
Live Virtual Event will be February 25-27, 2021
On Demand will be available February 28 – March 15, 2021

# 2021 Platform Functionality Guide

# Overview

The purpose of this document is to provide you with basic information on features included in your exhibitor profile page (your features are dependent on level of sponsorship). It will walk you through each platform, and highlight some features and ideas on how to leverage it in a virtual environment to help you deliver a successful program.

We hope this guide is helpful.

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# Drop a Business Card

# Drop a Business Card

A button is displayed which allows the attendee to send their contact information to the exhibitor. Registration data for the attendees who click the button will flow through reporting.

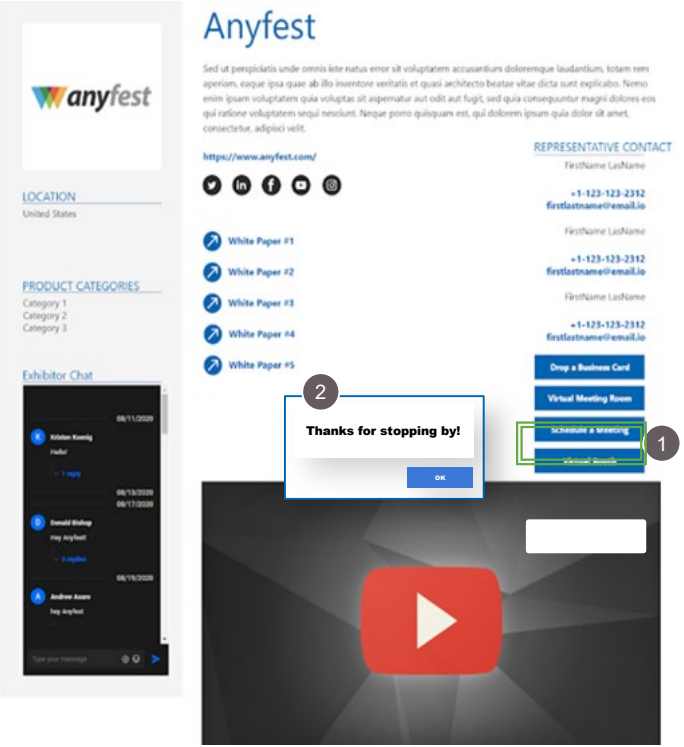
If an attendee opts-out at the event level, they are still able to share their contact information with specific exhibitors using this feature.

**USES/IDEAS:**

- Collect contact info
- For giveaways/raffles
- Similar to a fishbowl in a live event

**STEPS:**

1. Attendees click “Drop a Business Card”
2. When you click on the box a message will pop-up confirming that they have shared their information. They will see “Thanks for stopping by!”



# Live Exhibitor Chat

# Chat Within a Virtual Exhibit

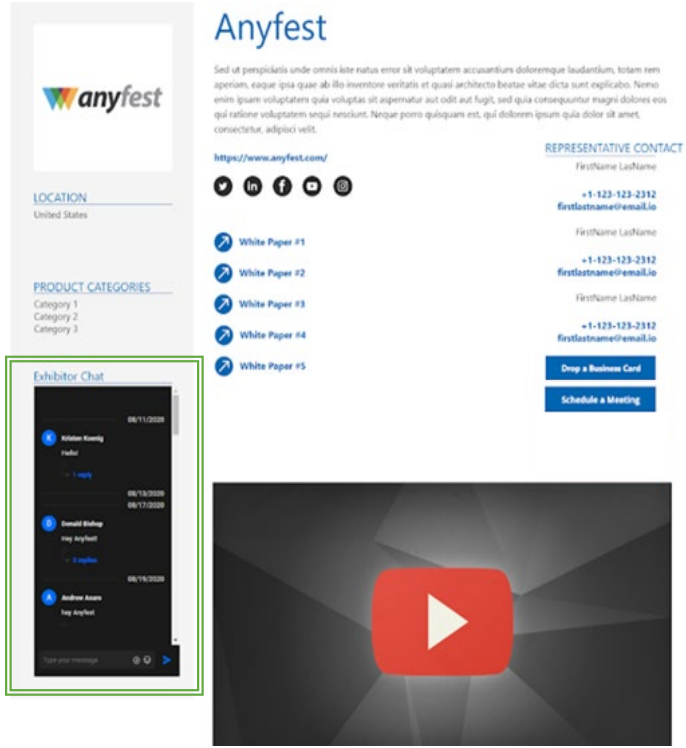
**Chat allows attendees to chat publicly during the event.**

When chatting**,** users can use a variety of tools, including:

- Add an emoji, or giphy
- Interact with an existing post
- @Mention

**USES/IDEAS:**

- Make quick connection
- Promote upcoming sessions
- Promote your other activities throughout the show
- Answer product and services questions
- Have your company representatives interact with other attendees



# Optional Booth Add-On: Virtual Meeting Room

*upgrade option for CDS exhibitors*

# Virtual Meeting Room

This is an optional booth add-on.  Please review if you have upgraded to include a virtual meeting room in your sponsorship package or contact CDS if interested in purchasing this feature.

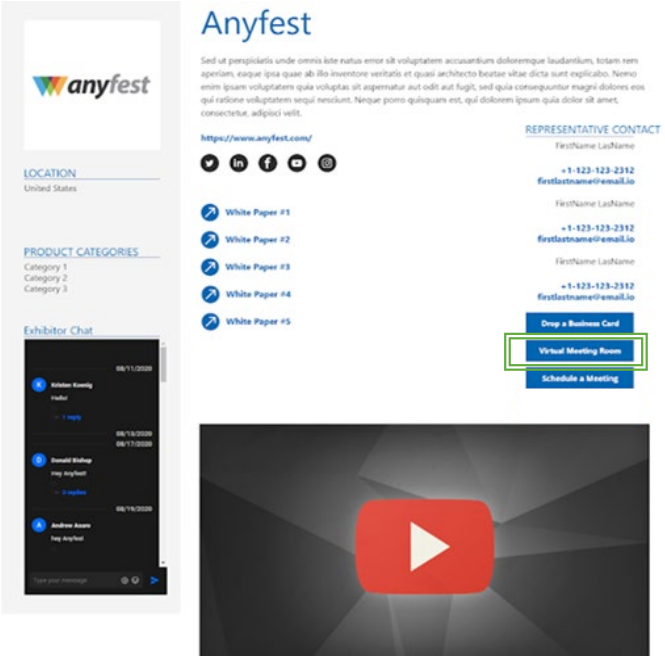
The Virtual Meeting Room can be used in a public setting, and accommodate up to 50 attendees at a time.

