Sponsor Guide

The Market Research Event
8-10 October 2024

informa connect

Table Of Contents

Please click on a link below to go to directly to that section of the guide.

informa connect
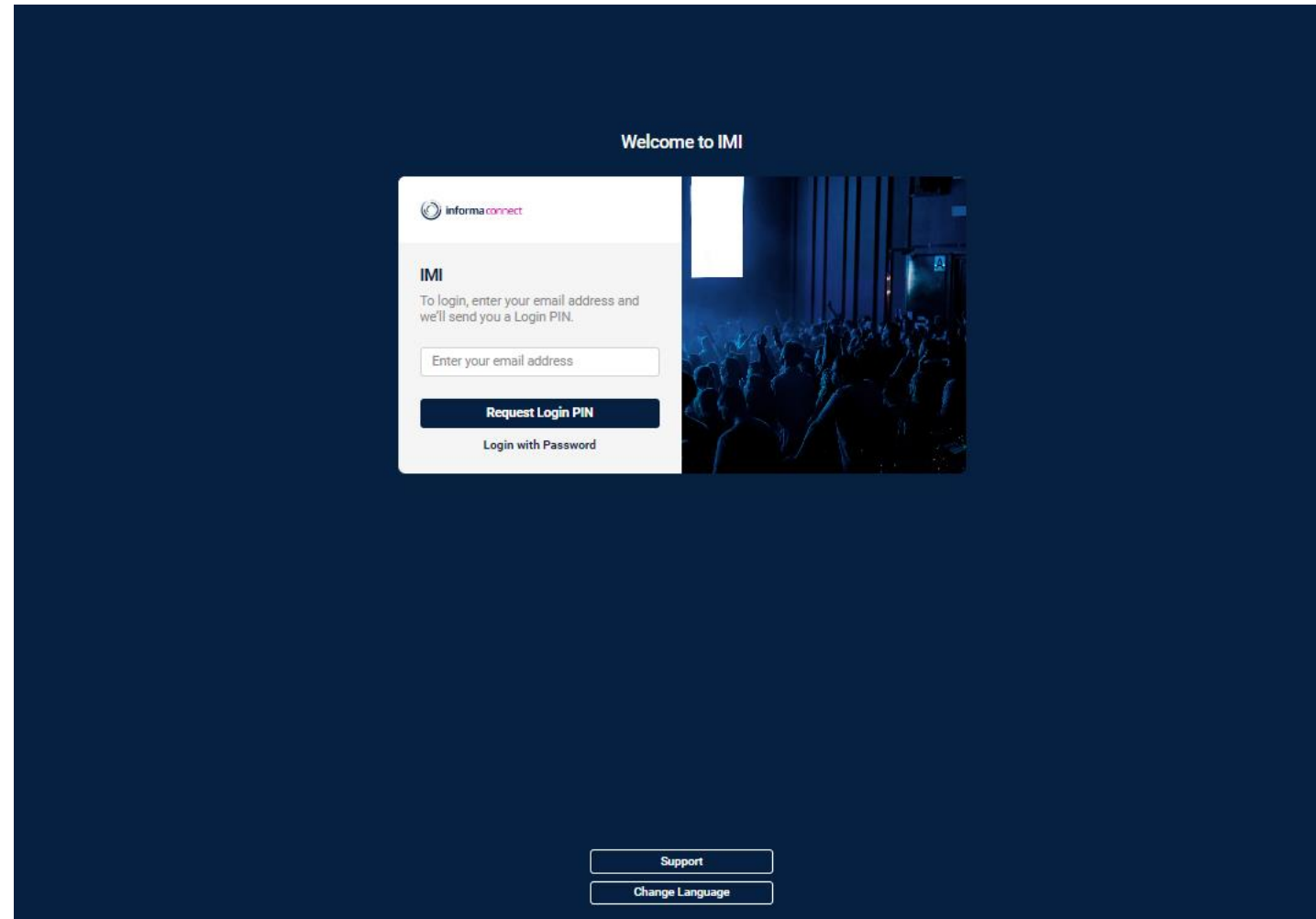
ConnectMe Guide:
How to Edit Virtual Booths

STEP 1 – LOGIN TO PLATFORM

Link to online platform: https://imi.connectmeinforma.com *Please use the login details you have received by email.*

Enter your email.

