

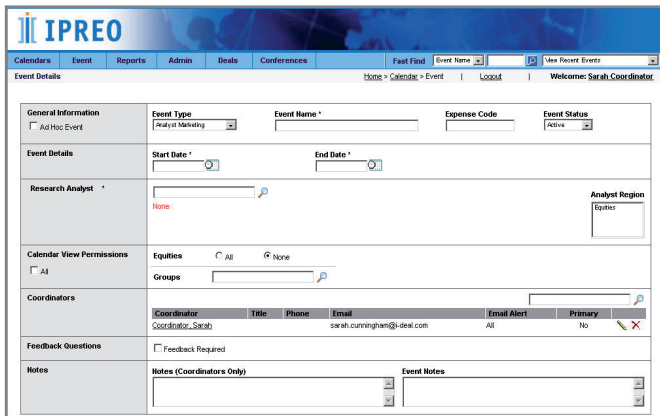
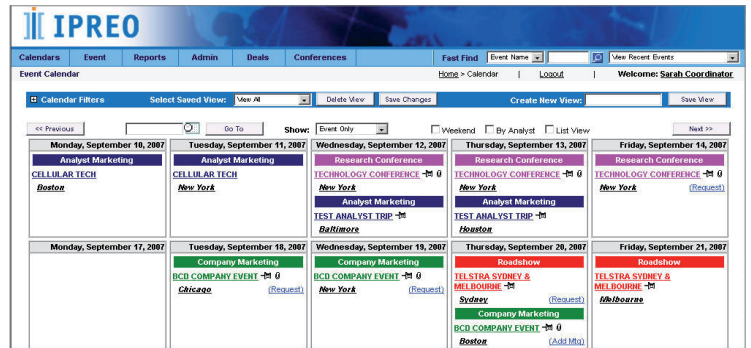
Manage roadshows and investor outreach

iPlanner

iPlanner is a global event management system for roadshows and other marketing & outreach initiatives that facilitates organization and execution of marketing events, including meetings, travel, targeting, requests, and reports.

Event Calendar

- Monthly, weekly and daily calendar views
- Drill down to detailed schedules
- Request meetings directly from the calendar
- View event notes and attachments

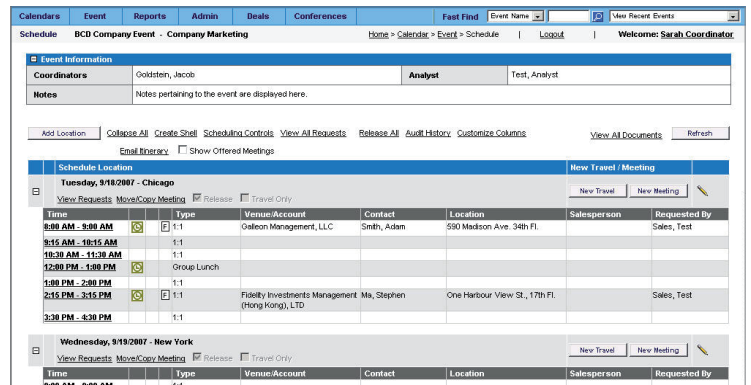


Create an Event

- Manage event details and control who can view the event
- Create groups that can be used repeatedly
- Select event coordinators and sales coordinators
- Maintain all event notes and comments
- Upload event attachments and track event expenses

Schedule & Travel

- Schedule meetings and travel logistics on a combined schedule
- Generate reports on the fly such as the Roadshow Schedule
- Manage flights, hotels and ground transportation



Manage Requests

- Request meetings by account name, account number or contact
- Notify stakeholders of meeting changes immediately with system email alerts

The screenshot shows the 'Existing Requests' table and the 'New Request' form. The 'Existing Requests' table lists requests with columns for Account #, Account Name, Contacts, Request Type, and Status. The 'New Request' form includes fields for Date/Time, Research Analyst, Account #, Account Name, Contact Name, and At Client, along with a calendar interface for scheduling.

The screenshot shows the 'My Accounts' view in iPlanner. It features a table with columns for Asset #, Account, Event Name, Status, Date, Time, Region/Location, Venue, Meeting Date, Account Contact, Salesperson, and Requested By. The table lists various accounts and their associated events.

My Accounts for Sales

- View and manage all event related activity for covered accounts from one centralized location
- Sort by account, date or event name
- Enter target accounts feedback, post-meeting feedback and scheduling notes
- Drill down to detailed event schedule

Reports

- Print detailed schedules and itineraries for the company management and teams that are traveling
- Generate user-defined reports to analyze meeting activity by company, account or salesperson
- Manage group meetings more effectively by easily printing name tags, reconciling shows/no-shows and recording walk-ins

The screenshot shows a travel itinerary for Monday, March 12, 2007 - VANCOUVER. It includes flight details (departure and arrival times, airlines, and airports) and meeting information (time, location, account name, address, contact, salesperson, and attendees).

The screenshot shows the 'My Buddies' view in iPlanner. It displays a list of contacts with columns for Date, Time, and Event Name. The list includes details about meetings and contact information.

CRM Integration

- Reference accounts and contacts directly from iPlanner
- Convert account meetings in iPlanner into activities in your CRM system
- Integrate iPlanner into any CRM solution. Use any of Ipreo's IRM platforms, and the integration is already done