

“Ask the Expert” Schedule Manual

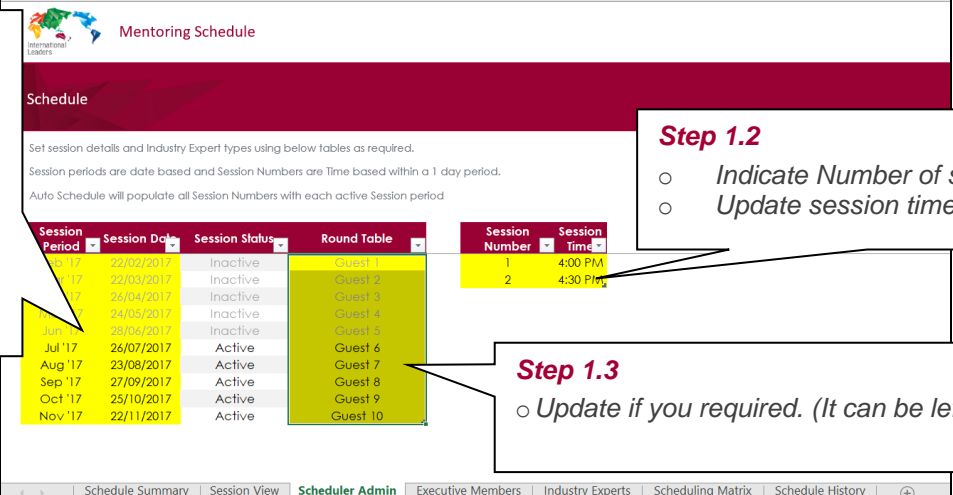
The purpose of the schedule is to track when Executive Series Members are scheduled to talk with Industry Expert companies. (ATE) = Ask the Expert

For the purpose of this document, we will assume that you are creating a document for a new Series. Instructions for current Series setup will be placed at the end of the document, along with [hints and tips](#).

Setup Step 1. Setting Up the Schedule – Open ATE Schedule > Select “Schedule Admin” Tab

Step 1.1

- Add Session Period Eg. Mar '17
- Session Date Eg. 08/03/2017
- Comply with formatting.



Step 1.2

- Indicate Number of sessions by place.
- Update session times

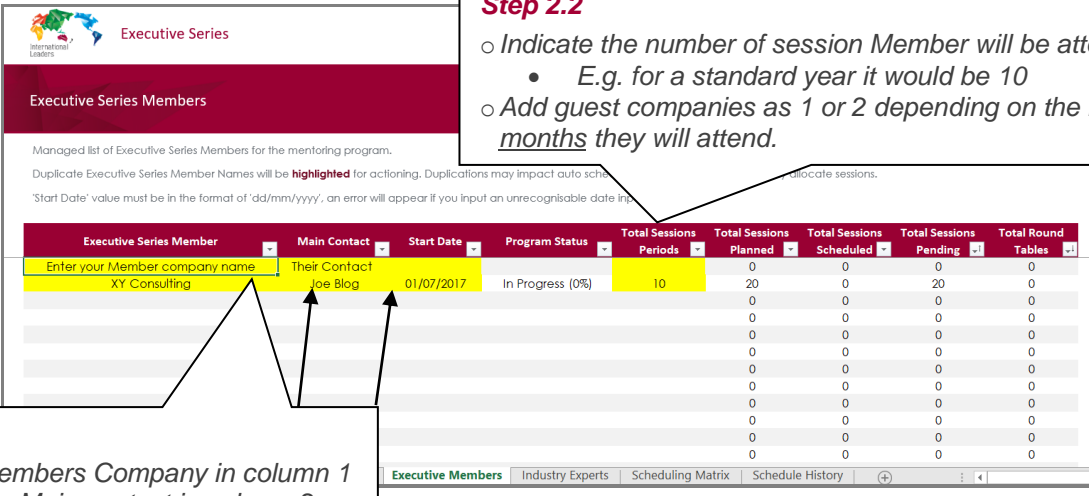
Step 1.3

- Update if you required. (It can be left as is)

Setup Step 2. Adding Executive Members - Select “Executive Members” Tab

Step 2.1

- Place Members Company in column 1
- Members Main contact in column 2
- Commencement date into column 3

