



Subject: BriefingEdge Version 13 New Features

Outlook Integration

By enhancing **BriefingEdge's** use of full Outlook Integration, managing your agendas has become a very dynamic (real time) function. Speakers can be invited, and their responses will be automatically interpreted and recorded by **BriefingEdge**.

The process starts after a visit request has been confirmed, and when you define the details of your agenda, such as identifying topics, adjusting the times and rooms, and selecting your presenters. Once you have completed building your agenda, your screen will look something like the sample below:

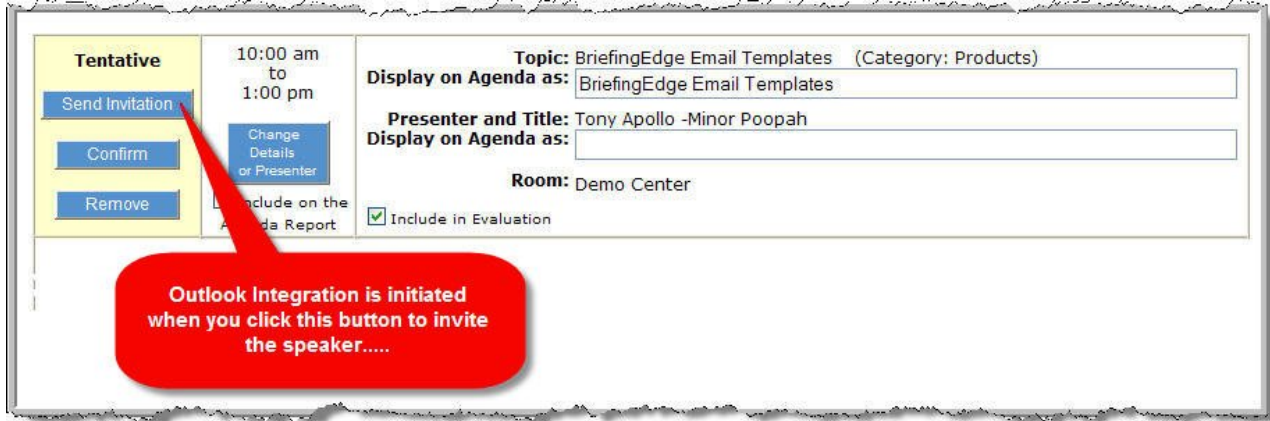
The screenshot shows the 'Visit Information' page for 'Chicago Briefing Center Site'. The visit details include Visit # 740, Visit Date 11/23/2009, and time 9:00 am - 5:00 pm. The location is 'Mary & Dave's Bakery'. The interface features a sidebar with navigation options like 'Information', 'Account Team Information', 'Customer Information', 'Reason for Briefing', 'Agenda Details', 'Attendees', 'Evaluation Forms', 'Reports', 'View/Email This Briefing Package', 'Agenda Report', 'Meals Report', and 'Help'. The main content area displays a table of agenda items with columns for 'Item Status', 'Schedule', and 'Topics and Presenters'. Each item is currently 'Tentative' and includes buttons for 'Send Invitation', 'Confirm', and 'Remove'. The first item is 'Welcome & Agenda Review' (9:00 am to 10:00 am) in 'Wellington' room. The second is 'BriefingEdge Email Templates' (10:00 am to 1:00 pm) in 'Demo Center' room. The third is a 'Meal/Break: Lunch' (1:00 pm to 1:45 pm) 'Off-Site'. The fourth is 'Future Technologies (60 min)' (1:45 pm to 4:00 pm) in 'Wellington' room. A checkbox at the bottom allows for displaying scheduled start times on the agenda report.

When you have completed your changes (if any) to the agenda, and after you have assigned speakers to each topic (topics are all independent of each other and may be individually scheduled with speakers), you can begin inviting your speakers.

