



Subject: BriefingEdge Version 13.0 - Attendees

Attendees Auto-completion – Why use this feature?

This particular enhancement was designed to increase the accuracy of attendee data while also reducing the actual amount of data entry. It's a very detailed discussion because at some point, you will have to select from a number of options, how this feature will be implemented on your web site.

The problem arose due to most of the fields on the attendee screen are simple text fields and therefore, prone to typographical errors. This is particularly troublesome when emailing surveys, or inviting attendees from within **BriefingEdge** because both functions require accurate email addresses. If the email address is wrong, it generates an error which is automatically sent to the **BriefingEdge** server, and to Customer Service, who has to contact you, who has to contact your account exec, and so on until we've single handedly proven Kevin Bacon's six degrees of separation.

Attendees Auto-completion – How does it work?

This enhancement retrieves from the existing **BriefingEdge** databases in order to try and match names of attendees *as they're being typed*. If **BriefingEdge** finds a matching name as you start typing, it will list the name and source for the matching names as well as their role and email address. But first let's take just a minute to define **source**.

The **source** means from which database **BriefingEdge** found the name. It could be from the user meaning they have a valid userid in **BriefingEdge**. The source could be a *prior attendee* meaning they attended a visit previously, or it could be a speaker.

For customer attendees the source is always a prior attendee since customer attendees are not registered users of **BriefingEdge**. Now, here is where it gets a little complicated. We've added some restrictions as to how much searching **BriefingEdge** is allowed to do with respect to customer attendees. This newer logic was only added after one of our early beta testers pointed out that you may not want one account exec to see matching names for a customer that doesn't belong to them.

To account for different levels of restriction we've developed this name matching technology to work in one of three ways, summarized below:

- ⇒ The **default** will be to only search against attendees from customers that "belong" to this account exec. In other words they won't be able to see the names and email addresses of attendees from customers that they themselves haven't brought into a briefing center.
- ⇒ The next level of matching allows names to be matched from **any** customer attendee that has been in this particular briefing center. If you are scheduling a visit for your London briefing center and start typing in a name, only those attendees who have already visited the London briefing center, will be matched.
- ⇒ The broadest matching occurs when we configure your web to perform a *global* match – any customer attendee who has ever visited any of your briefing centers.

For internal attendees there are different, equally challenging options. We had to modify the programming logic again, based on the early feedback we received during beta testing. Here's the problem.

BriefingEdge matches names as you're typing against three database tables – users, speakers, attendees. For users and speakers, a name is normally present just once and so as you type, you will usually get only **one** or a few matching names.

This is not true for attendees. You may have a policy in place where an executive “drops in” for part of every visit. The executive, if entered as an attendee instead of as a speaker, may have attended 20 or 30 visits. If you started entering his/her name in the attendee screen, there would be 20 or 30 matches as each occurrence from every past visit, was displayed.

As you can imagine, this proved cumbersome and not particularly useful. We needed a way to suppress duplicates while still allowing for the fact that there may be two or more attendees with the same name. We resolved the issue by using more than just name to match prior attendees. If they have the same name, attendee role and email address we assume they are the same person and only display their name once. However, if you sometimes log the same individual with different roles *intentionally*, then **BriefingEdge** will display their name once for *each unique role*.

We are still thinking through this duplicate internal attendee process and have decided that you guys are the best judge of whether we should suppress duplicates even more. Maybe we should only display those with a different name and/or email address. This is one of the reasons why we want your feedback; to tell us what is working well and what needs some refinement.

Finally, speaking of attendees, we are evaluating whether to add a speaker's role much like we have internal and customer attendee roles. Here's why: Speakers are invited for just a portion of a visit unlike attendees who are invited for the entire visit. It might be helpful to differentiate between a speaker who makes a presentation versus one who sat in on just part of a visit. Eventually, we may want **BriefingEdge** to track which speakers were invited, how often they accepted and how often they declined.

The following pages illustrate through screenshots the new attendee matching feature.

Customer Attendees

As you start to type in a name, notice how matching occurs on first, last and/or email address. The matching characters are shown in bold in the dropdown. Of course, **BriefingEdge** only searches against the existing prior **customer** attendees' database for possible matches.