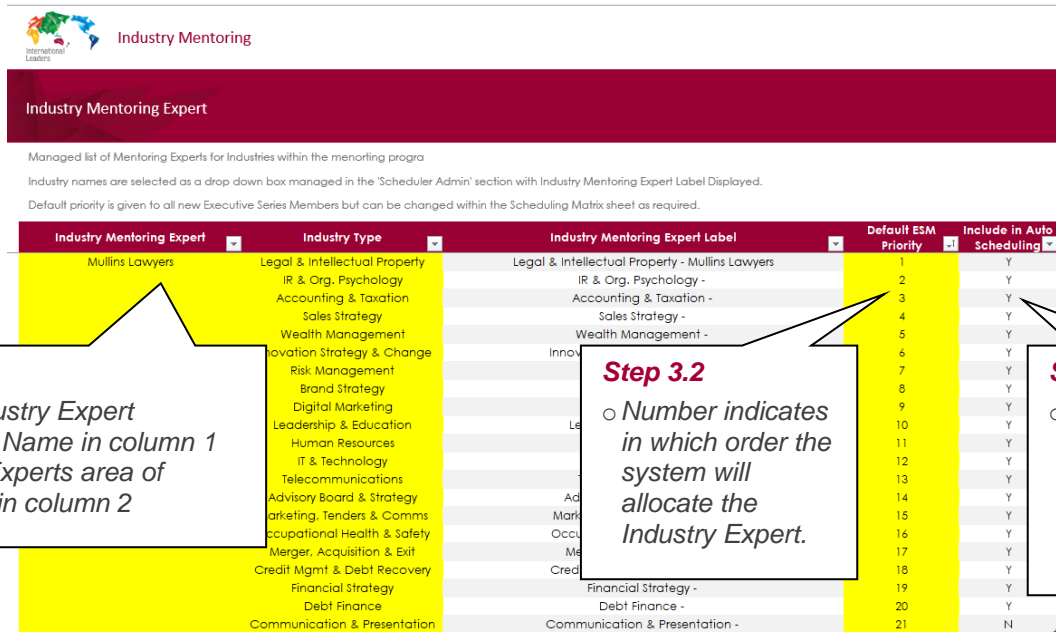


Step 2.2

- Indicate the number of session Member will be attending.
 - E.g. for a standard year it would be 10
- Add guest companies as 1 or 2 depending on the number of months they will attend.

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Setup Step 3. Adding Industry Experts - Select “Industry Experts” Tab



Industry Mentoring

Industry Mentoring Expert

Managed list of Mentoring Experts for Industries within the mentoring program

Industry names are selected as a drop down box managed in the 'Scheduler Admin' section with Industry Mentoring Expert Label Displayed.

Default priority is given to all new Executive Series Members but can be changed within the Scheduling Matrix sheet as required.

Industry Mentoring Expert	Industry Type	Industry Mentoring Expert Label	Default ESM Priority	Include in Auto Scheduling
Mullins Lawyers	Legal & Intellectual Property	Legal & Intellectual Property - Mullins Lawyers	1	Y
	IR & Org. Psychology	IR & Org. Psychology -	2	Y
	Accounting & Taxation	Accounting & Taxation -	3	Y
	Sales Strategy	Sales Strategy -	4	Y
	Wealth Management	Wealth Management -	5	Y
	Innovation Strategy & Change	Innovation Strategy & Change -	6	Y
	Risk Management	Risk Management -	7	Y
	Brand Strategy	Brand Strategy -	8	Y
	Digital Marketing	Digital Marketing -	9	Y
	Leadership & Education	Leadership & Education -	10	Y
	Human Resources	Human Resources -	11	Y
	IT & Technology	IT & Technology -	12	Y
	Telecommunications	Telecommunications -	13	Y
	Advisory Board & Strategy	Advisory Board & Strategy -	14	Y
	Marketing, Tenders & Comms	Marketing, Tenders & Comms -	15	Y
	Occupational Health & Safety	Occupational Health & Safety -	16	Y
	Merger, Acquisition & Exit	Merger, Acquisition & Exit -	17	Y
	Credit Mgmt & Debt Recovery	Credit Mgmt & Debt Recovery -	18	Y
	Financial Strategy	Financial Strategy -	19	Y
	Debt Finance	Debt Finance -	20	Y
	Communication & Presentation	Communication & Presentation -	21	N

Step 3.1

- Place Industry Expert Company Name in column 1
- Industry Experts area of expertise in column 2

Step 3.2

- Number indicates in which order the system will allocate the Industry Expert.

Step 3.1

- When an Industry Expert is not able to attend place, a **N** in this column. Otherwise leave as **Y**.