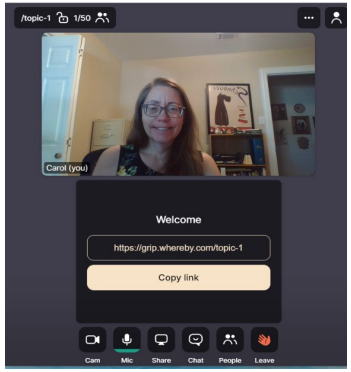
**FEATURES:**

- **Cam & Mic**: Toggle to turn the display off/on.
- **Share**: Allows the user to embed links for another app or to share their screen with other participants (for a better user experience, it is best to share the specific application and not your desktop).
- **Chat**: allows the user to enter a chat
- Open a window where all current meeting participants will be listed. This is the same window as the Chat window. There is a toggle switch to move between the two views.
- When, the participant leaves the meeting a pop-up is displayed.

**USES AND IDEAS:**

1. **Promote Upcoming Sessions**: Chat with virtual exhibit visitors and promote your sessions
2. **Make Quick Connections**: This can be a public meeting space where attendees can come in and out as they wish. Equivalent to a registration desk, you can have your exhibit staff on-hand to help answer attendee questions.
3. **Office Hours**: You can use it as an office hours to help answer specific product or service related questions.
4. **Public Booth Demos:** Highlight and demo your products or services in a public setting.



# Connect Now

*Virtual Networking*

# Overview

Grip (the virtual networking platform) provides attendees, exhibitors, and sponsors with highly targeted networking recommendations to help them meet other people who are aligned with their professional goals and interests.

**How Matchmaking works:**

- The AI-powered algorithm makes recommendations for connections.
- Individuals can act on these recommendations to reach out to and connect with other similarly aligned individuals, gather relevant business leads, and schedule meetings for the event. Meeting invitations are integrated with Outlook and Google Calendar.
- Attendees, exhibitors, and sponsors are able to grow their networks, save valuable contact details, and get business done.

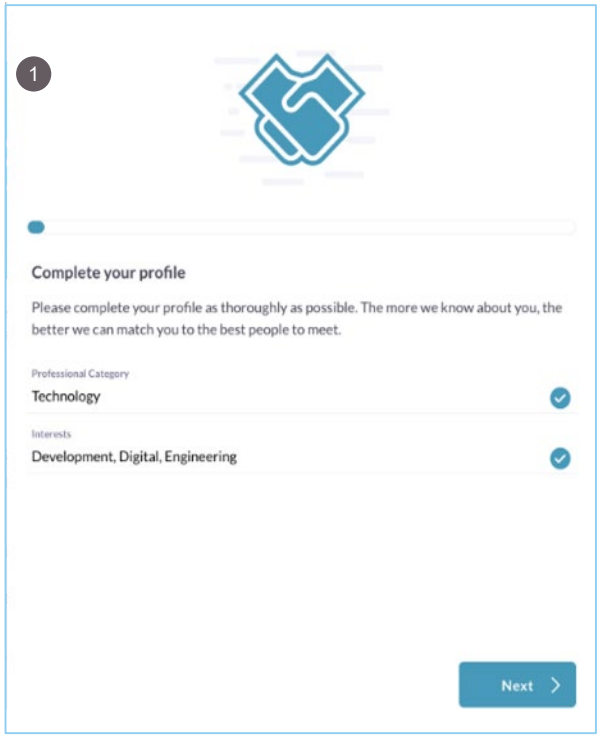
**Data sources**

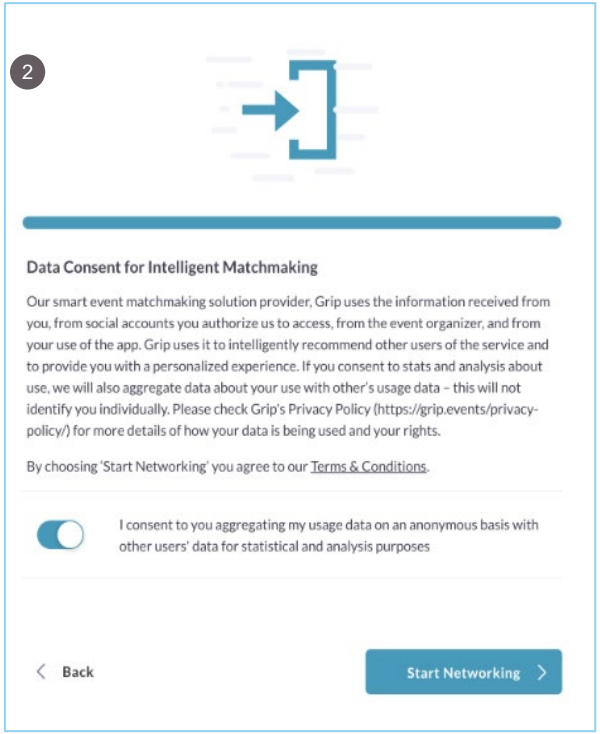
- Some are based on previous meetings and connections people like you have made.
- Others are based on your profile data and finding other people with similar profile data.

# Connect Now

Make connections with 2 Simple steps | Complete only one time

1. Step 1: The first time you log in to Grip you will see this screen and be prompted to complete these steps
2. Step 2: Consent