Attendees

Do **not** use your Browser's Back or Forward keys. Use the BriefingEdge buttons to navigate through the system.

Client/Customer Attendees

Name:	Attendee Role:	Title:	Company:
joh			
Bill J ohnson		Matthews Cable Modems	
Bill J ohnson	C-Suite (CEO,CTO,CFO,CIO)	Matthews Pastries	b j ohnson@matthews.com
Jeremy J ohnson		Paolo's Ponies	j. j ohnson@paoloponies.com
J ohn Harwood	Business Management (Finance, Legal)	Acme Bio Security	jharwood@acme.com
J ohn Smith	C-Suite (CEO,CTO,CFO,CIO)	Acme Digital	j ohn.doe@digital.com
Tom J ohnson	C-Suite (CEO,CTO,CFO,CIO)	Matthews Cable Modems	t. j ohnson@matthews.com
Tom J ohnson	Independent Hardware / Software Vendors	Matthews Cable Modems	t j ohnson@briefingedge.com

Add More

BriefingEdge matched on all of these prior customer attendees

The more letters I type, the fewer names that are returned in the list.

Attendees

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Client/Customer Attendees

Name:	Attendee Role:	Title:	Company:
johns			
Bill J ohnson		Matthews Cable Modems	
Bill J ohnson	C-Suite (CEO,CTO,CFO,CIO)	Matthews Pastries	b j ohnson@matthews.com
Jeremy J ohnson		Paolo's Ponies	j. j ohnson@paoloponies.com
Tom J ohnson	C-Suite (CEO,CTO,CFO,CIO)	Matthews Cable Modems	t. j ohnson@matthews.com
Tom J ohnson	Independent Hardware / Software Vendors	Matthews Cable Modems	t j ohnson@briefingedge.com

Add More Customer Attendees

As I type in more letters, the list gets reduced because fewer people match

Once you've found the name of the person you want, simply click on their name (in the list) and their information is transferred onto the screen. If it's a new name, then continue entering the rest of the information and that attendee will be added to the attendee list for this as well as future visits.

Attendees

Do **not** use your Browser's Back or Forward keys. Use the BriefingEdge buttons to navigate through the system.

Client/Customer Attendees

Name:	Attendee Role:	Title:	Company:	Em
Tom Johnson	C-Suite (CEO,CTO,CFO,CIO)		Matthews Cable Modems	ljo
Tom Johnson	C-Suite (CEO,CTO,CFO,CIO)	Matthews Cable Modems	t.johnson@matthews.com	
Tom Johnson	Independent Hardware / Software Vendors	Matthews Cable Modems	tjohnson@briefingedge.com	

Add More Customer Attendees

Internal Attendees

Visually, matching occurs the same way it does for customer attendees. For internal attendees, **BriefingEdge** matches against prior attendees, other users and speakers. So if you invite someone who is already a registered **BriefingEdge** user, their name should be found as you start typing. Here's why that's important. **BriefingEdge** integrates with the personal calendars of internal attendees. If you want this visit to be inserted into their personal calendar, simply invite them right from the attendee screen. **BriefingEdge** uses that attendee's email address to match their response and reflect that on the attendee screen.

Name:	Attendee Role:			---Invitations---
Kath Math	Marketing Dir.	Mktg Dir	kathmath1@briefingedge.com	<input type="checkbox"/> Accepted 10/2/2009 10:52:50 AM
Tony Paolo	Marketing Dir.	Marketing Dir	customerservice@briefingedge.com	<input type="checkbox"/> Accepted 10/2/2009 10:52:51 AM
Tom Matthews	Marketing Dir.	Nobody	tmatthews@briefingedge.com	<input type="checkbox"/> Declined 10/2/2009 10:54:20 AM
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Using Tony's favorite fake name, Apollo, I knew I had a pretty good chance of finding at least a couple of matches as I typed in **apol**.