Setup Step 4. Select “Schedule Matrix” Tab

Step 4.1

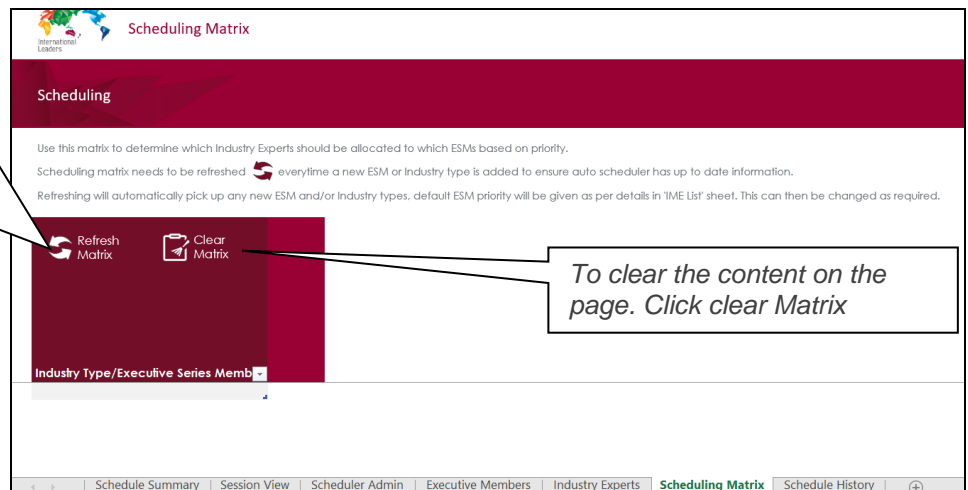
Once Steps 1 to 3 have been completed.

- Click on the Refresh Matrix

IMPORTANT NOTE

This step must be done each time you add or remove a Member or Industry Expert


First Clear Matrix then click Refresh Matrix



Scheduling Matrix

Scheduling

Use this matrix to determine which Industry Experts should be allocated to which ESMs based on priority.

Scheduling matrix needs to be refreshed  everytime a new ESM or Industry type is added to ensure auto scheduler has up to date information.

Refreshing will automatically pick up any new ESM and/or Industry types. default ESM priority will be given as per details in 'IME List' sheet. This can then be changed as required.

Refresh Matrix Clear Matrix

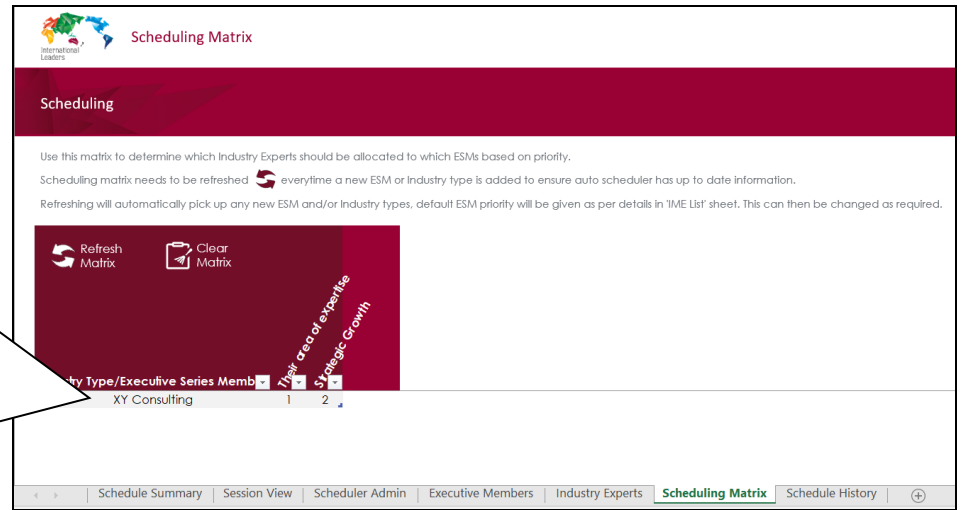
Industry Type/Executive Series Memb

Schedule Summary | Session View | Scheduler Admin | Executive Members | Industry Experts | **Scheduling Matrix** | Schedule History

