



HOSTED MERCHANTS PROGRAM GUIDELINES HOSTED MERCHANTS



8-minute read

SubSummit’s Hosted Merchants Program is the direct-to-consumer subscription industry’s leading meetings program. We’ll facilitate 3,000+ meetings between Merchants and Solution Providers, and you’ll be part of it!

You’ll get:

- **High value meetings with up to 8 participating sponsors who have products, solutions and services that can help your subscription business achieve its goals.** Each Hosted Meeting is 15 minutes and double opt-in (you both swiped right).
- **A free SubSummit ticket worth \$2,499**, with full access to all SubSummit agenda sessions, networking events, the exhibit floor and more.
- **Up to \$750 travel and hotel reimbursement**
- **To join Tabletalks, our peer group roundtable discussions program for Merchants.** Tabletalks is where it’s at if you want to discuss and debate key industry topics with 5-8 of your peers!

Here’s what you need to do, and when you need to do it. Don’t worry, we’ll help you each step of the way with reminders. **If you don’t get an email, check spam (from donotreply.subsummit25@eventpt.com), then let us know at hosted@subsummit.com.**

You must	Takes you	We’ll email you on		Your deadline is	
1. Complete Your Profile Hosted Merchant Registration Deadline	10-15 mins	Mon, Apr 21	9:00 am CDT	Wed, Apr 30	6:00 pm CDT
2. Select Your Tabletalks	5 mins			Tue, May 5	6:00 pm CDT
3. Select Your Networking & Social Activities	5 mins			Tue, May 13	6:00 pm CDT
4. Opt In to Hosted Meeting Requests and Request Meetings	30-90 mins	Wed, May 7	9:00 am CDT	Tue, May 13	6:00 pm CDT
5. Accept Tabletalks	5 mins			Tue, May 13	6:00 pm CDT
6. Accept Your Hosted Meetings	<5 mins	Mon, May 19	9:00 am CDT	Wed, May 21	6:00 pm CDT
7. Accept Calendar Invites for Hosted Meetings, Tabletalks and Networking & Social Activities	<10 mins	Thu, May 22	9:00 am CDT	Thu, May 22	6:00 pm CDT
8. Attend SubSummit and Join Your Hosted Meetings, Tabletalks and Networking & Social Activities	--	Wed, May 28	–	Fri, May 30	–
Provide Feedback and Claim Reimbursement	<15 mins	Mon, Jun 2	9:00 am CDT	Fri, Jul 18	6:00 pm CDT

TIMING OF HOSTED MEETINGS

All the action takes place on Wednesday, May 28 and Thursday, May 29 and you'll be in the room where it happens! As a **Hosted Merchant**, you must be available for a minimum of 16 time slots, however we'll schedule you for only up to 8 Hosted Meetings. You will not need to miss any agenda sessions for meetings. We'll send you calendar holds for your time slots when you complete your Profile.

Start (CDT)	End (CDT)	Mins	Wed, May 28
2:15 PM	2:30 PM	0:15	Meeting Slot #1
2:30 PM	2:33 PM	0:03	Transition time
2:33 PM	2:48 PM	0:15	Meeting Slot #2
2:48 PM	2:51 PM	0:03	Transition time
2:51 PM	3:06 PM	0:15	Meeting Slot #3
3:06 PM	3:09 PM	0:03	Transition time
3:09 PM	3:24 PM	0:15	Meeting Slot #4
3:24 PM	3:27 PM	0:03	Transition time
3:27 PM	3:42 PM	0:15	Meeting Slot #5
3:42 PM	3:45 PM	0:03	Transition time
3:45 PM	4:00 PM	0:15	Meeting Slot #6
4:00 PM	4:03 PM	0:03	Transition time
4:03 PM	4:18 PM	0:15	Meeting Slot #7
			Thu, May 29
10:15 AM	10:30 AM	0:15	Meeting Slot #8
10:30 AM	10:33 AM	0:03	Transition time
10:33 AM	10:48 AM	0:15	Meeting Slot #9
10:48 AM	10:51 AM	0:03	Transition time
10:51 AM	11:06 AM	0:15	Meeting Slot #10
11:06 AM	11:09 AM	0:03	Transition time
11:09 AM	11:24 AM	0:15	Meeting Slot #11
11:24 AM	11:27 AM	0:03	Transition time
11:27 AM	11:42 AM	0:15	Meeting Slot #12
11:42 AM	11:45 AM	0:03	Transition time
11:45 AM	12:00 PM	0:15	Meeting Slot #13
2:00 PM	2:15 PM	0:15	Meeting Slot #14
2:15 PM	2:18 PM	0:03	Transition time
2:18 PM	2:33 PM	0:15	Meeting Slot #15
2:33 PM	2:36 PM	0:03	Transition time
2:36 PM	2:51 PM	0:15	Meeting Slot #16
2:51 PM	2:54 PM	0:03	Transition time