Kath Math	Marketing Dir.	Mktg Dir	kath
Tony Paolo	Marketing Dir.	Marketing Dir	cust
Tom Matthews	Marketing Dir.	Nobody	tmat
apol			
Chatchapol Chor-sorapong		(Prior Attendee)	chatcha@th.lenovo.com
Nunzio Apollo		(User)	tpaolo@briefingedge.com
Tony Apollo		(Speaker)	tpaolo@briefingedge.com

Notice that the matching occurred with either the first or last names or even part of the name. You might also have noticed that I typed in all the names using lower case. As a matter of fact, you can use upper, lower or mixed case and **BriefingEdge** will match them.

You might also have noticed that for this particular example the match occurred with a prior attendee, another from the user database and the third, the one we selected, from the speaker database. This source information helps you to decide which matching name is the one you want.

One other observation is that none of these matches, even the prior attendee, had a role assigned. We suggest that to ensure the accuracy of your data, you make attendee role a required field.

This last attendee matching example illustrates the potential problem with duplicate names and why you may have lots of matches after a few years. The attendee I was entering is Alex Matthews. As you can imagine, in our test database we've put a lot of fake attendees named Matthews. Notice how many hits we had on "Matthews". For this discussion, we've highlighted three prior attendees named Alex Matthews in green.

Tom Matthews	Marketing Dir.	Nobody	tmatthews@briefingedge.com	<input type="checkbox"/> Declined
Tony Apollo	Marketing Dir.		tpaolo@briefingedge.com	<input type="checkbox"/>
matthews				<input type="checkbox"/>
abcdefghijklmnopqrstuvwxyz				
Matthews12345567777			tmatthews@briefingedge.com	Princeton Innovation Center
AccountTom Matthewsae			tmatthews@briefingedge.com	Princeton Innovation Center
AJ Matthews		(Speaker)	tmatthews@briefingedge.com	Princeton Innovation Center
AJ Matthews		(Speaker)	tmatthews@briefingedge.com	Princeton Innovation Center
AJ Matthews		(User)	tmatthews@briefingedge.com	Princeton Innovation Center
AJ Matthews	Marketing Dir.	(Prior Attendee)	kingalex19@yahoo.com	Princeton Innovation Center
AJ Matthews	Marketing Dir.	(Prior Attendee)	kingalex19@yahoo.com	Princeton Innovation Center
ajAM Matthews		(User)	kathmath1@bellsouth.net	Princeton Innovation Center
AI Matthews		(User)	kathmath1@bellsouth.net	European Briefing Centre
Alex Matthews	Marketing Dir.	(Prior Attendee)	Fake@email.com	Princeton Innovation Center
alex matthews		(User)	kathmath1@briefingedge.com	Princeton Innovation Center
Alex Matthews	Sales Mgr	(Prior Attendee)	matthewsaj@appstate.edu	Princeton Innovation Center
Alex Matthews	Marketing Dir.	(Prior Attendee)	kingalex19@yahoo.com	Princeton Innovation Center
Alex Matthews	Marketing Dir.	(Prior Attendee)	matthewsaj@appstate.edu	Princeton Innovation Center
Dave Matthews		(User)	kathmath1@briefingedge.com	Princeton Innovation Center
Dave Matthews	Marketing Dir.	(Prior Attendee)	information@briefingedge.com	Princeton Innovation Center
kam matthews		(User)	support@briefingedge.com	European Briefing Centre
Tom Matthews	Marketing Dir.	(Prior Attendee)	tmatthews@briefingedge.com	Princeton Innovation Center
Tom Matthews		(Prior Attendee)	tmatthews@briefingedge.com	European Briefing Centre
Tom Matthews		(Prior Attendee)	tmatthews@briefingedge.com	Princeton Innovation Center
Tom Matthews		(Prior Attendee)	twmatthews@yahoo.com	Princeton Innovation Center
Tom Matthews	Marketing Dir.	(Prior Attendee)	kathmath1@bellsouth.net	Princeton Innovation Center

Sorted by name

In the eyes of BriefingEdge, these may all be different attendees

To **BriefingEdge** these are all potentially different people named Alex Matthews. Here's why. The first and third highlighted attendees have the same name, email address and site. They differ in their attendee role, since the first is a sales manager while the third is a marketing director. Both are different from the second because of differing email addresses.

If match is found against users or speakers, **BriefingEdge** will also "pull over" the **title** that was entered for that user or speaker.