To clear the content on the page. Click clear Matrix

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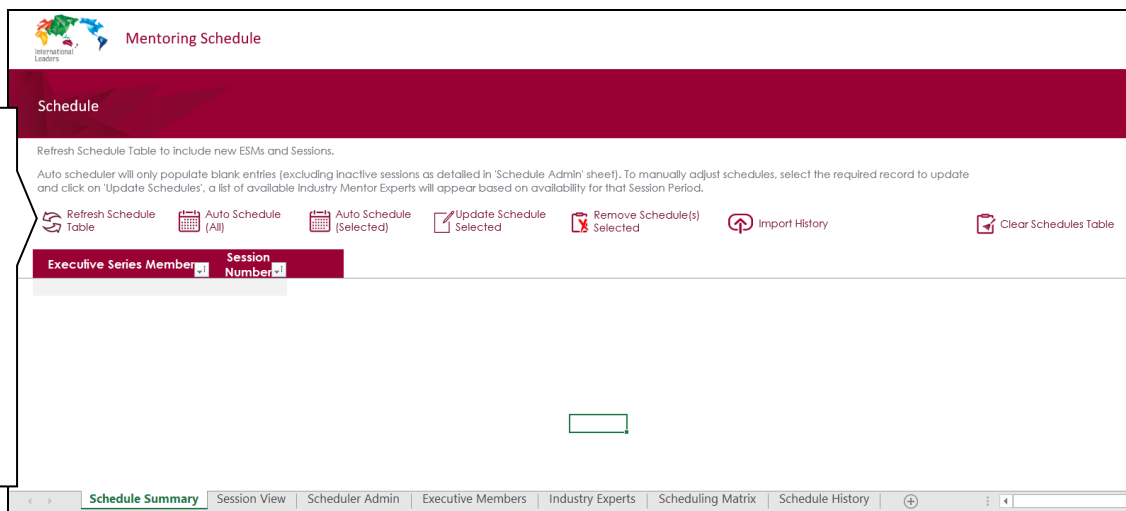
The sheet will populate with Industry Experts along the page and Executive Members down the page. You will be asked to confirm the details and be given an opportunity to confirm the number of Members and Industry Experts that been pick up.

Setup Step 5. Preparing a Schedule - Select “Schedule Summary” Tab

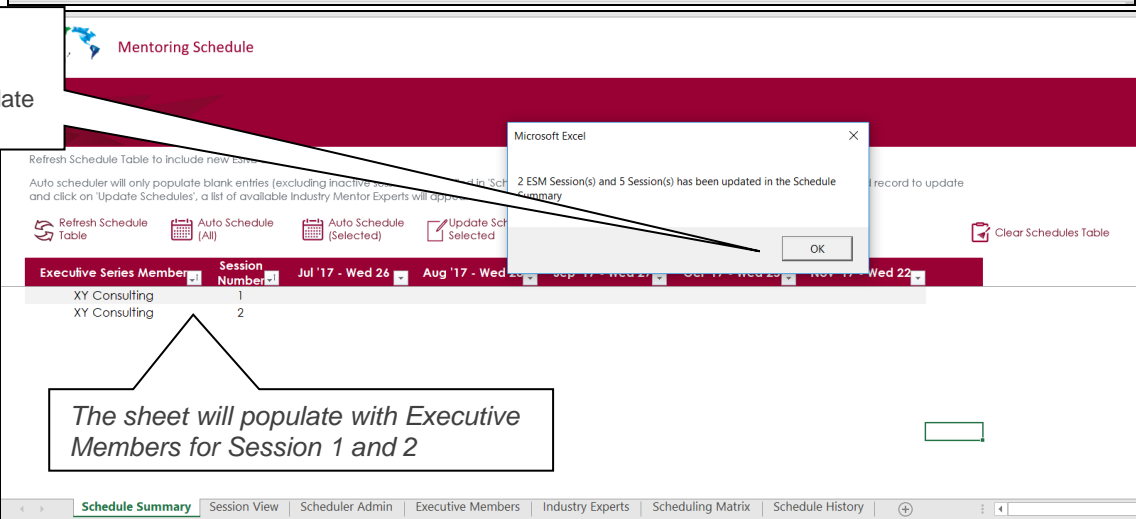
Step 5.1

Click on Refresh Schedule Table. This step to be completed each time a change is made.



Step 5.2

Accept Update



The sheet will populate with Executive Members for Session 1 and 2

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Step 5.3
Select a cell in the column for the month you are preparing a schedule.

Step 5.4
Then Click Auto Schedule (Selected)

Depending on the number of Members you have on your sheet, the processing for Step 5.4 may take several minutes to complete.

Executive Series Mem	Session Number	Mar '21 - Wed	Apr '21 - Thu
FUSION HVAC	1	Brand Strategy - Dais	Unattended - FUSION HVAC
FUSION HVAC	2	IT & Technology - Veracity	Unattended - FUSION HVAC

Industry Experts + Skill will populate into column

Setup Step 6. Preparing a PDF for Members - Select “Session View” Tab

Step 6.1
Click on Required Month

Session View

View scheduling of Executive Series Members and Industry Mentoring Expert per Session.

