

eSpot

Matchmaking with eSocial

What is it?

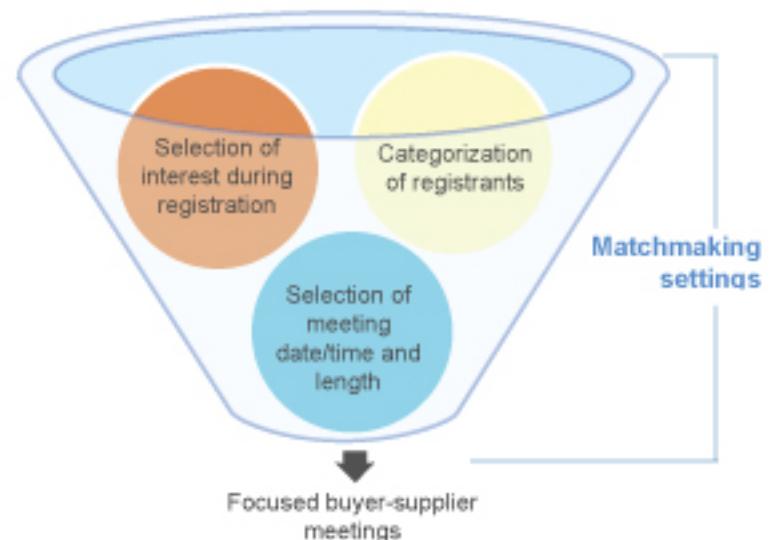
The eSocial module provides a centralized website that allows attendees to connect with other attendees before, during and after an event. The eSocial site allows attendees to see who else is coming, schedule appointments and message one another through email or SMS text messaging. Event planners and organizers can use the eSocial module for a variety of different programs including hosted buyer programs, networking and matchmaking programs, mentoring programs, cohort learning programs and more. Event marketers can utilize the site as a new sponsorship offering by including banner ads, sponsor content and interactive widgets such as embedded video, Twitter and RSS feeds.

Within the eSocial module there is a special feature called "Matchmaking" that allows administrators to automate the matching process between the role of vendor versus attendee. The feature allows you to designate different attendee types as vendor or supplier and then auto-generate meetings.

Why use it?

One of the most important criteria used to evaluate whether an event was "worth it" is whether the people that registered are perceived as the "right" type of people for an attendee's purpose. While event planners and organizers know that identifying and connecting the right people is the top priority at an event, few planners or organizers are actually doing this because it is an extremely challenging and time consuming process. eSocial's Matchmaking capability is designed to make the facilitation process easy.

The 'Matchmaking' feature set allows organizers, attendees and exhibitors an easy way to identify, connect and communicate with the individual they want to meet. It can support any type networking program and allow attendees to opt into pre-designed networking activities, as well as create their own and thus provide an exceptional experience at the event.



How do I use it?

The 'Matchmaking settings' feature set is found within the eSocial module available in the etouches' Pro package. The Matchmaking feature set within eSocial consists of 3 different sections:

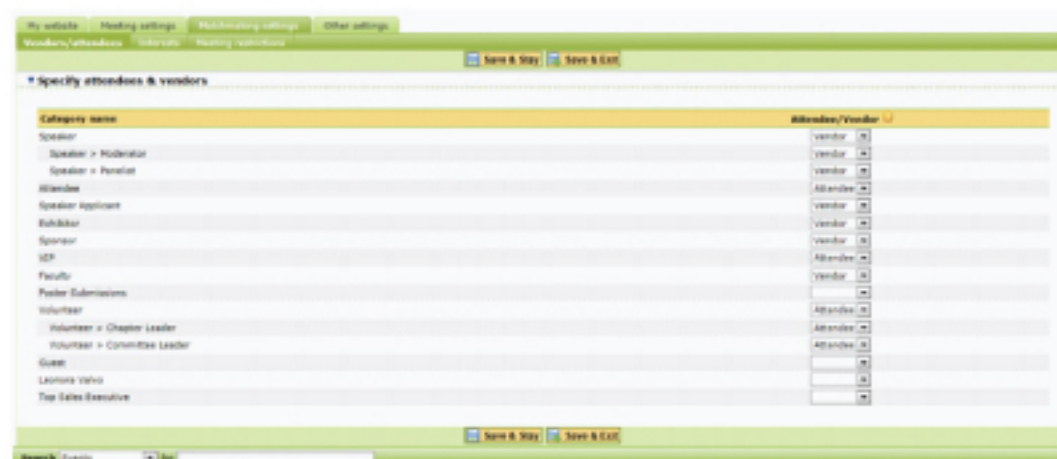
- Vendors/attendees
- Interests
- Meeting restrictions

Feature Focus: Matchmaking

The matchmaking feature of eSocial works with the eReg module to allow attendees to select interest areas or topics/categories during their initial registration or at a later date when the attendee wants to modify their registration. The selected interest areas, topics or categories can be used to match attendees to one another, or match various attendee categories together.

