SBC Matched Networking Roles & Responsibilities

For SBC Matched Networking to be most successful, everyone needs to know what’s expected of them. Please take a moment to review this so you know what’s expected of you and others!

**HOST Roles & Responsibilities**

1. Remember that the more you put into it, the more you get out of it. Read all the information provided and being sent to you from SAME, prepare in advance, communicate well, do your homework, and remind those you’re meeting with to do theirs!
2. Complete the Host Profile as soon as possible if it is not already completed.
3. Update your schedule of availability if it is not already completed.
4. Post materials in your virtual exhibit booth that you want those you’re meeting with to review prior to your appointment.
5. When appointments are requested, you will receive email notification of such. Login to the Exhibitor Service Center and:
   a. Review the appointment request and look at the individual’s profile.
   b. Accept the appointment if the individual can meet your needs. When accepting the appointment:
      i. Remind the individual to complete and return the “Supplemental Information Form” to you, along with their capabilities statement and any other information you’d like to see in order to make the appointment meaningful. Let them know where to send this information to you via email or another delivery method (unfortunately attachments cannot be sent through the SBC system).
      ii. Remind the individual that in order for discussions to be relevant to their business and generate a meaningful conversation, they are required to visit your virtual booth and review the materials there PRIOR to the scheduled appointment.
      iii. Provide any additional information or guidance that will allow them to maximize the effectiveness of the meeting with you.
   c. Reject the appointment if you are unable to do business together now. It is acceptable and appropriate to reject appointments if you don’t have opportunities for this person/company right now. Appointments are extremely limited – there’s someone else right behind them who’d love to meet with you and probably CAN fulfill your needs right now. Respond and let them know why you cannot meet during SBC, but suggest that you set up an appointment to discuss working together in the future.
6. Once the appointment is accepted, assign the appropriate booth staff individual to the appointment.
7. Monitor appointment requests daily and respond accordingly.
8. Check that you’ve received the advanced information from the individuals with whom you’re meeting. If you haven’t, follow up!
9. Prepare for each day of meetings by reviewing your itinerary, reviewing the information about each individual and make notes about what you’d like to discuss with each company representative. Organize your materials!
10. Be on time for your meetings. If you are late, you must deduct time from the 10-minute appointment length.
11. All meetings must be conducted within the 10-minute appointment window established. It is your responsibility to monitor the time...the meetings will not end automatically. End the meeting on time regardless of what time the meeting began.
12. If the attendee does not show up:
   a. Look up the individual in the Chat & Discussion Group Portal and send a note asking to reschedule.
   b. Report the no-show to SAME by emailing us at exhibit@same.org.
13. Thank your Attendee for taking the time and effort to prepare for the meeting with you!
14. Follow up on your meetings after the conference!
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ATTENDEE Roles & Responsibilities

1. Remember that the more you put into it, the more you get out of it. Read all the information provided and being sent to you from SAME, prepare in advance, communicate well, and do your homework.
2. Complete the “Supplemental Information Sheets” so you have them ready. These sheets were created on request from government agencies and large businesses! They will help you get down to business faster when you meet.
3. Remember that you are initially limited to requesting three appointments. CHOOSE WISELY! Review the list of matches generated for you and view the profiles of your matches. Request appointments with those with whom you meet the most criteria.
4. When requesting appointments:
   a. Send a note to the host and:
      i. Comment on the items you matched on to make it easy for them.
      ii. Ask to where you can send your Supplemental Information Sheet and capabilities statement if they accept your appointment (unfortunately attachments cannot be sent through the SBC system).
   b. Understand that hosts are not required to accept your appointment request and be respectful of decisions. If your appointment request is declined, be respectful. If the host did not suggest a meeting after SBC, ask if they’d be willing to meet with you in a few weeks!
5. Once the appointment is accepted, make sure you have added it to your calendar.
6. Email the host the appropriate Supplemental Information Sheet and your capabilities statement.
7. PREPARE IN ADVANCE FOR YOUR MEETINGS! Review the information in the host’s virtual booth and whatever additional information they suggest. Search for data on the host by using tools such as beta.sam.gov, Fedmine, Deltek, or others. The more information you already know, the quicker you can get down to business.
8. Prepare for each day of meetings by reviewing your itinerary, reviewing again the information about each Host and make notes about what you’d like to discuss with each. Organize your materials!
9. Be on time for your meetings. If you are late, you must deduct time from the 10-minute appointment length.
10. All meetings must be conducted within the 10-minute appointment window established. It is your responsibility to monitor the time...the meetings will not end automatically. End the meeting on time regardless of what time the meeting began.
11. During the meeting, be open, respectful, and professional. Remember this is a dialogue and a stepping stone to creating a new relationship or solidifying an existing one.
12. If the host does not show up:
   a. Visit their booth in the Chat & Discussion Group Portal and send a note.
   b. Look up the individual in the Chat & Discussion Group Portal and send a note asking to reschedule.
   c. Report the no-show to SAME by emailing us at exhibit@same.org.
13. Thank your Host for taking the time to meet with you!
14. Follow up on your meetings after the conference!
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SAME’s Roles & Responsibilities

1. Create, test, and continually monitor the Matched Networking system and SBC platform.
2. Provide excellent customer service. We want you to succeed…we are here to provide assistance!
   Reach us in the following ways:
   a. Chat widget on the website
   b. Email: exhibit@same.org
   c. Phone: 703-549-3800, follow the prompts for the helpdesk. We have a team standing by to answer your call!
3. Provide information on how the system works and best practices for all parties involved. Post this information in multiple ways (documents, videos, etc.) and in multiple places so it’s easy to find.
4. Monitor Matched Networking activity and act upon it as appropriate (i.e., if Hosts are not responding to requests in a timely manner, if individuals have exceeded appointment request limitations, etc.).
5. Use feedback provided to improve the Matched Networking activity in the future.
6. SAME REGRETS IT CANNOT:
   a. Guarantee appointment requests are accepted.
   b. Provide further insight into why appointments were declined.
   c. Ensure your schedule is accurate beyond what is shown in the system.
   d. Remind you of your appointments during the live event.
   e. Start or end your appointments on time.
   f. Contact a host or attendee if they don’t show up to an appointment to find out where they are, why they are not available, break-in to an existing conversation, etc.
   g. Provide email address, phone numbers, or any other contact information on the host or attendee other than what is publicly available.

THANK YOU FOR YOUR PARTICIPATION!