A QUICK GUIDE TO PLANNING YOUR FIRST B2B MATCHMAKING EVENT

hello!

eventtia
FOREWORD

B2B networking events aren’t just mining tools for growth—they’re at the core of most business dynamics nowadays.

Whether it’s to attract investors to a new community or to provide an interaction platform between brands and buyers, networking is the best way to connect people and businesses at events.

According to the State of the Event Industry Survey 2018, provided by EventMB, “Networking is the top priority for attendees at corporate events, 82% agreed.”

Networking is here to stay, and B2B interactions are gradually becoming the main engine for meaningful business opportunities. This quick guide will teach you all the subtleties you need to know to plan and run meaningful B2B networking dynamics or events.
THE BIG PICTURE

Here's how the planning of a B2B matchmaking event looks like:

**STEP 1**  CREATE THE EVENT & SET UP THE ATTENDEE PROFILES

**STEP 2**  BUILD THE B2B SESSION

**STEP 3**  SET UP THE NETWORKING PROFILES

**STEP 4**  LAUNCH THE EVENT

**STEP 5**  REGISTER THE GUESTS AND OPEN THE NETWORKING SPACE

**STEP 6**  ASSIGN TABLES AND GENERATE MEETINGS

**STEP 7**  RUN THE EVENT

**STEP 8**  SEND POST EVENT SURVEYS
QUICK DEFINITIONS

ATTENDEE TYPE

Events usually have different audience types, such as VIPs, exhibitors, staff, participants, speakers, visitors, students, employees, sponsors, etc. You can easily classify your attendees depending on your event goals.

For example, You decide to run an event about smart cities. Using the option of classifying the stakeholders, you can segment your audience into the following attendee types: city managers, entrepreneurs, researchers, urbanists, architects, and students.

Using these categories, you can then construct the registration and attendance parameters (fees, registration form, program, etc.).

NETWORKING PROFILE

If attendee types refer to a general classification you can use to easily manage your guests, networking profiles will help you structure the connections you want to build between your guests.

When guests register for the event and the B2B matchmaking dynamic, they’ll need to specify their networking preferences and interests (entrepreneurs & investors or VCs, corporations & professionals, hosted buyers & exhibitors, etc.). These networking profiles will allow your attendees to qualify and structure the mutual interest.

You’ll then use this information to create different networking profiles and segment your audience into groups.
QUICK DEFINITIONS

EXAMPLE #1. The networking profiles are the same as the attendee types.

ATTENDEE TYPES

BUYERS

SERVICE PROVIDERS

NETWORKING PROFILES

BUYERS

SERVICE PROVIDERS

EXAMPLE #2. The attendee types are grouped into two different networking profiles.

ATTENDEE TYPES

SMBs

STARTUPS

LARGE COMPANIES

VENTURE CAPITAL

BUSINESS ANGELS

NETWORKING PROFILES

COMPANIES

INVESTORS
QUICK DEFINITIONS

TIME SLOTS

Each B2B meeting between attendees has a start and an end time. When running a B2B matchmaking dynamic, you can always choose the exact time frameworks when guests can book the meetings.

MEETING DURATION

You can determine the duration of the 1-on-1 meetings by setting up the amount of time you consider necessary for the attendees to interact with each other.

RESTRICTION TIME

When planning a B2B matchmaking dynamic you can decide which are the hours when the attendees can’t schedule meetings. For example, you can restrict your guests from scheduling their B2B meetings during the lunch time or the knowledge sessions.

BUSINESS CATEGORIES

You'll have two options to choose from when designing the B2B matchmaking event. The first one is "I'm looking for," referring to those attendees who attend to find something (a job position, a product, services, etc.). The second one is "I'm offering," highlighting the business category which is there to provide something.
Here's how the meeting agenda may look like if you have 2 networking profiles:

**BUYERS**

01/10/2018
09:00

13:00 - 15:00
RESTRICTION TIME

01/10/2018
19:00

**PROVIDERS**
THE ANATOMY OF A B2B EVENT REGISTRATION FORM

To collect the necessary data about your attendees and understand what their networking preferences are, you’ll have to set up an easy-to-complete registration form. Depending on their attendee type, your guests will gain access to a personalized registration form, which they’ll have to fill out.

<table>
<thead>
<tr>
<th>Ticket type</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buyers</td>
<td>0 USD</td>
</tr>
<tr>
<td>Providers</td>
<td>0 USD</td>
</tr>
<tr>
<td>General registration</td>
<td>50 USD</td>
</tr>
</tbody>
</table>
To articulate their networking interest, your attendees will have to fill the form out, answering to networking-related questions and introducing more information about themselves, such as their business category ("I'm offering" or "I'm searching").

