



STEP-BY-STEP GUIDE

Organization of B2B matchmaking events



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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.

This guide was developed in the context of the West Africa Competitiveness Programme (WACOMP) with the financial support of the European Union (EU)



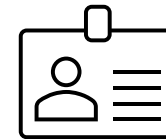
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Prepare the supplier
database



Determine the
selection criteria for
suppliers



Analyze the results of
the open call
application and select
suppliers based on
the criteria

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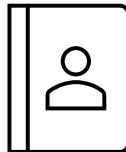
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Prepare the event
website



Plan and conduct
information gathering
events to identify the
buyers' supply needs
and requirements

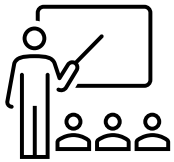


Create a registration
form including
questionnaire for
suppliers in the
selected value
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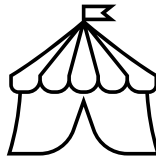




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Populate and
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Create a promotion
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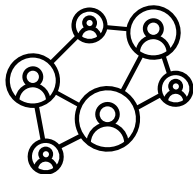


Recruitment of
international buyers

STEP 7

Prepare the selected
suppliers for
participation in the
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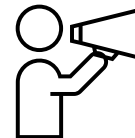
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STEP 9

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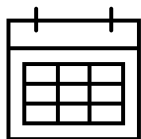
Recruitment of
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STEP 12



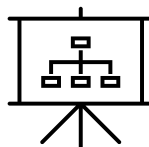


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including confirmed
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STEP 17

Evaluate and lessons
learned



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A background image showing a person's hands using a laptop. The person is wearing a white shirt and a ring on their finger. The laptop screen displays text, and the keyboard is visible. The entire image has a blue tint.

12 MONTHS PRIOR TO THE EVENT



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

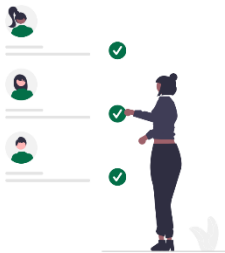
Check all links, bug fixing and pre-launch

05

Launch the website for event



12 months prior to the 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



12 months prior to the event



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

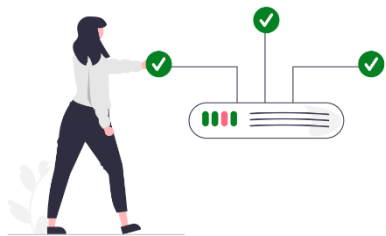
Identify and contact 2-3 experts in the selected value chains/sectors

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

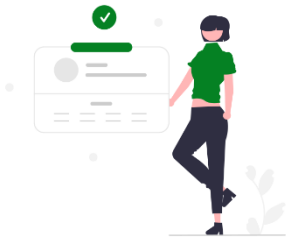
Create a list of minimum requirements to select the suppliers for the event

03

Create an instruction document with the methodology on how-to filter or select a supplier



12 months prior to the event



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



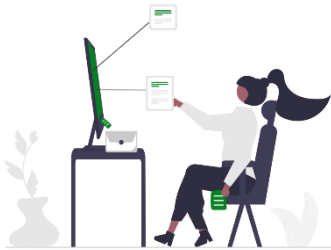
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A background image showing a man and a woman working together on a laptop in a library or study environment. The man is on the left, wearing a blue sweater and glasses, and the woman is on the right, wearing a white shirt and glasses. They are both looking at the laptop screen. The background is slightly blurred, showing bookshelves and other people in the distance. The entire image has a blue tint.

10 MONTHS PRIOR TO THE EVENT



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



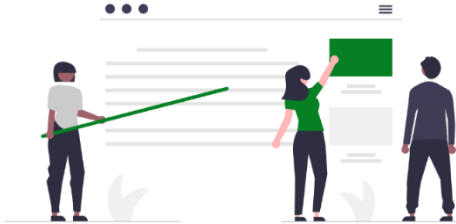
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A woman with curly hair, wearing a black t-shirt and a yellow measuring tape around her neck, is standing at a wooden workbench in a workshop. She is using a white marker to draw a pattern on a large piece of brown paper. On the workbench, there is a laptop, a pair of scissors, and some other papers. In the background, there are racks of clothes and a mannequin. The scene is lit with warm, string lights hanging from the ceiling.

8 MONTHS PRIOR TO THE EVENT



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

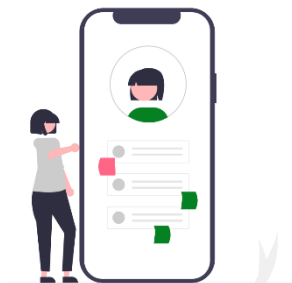
Upload the self-training materials to the event website

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



8 months prior to the event



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



8 months prior to the event



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



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A photograph of three people sitting on a couch in a modern office or co-working space. A woman on the left is wearing a grey blazer over a maroon top and is looking at a laptop. A man in the center is wearing a red shirt and white earbuds, smiling and looking at his laptop. A man on the right is wearing a blue patterned shirt and is looking at his laptop. The background shows a large window and a modern lamp. The entire image has a blue tint.

6 MONTHS PRIOR TO THE EVENT



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

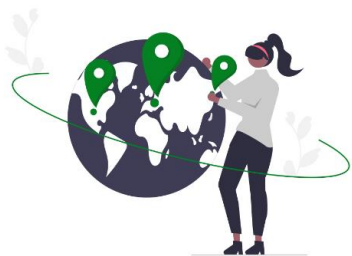
Follow up, coach and coordinate progress of local partners in recruiting regional buyers

05

Identify and contact BSO's or other organizations who could help recruit large regional buyers for the event



6 months prior to 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



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3 MONTHS PRIOR TO THE EVENT





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



3 months prior to the event



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



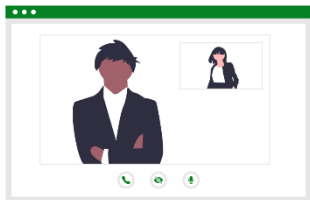
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A man and a woman in business attire are standing in a modern building with large windows. The man is wearing a dark suit and a red tie, and the woman is wearing a light-colored blazer. They are both smiling and looking towards the camera. The background shows a modern interior with large windows and a staircase.