You will be emailed a 4-digit code that will redirect you to the platform. Please contact us if you do not receive the email. It will come from "Totem"
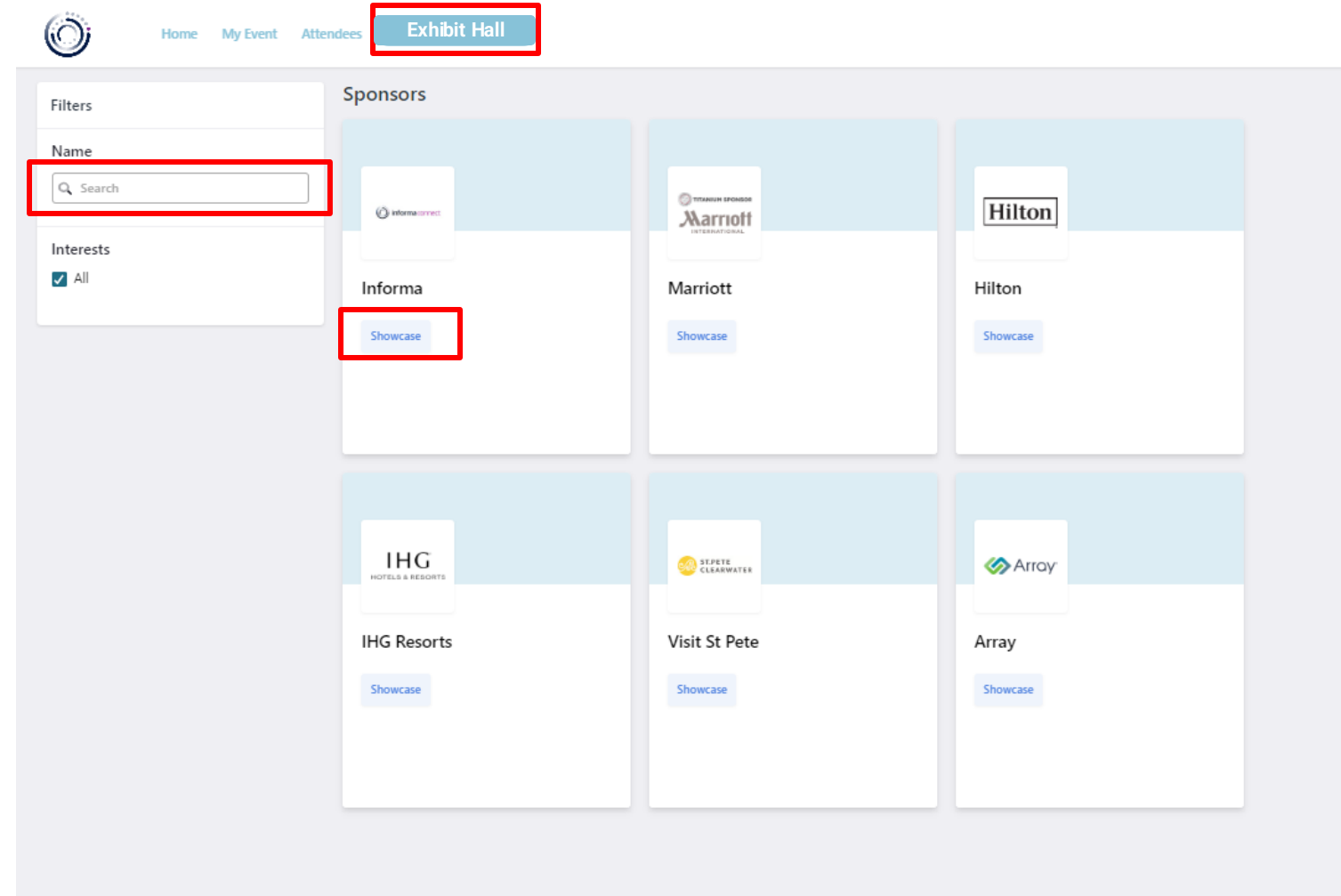
STEP 2 – FIND YOUR BOOTH

Click on the **"Exhibit Hall"** to see a list of all sponsors and partners. *The navigation could vary each event*

Search for your company name

Click on **"Showcase"** to access the booth.

STEP 3 – BUILD YOUR BOOTH

You can change the settings, by clicking on "Edit Stand". Only **representatives** can edit the booth.

If you don't have this permission, please send an email to your Informa contact.

Book Meeting & Chat Now: Interactive tools that can be used by attendees to either book a meeting with Reps or send a message on Chat.

Social media links

Representatives: will show all registered staff from your company attending the show (all attendee's will be registered 4 weeks before the event).