Generate PDF

Executive Member	Guest	Table Number	Time	Industry Expert
Advisory Board Centre		1	3:30 PM	Growth Strategy CFO Centre
Advisory Board Centre		1	4:00 PM	Debt Funding & Banking Bendigo & Adelaide Bank
Beginning Boutique		2	3:30 PM	IR & Org. Psychology Livingstones
Beginning Boutique		2	4:00 PM	Brand Strategy Dais
Code Heroes		3	3:30 PM	Cash Flow & Business Finance Scottish Pacific
Code Heroes		3	4:00 PM	Innovation & Govt Engagement Queensland Government
ConNetica		4	3:30 PM	Innovation & Govt Engagement Queensland Government
ConNetica		4	4:00 PM	Cash Flow & Business Finance Scottish Pacific

Check

Number of Schedules

IME	IME Type	1	2
Arthur J Gallagher	Risk, Liability & Insurance	1	1
Azentro & Telstra	Communications	1	1
Bendigo & Adelaide Bank	Debt Funding & Banking	1	1
CFO Centre	Growth Strategy	1	1
Dais	Brand Strategy	1	1
InterFinancial	Private Equity, M&A	1	1
Livingstones	IR & Org. Psychology	1	1
Morgans	Public & Equity Markets	1	1
Mullins Lawyers	Legal & Intellectual Property	1	1
Pitcher Partners	Accounting & Taxation	1	1
QMI Solutions	Best Practice	1	1
Queensland Government	Innovation & Govt Engagement	1	1
QUT	Leadership & Innovation	1	1
Salesmasters International	Sales Strategy	1	1
Scottish Pacific	Cash Flow & Business Finance	1	1
Watts Next	Human Resources & Culture	1	1
Encite	Strategic Development	1	1
Henderson Matusch	Wealth Management	1	1

Step 6.2
Review Industry Expert Scheduling Check.
(Found to the right of the Generate PDF icon)

Confirm each Industry Expert has a 1 in both columns next to their name.

In the case where the cell is shaded yellow, the Industry Expert has not been assigned a Member for Mentoring.

You will need to look at the issue and manually reshuffle to ensure all spots are filled.

(See section on *Manually Load Schedule*)

Step 6.3
Click on PDF Icon, a copy of the schedule will be loaded to your desktop.

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Setup Step 7. Preparing a PDF for Industry Expert - Select “IME Session View” Tab

The IME Session View tab is designed for use by your Industry Experts and will automatically update once you select the month required.



Ask the Expert - Thursday 9th June 2022

Industry Expert	Time	Table Number	Executive Member
Advisory Board Centre	3:30:00 PM	15	Nous
Advisory Board Centre	4:00:00 PM	4	Carbon Link
Agora	3:30:00 PM	4	Carbon Link
Agora	4:00:00 PM	10	Institute for Healthy Communities Australia
Aurora Marketing	3:30:00 PM	5	Devco Australia
Aurora Marketing	4:00:00 PM	19	RizeUp Australia
Clear Insurance	3:30:00 PM	9	Global Sourcing Services
Clear Insurance	4:00:00 PM	15	Nous
Dais	3:30:00 PM	12	Kzen8
Dais	4:00:00 PM	11	Kestrel Solutions
Fifth Eagle	3:30:00 PM	6	Digital Surfer
Fifth Eagle	4:00:00 PM	16	Rapid Platform
Heritage Finance	3:30:00 PM	11	Kestrel Solutions
Heritage Finance	4:00:00 PM	13	Lang's Gourmet
Impact Innovation Group	3:30:00 PM	20	Your Business Momentum
Impact Innovation Group	4:00:00 PM	17	Resourceful Recruitment
InterFinancial	3:30:00 PM	18	Resurge Digital
InterFinancial	4:00:00 PM	6	Digital Surfer
Kitney OHS	3:30:00 PM	3	Alternate Strategies
Kitney OHS	4:00:00 PM	14	Marsh Alliance
MAPIEN	3:30:00 PM	7	Emverio Workplace Solutions
MAPIEN	4:00:00 PM	18	Resurge Digital
Mullins Lawyers	3:30:00 PM	14	Marsh Alliance
Mullins Lawyers	4:00:00 PM	5	Devco Australia

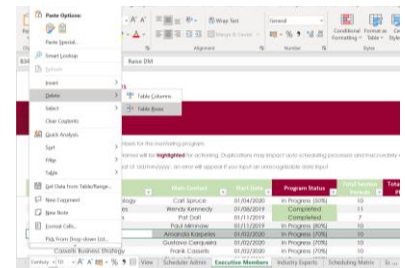
Click on PDF Icon, a copy of the schedule will be loaded to your desktop.

Note: Before Saving to your desktop save the Member's version as a different name, otherwise it will be overwritten.