1-2 WEEK PRIOR TO THE EVENT



2 weeks 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

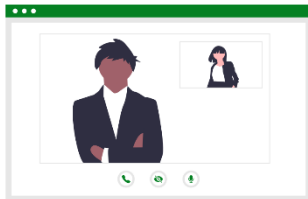
Confirm and contract a master of ceremony to lead the event

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 co-ordinate one-to-one appointments between the buyers and the suppliers



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A photograph of three people sitting on a couch in a modern office or home setting. A woman on the left is wearing a grey blazer over a maroon top and is gesturing with her right hand while looking at a laptop. A man in the center is wearing a red shirt and white earbuds, smiling and looking at his laptop. A man on the right is wearing a patterned shirt and is looking towards the other two. The scene is dimly lit with a blue tint. The text "D-DAY" is overlaid in the center.

D-DAY



D-DAY

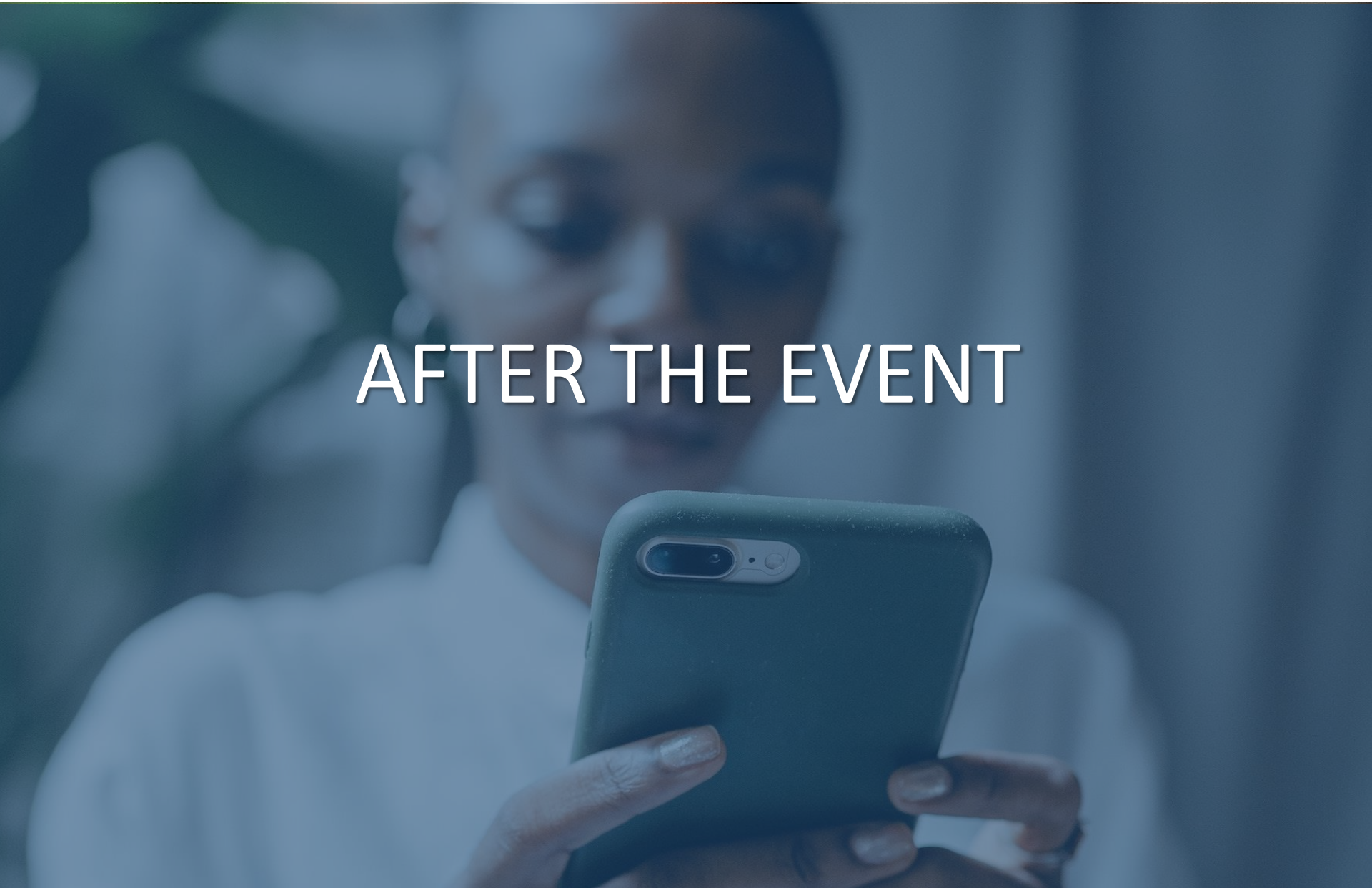


- ✓ You've done the work! Execute your plan and reach your event goals.
- ✓ Manage delegates and speakers during the event, make sure they are well looked after and on time for their seminars or webinars.
- ✓ Keep track on the timeline of the event, make adjustments if necessary.
- ✓ Make sure the suppliers 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.



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AFTER THE EVENT





7 days 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



7 days after 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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