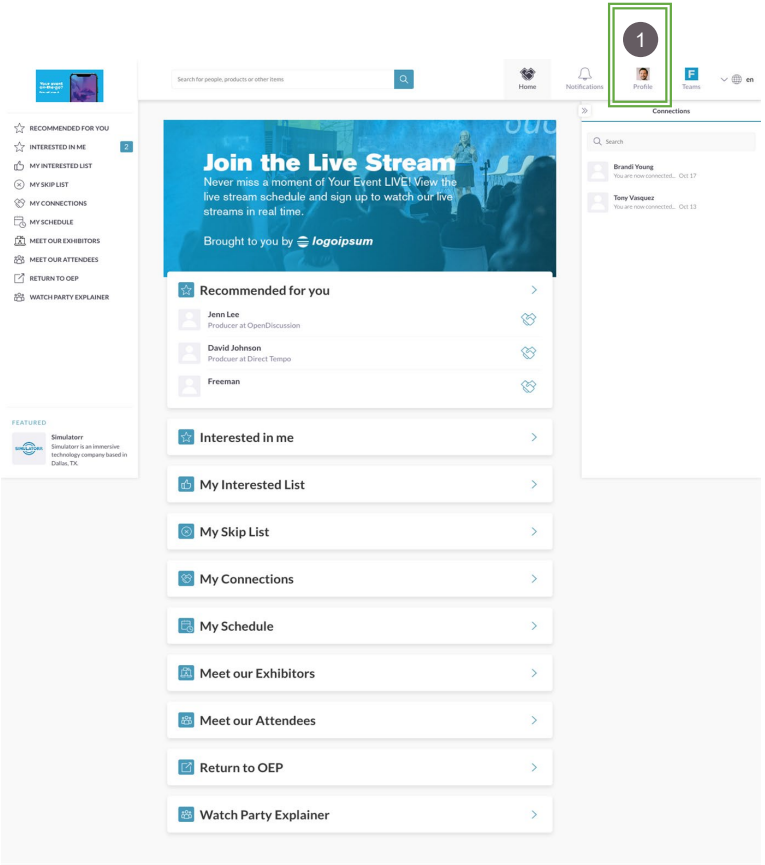


# Complete your Profile

# Your Profile

1 You can get to your profile from your home feed by Clicking on “Profile”



# Complete your profile

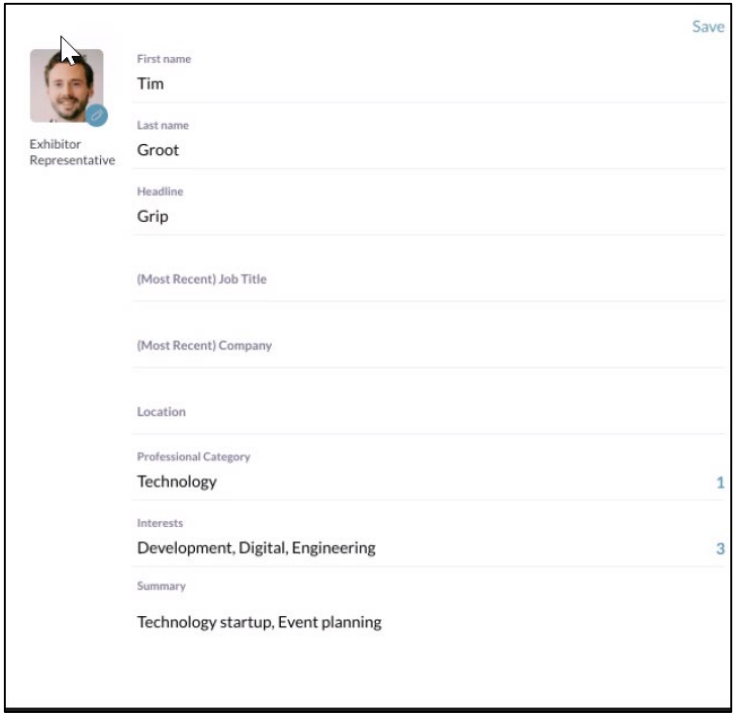
To get the best recommendations of people to meet and increase the chances that people accept your meetings one element is absolutely crucial: **complete your profile!** Please take a moment to complete these fields. Please note there may be additional onboarding questions, including professional category and interests, you may also be asked or imported from Registration in this step.

**Imported from Registration**

- First last name
- Job title
- Company
- Location

**Need to Complete**

- Headshot
- Headline - highlight or overview of you (word limit to 140 Characters)
- Summary - (word limit to 2,000 Characters)



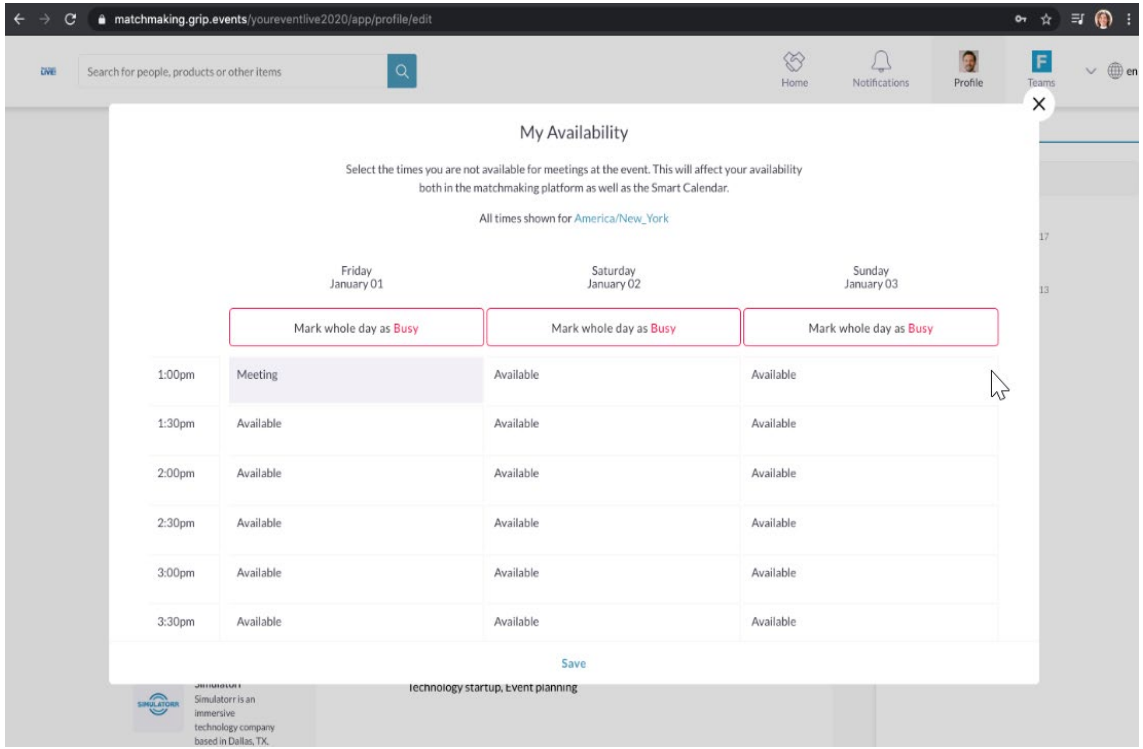
# Set Your Availability

Set dates and times you are available to meet under “Manage My Availability”.

These times will be shown to attendees when they request a meeting with you.

Meeting times will be displayed in your local time.

