



# MeetMax CAM

## Helping Make Meetings Pay

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MeetMax CAM (Corporate Access Manager) is to Corporate Access for brokerage firms, what a billing system is to a law firm or a medical practice. It's purpose is simply to enable sell side firms make more money from the Corporate Access activities they provide.

It centralizes and aggregates all Corporate Access activities, and generates detailed accurate reports for each Institutional Client and each Corporate Client. And sell-side firms can use it with no change whatsoever in the systems they already use.

Benefits:

### **Institutional Sales**

- Increase revenue with complete, accurate Clients reports each quarter to support vote requests from salespeople.
- Review your Clients each quarter in a summary "league table" of all Client activity and compare it with commission revenue.
- Learn about your firms relative significance at each Client from the Indicative Competitive Ranking report that indicates your rank and market share in Corporate Access work.
- Gain an extra tool in managing your sales force, with summary Corporate Access reports by salesperson to show who is generating the most Corporate Access activities for their clients.

### **Investment Banking**

- Review your Corporate Clients and prospects each quarter in a summary "league table" of all Corporate Client activity.
- Include a detailed report of Corporate Client activities in every meeting and pitch book – to demonstrate your firm's support of that firm.
- Learn about your firms relative significance at each Corporate Client from the Indicative Competitive Ranking report that indicate your rank and market share in Corporate Access work. (Similar to the AutEx/BlockData report for trading).
- See which Research Analysts are generating the most Corporate Access meetings by running summary reports by Analyst.

Here, more specifically, is how it works:

### **Aggregates your Corporate Access Data**

- 1-click importing from MeetMax, the most popular and leading system for managing Conferences and Conference 1x1s.
- Importing from a spreadsheet for any other system you may use for roadshows, analyst calls and meetings, lunches, conference calls. MeetMax CAM is

designed to be open and flexible so you do not need to change the way you work.

- Create events and meetings right into the system. In time, you may prefer to schedule your roadshows and company visits right in MeetMax CAM, and take advantage of it's intelligent lookup, printed and emailed reports and more.

### **Manages your Corporate Access Data**

- Easy filtering and sorting
- Sophisticated de-duping to allow you to easily remove the variations in Client names that different systems produce.

### **Reports your Corporate Access Activities**

- Detailed Reports by Institutional and Corporate Client
  - All the detail Clients need to issue votes.
  - Flexible report format by Client to respect those Clients who have a template.
- Summary Reports for Internal Management
  - Sort and filter in multiple ways to provide key insight into your biggest Institutional and Corporate Clients.
- Indicative Competitive Ranking Reports
  - Gain an understanding of your position within each Institutional and Corporate Client with CAM's unique report comparing your activity to an anonymous, meta-universe of meeting totals.

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This is a small summary of the features of MeetMax CAM. Ask for a demo for a greater appreciation of how **MeetMax CAM can help you manage your Corporate Access activities more profitably.**

MeetMax CAM is part of the MeetMax Systems group, which produces the marketing leading Conference registration system for investor conferences, serving about 50 banks and brokerage firms. MeetMax is a division of The Wall Street Transcript.