Global Leader in Financial Services
A global financial services firm and a market leader in securities, asset management and credit services, was struggling to get the optimal pairings of investment managers with investors for their annual investor conference meetings. They were looking for a solution that would enable them to create the best conference schedule in order to maximize business opportunities for investors while having their brokers spend time with the highest value clients.
Problem
The company’s brokerage unit holds several conferences each year to facilitate discussions between fund managers and investors. Prior to the event, investors register and submit a short list of fund managers they would like to meet as well as possible meeting times. One-on-one meetings are most desirable, but due to resource and time constraints, some fund managers must hold meetings where several investors participate. The conference organizers wanted to create a schedule that would maximize the number of investor meeting requests fulfilled while minimizing the frequency and size of group meetings. Satisfying fund managers’ and investors’ expectations was a key objective. The task proved to be too difficult to perform using Excel, given time and business constraints.

Solution
An AIMMS-based application was developed for the company’s conference organizers. The solution generates an optimal conference schedule based on registration data downloaded from the web. The underlying mathematical model computes optimal investor/manager pairings for all available time-slots. It also continuously updates as things change – such as when a meeting is cancelled or needs to be rescheduled. The use of advanced modeling combined with a user-friendly interface enables users to:

• Optimally create alternate schedules using the same data in real time
• Provide a system which prevents double bookings
• Provide statistical analysis to objectively generate reports

Benefits include:
• Scheduling time reduced from 20 hours to minutes
• 99% feasibility for investor requests
• Increased investor satisfaction
• Ability to continuously optimize and adjust the schedule during the event

Results
The time required to generate a conference schedule was reduced from 20+ hours to minutes. In addition, the client achieved 99% feasibility for investor requests successfully scheduled. The tool’s error-catching system successfully prevents double-bookings and time conflicts and reduces the amount of business knowledge required by an employee to build a good schedule. Moreover, organizers can now easily make changes to the schedule during the event and have access to valuable printable reports that provide statistics and distributions related to the generated schedule.

Contact Us for a Demo

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<th>Asia Pacific</th>
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About AIMMS

The AIMMS Prescriptive Analytics Platform helps you evaluate and identify the best options to tackle your most pressing challenges with sophisticated analytics that leverage mathematical modeling and scenarios while pulling from multiple data sources. You can immediately gauge, not just what is likely to happen, but what you should do about it for the best possible outcome. Whether you seek to improve your strategy, planning, operations or transform your entire supply chain, AIMMS software is the ideal combination of being tailored to your unique situation paired with speed to value (ROI). That’s why teams at Shell, Johnson & Johnson, GE and Heineken and many more fire up AIMMS every day.

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