



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:

- **To meet with up to 8 participating sponsors who have products, solutions and services that can help your business achieve its goals.** Each Hosted Meeting is 15 minutes and double opt-in (you both swiped right).
- **A free SubSummit ticket worth \$2,495,** 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.subsummit24@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 | Wed, May 8 | 9:00 am CDT | Tue, May 21 | 6:00 pm CDT |
| 2. Select Your Tabletalks | 5 mins | | | Wed, May 29 | 6:00 pm CDT |
| 3. Select Your Networking & Social Activities | 5 mins | | | Wed, Jun 5 | 6:00 pm CDT |
| 4. Opt In to Hosted Meeting Requests and Request Meetings | 30-90 mins | Wed, May 30 | 9:00 am CDT | Wed, Jun 5 | 6:00 pm CDT |
| 5. Accept Tabletalks | 5 mins | | | Mon, Jun 10 | 6:00 pm CDT |
| 6. Accept Your Hosted Meetings | <5 mins | Tue, Jun 11 | 9:00 am CDT | Thu, Jun 13 | 6:00 pm CDT |
| 7. Accept Calendar Invites for Hosted Meetings, Tabletalks and Networking & Social Activities | <10 mins | Fri, Jun 14 | 9:00 am CDT | Fri, Jun 14 | 6:00 pm CDT |
| 8. Attend SubSummit and Join Your Hosted Meetings, Tabletalks and Networking & Social Activities | -- | Mon, Jun 17 | – | Tue, Jun 18 | – |
| 9. Provide Feedback and Claim Reimbursement | <15 mins | Thu, Jun 20 | 9:00 am CDT | Fri, Aug 16 | 6:00 pm CDT |

TIMING OF HOSTED MEETINGS

All the action takes place on Monday, June 17 and Tuesday, June 18 and you'll be in the room where it happens! As a **Hosted Merchant**, you must be available for a minimum of 12 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 | Monday, June 17 | Tuesday, June 18 |
|-------------|-----------|------|-----------------|------------------|
| 10:15 AM | 10:30 AM | 0:15 | - | Meeting Slot #7 |
| 10:30 AM | 10:31 AM | 0:01 | - | Transition time |
| 10:31 AM | 10:46 AM | 0:15 | - | Meeting Slot #8 |
| 10:46 AM | 10:47 AM | 0:01 | - | Transition time |
| 10:47 AM | 11:02 AM | 0:15 | - | Meeting Slot #9 |
| 11:02 AM | 11:03 AM | 0:01 | - | Transition time |
| 11:03 AM | 11:18 AM | 0:15 | - | Meeting Slot #10 |
| 11:18 AM | 11:19 AM | 0:01 | - | Transition time |
| 11:19 AM | 11:34 AM | 0:15 | - | Meeting Slot #11 |
| | | | | |
| 12:30 PM | 12:45 PM | 0:15 | Meeting Slot #1 | - |
| 12:45 PM | 12:46 PM | 0:01 | Transition time | - |
| 12:46 PM | 1:01 PM | 0:15 | Meeting Slot #2 | - |
| 1:01 PM | 1:02 PM | 0:01 | Transition time | - |
| 1:02 PM | 1:17 PM | 0:15 | Meeting Slot #3 | - |
| 1:17 PM | 1:18 PM | 0:01 | Transition time | - |
| 1:18 PM | 1:33 PM | 0:15 | Meeting Slot #4 | - |
| 1:33 PM | 1:34 PM | 0:01 | Transition time | - |
| 1:34 PM | 1:49 PM | 0:15 | Meeting Slot #5 | - |
| 1:49 PM | 1:50 PM | 0:01 | Transition time | - |
| 1:50 PM | 2:05 PM | 0:15 | Meeting Slot #6 | - |
| | | | | |
| 2:00 PM | 2:15 PM | 0:15 | - | Meeting Slot #12 |
| 2:15 PM | 2:16 PM | 0:01 | - | Transition time |
| 2:16 PM | 2:31 PM | 0:15 | - | Meeting Slot #12 |
| 2:31 PM | 2:32 PM | 0:01 | - | Transition time |
| 2:32 PM | 2:47 PM | 0:15 | - | Meeting Slot #14 |
| 2:47 PM | 2:48 PM | 0:01 | - | Transition time |
| 2:48 PM | 3:03 PM | 0:15 | - | Meeting Slot #15 |
| 3:03 PM | 3:04 PM | 0:01 | - | Transition time |
| 3:04 PM | 3:19 PM | 0:15 | - | Meeting Slot #16 |

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 **Sun, Jun 16** and leaving on **Wed, Jun 19**.
 - **Hotel:** We've secured preferential rates at Sheraton Dallas Hotel. Please click [here](#) to purchase your room in our block.

