SUB SUMMIT

HOSTED MERCHANTS PROGRAM GUIDELINES
SPONSOR ORGANIZATION
ADMINS & MEETINGS REPS
8-minute read

SUB SUMMIT

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 your organization will be part of it!

Our Hosted Merchants Program provides complimentary SubSummit tickets and travel and hotel reimbursements to qualified Merchants who buy or influence the purchase of technology or other solutions. In return, these Merchants have each agreed to join up to eight 15-minute Hosted Meetings with our sponsors. Your organization has purchased meetings in the Hosted Merchants Program!

If you're an **Organization Admin****, you can complete Hosted Merchants Program tasks for your organization.**

If you're a **Meetings Rep****, your Hosted Merchants Program tasks start on Thu, May 22 with accepting calendar invites.** You can read the full guidelines, or click here to jump to the details of the stages that apply to you.

Here's what Org Admins and Meetings Reps need to do, and when. 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 Organization Profile	30-45 mins	Mon, Apr 21	9:00 am CDT	Wed, Apr 30	6:00 pm CDT
2. Request Hosted Meetings	60-90 mins	Thu, May 1	9:00 am CDT	Tue, May 6	6:00 pm CDT
Hosted Merchants opt in to your requests and select who they want to meet	–	–	–	–	–
3. Opt In to Requests from Buyers (say YES!) Meeting Rep Availability Deadline	<30 mins	Wed, May 14	9:00 am CDT	Fri, May 16	6:00 pm CDT
4. Assign Meetings Reps to Hosted Meetings	<15 mins	Mon, May 19	9:00 am CDT	Wed, May 21	6:00 pm CDT
5. Meetings Reps Accept Calendar Invites	<5 mins	Thu, May 22	9:00 am CDT	Thu, May 22	6:00 pm CDT
6. SubSummit! Meetings Reps Attend Hosted Meetings	--	Wed, May 28	–	Thu, May 29	–
Provide Feedback	–	Wed, Jun 2	9:00 am CDT	Wed, Jun 11	6:00 pm CDT

TIMING OF HOSTED MEETINGS

All the action takes place on Wednesday, May 28 and Thursday, May 29 and your organization will be in the room where it happens! You'll assign meetings to individual Meetings Reps from your company beforehand. *For now, please ensure your Meetings Reps will be available during all time slots.*

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
Register Your Team and Book Your Travel & Hotel

1. **Make sure you have enough registered attendees to join your Hosted Meetings (your Meetings Reps).**

- There is no limit to how many Meetings Reps your organization can have. To calculate the **minimum number** of Meetings Reps you'll need, divide the number of meetings you purchased by 19 and round up to the nearest whole number.
  - *For example, if you purchased 30 meetings, 30 / 19 = 1.58, rounded up to 2 Meetings Reps required.*

2. **If you haven't already, get your organization's travel and hotel booked ASAP!** Prices will go up and our room block will sell out, so book now to lock in the best rates.

- **Flights:** We recommend arriving on **Tue, May 27** and leaving on the afternoon of **Fri, May 30.**
- **Hotel:** We've secured preferential rates at Sheraton Dallas Hotel. Please click here to purchase your room in our block.

Apr 21 – Apr 30
Complete Your Organization's Profile (takes 30-45 minutes)

You can do this on: Desktop ✅

1. **Start Your Organization Profile on Mon, Apr 21, and complete it by Wed, Apr 30 at 6 pm CDT.**

- **Your Organization Profile will help Hosted Merchants decide if they're interested in meeting with you.**
- **Tell us how many Meeting Reps you'll have available to meet with Buyers during each time slot.**
  - The more meeting representatives you make available concurrently, the more likely we will be to schedule all of the meetings you have purchased.
  - You can change this at any time until **Wed, May 21 at 6 pm CDT.**
- **Consider making an Announcement:** Tell Hosted Merchants about your newly announced products, partnerships, funding, acquisitions, research and anything else!

2. **You can also:**

- Assign individuals from your organization as Meetings Reps (if you haven't already), until Wed, May 21 at 6 pm CDT.

May 1- May 6
Request Hosted Meetings with Merchants (takes 60-90 minutes)

You can do this on: Desktop ✅ SubSummit Mobile App ✅

1. **It's time to request Hosted Meetings for your organization (there are 400+ qualified Merchants to choose from!).**

- Start requesting Hosted Meetings on **Thu, May 1** and complete by **Tue, May 6 at 6 pm CDT.**
- **You should select ALL Merchants you would like to meet. At a minimum, we recommend you request Hosted Meetings equal to 4x the number of Hosted Meetings your organization has purchased.**

- You can request to meet >1 individual from an organization, but you won't have >1 Hosted Meeting scheduled with the same organization.
- You should consult others in your company, such as your sales teams, when requesting your meetings.
  - Just click 'Very Interested' or 'Interested' to request a meeting. Meeting requests are saved automatically as you go.
    - 'Very Interested' meeting requests get scheduled first, before 'Interested' ones.
    - You can provide a reason why your organization wants to meet a Merchant – they'll be able to see this when they're opting in to Hosted Meeting requests.
  - You can view summary information about each Merchant, as well as a detailed Profile (click ⬈).
  - Use *Filters* and *Predefined Lists* to zero in on the most interesting **Merchants** for your company.
  - Don't wait til the last minute to request meetings! With tools like *Bookmarks* and *Saved Lists*, you can start requesting meetings and come back, if needed, to finish them.

