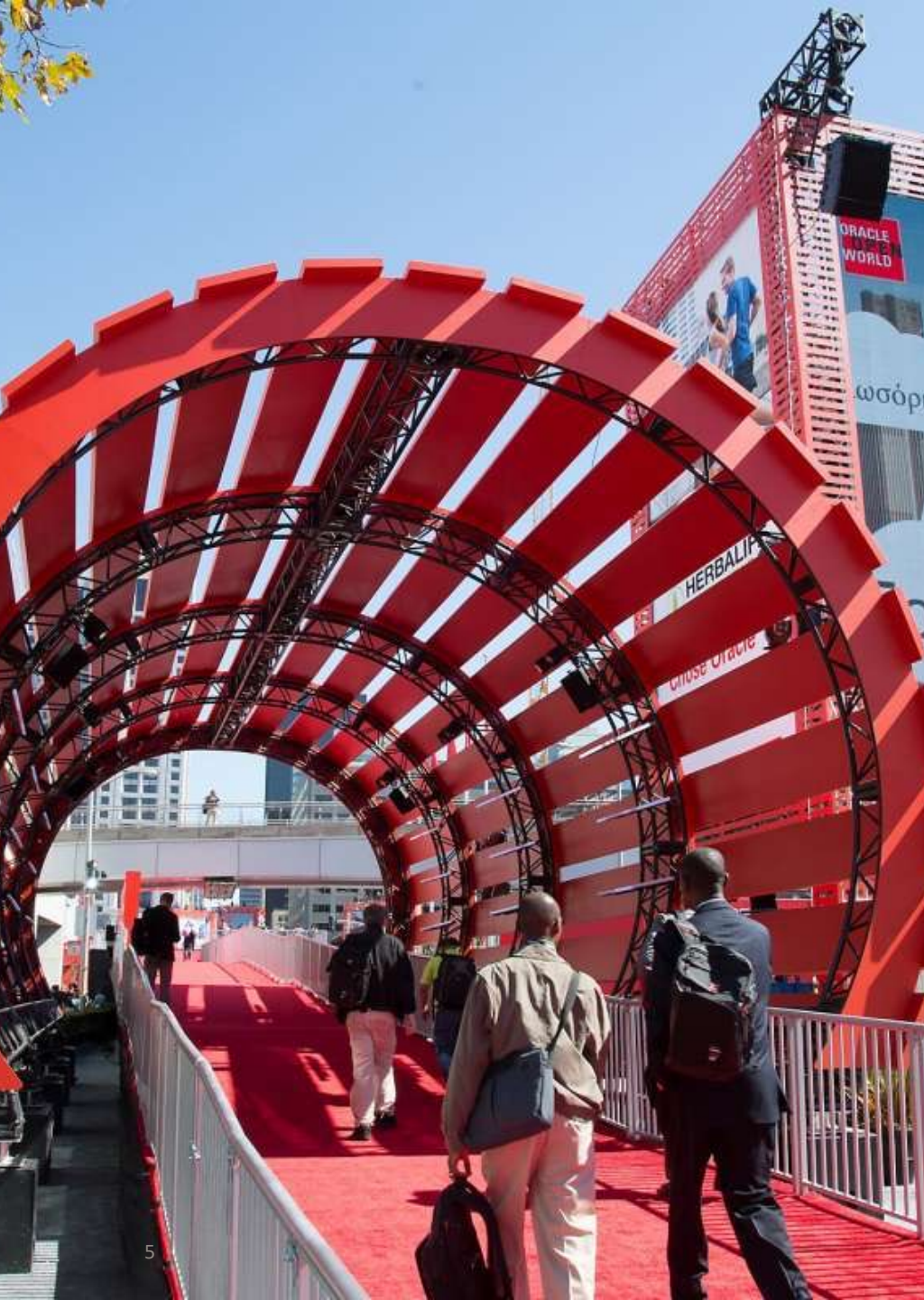
1000+

Coverages

75

AR Managers

23



# Oracle OpenWorld 2014

Large increase in AR programming over previous years

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## AR at Oracle OpenWorld

# 150+ Analysts

200+ published notes from attending analysts



## Meetings

Customers and executives

## Managers

Each AR Manager to handle over 3 days!