2:54 PM	3:09 PM	0:15	Meeting Slot #17
3:09 PM	3:12 PM	0:03	Transition time
3:12 PM	3:27 PM	0:15	Meeting Slot #18
3:27 PM	3:30 PM	0:03	Transition time
3:30 PM	3:45 PM	0:15	Meeting Slot #19

Immediate Next Steps

Book Your Travel & Hotel

1. **Once you're registered as a Hosted Merchant, get your travel and hotel booked ASAP!** Prices only ever go up and our room block will sell out, so book now to lock in the best prices.
 - **Flights:** We recommend arriving on **Tue, May 27** and leaving on **Fri, May 30**.
 - **Hotel:** We've secured preferential rates at Sheraton Dallas Hotel. Please click [here](#) to purchase your room in our block. Please note the Sheraton Dallas Hotel is the only hotel stay eligible for reimbursement.

Apr 21 – Apr 30

Complete Your Profile, Select Your Tabletalks and Networking & Social Activities (takes 10-15 minutes)

You can do this on: Desktop SubSummit Mobile App

1. **Start Your Profile on Mon, Apr 21, and complete it by Wed, Apr 30 at 6 pm CDT.**
 - **Tell us about yourself--select from 100+ data points!** This information will help participating Solution Providers determine if they want to meet with you.
 - **Confirm your availability** and we'll send you invites to block your calendar. As a Hosted Merchant, you must be available for all 16 time slots, however we'll schedule you for only up to 8 Hosted Meetings.
 - **Share the love!** Click **Post on Social** to tell your X followers and LinkedIn contacts that you're participating in SubSummit! While you're there, add your profile photo!
 - **If you're an Organization Admin** you can edit and complete profiles on behalf of Hosted Merchants from your organization (they can thank you later!).
 - Check out the [Org Admin Pro Tips](#) at the end of these guidelines for more info.
2. **Hosted Merchant Registration Deadline!** To qualify for the Hosted Merchants Program, Merchants must register before **Wed, Apr 30 at 6 pm CDT**. Make sure any of your colleagues who want to get free tickets and travel, as well as high value meetings, register before the deadline.
3. **Start Your Tabletalks Selections on Mon, Apr 21, and complete them by Tue, May 6 at 6 pm CDT.**
 - Tabletalks are 45-minute peer group roundtable discussions with 5-8 merchant peers on key industry topics. They're held during breakfast on Thursday, May 29 and Friday, May 30
 - Tell us how many Tabletalks you'd like to join (one or two), which topics you're interested in, what questions you'd like discussed, and any organizations you'd prefer not to be placed with (yes, you can avoid competitors).
 - Organization Admins cannot select Tabletalks (or do any other Tabletalks actions) on your behalf.
4. **Networking & Social Activities:** Starting **Mon, Apr 21** you must select all Networking & Social Activities you want to attend, and complete your selections by **Tue, May 13**.
 - You can view details of all Activities you're eligible for, including location, description, sponsor (if any) and time slots
 - The Activities you can view and select may be open-to-all, based on attendee segmentation criteria, or you have been handpicked by the Activity organizer
 - Selecting an Activity does not guarantee you'll be scheduled for that Activity, so we recommend you select all Activities you would attend. If you're scheduled for an Activity, you will receive a calendar invite on **Thu, May 22**.

May 7 – May 13

Opt In to Hosted Meeting Requests and Request Meetings! (takes 30-90 minutes)

You can do this on: Desktop  SubSummit Mobile App 

1. Start opting in to Hosted Meeting requests and requesting meetings on **Wed, May 7** and complete by **Tue, May 13 at 6 pm CDT**.
 - **You must opt in to Hosted Meeting requests from (or request meetings with) at least 24 organizations.**
 - We'll schedule only 8 Hosted Meetings max.
 - **Opt In to Hosted Meeting Requests:**
 - Hosted Meeting requests you've received from participating Solution Providers will be displayed at the top of the screen when you log in.
 - Just click 'Very Interested' or 'Interested' to opt in. Opt-ins are saved automatically as you go.
 - 'Very Interested' opt-ins (and meeting requests) get scheduled first, before 'Interested' ones.
 - **Request Meetings with Solution Providers Organizations:**
 - You should request to meet every organization you're interested in meeting with. You won't have >1 Hosted Meeting with the same organization.
 - Just click 'Very Interested' or 'Interested' to request a meeting. Meeting requests are saved automatically as you go.
 - You can provide a specific reason why you want to meet an organization.
 - Don't wait until the last minute to request meetings! Tools like **Bookmarks** allow you to start requesting meetings and come back if needed to finish them.
2. **Org Admins:** You can opt in to Hosted Meeting requests and request meetings on behalf of Hosted Merchants from your organization.
3. **Accept Your Tabletalks Assignments:** You'll get your Tabletalks assignments on **Wed, May 7** and you must accept them by **Tue, May 13 at 6 pm CDT**. Tabletalks is where it's at if you want to broaden your peer network as well as discuss and debate key industry topics!