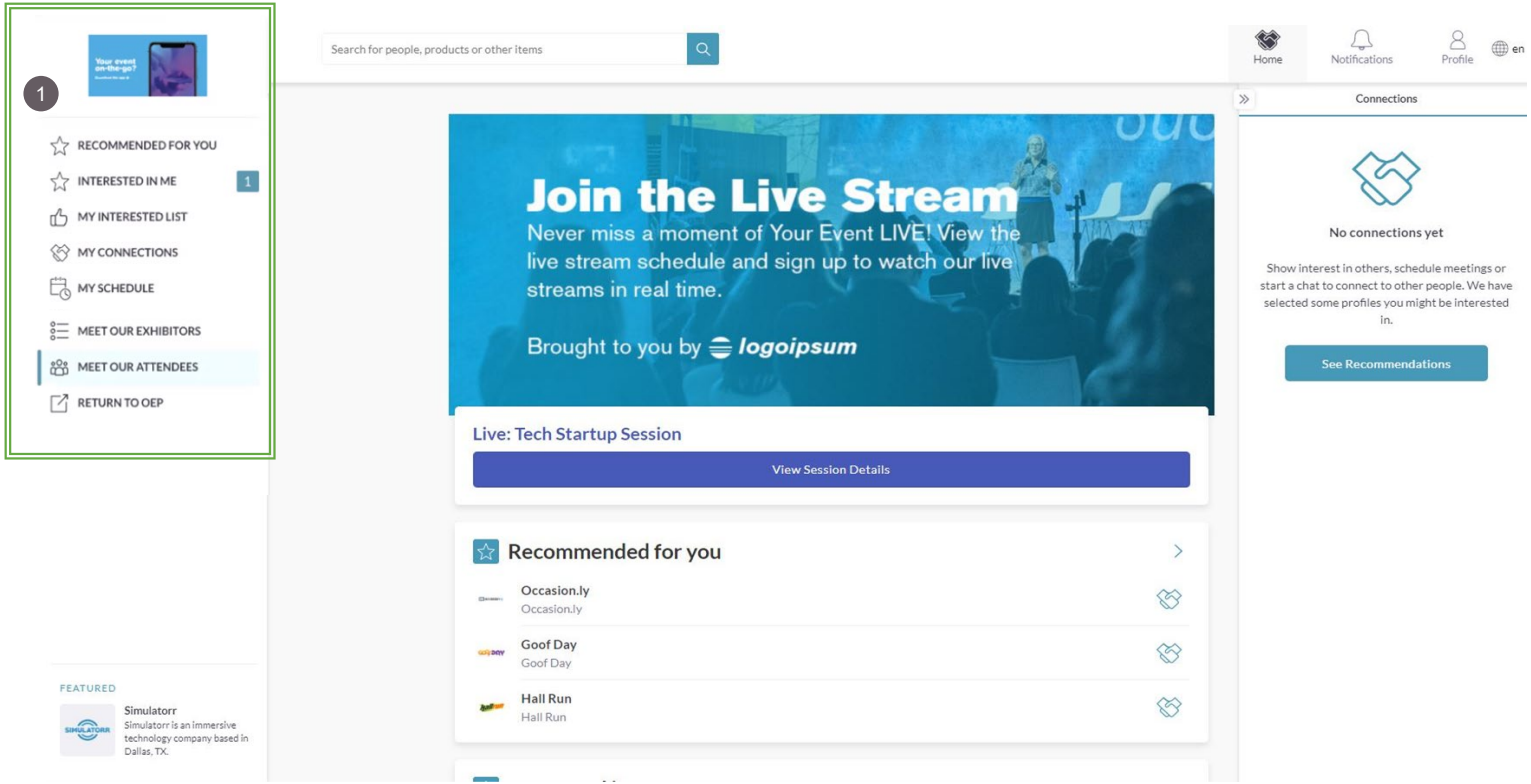
**PLEASE NOTE**: you can schedule meetings during the virtual program from February 25 through February 27 from 9:00am to 5:00pm CST.



# Access & Navigation

# Virtual Networking Homepage

1. Access through the Exhibitor Listing Page- in the drop down select “Connect Now”
2. Navigation bar



# Homepage Navigation Bar Menu

RECOMMENDED FOR YOU

**RECOMMENDED FOR YOU**: once selected you'll see a list of recommendations and have the option to Meet, tag as Interested, or Skip.

INTERESTED IN ME

**INTERESTED IN ME**: once selected a list of people who have shown an interest in you will be displayed. you'll have the option to Meet, tag as Interested, Skip or Chat.

MY INTERESTED LIST

**MY INTERESTED LIST**: Once selected a list of your connections you have shown interested in will be displayed.

MY SKIP LIST

**MY SKIP LIST**: If you skip a profile it will move into My Skip List and removed from the Recommended for You list. (this is anonymous). You can also choose to "unskip"

MY CONNECTIONS

**MY CONNECTIONS**: Once selected a list of your connections will be displayed. A connection is defined as anyone you have a meeting scheduled with or have a mutual handshake.

MY APPOINTMENTS

**MY APPOINTMENTS:** There are two methods to view your Schedule, select My Schedule for the Home Icon in the Nav bar or in the Schedule Sub-Menu.

MEET OUR EXHIBITORS

**MEET OUR EXHIBITORS:** Click here to view the list of all event Exhibitor. Filter by various categories including location and company name.

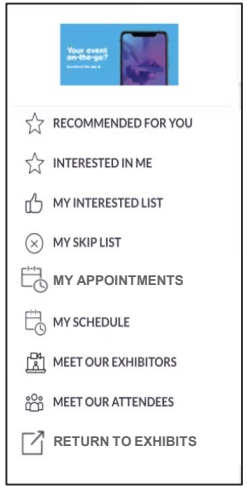
MEET OUR ATTENDEES

**MEET OUR ATTENDEES**: Once selected a list of attendees will be displayed. You will have the ability to filter and sort by name, company, and categories.

RETURN TO EXHIBITS

**RETURN TO EXHIBITS**: This will take you back to the Exhibit Homepage.

Navigation bar



# Meet Attendees

# Meet Attendees

1 **CHAT**
A participant is only able to chat with another participant when a connection (handshake) is made by:

- Both participants showing interest
- A Meeting invitation being sent to you (allows the invitee to message the inviter)
- A Meeting request has been accepted

2 **INTERESTED**
When selected, the attendee profile will move into My Interested List and removed from the Recommended for You list.