Affiliates



11/10/22



## Problem

With a large number of people, limited time, and limited space, it is very challenging to schedule all the necessary AR meetings while avoiding conflicts, ensuring a single source of truth, and presenting accurate itineraries to participants.

## Opportunity

Many ARInsights customers share similar needs for scheduling meetings and events. Further increase the value of ARchitect by adding features to meet these needs.

## Solution

ARInsights added Event Manager to ARchitect for Oracle with the following features:

- Manage meeting invites (yes, no, maybe)
- Schedule 1:1s for analysts and executives/spokespeople
- Create itineraries/agendas for analysts and executives/spokespeople

# ARchitect Event Manager 2014

**New Interaction**

6 Cancel Invite Save

Title & Description

Title \* Customer 1:1: Joerg Modlmayr (Siemens) | Jim L

Description \* meeting description here

Basics

Type \* OpenWorld - Customer 1:1

Date 10/12/2015 9:00AM

End Date 10/12/2015 9:30AM

Initiator Insights, AR

AR Manager Insights, AR

Location Moscone Room 124

Details

Customer Company \*

Customer Spokesperson

Attendees Total \* 1

Need 1:1 Room

**Interactions**

+ Add New Interaction CALENDAR GRID REPORT

Add Filter(s) Future Begin typing for results Search

Interaction Types: OpenWorld - Session x OpenWorld - Keynote x OpenWorld - Customer 1:1 x OpenWorld - Executive 1:1 x

OpenWorld - Analyst Registration x OpenWorld - AR Workroom Hours x OpenWorld - AR W

OpenWorld - Meal x OpenWorld - Registration x OpenWorld - Roundtable x OpenWor

Export Columns Reset Grid

Date...	Title	Initia...	Type	Anal...	Cove...	Atta...	Per
10/2... 1:15 PM to 10/2... 2:00 PM	Hands-On Lab   Commerce—CX Central [ ] Thursday	Seba... Mike	Ope... - Sessi...				
10/2... 10:45 AM to 10/2... 11:30 AM	Hands-On Lab   Commerce—CX Central [ ] Thursday	Seba... Mike	Ope... - Sessi...				
10/2... 10:00 AM to 10/2... 11:30 AM	General Session   HCM Central Thursday	Seba... Mike	Ope... - Sessi...				

50 items per page

**Interactions**

+ Add New Interaction CALENDAR GRID REPORT

Add Filter(s) Future Begin typing for results Search

Interaction Types: OpenWorld - Session x OpenWorld - Keynote x OpenWorld - Customer 1:1 x OpenWorld - Executive 1:1 x

OpenWorld - Analyst Registration x OpenWorld - AR Workroom Hours x OpenWorld - AR Workroom Meals x OpenWorld - Flight arrival/departure x

OpenWorld - Meal x OpenWorld - Registration x OpenWorld - Roundtable x OpenWorld - Social x

**ORACLE Analyst Agenda**

Report settings Export report Save Report Close

1 of 1

Analyst Agenda Prepared for: [Avatar]

(printed: 7/27/2015)

Sunday, September 28, 2014

Start Time	End Time	Interaction Type	Summary	Oracle Spokesperson	Customer Spokesperson	Location	Session ID
1:45 PM	1:45 PM	OpenWorld - Flight arrival/departure	Arrival details: United Airlines Flight #900				
3:30 PM	5:00 PM	OpenWorld - Social	Oracle Analyst Relations' Industry Analyst Reception			The Cavalier Restaurant, 360 Jessie St, San Francisco	
5:00 PM	7:00 PM	OpenWorld - Keynote	Oracle OpenWorlds Sunday Welcome Keynote [KEY10426]   Larry Ellison			Moscone North, Hall D	KEY10426

Monday, September 29, 2014





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## ARchitect Event Manager, to the rescue!

100+ Analysts

200+ published notes from participating analysts

*satisfied*

300+ Meetings

Analysts meeting with customers and executives

*successful*

20+ AR Managers

That's 15 meetings for each AR Manager to handle over 3 days!