Vendor/Attendees

The Vendors/attendees section allows pairing different categories of registrants. This feature helps in differentiating between attendees and vendors at your event.

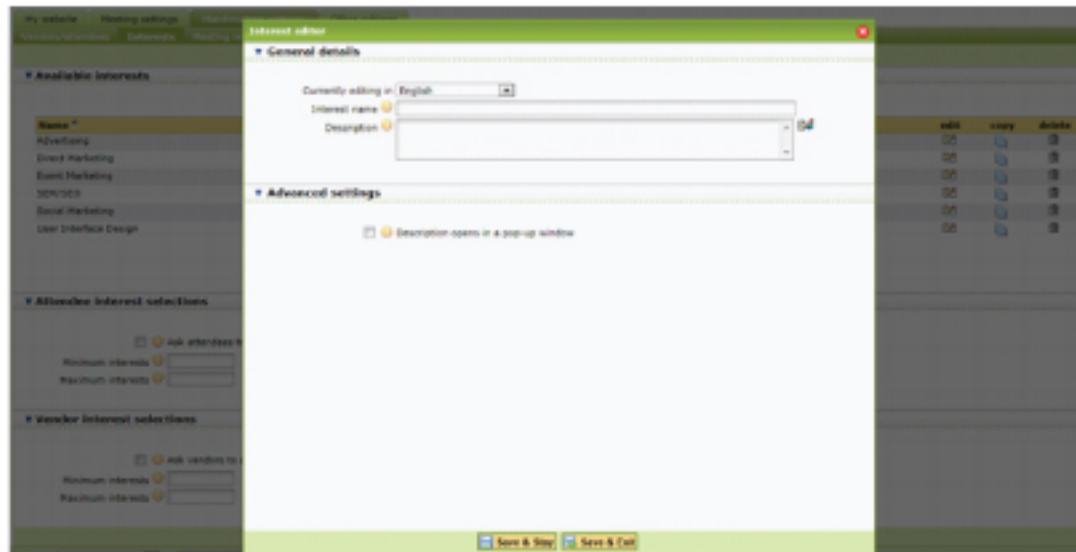


The screenshot shows the 'Matchmaking settings' interface for 'Vendors/Attendees'. It features a table with two columns: 'Category name' and 'Attendee/Vendor'. The table lists various categories and their corresponding match settings. At the bottom, there are 'Save & Stay' and 'Save & Exit' buttons.

Category name	Attendee/Vendor
Speaker	Vendor
Speaker > Moderator	Vendor
Speaker > Panelist	Vendor
Attendee	Attendee
Speaker Applicant	Vendor
Exhibitor	Vendor
Sponsor	Vendor
SEP	Attendee
Faculty	Vendor
Poster Submissions	
Volunteer	Attendee
Volunteer > Chapter Leader	Attendee
Volunteer > Committee Leader	Attendee
Guest	
Lecturer/Video	
Top Sales Executive	

Interest

The 'Interest' section allows you to enter your interests during registration. Interests can be either added or imported.



The screenshot shows the 'Interest editor' window. It has a sidebar on the left with sections: 'Available interests' (listing Advertising, Direct Marketing, Event Marketing, SEM/SEO, Social Marketing, User Interface Design), 'Attendee interest selections' (with checkboxes for asking attendees to weight interests and input fields for minimum/maximum counts), and 'Vendor interest selections' (similar fields for vendors). The main area is divided into 'General details' (with fields for 'Currently editing in: English', 'Interest name', and 'Description') and 'Advanced settings' (with a checkbox for 'Description opens in a pop-up window'). At the bottom are 'Save & Stop' and 'Save & Exit' buttons.



The screenshot shows the 'Interest' management page. It has a sidebar on the left with sections: 'Available interests' (a table with columns 'Name', 'edit', 'copy', 'delete' containing the same list as the previous screenshot), 'Attendee interest selections', and 'Vendor interest selections'. At the bottom are 'Save & Stop' and 'Save & Exit' buttons, and a search bar.

Attendee Interest Selections

Additionally, attendees can weight their interests based upon which interests are most important to them. Attendees can also be given a certain minimum and maximum number of interests they should select. Weighted interests require the attendee to rank their selected interests in order of importance to them. This will give better matches when it comes to matching your attendees with vendors.

Vendor Interest Selections

Vendors can also weight their interests based upon which interests are most important to them. Vendors can be given a certain minimum and maximum number of interests they should select. Weighted interests require the vendor to rank their selected interests in order of importance to them. This will give better matches when it comes to matching your vendor with attendees.