May 19 – May 21

Accept Your Hosted Meetings (takes less than 10 minutes)

You can do this on: Desktop  SubSummit Mobile App 

1. On **Mon, May 19**, you'll receive an email to review and accept each of your Hosted Meetings. Please do this by **Wed, May 21 at 6 pm CDT**. *It won't take more than 10 minutes* (if that!).
 - **As a Hosted Merchant, you must accept all (no more than 8) your Hosted Meetings by Wed, May 21 at 6 pm CDT (takes <10 minutes).**
 - Failure to do this by the deadline will mean you cannot participate in the Hosted Merchants Program and your SubSummit ticket will be canceled.

May 22

Accept Calendar Invites for Hosted Meetings, Tabletalks and Networking & Social Activities

1. **Accept Your Hosted Meetings Calendar Invites:** On **Thu, May 22**, you'll receive a calendar invite for each Hosted Meeting, including details of precisely who you'll meet from each Solution

Provider. YOU MUST ACCEPT all calendar invites **THE SAME DAY by 6 pm CDT**. This is a quick turnaround, *but it won't take more than 5 minutes*.

- a. We can't change **any** meeting times (fun fact: the Hosted Merchants Program is enabling 3,000+ meetings!) and we cannot reschedule meetings.
 - b. If a person you're scheduled to meet is no longer available, we'll let you know--people have emergencies, so this does happen once in a while!
 - c. If you're no longer planning on attending SubSummit, let us know at hosted@subsummit.com.
2. **Accept Your Tabletalks Calendar Invites:** On **Thu, May 22**, you'll receive separate calendar invites for your Tabletalks. Please accept each calendar invite **THE SAME DAY by 6 pm CDT**. The only change we can make to your Tabletalks assignments is to drop you from them. Tabletalks are super fun, informative, and they always get high marks by participants!
- o Important note: We won't know if you reject a calendar invite! So email us at hosted@subsummit.com if you really can't make it to a Tabletalk.
3. **Accept Your Networking & Social Activities Calendar Invites:** On **Thu, May 22**, you'll receive a calendar invite for each Activity you have been scheduled for. You must accept all calendar invites by **THE SAME DAY at 6 pm CDT**.
- o Important note: We won't know if you reject a calendar invite! If you really can't make the Activity you should cancel your attendance using the SubSummit platform (desktop or mobile app). This will help the Activity organizer plan for and manage their Activity.

May 28 – May 30

SubSummit Time! Join Your Meetings, Tabletalks and Networking & Social Activities!

1. **Join Your Hosted Meetings: As a Hosted Merchant**, you **must** join all your scheduled meetings (no more than 8). Here's what you need to know:
 - a. **Where are the meetings?** All meetings are held in a dedicated Hosted Merchants Program area and each meeting is assigned a table number.
 - b. **How do I know where to go?** Check the SubSummit mobile app or your calendar invites for the assigned table number for each meeting, and at the start of each scheduled meeting proceed directly to the assigned table.
 - c. **When should I arrive?** You should arrive at the Hosted Merchants Program area a few minutes before your first scheduled meeting. There is no check-in required. If you have any questions, there will be a Q&A desk.
 - d. **What happens if the person I'm meeting doesn't show up?** Give them 5 minutes and if they've still not joined, click the "Mark as No Show" button in the SubSummit mobile app.
 - e. **What else should I do?**
 - i. Do join each meeting on time and don't exceed the allotted 15 minutes for each scheduled meeting.
 - ii. Do check the table number for each scheduled meeting--each of your meetings will be at a different table. There is a 3-minute transition time between each meeting.
 - iii. Do download the SubSummit mobile app ahead of your meetings (if you haven't already). You can take notes and request follow-ups in the app.
2. **Join Your Tabletalks:**
 - a. **When are the Tabletalks:** 8:00 am - 8:45 am CDT on Thu, May 29 and 9:30 am - 10:15am am on Fri, May 30.