Apart from that, they'll have the option to set up their login credentials and gain access to a private networking space. Once the networking space will be open, you'll enable your guests to scroll through the networking participants, check their profiles, and send or accept meeting requests.
THE TIMELINE OF A B2B MATCHMAKING EVENT

Click here for more information about how to create an event and set up the attendee profiles using Eventtia.
To create a B2B session, click on NETWORKING then on CREATE NETWORKING.
You’ll be taken to a page where you can:

1. Decide the name and the location of the B2B matchmaking dynamic.
2. Indicate the sender name and email account.
3. Establish the start and end date of the B2B matchmaking event / dynamic.
4. Specify a date and time to stop the attendees from requesting meetings.
5. Decide the 1-on-1 meeting duration between the attendees.
Once you click SAVE to create a new B2B session, you'll have the option to set up the networking profiles. To do so, you'll have to go to NETWORKING PROFILES.

### Step 3

#### Set up the Networking Profiles

<table>
<thead>
<tr>
<th>Networking has been saved</th>
<th>General information</th>
<th>Networking profiles</th>
<th>Categories</th>
<th>Participants</th>
<th>Booked meetings</th>
<th>Free slots</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name*</td>
<td>B2B Demo</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location*</td>
<td>Paris, France</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sender name*</td>
<td>Demo Eventia</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sender email account*</td>
<td><a href="mailto:demo@eventia.com">demo@eventia.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start date*</td>
<td>25/03/2018 - 12:00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End date*</td>
<td>28/03/2018 - 18:00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meeting scheduling stops on*</td>
<td>18/03/2018 - 23:55</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meeting duration*</td>
<td>30 Minutes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Start creating the networking profiles by clicking on the call to action, indicated with a purple arrow.

Once you'll click on the call to action, you'll be taken to a page with the following options: General information, Networking form, Meeting notifications, and Time restrictions.
To configure the networking profiles, you'll have to stay on the page General Information. By doing so, you'll have the option to decide and manage the following fields:

1. Name of the networking profile and the price your attendee will have to pay to attend the networking session.

<table>
<thead>
<tr>
<th>Name*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price vat included* 0.0</td>
</tr>
</tbody>
</table>

2. The start and end date of the attendees' networking agenda.

<table>
<thead>
<tr>
<th>Agenda start date*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agenda end date*</td>
</tr>
</tbody>
</table>
3. The need for a fixed location (such as a table or booth) for the 1-on-1 meetings.

<table>
<thead>
<tr>
<th>Needs location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

Select this option if participants form this networking profile must have a fixed location like a stand or a numbered table.

4. The possibility for the attendee to set unavailable time slots in his or her agenda.

<table>
<thead>
<tr>
<th>Can block time slots</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

Select this option if you want to allow attendees with this networking profile to set unavailability times in their agendas.
5. The attendee type(s) associated with the networking profile you are creating.
6. The business category associated with the networking profile you are setting up.

<table>
<thead>
<tr>
<th>Categories</th>
<th>Enable “I’m offering” mode</th>
<th>Enable “I’m looking for” mode</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Save] [Cancel]
Subsequently, you can configure the networking form.

<table>
<thead>
<tr>
<th>General information</th>
<th>Networking profiles</th>
<th>Categories</th>
<th>Participants</th>
<th>Booked meetings</th>
<th>Free slots</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Information</td>
<td>Networking form</td>
<td>Meeting notifications</td>
<td>Time Restrictions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You’ll need to think a series of questions for each profile. The networking form could include questions or information requests for startups such as, “Describe your products or services,” “Add your pitch presentation,” “What is the investment amount of investment you need?” “Describe your business model,” etc.

On the other hand, depending on the questions you include on the networking form, you’ll be able to validate or veto applicants. This will depend on their qualification level to attend the event or networking dynamic.

To guarantee you’re getting the right attendees, you can ask questions such as: “What is your decision-making level in the company?” “What is your area of expertise?” “What size is your company?” etc. Obviously, these questions will depend on the character and goals of your B2B matchmaking event or dynamic.
If you’ll select the “Filter by this field” option, you’ll enable your attendees to conduct searches in the B2B space, using this specific filter.
Apart from that, you can configure the meeting notifications and the time restrictions.

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**B2B Matchmaking**

**Location**: Hall 1

**Start date**: October 10, 2018 08:00 - **End date**: October 10, 2018 20:00

**Meeting scheduling steps**: October 07, 2018 - 23:00

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**General information**  **Networking profiles**  **Categories**  **Participants**  **Booked meetings**  **Free slots**

---

**General information**  **Networking form**  **Meeting notifications**  **Time Restrictions**

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**Meeting Request Email**  **Meeting Acceptance Email**  **Meeting Rejection Email**

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Here you can block time slots for all participants. This is useful for lunch or break times.