About: short company description

Guest book: Lead capture tool that can be used by attendees. You can export a list of all guests who signed by clicking on the Spreadsheet icon.
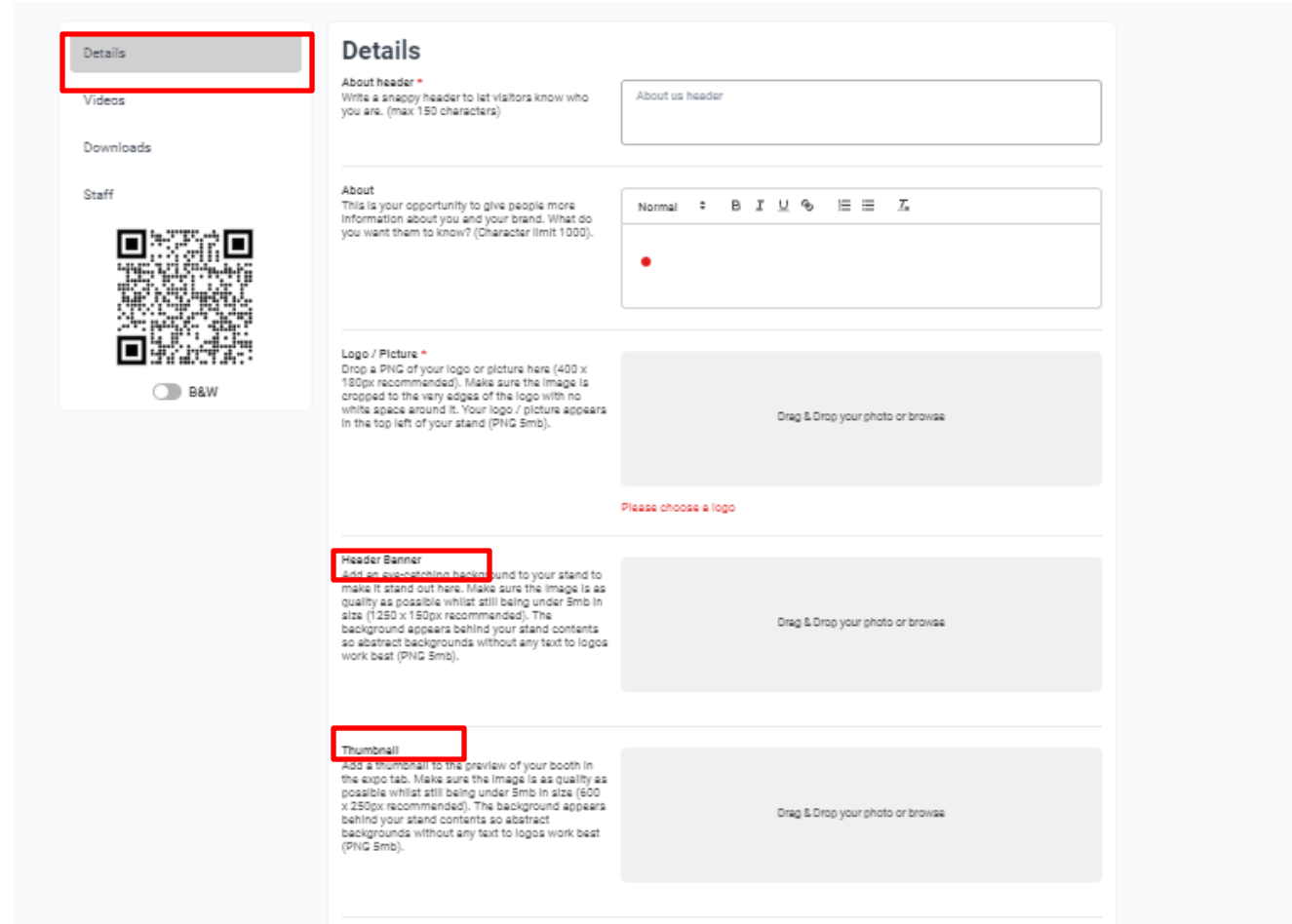
STEP 4 – BUILD YOUR BOOTH

Details: An overview of your booth. You can edit all your company details such as 'About Us', 'Logo', 'Background', etc. Specs are listed besides each editable option.

Don't forget to save your changes by clicking on **"Update About Us"** at the bottom of the page.

Header Banner: 1250 x 150px recommended. The background appears at the top of your stand so abstract backgrounds without any text to logos work best.

Thumbnail: 600 x 250px is in the lobby of the Exhibit Hall - we will provide one for you if you choose not to add one of your own.

Website & Social links: The links must include the prefix https://

Helix Tags: *If these have been provided* for the event, pick up to 10 Helix tags that best define your stand to help the most relevant attendees find you. Attendees can filter stands by specific Helix tags on the Expo overview page. Chosen Helix tags will also appear in the top left of your booth, underneath your logo.