The buttons for each topic remain the same as the buttons from earlier versions of **BriefingEdge**. You can remove any topic (or meal) by clicking on the **“REMOVE”** button. You can instantly confirm the topic by clicking on the **“CONFIRM”** button. Or you can change the details of the topic by

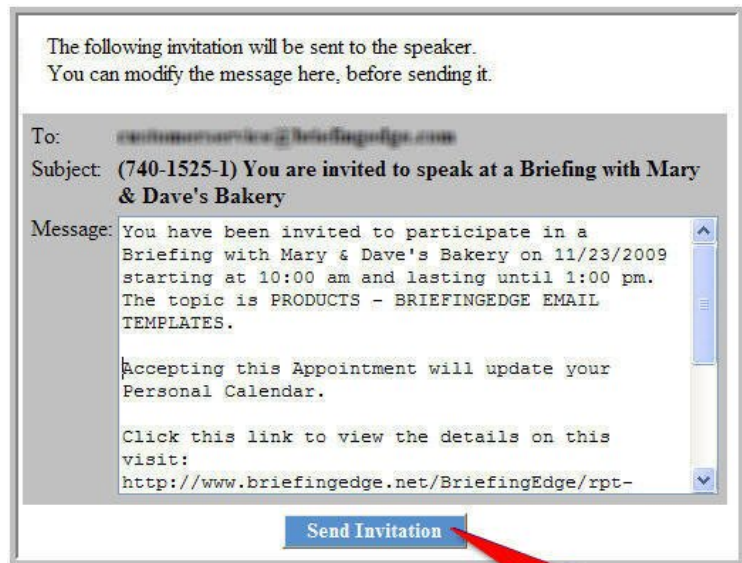
clicking on the “**CHANGE DETAILS or PRESENTER**” button, which you have probably already used to adjust the times, or to select a speaker.

To invite your speaker, click on the “**SEND INVITATION**” button. This gets the integration process started.