*still sane*





# Oracle CloudWorld 2022

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**First event of this scale in 3 years & at a new venue!**



## New Challenges for CloudWorld 2022

### Limited meeting space

Limited space means difficulty avoiding conflicts

### Most meetings ever

More analysts, executives, and customers than ever before

### First big one in years

Lots of new team members at their first CloudWorld



## Problem

AR Managers need to schedule more event meetings than ever while avoiding conflicts for their participants and location bookings. Challenging to do with Event Manager.

Event managers challenged to make efficient use of limited meeting spaces.

## Opportunity

Further enhance the capabilities of ARchitect Event Manager so that AR teams planning large events can do it all in ARchitect and avoid the need for a separate booking and logistics platform.

## Solution

ARInsights delivered a 2022 update to ARchitect Event Manager with the following new features:

- Visual calendar view on the Interaction Screen to ease finding meeting times when there will be no conflicts
- Multi-slot locations

# ARchitect Event Manager 2022

Locations + New

Create a new Location

Location (e.g. room name)  Multi Slot Location

Cancel Add

- Allian
- Apex
- Ascer
- Bellin
- Bellini 2004 - The Venetian - Level 2
- Bellini 2005 - The Venetian - Level 2
- Bellini 2006 - The Venetian - Level 2
- Bellini 2102 - The Venetian - Level 2
- Bellini 2103 - The Venetian - Level 2
- Bellini 2104 - The Venetian - Level 2
- Bellini 2105 - The Venetian - Level 2
- Bellini 2106 - The Venetian - Level 2
- Caesar's Forum
- Caesars Forum Alliance Ballroom

Today Tuesday, October 18, 2022

Tue 10/18

all day 2022 Oracle CloudWorld

8:00 AM

9:00 AM

10:00 AM Current Interaction Crystal Golightly Kaitlyn Nguyen Venetian\_Level5\_Meeting

11:00 AM

12:00 PM Venetian\_Level\_5\_Meeting Rooms 11-23 - Large Room (Capacity 20) - Executive 1:1 | Chris Weber, Jeff Newton, Erin Hichman, Eric Newmark, Frank Della Rosa (IDC) and Julie Tung (Oracle)

1:00 PM Venetian\_Level\_5\_Meeting Rooms 11-23 - Large Room (Capacity 20) - Executive 1:1 | Suhas Uliyar, Sanga Viswanathan, Srin Vinnakota, Venetian\_Level\_5\_Meeting Rooms 11-23 - Large Room (Capacity 20) - Executive 1:1 Meeting with Joey Fitts & Ritu Jyoti/David Schubmehl

2:00 PM

3:00 PM

4:00 PM Venetian\_Level\_5\_Meeting Rooms 11-23 - Large Room (Capacity 20) - Customer 1:1 | Gordon Mackechnie, Matt Kurko (Deutsche Bank)

Show full day

Show/Hide

- Analysts
- Participants
- Location



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2022 Event Manager updates meant we didn't need a separate scheduling tool!



limited meeting space

before

S



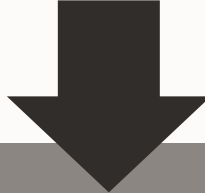
# Planning Process



**1**

## Establish Ground Rules

There is flexibility in how the Event Manager works. We needed to begin with establishing rules that best work for our team.



**2**

## Begin Team Training

Many processes and rules we've set aren't easy to remember. Team trainings leading up to the event were vital to our success.



**3**

## Bulk Upload Sessions

With the size of our event, having ARInsights bulk upload and bulk update our sessions saved hours of effort.



**4**

## Start Scheduling

With everything in place, AR Managers can begin finding sessions/locations within ARchitect and sending out invites.



**5**

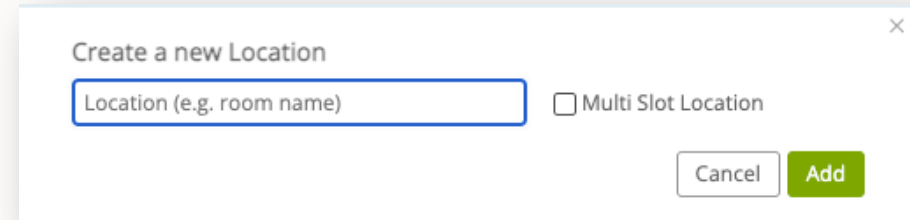
## Check Entries Regularly

Team trainings will never be foolproof. It's important to regularly check entries before and during the event to catch any errors.