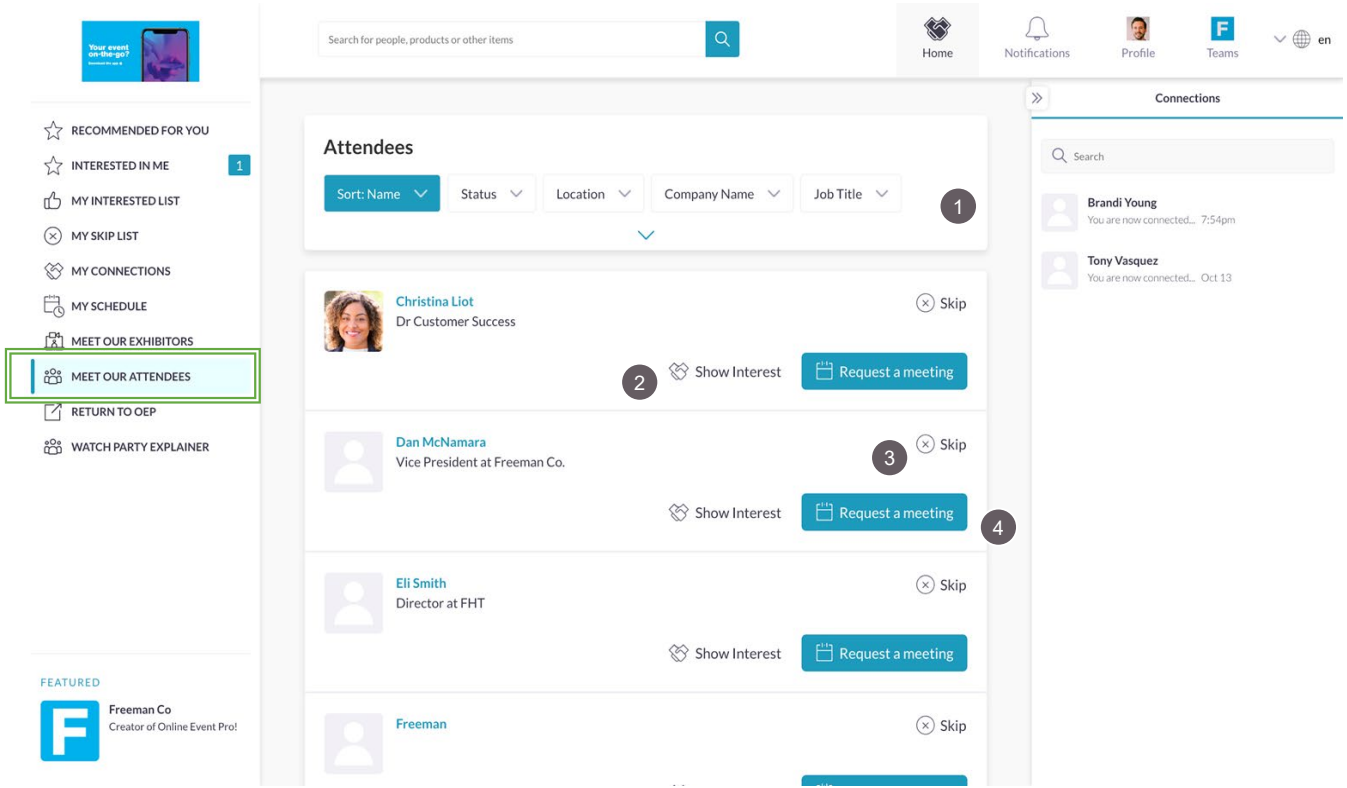
3 **SKIP**
When selected, the attendee profile will move into My Skip List and removed from the Recommended for You list. This is anonymous so the person you skip will not know you selected this option.

By selecting **Meet**, **Interested** or **Skip**, Grip will update your profile and provide better recommendations for other participants to meet.

4 **MEET**
A Meeting Schedule Pop-Up is displayed highlighting the profile of the individual selected with a scheduler to request a meeting .

Once the request is made, the system will Block the Grip calendar of both participants,

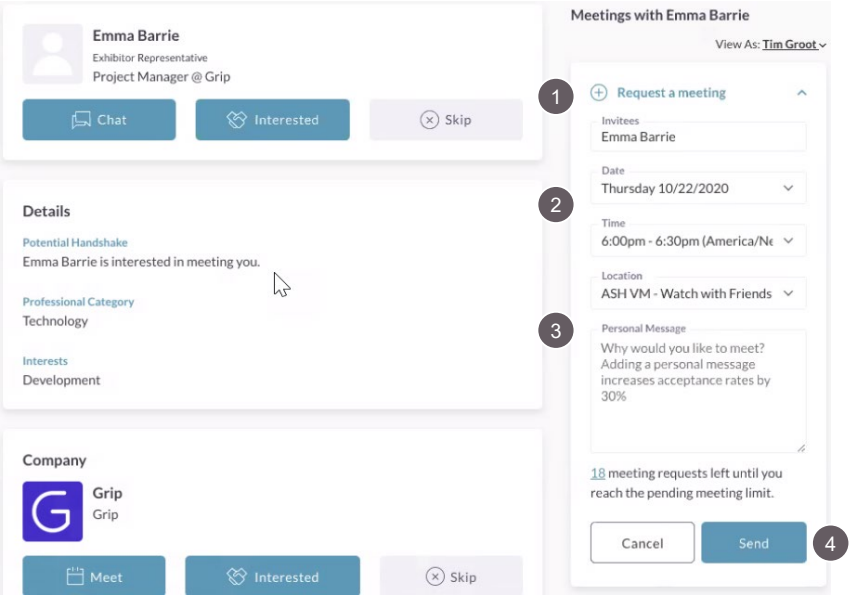
Update the inviter's schedule, display a meeting content block and send a notification to the invitee registration email.



