

Streamline meeting planning with *harmony Meetings*

Key Features

- Central hub for contact lists, emails, calendars, action items, and reporting
- Templates for all scheduling and invitation communications
- Sophisticated invitation system
- Built-in auto-scheduler
- Visual resource scheduler
- Integrated CRM
- File management for meeting materials
- Integrated meeting notes
- Integrated action item tracking
- Meeting attendance tracking
- Comprehensive reporting and dashboards

Key Benefits

- 50% increase in meetings per conference
- \$60,000 average savings per conference
- 1,000 hours saved per conference

harmony Meetings helps teams flawlessly schedule, manage, and conduct hundreds of meetings per day at conferences. It provides an integrated set of automation and productivity tools in a central hub that accelerates contact outreach and meeting scheduling, simplifies meeting space management, automates meeting confirmations and reminders, streamlines meeting preparation, captures meeting notes and tasks, and even tracks meeting attendance. *harmony Meetings* drastically reduces administrative time, increases scheduled meetings per conference, institutes process consistency, and reduces external spend.

PRODUCT OVERVIEW

harmony Meetings is an end-to-end solution for teams conducting meetings at conferences. *harmony Meetings* integrates Email Automation, Calendar, CRM, Project Management, and File Management into a single, easy-to-use, web-based application that enables teams to schedule more HCP interactions in less time. During scheduling, the system sends all communications to external stakeholders and internal attendees from a centrally managed account. Time-saving, customizable email templates are

available to ensure a consistent voice across communications. Our built-in scheduler drastically reduces the back and forth emails to find available meeting times with external attendees by sending a link to allow them to view, select, and book from a live-list of available times. *harmony's* sophisticated invitation system allows for sending invitations to external stakeholders and internal attendees independently, so only the relevant and appropriate information is sent to each attendee, at the right time. As meetings approach, integrated CRM and File-Sharing store and share the attendee's biographies, contact information, interaction histories, meeting agenda and supporting meeting materials to allow for quick and easy meeting-prep. During and immediately following meetings, integrated meeting notes that are directly tied to the interactions provide a means to collect notes through customizable drop-downs and/or free text fields. Additionally, time-bound action items on interactions can be collaboratively captured and assigned in real-time to ensure timely post-meeting follow-ups. The system can also track who attended meetings to support more detailed reporting. Lastly, throughout the entire process, the system provides pre-configured, customizable dashboards and reports that provide insights on scheduling, preparation, and post-meeting metrics.



Orbytel Group Overview

- Founded in 2009
- Exclusively focused on the biopharma industry
- Works with 4 of the top-6 global biopharma companies
- Provides end-to-end services including product setup and configuration, customization, user training, account management, and technical support
- Fully based in the USA

Technology Overview

- Validated secure enterprise technology
- Sophisticated access control
- GDPR compliant
- End-to-end encryption
- Fully web-based, no device installs
- Redundant, fault-tolerant cloud-based architecture
- Consistent with ISO 27001 and ISO 27002

Related Products

- *harmony Insights*
- *harmony Trials*
- *harmony Forecasts*

BUSINESS VALUE

Medical and scientific conferences are special events that make it possible to have hundreds of interactions with key stakeholders in several days. Key stakeholders have limited availability during these events and are generally being contacted by several companies. For this reason in particular, being organized, fast, and efficient in outreach and scheduling is important to securing the interaction. Traditionally the outreach process involves several disparate systems including CRM, spreadsheets, emails, calendar requests, and file sharing systems. It's administratively burdensome, resource intensive, inefficient, and relatively slow. *harmony Meetings* consolidates the various business processes and systems into a single integrated solution that enables teams to rapidly outreach, schedule, conduct, and follow-up. The result: more meetings, scheduled faster, conducted better, with seamless follow-up.

KEY FEATURES

harmony Meetings offers several key features that deliver results:

- **Central hub.** A single system for the entire meeting planning process - your team's contact list, emails, calendars, action items, and reporting are connected, managed, and stored in a central hub.
- **Unified communications.** Communications are sent centrally to HCPs and internal meeting attendees using standard templates. Templates provide consistency across your team's communications and are included with the application for all standard email communications, including scheduling requests, calendar invites, confirmations, reminders, cancellations, scheduling changes and more.
- **Streamlined scheduling.** Built-in auto-scheduler sends emails from the system that contain a scheduler-link, allowing invitees to select from available times to book the meeting.
- **Resource scheduler.** Visualize internal attendee schedules and meeting-room availability for easy meeting scheduling.
- **Sophisticated invitation system.** A proprietary color-coded system for invitation management to easily track and manage invitations. Its unique separation between internal and external invitations allows invites to be sent to HCPs and internal attendees independently, so each can contain the appropriate information for external stakeholders or internal team members. The system also provides multiple calendar sync and download options to ensure attendees have compatible calendars with correct time zones.
- **Integrated CRM.** Add biographies, interaction history, and contact information to attendees.
- **Integrated file management.** Associate meeting agendas and supporting materials directly to interactions. Files are available to internal attendees in real-time.
- **Integrated meeting notes.** Create custom interaction note templates (with drop-downs and free-text) for use by internal attendees to capture meeting notes via any device. Submitted meeting notes are tied directly to the meeting record for organized note taking.
- **Action item tracking.** Create follow-up tasks that are associated to interactions. Assign tasks to internal team members, and easily track the status of each individual task.

KEY FEATURES (Cont.)

- **Meeting attendance tracking.** Keep track and report on who attended meetings, attendee roles, and any pertinent notes related to attendance status for each meeting, by attendee.
- **Comprehensive reporting & dashboards.** Track the meeting scheduling process, support pre-conference preparations, and summarize conference activities easily and visually with pre-built, customizable dashboards and reports.

KEY BENEFITS

For teams attending conferences, *harmony Meetings* provides significant direct and indirect benefits. On average, from 2015 to 2018, teams saved 1,000 hours per conference during the meeting scheduling process, with a 50% increase in meetings scheduled. Teams that used *harmony Meetings* directly saved an average of \$60,000 in external spend *per* conference. And, across all teams, *harmony Meetings* eliminated missed meetings due to incorrect time zone or calendar synchronization issues — a frequently reported pain point for many teams. In summary, for a company that attends 10 conferences per year, *harmony Meetings* could save 10,000 hours and \$600,000 in external spending per year, while increasing interaction quantity and improving the quality of the engagement process for its teams and external stakeholders.



Contact Us

For more information about Orbytel Group, *harmony Meetings* and/or related solutions please:

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