Chat & Guest book list: Interactive tools. We recommend keeping both of these toggled on.

Expo Visibility: *I do not believe you will have this button, but if you do, please leave it toggled on*

Don't forget to save your changes by clicking on **"Update About Us"**

Website URL

Link to your company website in the top left of your stand by adding your URL here.

> https://informaconnect.com/finovateeurope/

Social Links

This is your opportunity to add social media URLs to your stand and encourage traffic! Icons for each social media site will only appear on your stand once a link is added.

- Instagram
- Linkedin
- Twitter
- Facebook

Choose Helix Interests

Pick up to 10 Helix tags that best define your stand to help the most relevant attendees find you. Attendees can filter stands by specific Helix tags on the Expo overview page. Chosen Helix tags will also appear in the top left of your booth, underneath your logo.

Alternative Credit Analytics/Data Consumer/Retail Banking
Core Banking/Back Office Customer Engagement Embedded Finance
Identity/Authentication Insurtech Investing/Asset Trading
Lending/Alternative Lending Open Banking Payments
PFM/Financial Planning Regtech/Compliance Risk Management
Security/Biometrics SMB/SME Wealthtech Financial Inclusion

Chat

Toggle this button off to hide chat from this expo

`visible`

Guest Book

Toggle this button off to hide guest book from this expo

`visible`

Expo Visibility

Toggle this button off to hide this expo from mobile app

`visible`

Update About Us

STEP 5 – ADD NEW VIDEOS

Videos: An overview of all your videos. To add new videos please click on the icon highlighted.

Don't forget to save all changes by clicking on **"Update Videos"**

Add all required information – Title, description, thumbnail and the file.

Thumbnail: Pause your video and take a snapshot of the video (5MB PNG image).

STEP 5 CONT. – ADD NEW VIDEOS

Select the file in the library and press "Confirm Selection."

Library ✕

🔍 Search by file name

Upload

FinovateEurope

‹ **1** ›

Video Files

Entice your visitors with up to ten engaging videos at a time that represent your brand. Click the cloud icon to open y... existing file or click Upload to add something new. Use the trash icon to delete an existing stand video. When uploadi... Title, Description and static Thumbnail which will display to visitors before a video is played. Finally drop your chosen ... (recommended 1920 x 1080px). Videos over 500mb or 5min in length will fail to upload, so keep them short and inter...

STEP 6 - ADD DOWNLOADABLE DOCUMENTS

Downloads: Add up to 10 downloadable PDFs to your stand.

Choose an existing file or click **"the Icon"** to add something new. Click the upload button to add.

Add all required information (title, description, thumbnail and file).

Thumbnail:, add a screenshot of the first page. Without a thumbnail, the image will be black on the front end (5MB PNG image).

Portrait downloadable PDFs are recommended.

STEP 6 CONT. – ADD DOWNLOADABLE DOCUMENTS

Select the file in the library and press "Confirm Selection".

Your new document will appear on this page.

You can always come back to this page and edit the title and description if needed.

STEP 7 – MANAGE STAFF AVAILABILITY

Staff: Manage staff availability by toggling them on/off.

Get in touch with your operations manager if any of your team is missing.

STEP 8 – QR CODES- rather than print any materials, you can upload and bring a QR code for attendees to scan and add to their delegate bag. Each time an attendees does so, it will provide a lead for you.

You can print a QR code which can be scanned by attendees onsite at your booth to download your documents for later viewing. All downloads come in 1 file

STEP 8 – QR CODES (cont'd)

When you click download, all your uploaded documents will be linked to the respective QR codes for you to print and bring onsite. Prior to printing, make sure to select "Sustainability" under QR Type to produce a green QR code. This will indicate a sustainable action.

ConnectMe Guide:
How to Edit your Personal Profile

STEP 1 – EDIT MY PROFILE

To edit your profile, go to My Event in the Navigation Bar and select My Profile.

To change/add a photo, click on the profile picture icon. Images should be no larger than 500x500px.

You can also change your password, timezone, job title etc. here too.

Lead Retrieval

LEAD RETRIEVAL – HOW TO SETUP, SCAN AND COLLECT LEADS ONSITE

1. On your mobile device, please download the ConnectMe app. To find it in the App Store / Google Play, please search *'**ConnectMe by Informa'.**

2. Once downloaded, please enter the event code: **IMI2024**

3. Enter your email address used to register for the conference, to which you will receive a 4-digit pin to login

*If you do not receive a 4-digit pin, please email **annjolynn.cales@informa.com**.*

LEAD RETRIEVAL

4. Once entered, please select the TMRE event to enter. The dashboard on the right should appear and you will have the **Lead Retrieval** button which will take you to the lead scanning page.