May 14 - May 16
Opt In to Requests from Merchants *(takes up to 30 minutes)*

You can do this on: Desktop ✅   SubSummit Mobile App ✅

1. **Opt In to Meeting Requests From Merchants You Didn't Previously Select:**

   - Opt in to Meeting Requests on **Wed, May 14** and complete by **Fri, May 16 at 6 pm CDT**.
   - We facilitate meetings based *only* on the requests your organization opts in to (and your organization's own requests if there is a mutual match), so you should opt in to *every request from a Merchant your organization would meet with.*
   - Some of these requests may be from newly added individuals that joined the Hosted Merchants Program after you completed your initial meeting requests.
   - **The more requests you opt in to, the more likely we will be to schedule all of the meetings you've purchased.**
     - **Not all of your meeting requests will convert into scheduled meetings, so we recommend you opt in to requests you received from Merchants you would want to meet onsite at SubSummit**
   - You won't have >1 Hosted Meeting scheduled with the same organization.

May 19 - May 21
Assign Meetings Reps to Hosted Meetings *(takes less than 15 minutes)*

You can do this on: Desktop ✅   SubSummit Mobile App ✅

1. **Assign Meetings Reps to your Hosted Meetings starting on Mon, May 19 but no later than Wed, May 21 at 6 pm CDT.**

   - A Meetings Rep must be assigned to each Hosted Meeting, otherwise it won't get scheduled.
   - If you haven't assigned Meetings Reps yet, you can do this until **Wed, May 21 at 6 pm CDT.** As soon as you've assigned a Meetings Rep, you can assign meetings to them.
   - You should assign the most appropriate Meetings Rep for each Merchant, based on the characteristics of the Merchant, their (or your) reason for meeting, which products, solutions or services they're interested in, Meetings Rep availability and other factors.
   - As a reminder, you will **not receive refunds** for Hosted Meetings you don't assign Meetings Reps to, since those meetings could have been scheduled.

Jun 14
Meetings Reps Accept Calendar Invites *(takes them less than 5 minutes)*

1. **Accept Meetings Calendar Invites:** On **Thu, May 22,** Meetings Reps will receive a calendar invite for each scheduled Hosted Meeting they have. THEY 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. **Important note: If your Meetings Rep cannot attend the meeting, they must email us at hosted@subsummit.com to let us know. Neither we nor the Merchant will be notified if your Meetings Rep declines a calendar invite!**
    b. We can't change *any* meeting times (fun fact: the Hosted Merchants Program is enabling 3,000+ meetings!).
    c. If a Merchant who one of your Meetings Reps is scheduled to meet is no longer available, we'll let your Meetings Rep know and you'll be refunded for the meeting after the show. People have emergencies, so this does happen once in a while!
    d. We will communicate with Meetings Reps directly on accepting their Hosted Meetings.

May 28 – May 29
SubSummit Time! Meetings Reps Attend Hosted Meetings!

1. **Meetings Reps Join Your Organization's Hosted Meetings.**

    Your Meetings Reps **must** join all your scheduled Hosted Meetings. Here's what you and they 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 Meetings Reps know where to go?** They should check the SubSummit mobile app or their 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 Meetings Reps arrive?** They should arrive at the Hosted Merchants Program area a few minutes before their first scheduled meeting. There is no check-in required. If they have any questions, there will be a Q&A desk.
    d. **What happens if the person they're meeting doesn't show up? Meetings Reps should** 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 other Do's and Don'ts are there for Meetings Reps?**
        i. **Meetings Reps should:**
            1. Join each meeting on time and don't exceed the allotted 15 minutes for each scheduled meeting.
            2. Check the table number for each scheduled meeting--each meeting will be at a different table. There is a 3-minute transition time between each meeting.
            3. Download the SubSummit mobile app ahead of meetings. Meetings Reps can take notes and request follow-ups in the app.
        ii. **Meetings Reps should not:**
            1. Contact any individual Hosted Merchants prior to Hosted Merchants Program meetings in relation to Hosted Merchants Program meetings, or use the confidential information we have provided at any stage of the program to reach out to participating individuals using non-program channels.
            2. Approach anyone in the Hosted Merchants Program area with whom they do not have a Hosted Merchants Program program meeting.

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3. Enter the Hosted Merchants Program area at any time they do not have a Hosted Merchants Program program meeting.
4. Assume the Hosted Merchants they are meeting have prepared for the meeting. These individuals may have agreed to meet based solely on categories or search filters rather than any specific understanding of your organization or solutions. Meetings Reps must assume the Hosted Merchants have no knowledge of your organization or your products, and should be prepared to give a complete sales pitch during their 15-minute meeting as well as leave time for any Q&A.
5. Bring any materials that cannot fit on the table (e.g., free standing structures and pop-up signage is not allowed) or leave any materials at the table after the meeting concludes.

Jun 1 - Jun 11
Provide Feedback

1. **Help us to help you!** On **Mon, Jun 2** each Meetings Rep will receive an email to provide feedback on their Hosted Meetings, the meetings program and the event to help us improve SubSummit--please share your thoughts by **Wed, Jun 11**.
   a. Once Meetings Reps provide feedback, they can download a summary of their meetings, including their notes and contact details of who they met.

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.

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Sheraton | Dallas | May 28-30

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