# How to Schedule a Meeting

# With Attendees

1. Click “Request a Meeting” and select a date and time from the drop down.
2. The dates and times you see will show dates and times available to both parties.
3. Add a personal message to the meeting request
4. Send request

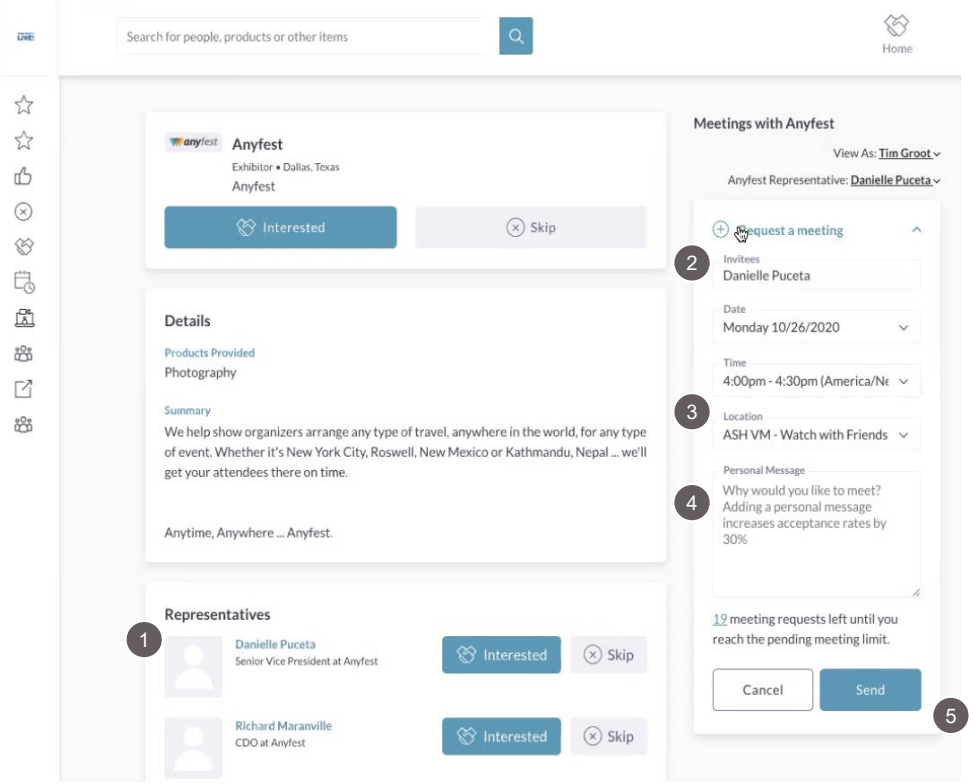


# With Exhibitors

Attendees can schedule meeting with exhibitors from the Meet Our Exhibitor section or Schedule a Meeting button on the exhibitor virtual booth.

Exhibitors can be searched for by Company Name or other filter options available.

1. Click on the representative to see detailed information and select “Meet”
2. Click “Request a Meeting” and select a date and time from the drop down.
3. The dates and times you will see are the available times you and the invitee have pre-set. It will only show open/free times for all parties.
4. Add a personal Message
5. Send



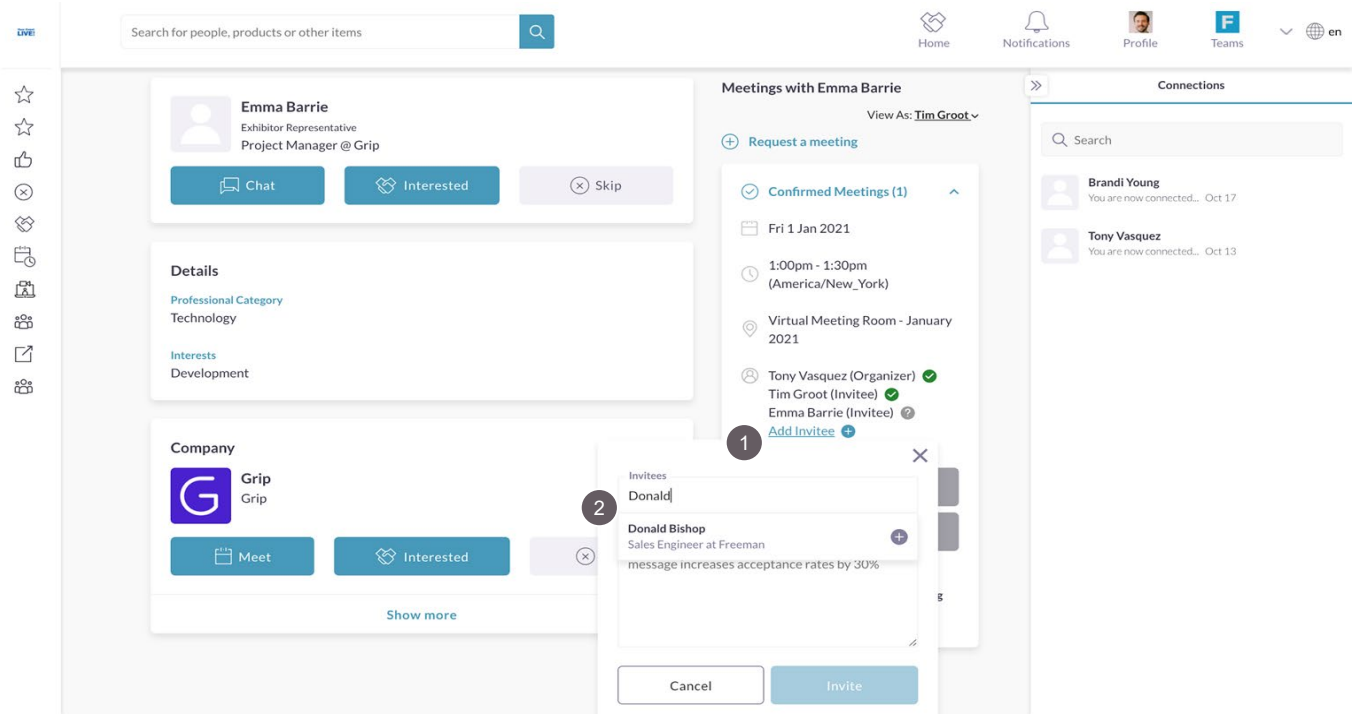
# Adding Attendees to a Meeting

# Meeting Confirmation Screen

**From the meeting confirmation screen you can add additional attendees.**

1. As soon as you schedule a meeting you can add additional attendees, by staying on the page or at a later time
2. Add additional attendees

*Note:* The additional attendees availability will have to be open to be part of the meeting. Otherwise, it will not allow you to send them the meeting invite if their time is blocked.