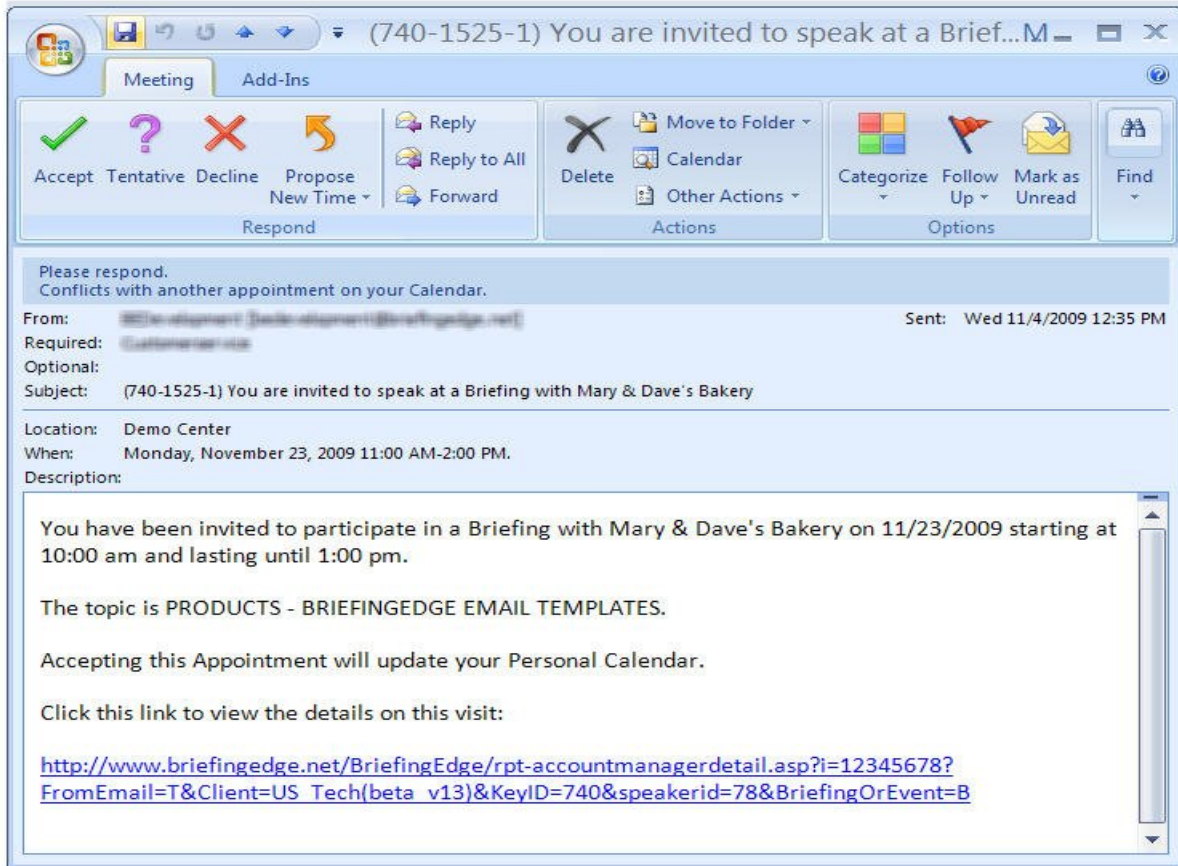


BriefingEdge will now display the e-mail message that will be sent to your speaker. You have the option to modify the text of the message, or to leave it intact. Changing the text is entirely optional, and can be a powerful communication tool to your speakers, as in adding “*This customer has personally asked that you make this presentation because they heard that you were best prepared to answer any questions.*”

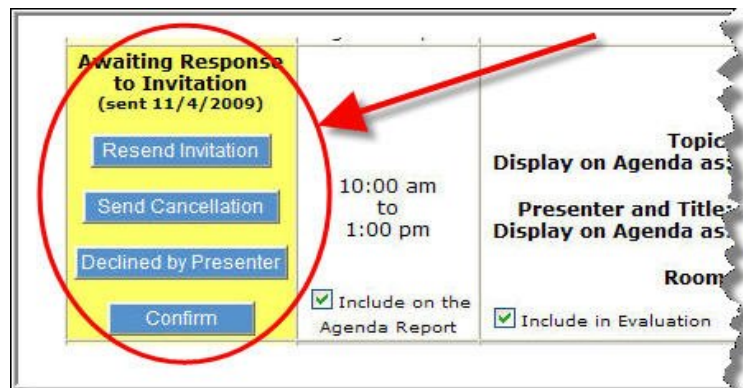
Once the message is ready to go, simply click on the “**SEND INVITATION**” button.



On the presenter's side, they will receive an e-mail invitation similar to the example below, which requires that they click on one of the four possible responses in the upper left portion of the message. The message will also contain the text (standard or modified) that you saw displayed on your screen prior to actually being sent.



After you have sent the invitation, you will next notice the change to the left banner of the topic in your agenda. The background has changed to a darker yellow and a different set of buttons will appear. The darker color will also indicate that an invitation has been sent, displays the date it was sent, and that you are now waiting for a response from the speaker.

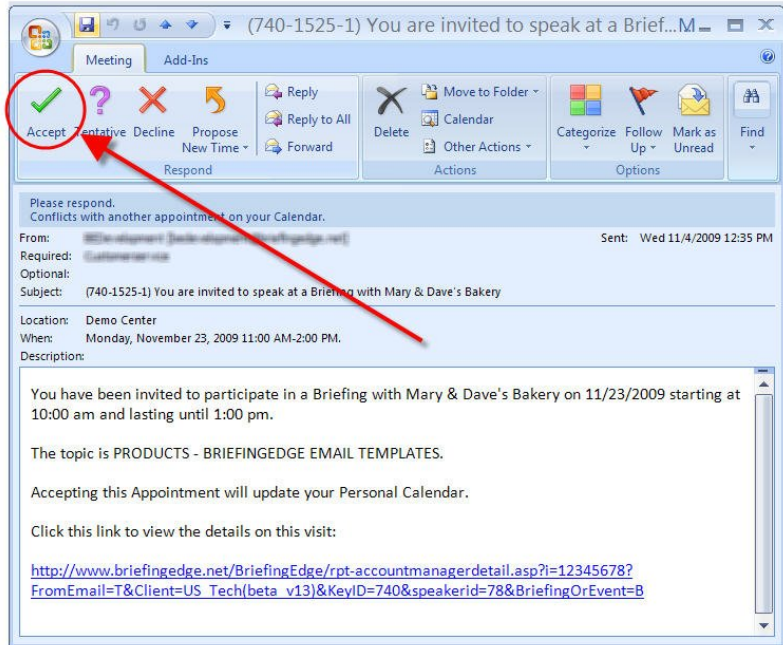


When the speaker receives your invitation, they have one of 4 choices:

1. ACCEPT the invitation:

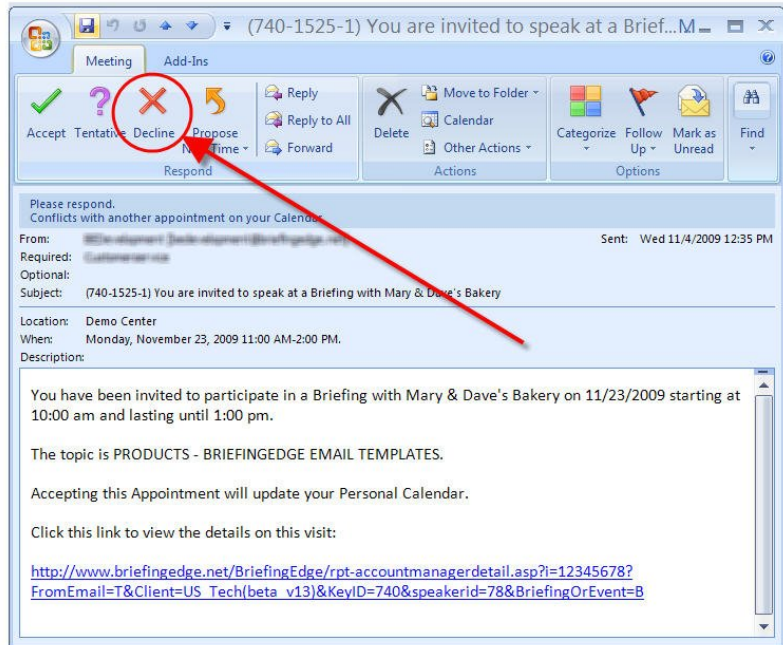
The speaker is available and will be able to speak, so they need only click on the “**Accept**” icon at the top of their invitation (Circled).

Important - When a speaker accepts an invitation, an entry is automatically posted in their **Personal Calendar** for that date and time slot.



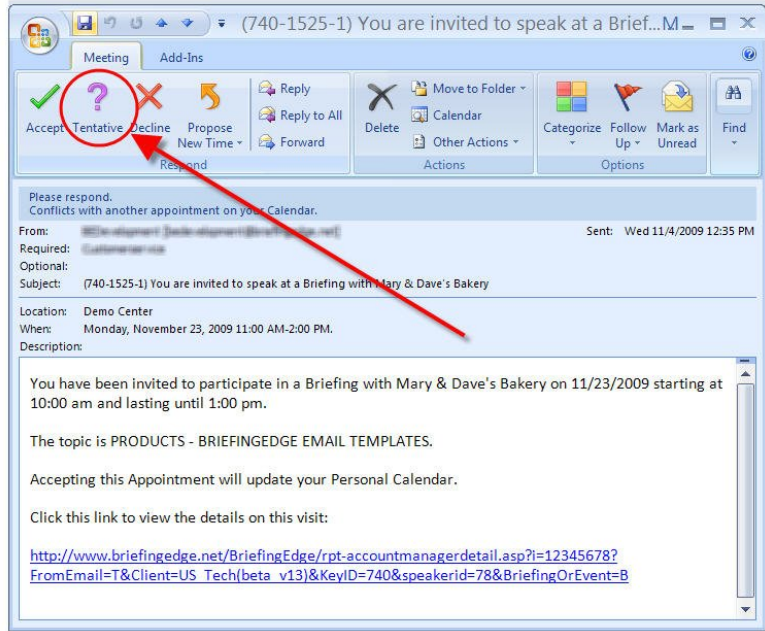
2. DECLINE the invitation:

The speaker is NOT available and will be unable to speak, so they need only click on the “**Decline**” icon at the top of their invitation (Circled).