If you do not see this button on your screen, please contact sydney.atendido@informa.com
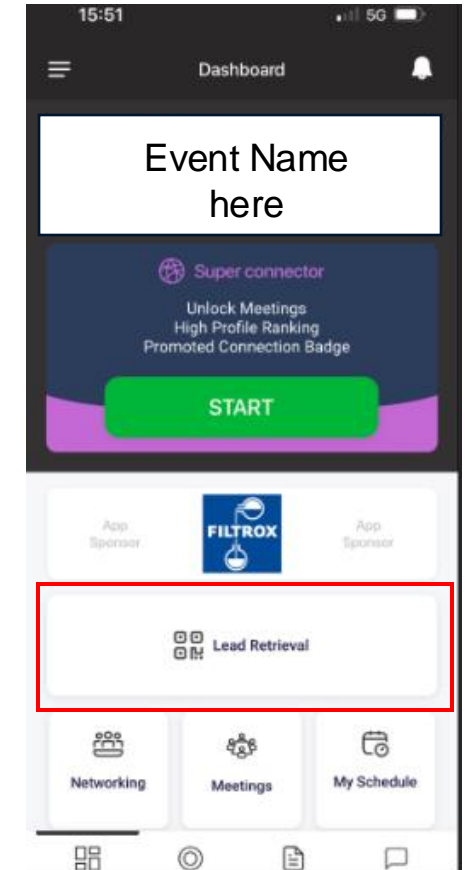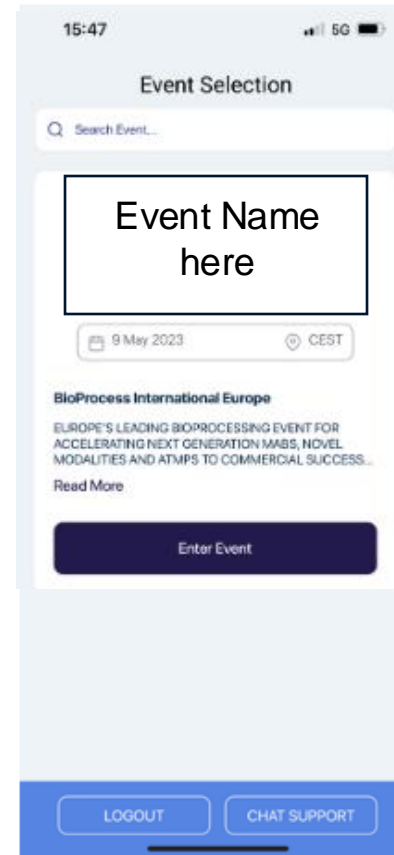
LEAD RETRIEVAL

5. This takes you to the partner portal for capturing leads. To begin scanning click the blue button at the bottom of your screen.

