STEP-BY-STEP GUIDE
Organization of B2B matchmaking events
Introduction

This document consists of a 17 step-by-step guide for the organization and implementation of B2B matchmaking events.

How to use?

This event guide serves as a guideline for any organization willing to organize and implement B2B matchmaking events. It was created to help you organize a successful event starting from the preparation steps up to the monitoring and evaluation phase.

Following the steps in this step-by-step guide will make a huge impact on the organization of your next event and will avoid common planning pitfalls.

The guide is customized to both a physical and virtual event.

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12 MONTHS PRIOR TO THE EVENT
Step 1 - Prepare the event website

Start creating (or updating) the event website with relevant content on the selected value chain/sector, the latest information about when and where the event will take place, and how suppliers and buyers can participate.

Prepare infographics, photos, Q&A, highlights or stories to use as “Reasons why you should join this event”.

To-do list:

01 Create written content
02 Translation of content in other languages (if applicable)
03 Create visual content
04 Check all links, bug fixing and pre-launch
05 Launch the website for event
Step 2 - Prepare the supplier database

Prepare the supplier database for the selected value chain (both in case of a virtual and physical event).

To-do list:

01. Subscribe to an event tool of your choice (e.g. B2Match)
02. Adjust registration process based on the selected supply chain
03. Prepare to integrate the selection questionnaire and event registration on the website / Supplier database
Step 3 - Plan and conduct information gathering events

Plan and conduct information-gathering activities by establishing contact with key procurement managers of potential buyers in the selected value chains/sectors (focus group discussions, workshops, face-to-face meetings, interviews etc). Collect information and conduct interviews with questions related to their requirements, for example:

- Their exact supply need: definition of precisely what goods/services the buyer is seeking
- Their supplier requirements (for example):
  - Industry and production standards (EN, DIN etc.)
  - Certifications (e.g., ISO9001, ISO14000 etc.)
  - Evidence that the products will be considered safe for the environment and human health
  - Required communication language with the procurement manager, etc.

The results of the information gathering events will serve as input for your supplier selection criteria (step 4).

To-do list:

01. Create an interview script with questions related to buyer requirements to identify the supply needs
02. Identify and contact procurement managers of buyers in the selected value chains/sectors
03. Identify and contact 2-3 experts in the selected value chains/sectors
04. Gather and analyse the results of the activities in a report
12 months prior to the event

Step 4 - Determine the selection criteria based on the information gathering events with procurement managers

Gather all the information from discussions with procurement managers, then determine the supplier selection criteria and methodology to make sure the selected suppliers meet the requirements of the buyers.

**Tip:** different target groups result in different standards of requirements, make sure the suppliers' credentials meet the target groups’ standards and requirements.

To-do list:

01. Appoint a person in charge or a team to carefully conduct the selection process of the suppliers

02. Create a list of minimum requirements to select the suppliers for the event

03. Create an instruction document with the methodology on how to filter or select a supplier
Step 5 - Create a registration form including questionnaire for suppliers in the selected value chains/sectors to participate in the event

Create the list of questions for the questionnaire based on the selection criteria determined in step 4. Once the questionnaire is finalized, create and disseminate the form through an open call application, ask suppliers to submit the questionnaire and registration before the due date.

Make sure the registration form is online and integrated on the event website. Place a prominent call-to-action button to ‘Register as Supplier’ (bold, color-contrast).

Tip: If creating a dedicated form on the event website is not possible, make use of Google Form, Zoho or any other online form application that you could use.

To-do list:

01 Create a dedicated registration page for suppliers on the event website

02 Make sure the registration form for suppliers is easily accessible on the event website

03 Create an instruction document on how to fill in the registration form
10 MONTHS PRIOR TO THE EVENT
Step 6 - Analyze the results of the open call application and select the companies based on the criteria

Review your selection criteria and methodology based on the results from the questionnaire. Depending on the results you might have to slightly adjust your selection process. Sort and filter the companies based on the criteria and selection methodology.

To-do list:

01  Review your selection criteria and methodology
02  Sort and filter the companies
03  Prepare and send the announcement for the selected companies and for the ones that have not been selected
8 MONTHS PRIOR TO THE EVENT
Step 7 - Prepare the selected suppliers for participation in the event (training, disseminate self-training material)

Prepare the selected suppliers for participation in the event. Conduct trainings (online or face to face) and create self-training material that can be downloaded from the event website.

Make sure the representatives of the suppliers can answer questions about their products or services and have their sales pitches rehearsed and ready.

To-do list:

01 Prepare training material and self-training material

02 Upload the self-training materials to the event website

03 Inform all selected suppliers about the trainings or self-training materials, and how they can access it
8 months prior to the event

Step 8 - Populate and maintain the supplier database with profiles

Activate, check and update the participation status of the selected suppliers. Request suppliers to optimize their profiles when necessary and follow up on this.

Tip: If participants are not responsive to emails, consider contacting them via WhatsApp.

To-do list:

01 Activate profiles of the selected companies

02 Manage optimization of profiles

03 Follow up on optimization of profiles
Step 9 - Establish the most appropriate location for the networking event

Selecting a country and venue for a physical event can be challenging, especially if you will conduct the event abroad. Make sure you have detailed information on the accessibility of the country and location, how to get there (flights, visa’s, public transportation etc.), amenities.

In this stage of the organization, you must also sign the contract with the venue’s / exhibition’s organizer. Review all contracts carefully and note all deadlines for submitting paperwork and payments.

Identify and choose your service providers (such as audio and video teams, photographers, printing companies etc.) and make sure all concerned parties are aware of the correct dates and the scope of services required.