**From**: October 10, 2018 - 12:00  **To**: October 10, 2018 - 13:00

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**New Time Request**
To launch the event, go to the website builder and add the LogIn block, then click on PUBLISH. Subsequently, send an email to your potential attendees and let them know that the event is already active and they can register.
EXTRA TIP: COMMUNICATE THE B2B DYNAMIC

One of the most important elements of a successful B2B matchmaking event or dynamic is how you communicate it. You can’t run a high-quality session if you don’t adequately explain and prepare your guests for it; in fact, you run the risk of running a doomed event if you can’t show the real benefits of this incredibly efficient dynamic.

Here are a few ways to make sure you thoroughly communicate the dynamic to your participants:

- Communicate the B2B networking format is by designing well-explained email newsletters.

- Your attendees may not know how to engage in this setting, so if your event has a webpage, make sure to dedicate a module to the networking session, explaining how B2B matchmaking works and why it will make a difference in their professional lives.

- Be ready to assist your attendees at all times. Don’t forget to ask a few volunteers or staff members to be always present in the networking room for any questions.
A B2B matchmaking system enables attendees to schedule short meetings during the event with people they feel are important for their businesses or careers.

This is possible thanks to a private online space that your guests will have access to through their personal log-in credentials.

They’ll have absolute control over the networking dynamic. Not only can they scroll through the guest list, but they can also decide with whom they want to connect.
To navigate the networking space, your guests will have to login, using the credentials they've indicated in the registration form.
By accessing their private networking space, your attendees will be able to execute the following actions:

1. Edit their profile.

![My networking interface with 17 participants and 2 accepted meetings in November.](image-url)
2. Check other networking participants and sort them by using the pre-established filters.
4. Request meetings.

<table>
<thead>
<tr>
<th>Time</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>02:00 PM</td>
<td>You're not available at this time</td>
</tr>
<tr>
<td>02:30 PM</td>
<td>Not available</td>
</tr>
<tr>
<td>03:00 PM</td>
<td>Not available</td>
</tr>
<tr>
<td>03:30 PM</td>
<td>Not available</td>
</tr>
<tr>
<td>04:00 PM</td>
<td>Not available</td>
</tr>
<tr>
<td>04:30 PM</td>
<td>Not available</td>
</tr>
<tr>
<td>05:00 PM</td>
<td>Request meeting</td>
</tr>
<tr>
<td>05:30 PM</td>
<td>Request meeting</td>
</tr>
<tr>
<td>06:00 PM</td>
<td></td>
</tr>
</tbody>
</table>
5. Accept or cancel meetings.

<table>
<thead>
<tr>
<th>Time</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>02:00 PM</td>
<td>Not available</td>
</tr>
<tr>
<td>02:30 PM</td>
<td>Not available</td>
</tr>
<tr>
<td>03:00 PM</td>
<td>Not available</td>
</tr>
<tr>
<td>03:30 PM</td>
<td>Not available</td>
</tr>
<tr>
<td>04:00 PM</td>
<td>Request meeting</td>
</tr>
<tr>
<td>04:30 PM</td>
<td>Not available</td>
</tr>
<tr>
<td>05:00 PM</td>
<td>Not available</td>
</tr>
<tr>
<td>05:30 PM</td>
<td>You’re not available at this time</td>
</tr>
<tr>
<td>06:00 PM</td>
<td>Request meeting</td>
</tr>
</tbody>
</table>

Scheduled for November 15, 2016
02:30 PM - 03:00 PM

Radisson Hotels
Katherina Moncayo
Hosted buyer
Click here to see more details of this participant

Cancel meeting
6. Check or print the meeting agenda.
**STEP 6**
ASSIGN TABLES AND GENERATE MEETINGS

**STEP 7**
IMPORTANT
To assign tables and generate the meetings between your attendees contact us at help@eventtia.com

**STEP 8**
SEND POST EVENT SURVEYS
EXTRA TIPS

Define the space for the 1-on-1 meetings

Apart from the venue rooms dedicated to other event activities (if needed), also prepare a comfortable environment with multiple tables and sets for the networking sessions. Here’s what you should consider:

Types of venue accommodation

Depending on your event format, you can set up either tables and chairs or stands (booths). If you decide to elect tables, you can go for standing desks or traditional table formats. If you’ll run a trade show, make sure to accommodate the booths for the B2B matchmaking interaction, in case this dynamic is part of an exhibition.

Spaces and meetings

An important detail you have to take into account is the number of meetings scheduled and the number of tables available. If you have 20 registered meetings, you’ll need to make sure you have 20 tables. Pay special attention to this aspect to avoid unpleasant surprises. Note that the algorithm will assign a table for every single meeting.

You have to perfectly adapt the venue to your attendees’ needs. Make sure the space is well-illuminated and each table has power plugs and sockets. Definitely make sure you have a good Wi-Fi connection.