

BD CRM ensures that your team is informed of critical intelligence or important client interactions

Keep Your Team Informed

BD CRM allows you to effectively communicate with your team, manage your accounts, and track your team's activities to maximize return.

The screenshot displays the BD CRM interface. On the left, a table lists contacts with columns for Name, Institution Name, Primary Institution Type, Side, Asset Class, Job Function, Phone, City, State, Country, and Geographical Region. An 'Actions' dropdown menu is open over the table, listing options like 'Add Meeting', 'Add Activity', 'Add to CRM', etc. On the right, a form for creating an activity is shown, with sections for 'Type, Subject and Topic', 'Participants', 'Date, Time and Location' (with a date picker set to 5/7/2009), 'Activity Location', 'Symbol and Sector', 'Activity Defined Fields', and 'Description'. The description field contains the text: 'She is a buyer of Cost - looking to add it to her portfolio'. Below the form, an 'Alerts' section is visible, showing 'Send Alert' options (BCC, CC) and a list of recipients under 'Recipients', including 'Team', 'Ipreo CM', and 'Member' with individual names like Gibran Augustine, Ryan Bateman, etc.

Activity and Alerting

- z Enter interactions directly from the contact profile or ownership report
- z While logging a new activity to a profile, automatically alert colleagues to an activity that is being logged
- z Customize your recipient list

Management Reporting

- z Track your team's performance and activity
- z View notes associated with each activity
- z Easily drill down to view the contact or institutional profile
- z Analyze the effectiveness of your client outreach initiatives

Date & Time	Entered By	Location	Action Type	Topic	Subject	Notes	External Attendees	Internal Attendees	Management
Wednesday, May 06, 2009 6:26:00 AM	Dominic Mattiucci	Corporate Headquarters	Conference Call	Results	Q4 Earnings Release	Current Release discussed - mention our outlook for 2009	Paul Cooper		
Wednesday, April 29, 2009 11:06:00 AM	Kelly McPartland		1 - 1	Results	TR Meeting		T. Rowe Price Associates, Inc.	Sena Bevil James Bond James Bond Michael Chren	Sena Bevil James Bond James Bond Michael Chren
Monday, April 27, 2009 5:05:00 PM	Liz Goodroe		1 - 1		icker here	sample	Fidelity Management & Research Company		
Friday, April 24, 2009 10:06:00 PM	Kelly McPartland		1 - 1		Meeting		T. Rowe Price Associates, Inc.		
Friday, April 24, 2009 9:29:00 PM	Radha Badrinarayan		1 - 1	Financials	press release	press release	Barclays Global Investors N.A.	Jurgen Kleinhans SENA bevil	Marie Cuevas Hampus Linden SENA bevil Test Tester
Friday, April 24, 2009 5:52:00 PM	Kelly McPartland	Ipreo Headquarters	1 - 1	Guidance	T. Rowe 1 on 1	discussed Q3 guidance	T. Rowe Price Associates, Inc.	James Bond James Bond Sena Bevil	James Bond James Bond Sena Bevil
Thursday, April 23, 2009 10:48:00 PM	Nathan Rose			Broker Lunch	Cash Flow	met at luncheon in perth	UBS Emerging Companies Fund		
Monday, April									