Meeting Restrictions

The 'Meeting restrictions' section lets you select the meeting date, time and length. You can specify the meeting length, minutes that the time dropdowns should increment when using this meeting type.

[My website](#)
[Meeting settings](#)
[Matchmaking settings](#)
[Other settings](#)

[Standard calendar](#)
[Calendar](#)
[Meeting restrictions](#)

Save & Exit

Save & Exit

Meeting length

Time increments

15

minutes

Meeting length

15

minutes

Matchmaking (meeting dates and times)

☒
☐

Use the same dates and times as the standard meeting schedule

Save & Exit

Save & Exit

Search

Events

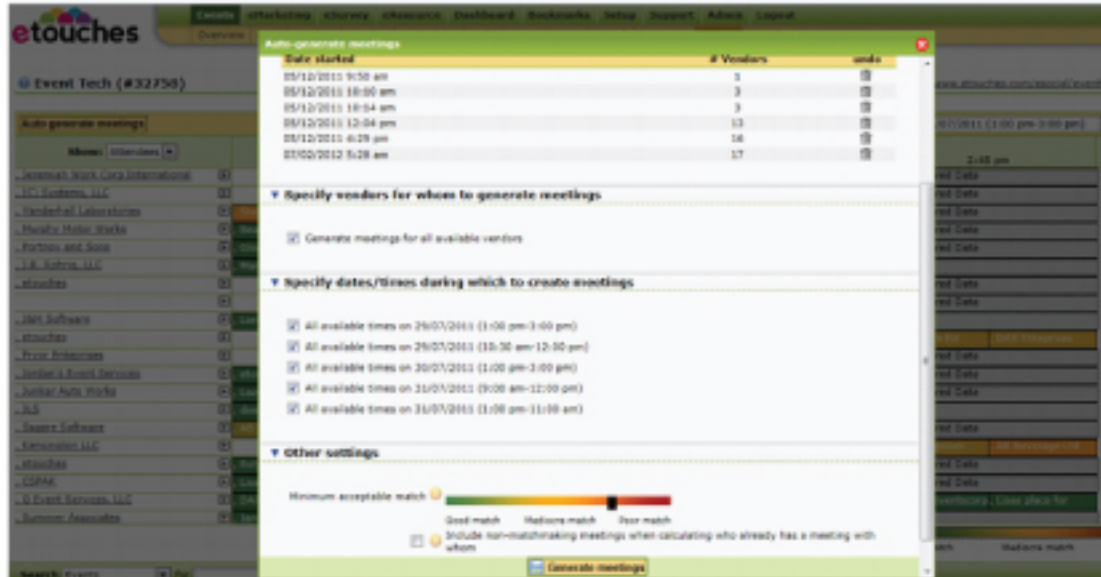
14

See

Matchmaking Report

eSocial allows event administrators to auto-match attendees together and automatically generate meetings. The matchmaking reports are color-coded to demonstrate the goodness of fit between areas of interests of attendee and vendor.

Avis generate meetings					on Day 18/07/2013 11:00 am-3:00 pm					Next on
Shower	Friday 18/07/2013									
	8:15 pm	8:30 pm	8:45 pm	9:00 pm	9:15 pm	9:30 pm	9:45 pm			
Jacobson Tech Corp International	8:15 pm	8:30 pm	8:45 pm	9:00 pm	Business Intelligence across Structured and Unstructured Data					
JCI Systems, LLC	8:15 pm	8:30 pm	8:45 pm	9:00 pm	Business Intelligence across Structured and Unstructured Data					
Vanadium Laboratories	8:15 pm	8:30 pm	8:45 pm	9:00 pm	Business Intelligence across Structured and Unstructured Data					
Beauville Motor Works	8:15 pm	8:30 pm	8:45 pm	9:00 pm	Business Intelligence across Structured and Unstructured Data					
James and Sons	8:15 pm	8:30 pm	8:45 pm	9:00 pm	Business Intelligence across Structured and Unstructured Data					
J.R. Johnson, LLC	8:15 pm	8:30 pm	8:45 pm	9:00 pm	Business Intelligence across Structured and Unstructured Data					
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When you click on the 'Auto generate meetings' tab, you can do the following:

- Check the vendors for which the matchmaking auto-generations have been partially completed.
- Check the vendors for which the matchmaking auto-generations have been fully completed.
- Specify vendors for whom to generate meetings.
- Specify dates/times during which to create meetings.
- Specify a 'minimum acceptable match' - Use the slider to specify a minimum score a match must have for an appointment to be created.
- Include non-matchmaking meetings when calculating who already has a meeting with whom – This setting is useful if you are allowing the attendees and vendors to schedule their own meetings in the system.