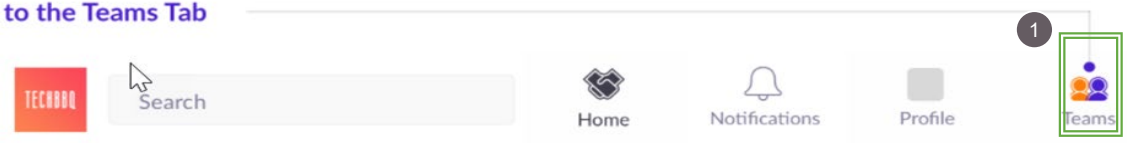
# Create Teams

# How to Create Teams and Invite Team Members

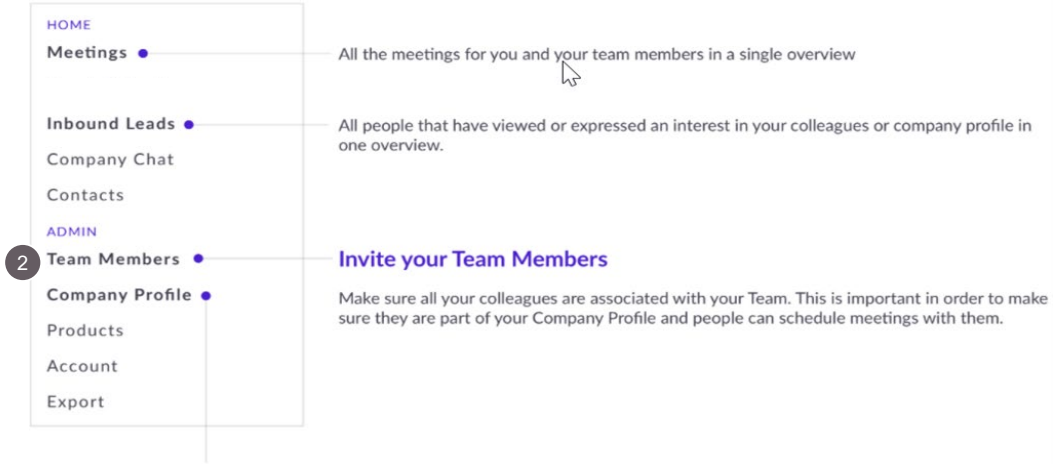
When the first person from your company signs in they'll be presented with the option to create a team. Enter your company name and immediately invite your colleagues. If not, you can follow the steps below:

1. Once logged into Grip, go to "Teams" on the top right, and follow the steps below.
   - Press "Get Started with Teams" and create your team
   - Once invited, Team Members will receive an email to join your team. If they have not received it, you can always copy the Personal Invite Link from the Team Members page and share it directly with them.
2. Invite additional team members from the Team Members page

## Go to the Teams Tab




## Powerful functionality for your Company

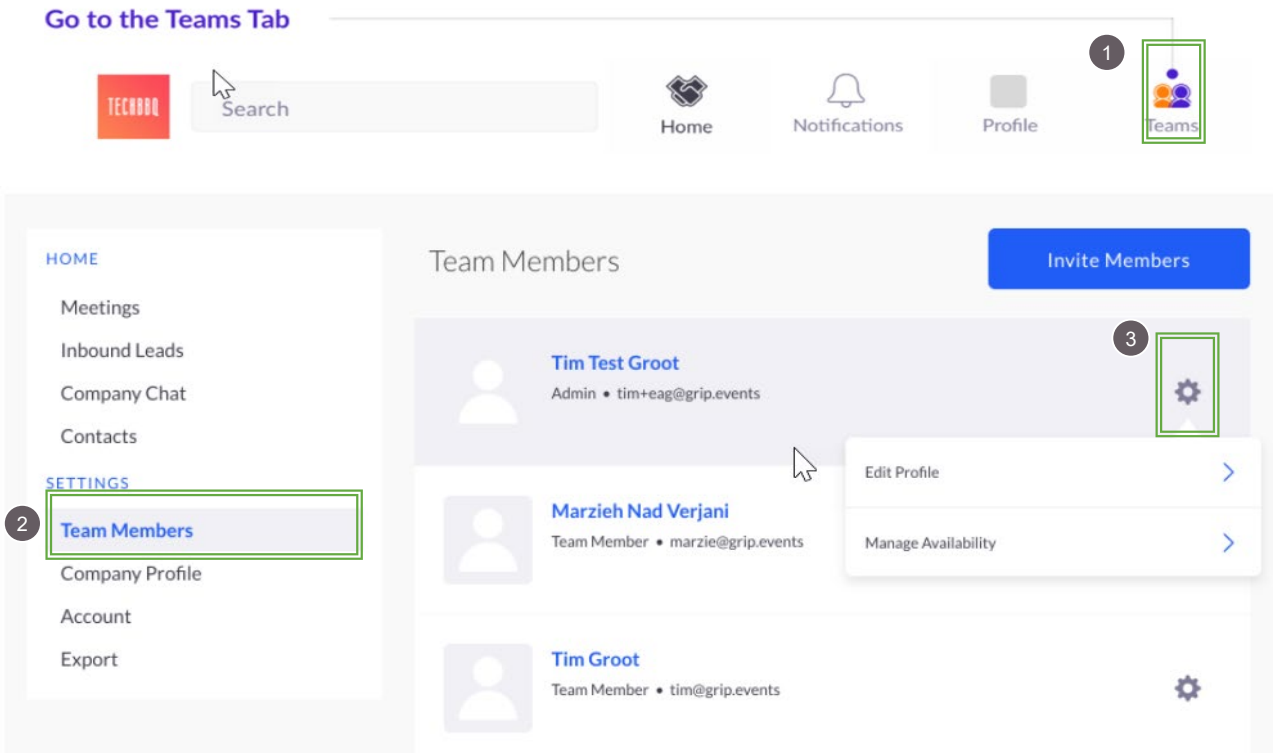



## Edit the Company Profile

It is critical that your company profile looks as great as it can be, add images a description and event specific metadata to make it appear across the platform as frequently as possible.

# How Can I Block Time on the Calendar of My Team Members?

1. Go to Teams in the top right corner.
2. Click on “Team Members” on the left sidebar
3. Then click on the 'cog' for the team member that you want to manage the availability of.
4. Steps continued on slide 31