6. Make sure your camera permissions are set to *"allowed"* in order to scan.

If you do not see this button on your screen, please contact <mark>*annjolynn.cales@informa.com*</mark>
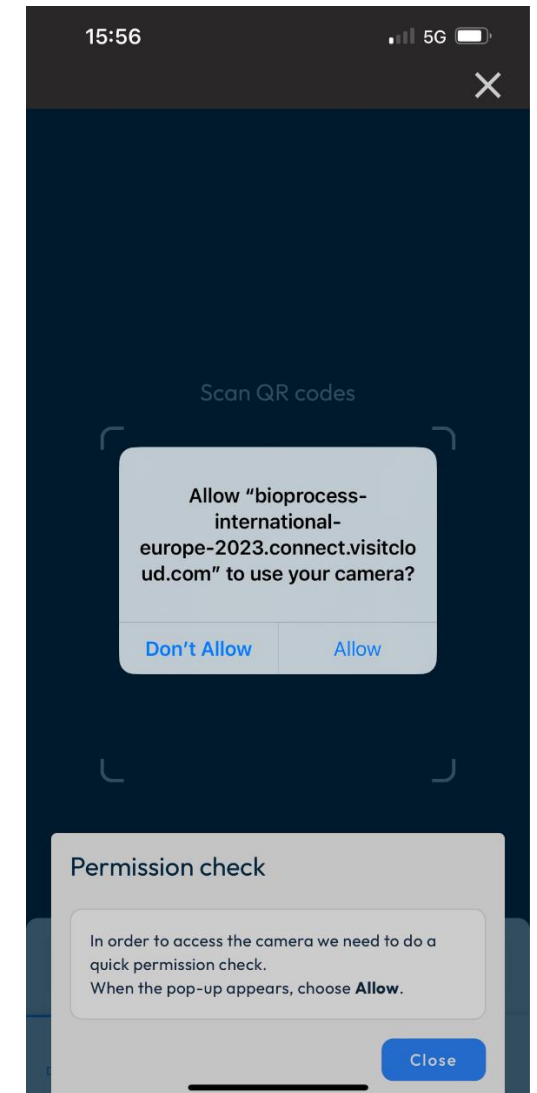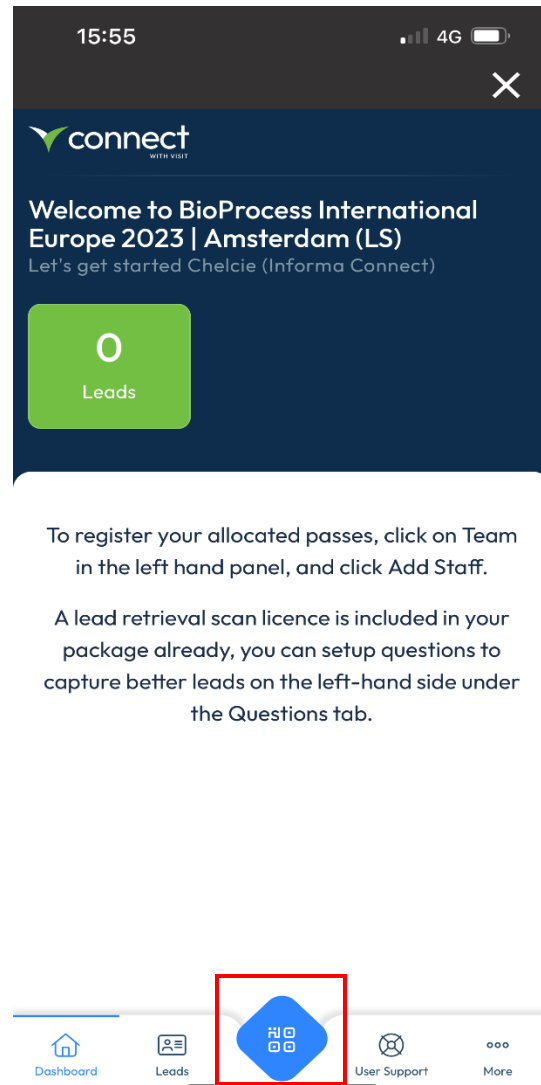
FAQ - LEAD RETRIEVAL
PRE-EVENT

How do I setup my team so that they have access to capture leads?
As the main contact for your team, login to the *VISIT Connect* portal link sent to you by your operations manager to register your allocated passes for the event. Go to TEAM on the left-hand side navigation bar, and then select *Add Staff.* Once your team has been entered, they will be automatically setup with access to lead retrieval.

Can I setup custom questions?
Yes – your company's main contact person can set these for your team via the *VISIT Connect* portal under *Questions.*

How many custom questions can we have?
You can have an unlimited amount.

Is there a character limit for the questions I set?
There is a 100-character maximum for questions (including spaces).

When is the deadline for customizing questions?
There is no deadline, you can keep updating questions right up until the event.

Is it possible to get a developer's kit so that we can use our own lead retrieval system?
No, it is not possible. Lead retrieval for this event can only be used via the system provided through the *ConnectMe* app. You cannot scan badges with another program.

I want to stop my colleagues attending from downloading leads. Is this possible?
Yes, in your *Visit Connect* portal, go to TEAM on the left-hand side. Hover your mouse over the attendee whose permission you would like to change and select the *Edit* icon on the right-hand side. From here, you can change whether that person can: capture leads, export leads, show all leads or have admin permissions.

What does "admin" permission mean?
An Admin user will have access to dashboard, users, profile questions, leads and agenda. This included managing registration and downloading the team's leads.

FAQ -LEAD RETRIEVAL
DURING THE EVENT

How do I access the lead scanner?
Download *ConnectMe by Informa* via your smart-device's app store.

What is the event code for the *ConnectMe* App?
IMI2024

How do I login to the app?
Enter the email address that was used to register for the event.

How do I scan badges with the *ConnectMe* App?
Once logged in, on your dashboard you should see a *Lead Retrieval* button. Click this to begin scanning badges. If you do not see this button, please visit the helpdesk at registration.

Are the leads GDPR compliant?
All attendees are asked an explicit opt-in consent statement as a required stage of the delegate badge process. Please see example <u>here</u>. If your company requires a specific question to be asked, the easiest way of capturing this would be to create a custom question at setup.