- b. **Where are the Tabletalks?** All meetings are held in Track Room 2 and each Tabletalk is assigned a table number (check your calendar invite or the mobile app for the table number). Breakfast will be available in the Tabletalks area.
 - c. **How do we start the discussion?** Each discussion has a randomly assigned “Starter” who should kick off by introducing themselves. Each intro should be no more than 60 seconds, and each participant should call on another to introduce themselves. The last participant to do an intro should read the first of the suggested questions below to start the conversation, then everyone should help move the conversation along.
2. **Attend your Scheduled Networking & Social Activities:**
 - You must attend all of your scheduled Activities. Since we’ve optimized scheduling for all Activities and attendees, failing to attend any of your scheduled Activities will mean other attendees have missed out.

Jun 2 onwards

Provide Feedback and Claim Reimbursement

You can do this on: Desktop SubSummit Mobile App

1. **Help us to help you!** On **Mon, Jun 2**, you will receive an email to provide feedback on your meetings, Tabletalks and Networking and Social Activities (if applicable) and the event to help us improve SubSummit--please share your thoughts!
 - a. Once you provide feedback, you can download a summary of your meetings, including your notes and contact details of who you met.
2. **Show me the money!** From **Thu, Jun 12 - Fri, Jul 18**, submit your expenses via the SubSummit platform to claim up to \$750 of travel and hotel reimbursement. We provide reimbursements on a rolling basis.
 - a. You must have provided feedback to claim your reimbursement.

SOME FINE PRINT: Our participant list is confidential, and shouldn't be (1) shared with anyone else, (2) downloaded or (3) used other than as described by us. Based on information you receive as part of the Hosted Merchants Program, you can't solicit participants (including individuals you're scheduled to meet prior to your meetings) outside of the event other than as we permit. If you breach this provision, you may be eliminated from further participation and barred from future programs. Do not assume that requests (or opt-ins) to meet with you as part of the Hosted Merchants Program indicate any interest in meeting with you outside of the Hosted Merchants Program.

Organization Admins: Pro Tips

If you're an Org Admin, here's some more helpful info:

- Completing Org Admin tasks:** To help complete Hosted Merchants Program action items for Hosted Merchants from your organization, you'll need to use your desktop (the mobile app does not support Org Admin activities). If you're a Hosted Merchant just completing action items for yourself, you can use the mobile app.

Stage	From	To	Org Admin can
1. Complete Your Profile	Mon, Apr 21	Wed, Apr 30	Complete tasks
Select your Tabletalks		Tue, May 6	Not applicable <i>(Org Admins cannot complete Tabletalks tasks)</i>
2. Opt In to Hosted Meeting Requests and Request Meetings	Wed, May 7	Tue, May 13	Complete tasks
Accept Tabletalks		Mon, Jun 10	Not applicable <i>(Org Admins cannot complete Tabletalks tasks)</i>
3. Accept Your Hosted Meetings	Mon, May 19	Wed, May 21	View only
4. Accept Calendar Invites for Hosted Meetings & Tabletalks	Thu, May 22	Thu, May 22	Not applicable
5. Attend SubSummit and Join Your Hosted Meetings & Tabletalks	Wed, May 28	Fri, May 30	View only
6. Provide Feedback and Claim Reimbursement	Mon, Jun 2	Fri, Jul 18	View only

- 'Manage Participants & Roles' screen:** From this screen you can:
 - Select who you want to manage:** Go to 'Manage Participants & Roles' and select the Hosted Merchants from your organization that you want to 'Manage As Org Admin'. Voilà—you can help complete action items for them.
 - Add or Assign Org Admins:** Need some Org Admin backup? Click 'Add New Org Admin' to add unregistered individuals as Org Admins, or click 'Assign' to assign registered attendees as Org Admins.
- Opt In to Hosted Meeting Requests and Request Meetings stage:**
 - 'Manage Organization's Participants' Requests & Opt-ins' screen:** If you want to help opt in to Hosted Meeting requests or request meetings for some or all of the Hosted Merchants you're managing, check the boxes next to their names.
 - Collaboration & Efficiency tools:** Just like regular program participants, Org Admins can use the full range of collaboration and time-saving features:
 - Bookmarks:** If you're not sure you want to request to meet someone (for the Hosted Merchants you're requesting meetings for, or yourself if you're a Hosted Merchant), simply Bookmark them and decide later (they'll be under 'Bookmarks').

- **Saved Lists:** Click 'Save List' to name and save a specific search/filter result so you can come back to it later (it'll be under 'My Lists').
- **Meeting Requests Progress:** Click the tooltip at the top of the screen to track the progress of Hosted Merchants you're helping manage against their recommended minimum number of opt-ins to Hosted Meeting requests and their own meeting requests.
- **Accept Meetings onwards:** From the Accept Your Meetings stage onwards, you may view the ongoing progress and status of the Hosted Merchants you want to manage, including:
 - View if they have accepted their meetings
 - View their scheduled meetings
 - View if they have provided feedback

SUBSUMMIT

Sheraton | Dallas | May 28-30