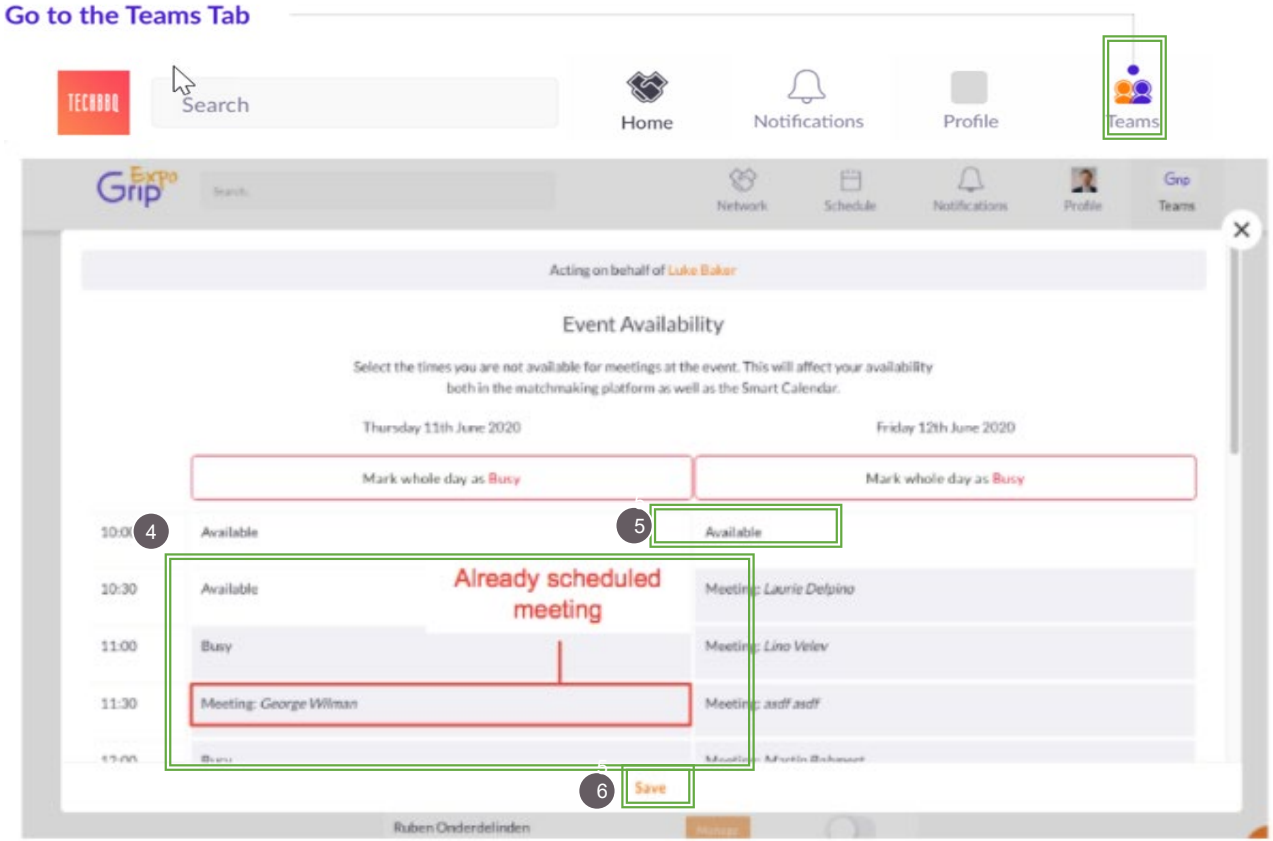


# *Continued*: How Can I Block Time on the Calendar of My Team Members?

4. See the scheduled meetings for your colleague.

5. To select a time slot to show as “Busy,” simply click on that specific time and wait for it to say “Busy” - To change a time slot from “Busy” to “Available,” simply click on that time and wait for it to say “Available.”

6. Click to “Save” to finalize calendar changes



# Resources

# For Exhibitors Using Grip

**Schedule a Meeting**

How to reschedule a meeting?

What is the difference between “awaiting response” and "pending" status?

Grip Calendar Integration and Timezones

**Teams**

How can i block time on the calendar of my Team Members

How do I update my company profile?

How to request a meeting on behalf of a team member?

How to use the Instant Company Chat function from Grip Teams

How to change a Team Member role from Admin or Team Member?

What is the difference between Admin and Team Member roles?

# FAQ

# FAQ

## CONNECT NOW: MATCHMAKING

**Q:** *What data is used to build matchmaking profiles?*
**A:** During the registration process, registration data flows into the matchmaking engine. When you enter Connect Now for the first time (which can be done through the Exhibit Listing Page from the Midwinter Meeting Virtual Meeting site) you will see some pre-populated fields from registration, be asked to opt-in and complete other onboarding questions. You will only have to do this once.

**Q:** *Matchmaking privacy concerns*
**A:** Users must opt-in.

## PLATFORM ACCESS

**Q:** *When will I have access to the platform?*
**A:** You will have access to the platform beginning February 19 at 9:00am CST

**Q:** *When can I schedule meetings?*
**A:** You will be able to schedule meetings from February 25 through February 27, daily 9:00am – 5:00pm CST

**Q:** *Will contact information be shared with me?*
**A:** No, exports of personal contact info is not possible due to GDPR

## SCHEDULES

**Q:** *Can someone else manage my schedule?*
**A:** Yes, your schedule can be managed through Teams

**Q:** *Can I block time on behalf of my executives and sales reps?*
**A:** Yes, you can block time on behalf of your executives and sales reps.

**Q:** *What if I am not available for some of the time?*
**A:** You can block your calendar and meetings will only be scheduled during your available time.

**Q:** *Will all my company representatives who are registered be available for attendees to schedule meetings?*
**A:** Yes, all of your reps will be listed as available for meeting, but they have the option to block their calendars

**Q:** *Can I remove some of my company representatives if they do not want to participate in the meeting scheduling?*
**A:** No you cannot remove people from a meeting, but they have the option to block their calendars

# FAQ

## MEETING LENGTH

**Q:** *Can meeting only be scheduled 20 minutes at a time?*
**A:** Yes, you can only schedule meetings in 20 minutes increments.

**Q:** *What happens if my meeting runs over?*
**A:** Meeting will not end until everyone leaves the rooms.

## TIMEZONE

**Q:** *What time zone will my meetings be scheduled in?*
**A:** Your meeting will appear in your calendar in the time zone your system is set to.

## NUMBER OF MEETINGS ALLOWED

**Q:** *Am I only allowed to schedule up to the number of meetings on my sponsorship tier?*
**A:** No, you can send invitations up to the number allowed in your sponsorship tier, Once an invitation is accepted or declined you get that meeting allowance back.

**Q:** *How many meetings can I schedule at a time?*
**A:** You have a rolling limit of 30 pending meeting requests to use throughout the live show days. Once a meeting is accepted, declined, or cancelled, you will receive this meeting credit back to your 30 allocated.

## ADMIN ACCESS

**Q:** *How many admins can we assign to our account?*
**A:** There is no limit to how many admins are part of a Team. The person that creates the Team is automatically set as the admin. All other people are added as a “Team member” by default but can be upgraded to Admin.

**Q:** *How is an admin assigned?*
**A:** By default the admin is assigned to the Exhibitor Representative that creates the Team in Grip (Typically the first one to login)

# Thank You!