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Hints and Tips

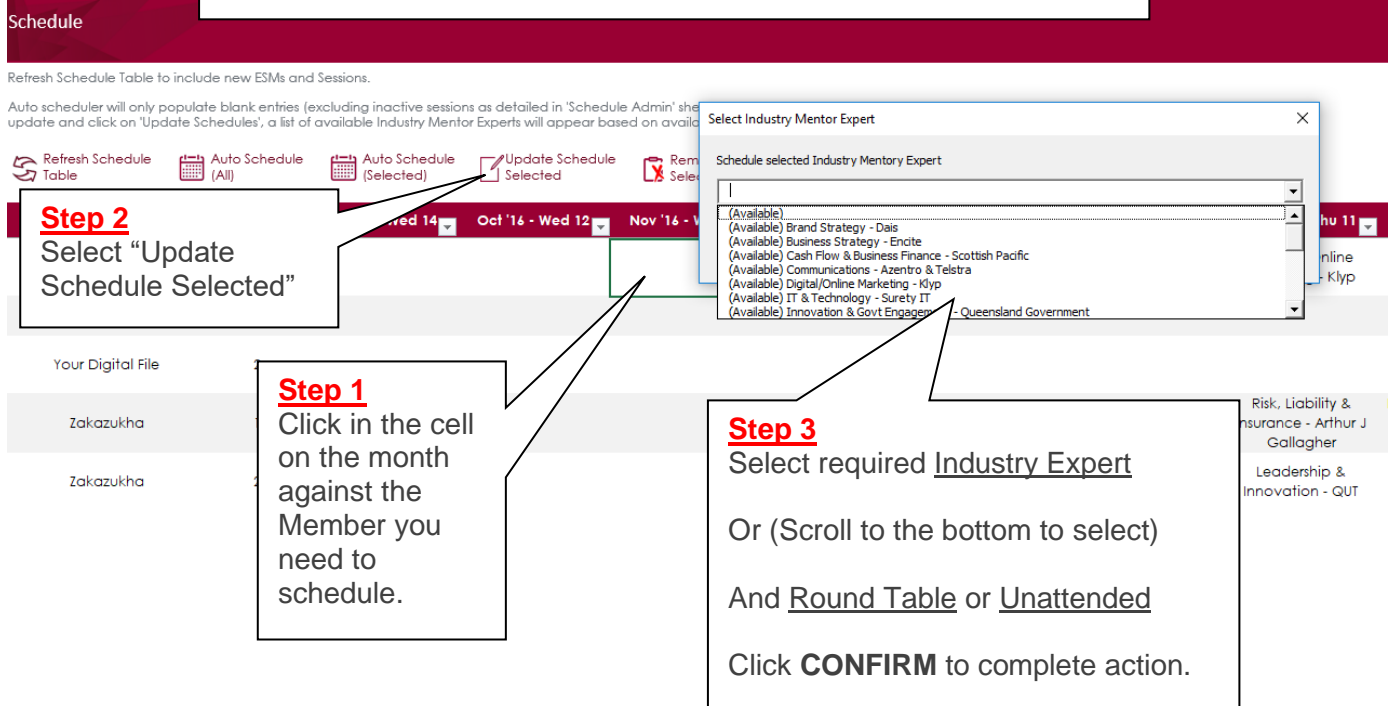
1. Fill in columns highlighted in yellow only (in the downloadable document), deleting information in any other columns will break the Scheduler.
2. Keep to the required formatting in cells, where dates and times are listed.
3. If you have loaded a new Member or Industry Expert into the relevant pages, you **MUST** complete **SETUP STEP 4.1 & SETUP STEP 5.1**
4. Before clicking “AUTO SCHEDULE SELECT”, always manually load your “unattended” Members and assign Industry Expert to preferred Member first. **See Manually Load Schedule Below**
5. On the **Schedule Summary Tab**, once you have loaded a new month, check each Member entry to ensure they have not been allocated the same Industry Expert Twice.
6. If you need to add or remove a Member or Industry Expert, you must delete the row as per below. DO NOT delete the contents of the row.



Manually Load Schedule - Select “Schedule Summary” Tab

To assign as specific Industry Expert to a Member or to indicate the Member is not attending the Event.

When you have completed this step, it is advisable to check the **Schedule History Tab** to confirm dates and times have been loaded. Load information manually if it doesn't appear in the columns.



Step 1
Click in the cell on the month against the Member you need to schedule.