May 8 – May 21

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 Wed, May 8, and complete it by Tue, May 21 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 a minimum of 12 time slots, however we'll schedule you for only up to 8 Hosted Meetings.
 - **Share the love!** Click **Post on Social** to tell your Twitter 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 **Tue, May 21 at 6 pm CDT**. Make sure any of your colleagues who want to get a free Hosted Merchant ticket for SubSummit register before the deadline.

Start Your Tabletalks Selections on Wed, May 8, and complete them by Wed, May 29 at 6 pm CDT.

- Tabletalks are 45-minute peer group roundtable discussions with 5-8 merchant peers on key industry topics. They're held from 8:00 am - 8:45 am CDT on Tue, Jun 18.
 - 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.
1. **New for 2024 – SubSummit's Networking & Social Activities Program!**

There's no shortage of new innovations from SubSummit, and 2024 is no different. We've launched an industry-pioneering new Networking & Social Activities Program to enable you and all other SubSummit attendees to easily view, select and be scheduled for Activities taking place while you're in Dallas for SubSummit. There's never been anything like this, and it's the best way for you to plan for every Activity not on the SubSummit agenda, all delivered seamlessly using the same platform as our other programs, Hosted Merchants Program and Tabletalks.

Networking & Social Activities: Starting **Wed, May 8** you must select all Networking & Social Activities you want to attend, and complete your selections by **Wed, Jun 5**.

- 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 **Fri, Jun 14**.

May 30 – Jun 5

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 **Thu, May 30** and complete by **Wed, Jun 5 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.

Accept Your Tabletalks Assignments: You'll get your Tabletalks assignments on **Thu, May 30** and you must accept them by **Mon, Jun 10 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!

Jun 11 – Jun 13

Accept Your Hosted Meetings (takes less than 10 minutes)

You can do this on: Desktop SubSummit Mobile App

1. On **Tue, Jun 11**, you'll receive an email to review and accept each of your Hosted Meetings. Please do this by **Thu, Jun 13 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 Thu, Jun 13 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.

Jun 14

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

1. **Accept Your Hosted Meetings Calendar Invites:** On **Fri, Jun 14**, 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 2,500+ 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.

Accept Your Tabletalks Calendar Invites: On **Fri, Jun 14**, 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.

Accept Your Networking & Social Activities Calendar Invites: On **Fri, Jun 14**, 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.

Jun 17 – Jun 18

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 1-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.

Join Your Tabletalks:

- a. **When are the Tabletalks:** 8:00 am - 8:45 am CDT on Tue, Jun 18.
- b. **Where are the Tabletalks?** All meetings are held in a dedicated Tabletalks area 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.

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 20 onwards

Provide Feedback and Claim Reimbursement

You can do this on: Desktop SubSummit Mobile App

1. **Help us to help you!** On **Thu, Jun 20**, you will receive an email to provide feedback on your meetings, the meetings program, Tabletalks (if you participated) 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 **Mon, Jul 8 - Fri, Aug 16**, 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 | Wed, May 8 | Tue, May 21 | Complete tasks |
| Select your Tabletalks | | Wed, May 29 | Not applicable (Org Admins cannot complete Tabletalks tasks) |
| 2. Opt In to Hosted Meeting Requests and Request Meetings | Wed, May 30 | Wed, Jun 5 | Complete tasks |
| Accept Tabletalks | | Mon, Jun 10 | Not applicable (Org Admins cannot complete Tabletalks tasks) |
| 3. Accept Your Hosted Meetings | Tue, Jun 11 | Thu, Jun 13 | View only |
| 4. Accept Calendar Invites for Hosted Meetings & Tabletalks | Fri, Jun 14 | Fri, Jun 14 | Not applicable |
| 5. Attend SubSummit and Join Your Hosted Meetings & Tabletalks | Mon, Jun 17 | Tue, Jun 18 | View only |
| 6. Provide Feedback and Claim Reimbursement | Thu, Jun 20 | Fri, Aug 16 | 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 Hotel | Dallas | June 17-19