# Using the Multi-Slot Location Feature to Track Room Inventory

1. Challenge this addressed:
  - Repeated trial and error to find an open meeting space.
2. Assigned *types of rooms* through interactions, and waited to assign *specific* room numbers the night before each event day.
  - Allows us to ensure that logistics of room allocation makes sense
  - Makes finding an open room much easier than before



Create a new Location

Location (e.g. room name)  Multi Slot Location

Cancel Add



Venetian, Level 5, Meeting Rooms 11-23 - Large Room (Capacity 20)		
Venetian, Level 5, Meeting Rooms 11-23 - Medium Room (Capacity 10) (2)		
Venetian, Level 5, Meeting Rooms 11-23 - Small Room (Capacity 4) (10)		



Meeting Time	Meeting Attendees	Meeting Room
10:00-10:30	I. Hansen (Gartner), A. Onate, S. Streich, S. Sofat (Oracle)	21
10:30-11:00	M. Holt (Omdia) and S. Jones, J. Chacko (Oracle)	11
11:00-11:30	R. Potturi (GE Power) and S. Banker (ARC)	12
11:00-11:30	M. Holt (Omdia) and E. Meritt (Oracle)	13
12:30-1:00	V. Brown and M. Threadgill (Forrester), A. Onate and S. Streich (Oracle)	21
12:30-1:00	P. Bues (IDC) and M. Thiagarajan (Oracle)	11
1:00-1:30	P. Bues (IDC) and J. Larsen (Oracle)	12
1:00-1:30	A. Nadkarni (IDC) and L. Leung (Oracle)	13





# Using Calendar View to Check Meeting Conflicts

Cancel Save & Invite Save

**INTERACTION HAS NOT BEEN SAVED DUE TO CONFLICTS** ?

**LOCATION CONFLICT**

- Executive 1:1 | Crystal GoLightly (Analyst Firm) and Kaitlyn Nguyen (Oracle)

**ANALYST CONFLICT**

- Crystal Golightly, ARInsights, LLC - Executive 1:1 | Crystal GoLightly (Analyst Firm) and Kaitlyn Nguyen (Oracle)

**PARTICIPANT CONFLICT**

- Kaitlyn Nguyen - Executive 1:1 | Crystal GoLightly (Analyst Firm) and Kaitlyn Nguyen (Oracle)

Save - I am OK with Conflicts Save - I have Resolved Conflicts

**Title & Description**

Title \* Executive 1:1 | Jane Smith (Analyst Firm) and Joe Smith (

Description \* example

**Basics**

Event 2022 Oracle CloudWorld

Interaction Type \* 1:1 Meeting Executive

Start Date \* 10/18/2022 10:00AM PT

End Date \* 10/18/2022 11:00AM

Initiator Nguyen, Kaitlyn

AR Manager Nguyen, Kaitlyn

**Analysts (1)** Pick

Analyst Name

Choose Analyst

No Grouping • By Firm • By Last Name

Crystal J. Golightly  
ARINSIGHTS, LLC

**Firms (1)**

Firm Name

ARInsights, LLC

**Participants (1)** +New Pick

Participant Name

Choose Participant

Kaitlyn Nguyen

**Coverages** +New Pick

Coverage Name

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Show full day

Show/Hide

Analysts Participants Location



# Best Practices & Lessons Learned

## Best Practices

- **Evaluate your team's needs** *each time, long before the event*. Interview team members, understand their pain points, and how these points have evolved.
  - Gives you time to either strategize around challenges, or work with ARInsights through product enhancements.
- **Set ground rules** and *share them often*.
- **Hold office hours regularly** leading up to the event for your team to get help or ask questions.
- **Assign 1-2 people to QC** all entries throughout the event lifecycle.
- **Check scheduled meetings** the **night before** each event day, and **the morning of** as well to catch any last-minute changes.

## Lessons Learned

- **QC of meeting scheduling is critical** – the more diligent you are with QC ahead of time, the smoother the event will run.
- **ARInsights is there to help** – If you come across a challenge at *any* point in the event planning process, just ask!
  - ARInsights has surprised us many times with addressing asks we thought were too ambitious. At the least, they will help you with a workaround and note the challenge for future product enhancements anyways.



# Q&A