Step 2
Select “Update Schedule Selected”

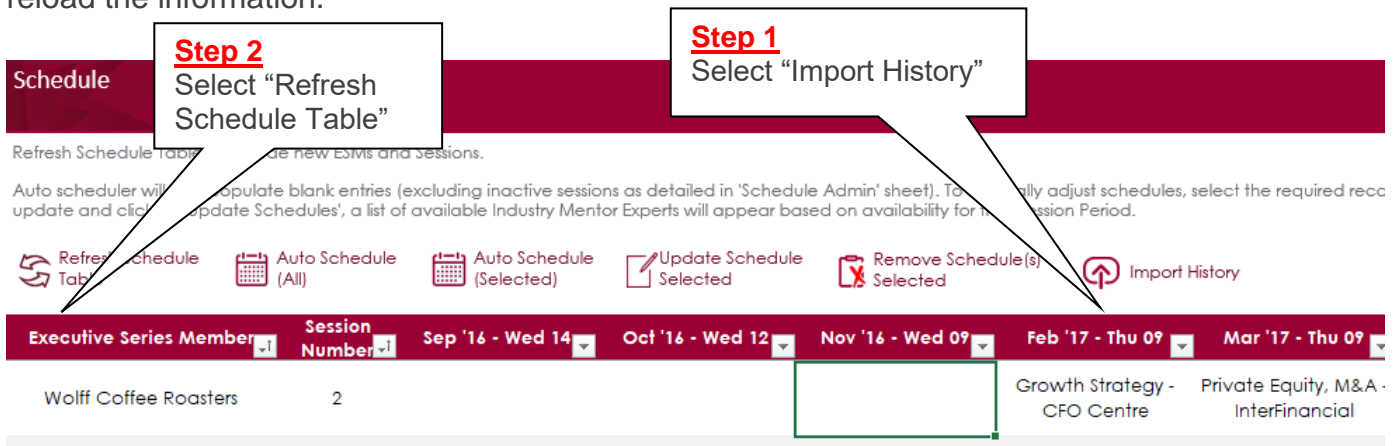
Step 3
Select required Industry Expert
Or (Scroll to the bottom to select) And Round Table or Unattended
Click **CONFIRM** to complete action.

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Loading information from history (use this method to load history into the schedule)

The “Schedule History” Page holds all the schedules that have been created through the “Schedule Summary” Page

In the event you delete or lose the information in the “Schedule Summary”, it is an easy set to reload the information.



Step 1
Select “Import History”

Step 2
Select “Refresh Schedule Table”

Refresh Schedule Table
Auto scheduler will populate blank entries (excluding inactive sessions as detailed in 'Schedule Admin' sheet). To manually adjust schedules, select the required record and click 'Update Schedules', a list of available Industry Mentor Experts will appear based on availability for the session period.

Refresh Schedule Table | Auto Schedule (All) | Auto Schedule (Selected) | Update Schedule (Selected) | Remove Schedule(s) Selected | Import History

Executive Series Member | Session Number | Sep '16 - Wed 14 | Oct '16 - Wed 12 | Nov '16 - Wed 09 | Feb '17 - Thu 09 | Mar '17 - Thu 09

Wolff Coffee Roasters | 2 | Growth Strategy - CFO Centre | Private Equity, M&A - Interfinancial

How to roll over your ATE for a new year.

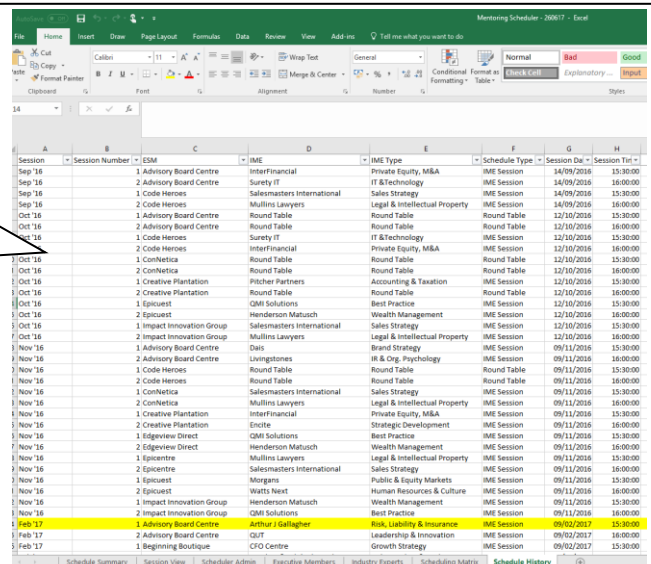
1. Open your document and save as for your new year.
2. Go to Schedule Admin Tab – change months and dates for your new year.
3. Go to Executive Members Tab – Delete Members who are showing as completed (See note about the correct way to delete)
4. Go to Industry Expert Tab – Make any changes required.
5. Go to Scheduling Matrix Tab – complete clear and refresh process.
6. Go to Schedule History – filter on ESM column and remove any Member company no longer required. Remove blank lines left between entries.
7. Save your document.
8. Now you can add your new Members to commence your new year.

Points to remember when entering detail in the Schedule History Page.