Does lead scanning work if there is no internet connection?
Yes, you can still scan badges. The app will synchronise the missing information as soon as you reconnect to the internet. There will be event WiFi available to all attendees.
Can I see the leads I've scanned in real-time?
Yes, all the leads you have scanned will show on the lead retrieval dashboard. From there, you can export these leads straight away.

Can I see a consolidated list of leads scanned by my team?
Yes, on the VISIT by GES pass registration portal under *Leads,* you can view and export your team's scanned leads. This will show which colleague scanned which delegate line by line.

Can I give permission to my colleagues to view and export all the leads on their devices?
Yes. As an admin user, you can click on the homepage > Team and see all the colleagues who are using Visit Connect. In the Permissions column, there are shown the 4 types of access:
- *Admin permissions – in this case, the user becomes an admin user*
- *Show all leads – the user will be able to see the leads captured by other team members*
- *Allow capture leads – this option is already enabled when a user is registered*
- *when enabled, the user can export the leads*

24

FAQ -LEAD RETRIEVAL

POST EVENT

Where can I find my leads post-event?
By accessing VISIT Connect from a desktop, you can export a .csv file of all the leads scanned by your team, including any notes that were made. Your main contact from each company can do this.

Will the leads I scanned be sent to me?
All leads captured both from your onsite scans and onsite & digital engagement will be processed and consolidated into your ALCHEMY Lead Report, which will be sent to you directly. If you have any questions, contact Holly McAllister.

What is ALCHEMY?
Your dashboard contains all your event lead data in a single view. You will receive an email from Holly McAllister via SmartSheet with directions on how to access your data. Your dashboard will continue to be updated after the event – all accessible through the same login credentials. You can then feel free to share your unique login credentials with anyone from your team. For any questions related to your lead data, contact Sofia Munoz.

How do I use the ALCHEMY dashboard?
Please click the link here to view an example of the Alchemy Dashboard.

I can't see the notes my team made in my ALCHEMY dashboard?
Your booth scan notes and answers can be found on the *VISIT Connect* portal by navigating to "*Leads*" on the left-hand side navigation bar and clicking "*Export.*"
This data is also available within your ALCHEMY report under 'My Leads' and clicking the lead name. For any questions related to your lead data, contact Holly McAllister.

Your Lead Insights Dashboard

Access your Lead data

Lead Data Details
Your dashboard contains all your event lead data in a single view. You will receive an email from Holly McAllister (holly.mcallister@informa.com) with login credentials and instructions to enable access to your company's lead data dashboard. Data delivery timing varies by event so contact Holly or your account manager to find out when your dashboard will become available.

Keep in mind that your company's primary contact also has real-time access to your raw scan data if exported directly from the VISIT platform, which is the only way to access your booth notes. For questions on this contact Sydney Atendido (sydney.atendido@informa.com).
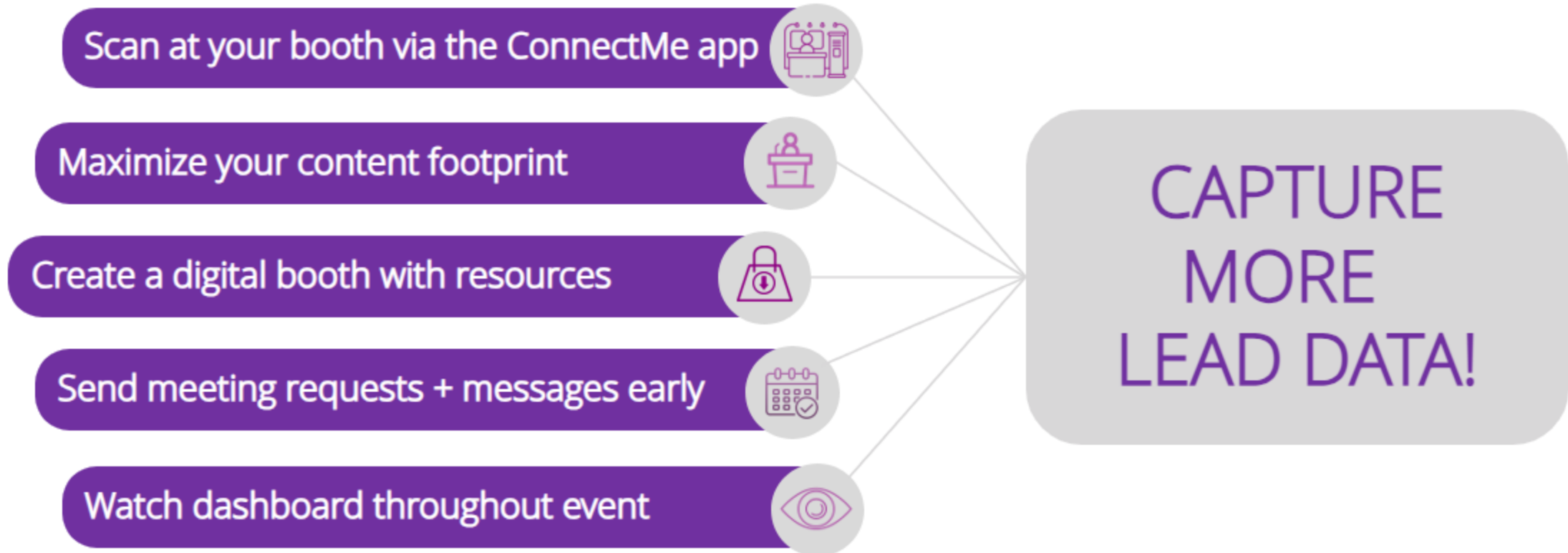
Alchemy User Guide: https://assets.informa.com/connectls/SPEX/LeadAnalyticsDashboard/LeadReportGuide_AlchemyIRIS.pdf