3. Accept the invitation
TENTATIVELY:

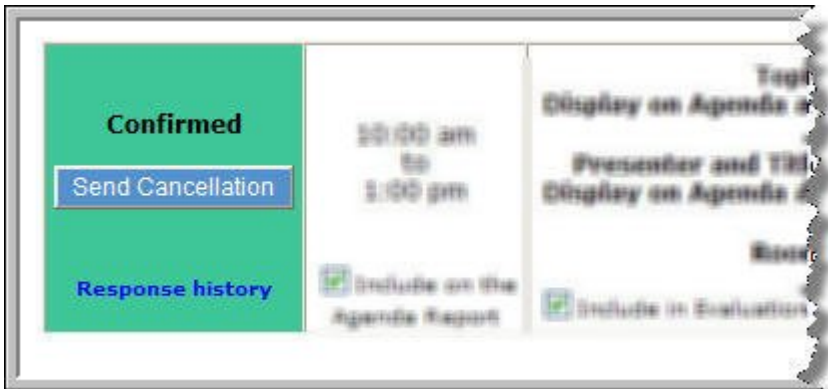
The speaker is available and will be able to speak, BUT there are certain conditions they need to tell you about, such as ***"I can speak if you can push it back by one hour"***. They can click on the **"Tentative"** icon at the top of their invitation (Circled), and an additional message screen will pop up for them where they can enter their comments



On your **BriefingEdge** agenda, you will know which of the four choices the speaker made. **BriefingEdge** reads and interprets the speaker's response and changes the left banner section of your agenda item appropriately.

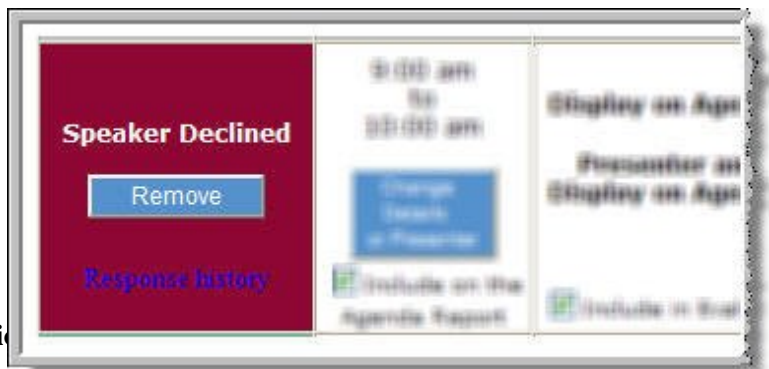
1. Speaker has **"ACCEPTED"**:

The banner will have turned to green, and will be labeled **"Confirmed"**.



2. Speaker has **"DECLINED"**:

The banner background is displayed as dark red, and will indicate **"Speaker Declined"**.



You will notice in each of the four response types, **BriefingEdge** now presents you with the ability to review the **history** of responses for each agenda item by simply clicking on those words in the left banner for that agenda item. When you click on “**Response history**”, a pop-up will display the history, as in the following sample:

All Responses for this Agenda Item			
Date	Presenter's Response	Presenter	Message included in response
11/4/2009 3:04 pm	Accepted	Apollo Tony	

[Close](#)

When you have finished reading, simply click on the “CLOSE” button.

3. Speaker has “TENTATIVELY ACCEPTED”:

The background displays in a pale purple color, which indicates that the speaker has tentatively accepted, but has also sent you comments. You can view those comments by clicking on the words “**Presenter’s message**”



The exact text the presenter entered will be displayed along with the date and time:

Presenter's Last Response to an Invitation for this Agenda Item			
Date	Presenter's Response	Presenter	Message included in response
11/7/2009 7:51 pm	Tentative	Apollo, Tony	I would love to speak at this briefing but only if you could move my talk back by an hour from 2:00 pm unti, 3:00 pm.

Close

When you have finished reading, simply click on the “CLOSE” button.

4. Speaker has “PROPOSED a NEW TIME”:

Your agenda item’s banner will look identical to that of a “**Tentatively Accepted**” response (see above), with two exceptions: The first is that the words “**Presenters message**” DO NOT appear. Secondly the presenter’s response is in the form of having changed the time allocated to this agenda item, to the speaker’s proposed new time. Of course, you may now have to rearrange other portions of your agenda to accommodate this proposed new time.