To-do list:

01 Create criteria for the selection of the country/venue
02 Analyze each country/venue based on these criteria
03 Make a final selection for the country and book the venue
Step 10 - Create a promotion plan

Raise awareness of and market the event, including the design of marketing materials for the event. This could also include working closely with organisations such as Chambers of Commerce, Business associations, etc. to deliver a series of awareness raising events to ensure a high-level attendance at the event.

Conduct an online advertising campaign for the event social media channels and Google Ads, prepare press releases and send them to local and international press. Upload promotion materials to the event website, and make sure they are easily accessible and downloadable by the press or public (logo of event, web banner, calendar of event, event rundown, templates for social media post, etc.)

To-do list:

01 Design promotion plan, including content plan and materials
02 Coordinate with BSO’s to promote the event
03 Promotion of host country in all marketing material
04 Design material for physical event (banners, folders, brochures, gifts)
05 Translate all content (if applicable)
06 Print and produce all promotional material
6 MONTHS PRIOR TO THE EVENT
Step 11 - Recruitment of regional buyers

Work with local partners that could assist you to recruit regional buyers to participate in the event.

To-do list:

01 Identify local partners that can help recruiting regional buyers
02 Prepare the contracts for local partners
03 Train and coach local partners on how to recruit regional buyers
04 Follow up, coach and coordinate progress of local partners in recruiting regional buyers
05 Identify and contact BSO’s or other organizations who could help recruit large regional buyers for the event
Step 12 - Recruitment of international buyers

Inform international associations, BSO’s, organizations about your event and if possible, to collaborate in sourcing for international buyers to participate at your event.

Email your existing network of potential buyers with details of the event and encourage them to register early. Consider offering incentives to your most important participants.

To-do list:

01 Identify potential international buyers through desk research

02 Contact experts in the value chains/sectors to identify international buyers

03 Contact international organizations, such as associations or other international BSO’s that could potentially help recruit international buyers
3 MONTHS PRIOR TO THE EVENT
Step 13 - Finalize the agenda for the event, including confirmed guest speakers

Confirm all dates and details with your speakers, logistics, any vendors for your event. Finalize and confirm payment information with your vendors.

Inform speakers on the deadline to submit their presentation materials, their presentation agenda and speaker profile.

Upload the agenda to the event website, share to social media, tag and mention the speakers and inform the press about the agenda.

To-do list:

01 Determine number of seminars and subjects
02 Contact and recruit potential speakers for the event
03 Create a profile of each speaker, including their bio, photo, and PowerPoint presentation
04 Develop the agenda for the event
05 Launch the agenda of the event on the event website and share on social media channels
Step 14 - Check and follow up on scheduled meetings

The success of the B2B event depends on the number of meetings scheduled. Therefore, make sure you regularly check and follow up with participants on scheduled meetings.

Contact participants that have pending meeting requests. Motivate them to search the exhibitor lists and find potential partners.

Tip: If participants are not responsive to emails, consider contacting them via WhatsApp.

To-do list:

01 Regularly check and follow up on scheduled meetings

02 Create standard follow up emails

03 Contact participants that have pending meeting requests

04 Send out emails to participants motivating them to search the exhibitor list to find potential partners
1-2 WEEK PRIOR TO THE EVENT
Step 15 - Final preparations for the event

Meet with the team and confirm all final details against the workplan.

Do a final check on the venue and make sure you have confirmed all contracts with service providers.

Confirm the master of ceremony and finalize the script together.

To-do list:

01 Final check of the venue

02 Contract providers for lunch, drinks, snacks etc.

03 Confirm and contract a master of ceremony to lead the event

04 Finalize the script for the opening ceremony, the seminars and the closing ceremony
1 week prior to the event

Step 15 - Final preparations for the event

Make sure all delegates and speakers are briefed before the start of the event.

Do a final check on the preparations for the B2B meetings and make sure all audio and video equipment is working properly.

To-do list:

05
Manage delegates and speakers before, during and after the event

06
Finalize arrangement for coordination of the meetings taking place at the venue

07
Finalize arrangement for technical assistance (video/audio) for the seminars

08
Organize and coordinate one-to-one appointments between the buyers and the suppliers
D-DAY
D-DAY

✓ You’ve done the work! Execute your plan and reach your event goals.

✓ Manage delegates and speakers during the event, make sure they are well looked after and on time for their seminars or webinars.

✓ Keep track on the timeline of the event, make adjustments if necessary.

✓ Make sure the suppliers and buyers are ON TIME for their appointment!

✓ Consider to appoint a Liaison officer for VIP Buyers.

✓ Have a daily briefing and evaluation meeting during the event with your team. See if there are any challenges or issues and what can be improved.
AFTER THE EVENT
Step 16 – Follow up

Send thank you emails to suppliers and buyers, no later than 1 week after the show!

Also send an online survey to measure the participants satisfaction with the organization of the event (can be created with Google form or SurveyMonkey).

To-do list:

01 Send thank you emails to the suppliers, buyers, speakers, delegates, and other parties that participated

02 Send an online survey to measure the participants satisfaction with the organization of the event
Step 17 - Evaluate and lessons learned

Set up an evaluation meeting with your team. Prepare a complete report of the event, so it can be used as a reference for next events.

Check the total visitor number and compare with previous events.

Check the survey and summarize the results.

To-do list:

01 Set up an evaluation meeting with your team

02 Check the survey results and summarize them in a report

03 Analyze the lessons learned and determine improvements for the next events
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