Third-party Consent Capture Details:
https://assets.informa.com/connectls/SPEX/LeadAnalyticsDashboard/ConnectMe_GDPR-Consent-Capture.pdf

Engagement Types found on your Alchemy

Activity Type	Description	Engagement Score
Meeting Schedule	Pre-arranged meeting with a specific time accepted between your staff and a delegate	20
Inbound Call	Call to your staff initiated by delegate who visited your digital exhibition page	15
Session Question	Question submitted in association with your session (live or on-demand)	15
Session Attend - Onsite	Attended a live face-to-face session sponsored by or presented by your staff	12
Session Attend – Live Digital	Attended a live session sponsored by or presented by your staff on the digital platform	12
Meeting unconfirmed	Delegate requested a meeting with your staff with no response from your staff	10
Session Attend - OD	Delegate viewed an on-demand session sponsored by your company	10
Ad Click	Delegate clicked an in-platform banner ad from your company (not applicable to most sponsors)	7
Booth Visit - Onsite	Delegate scanned by your staff at the onsite exhibition	7
Poll Respondent	Delegated answered your sponsored poll question	7
Poster View	Delegate viewed and/or downloaded your sponsored poster presentation	7
QR Code Scan - Onsite	Delegate scanned a QR code at your onsite booth to add your collateral or booth listing to their delegate bag	7
Content View – Digital Showcase/Exhibit	Delegate scanned a QR code at your onsite booth to add your collateral or booth listing to their delegate bag (not applicable to some events)	7
Scheduled Session	Delegate added your sponsored session to their custom agenda	7
Connection Enabled	A connection request was accepted between a delegate and your staff (not applicable to some events)	5
Booth Visit - Digital	Attendee visited your company's showcase page	4

CONFERENCE APP

connectme

- Access lead retrieval to scan attendee badges*
- View attendee directory
- Send direct messages and meeting invitations
- Set up and view virtual exhibit booths
- Access event content agenda
- Stream live (hybrid events) and on-demand sessions
- Scan exhibit booth QR codes

Who has access?
Sponsors, speakers and all attendees
Download the app
Enter App code: LS2024
(Event registration required to use conference app)

*All sponsor team members should see a "Lead Retrieval" button on the home screen of the ConnectMe app.

Key Support Contact
Digital Event Ops
Annjolynn.cales@informa.com

REGISTRATION SYSTEM

connect
WITH VISIT

- Register staff with contracted complimentary event passes
- Access all badge scan data captured by your team
- View badge scan notes
- Set up custom badge scan questions

Who has access?
Sponsor's main contact only
Your main contact will receive pre-event access via email to set up your team registration and lead retrieval

Key Support Contact
Exhibitor Ops
Sydney.atendido@informa.com

LEAD REPORTING & ANALYTICS

LeadInsights

- Access all your event leads, including session attendance, booth/badge scans, scan notes, virtual booth visits, and more
- View individuals/companies that are most engaged with your company
- Export your full event lead data
- Lead data is updated throughout event

Who has access?
Contract signer and main contact
You'll receive an email pre-event with access to your account, and you can extend access to colleagues. If you have questions about your lead data or access, please contact us.

Key Support Contact
Lead Data Delivery
Holly.Mcallister@informa.com

informa connect