The Date, Times, Names, descriptions must match perfectly the information placed in the following tab.

- Scheduler Admin
- Executive Members
- Industry Experts

If there is any difference the information imported into the Schedule Summary Page will be scrambled.



Session	Session Number	ESM	IME	IME Type	Schedule Type	Session Date	Session Time
Sep '16	1	Advisory Board Centre	InterFinancial	Private Equity, M&A	IME Session	14/09/2016	15:30:00
Sep '16	2	Advisory Board Centre	Surety IT	IT & Technology	IME Session	14/09/2016	16:00:00
Sep '16	1	Code Heroes	Salesmasters International	Sales Strategy	IME Session	14/09/2016	15:30:00
Sep '16	2	Code Heroes	Mullins Lawyers	Legal & Intellectual Property	IME Session	14/09/2016	16:00:00
Oct '16	1	Advisory Board Centre	Round Table	Round Table	Round Table	12/10/2016	15:30:00
Oct '16	2	Advisory Board Centre	Round Table	Round Table	Round Table	12/10/2016	16:00:00
Oct '16	1	Code Heroes	Surety IT	IT & Technology	IME Session	12/10/2016	15:30:00
Oct '16	2	Code Heroes	InterFinancial	Private Equity, M&A	IME Session	12/10/2016	16:00:00
Oct '16	1	ComNetica	Round Table	Round Table	Round Table	12/10/2016	15:30:00
Oct '16	2	ComNetica	Round Table	Round Table	Round Table	12/10/2016	16:00:00
Oct '16	1	Creative Plantation	Pitcher Partners	Accounting & Taxation	IME Session	12/10/2016	15:30:00
Oct '16	2	Creative Plantation	Round Table	Round Table	Round Table	12/10/2016	16:00:00
Oct '16	1	Epicoust	OM Solutions	Best Practice	IME Session	12/10/2016	15:30:00
Oct '16	2	Epicoust	Henderson Matusch	Wealth Management	IME Session	12/10/2016	16:00:00
Oct '16	1	Impact Innovation Group	Salesmasters International	Sales Strategy	IME Session	12/10/2016	15:30:00
Oct '16	2	Impact Innovation Group	Mullins Lawyers	Legal & Intellectual Property	IME Session	12/10/2016	16:00:00
Nov '16	1	Advisory Board Centre	Dais	Brand Strategy	IME Session	09/11/2016	15:30:00
Nov '16	2	Advisory Board Centre	Livingstones	HR & Org. Psychology	IME Session	09/11/2016	16:00:00
Nov '16	1	Code Heroes	Round Table	Round Table	Round Table	09/11/2016	15:30:00
Nov '16	2	Code Heroes	Round Table	Round Table	Round Table	09/11/2016	16:00:00
Nov '16	1	ComNetica	Salesmasters International	Sales Strategy	IME Session	09/11/2016	15:30:00
Nov '16	2	ComNetica	Mullins Lawyers	Legal & Intellectual Property	IME Session	09/11/2016	16:00:00
Nov '16	1	Creative Plantation	InterFinancial	Private Equity, M&A	IME Session	09/11/2016	15:30:00
Nov '16	2	Creative Plantation	Enclite	Strategic Development	IME Session	09/11/2016	16:00:00
Nov '16	1	Edgewire Direct	GM Solutions	Best Practice	IME Session	09/11/2016	15:30:00
Nov '16	2	Edgewire Direct	Henderson Matusch	Wealth Management	IME Session	09/11/2016	16:00:00
Nov '16	1	Epicentre	Mullins Lawyers	Legal & Intellectual Property	IME Session	09/11/2016	15:30:00
Nov '16	2	Epicentre	Salesmasters International	Sales Strategy	IME Session	09/11/2016	16:00:00
Nov '16	1	Impact Innovation Group	Morgans	Public & Equity Markets	IME Session	09/11/2016	15:30:00
Nov '16	2	Impact Innovation Group	Watts Next	Human Resources & Culture	IME Session	09/11/2016	16:00:00
Nov '16	1	Impact Innovation Group	Henderson Matusch	Wealth Management	IME Session	09/11/2016	15:30:00
Nov '16	2	Impact Innovation Group	OM Solutions	Best Practice	IME Session	09/11/2016	16:00:00
Feb '17	1	Advisory Board Centre	Arthur J Gallagher	Risk, Liability & Insurance	IME Session	09/02/2017	15:30:00
Feb '17	2	Advisory Board Centre	GM Solutions	Leadership & Innovation	IME Session	09/02/2017	16:00:00
Feb '17	1	Beginning Boutique	CFO Centre	Growth Strategy	IME Session	09/02/2017	15:30:00