



Ideal-ist Brokerage Event Guide

Informal internal support document

Restricted



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1 Guidelines for main organisers setting up an event

For many years, Ideal-ist projects have been using the services of the European company [b2match](#) for hosting brokerage events both online and offline. Their product for handling events is quite advanced and comes with a mobile app for participants which is very useful.

Individual pricing depending on your requirements is available and if the organisation holding the event licence is an Enterprise Europe Network partner, there is a significant discount.

Step 1: What do you need?

Before contacting b2match, you need to know a few parameters for the event, as these will determine the price of the b2match license:

- Which Ideal-ist beneficiary is paying the invoice?
- Expected no. of participants? Will we perhaps need to update to a bigger license later on?
- Is the event physical, online or hybrid?
- Is long-term online matchmaking after the actual event date required?
- Is the platform just for participant registration and matchmaking or will an event live-streaming be embedded in the b2match platform from an external source?

Step 2: Order at b2match

The customer support team at b2match have different people for different regular customers. If you don't know who to contact, just contact their hotline: [Contact us](#)

Things that they need to know to set up the platform:

- The data from step 1
- Stress that you are asking for an EEN package deal
- Remind them that it might be one partner from Ideal-ist being admin of the platform and a different organisation paying the invoice
- Remind them that Ideal-ist has had many previous events with them and that they can probably clone an old one (check for events that Edina Nemeth or Alrun Hauke owned) to speed up the process
- Will this event be co-organised with EEN?

Step 3: Set up the platform

You will be invited as organiser once your contact at b2match has set up the event platform for you. Then you need to:

1. Decide whether people's profiles will be visible immediately or if you want co-organisers to verify them before they become publicly visible (the latter is recommended only for small events)



2. Add custom questions for participants such as the call topics they are interested in or whether they would like to receive support from their NCP / EEN representative. The platform allows to set both public and hidden questions, mandatory questions and even search filters for answers
3. Set the opening date for registration
4. Set the start date for when people can book meetings with each other
5. For physical events: Add the agenda and timing / number of matchmaking sessions and the location and number of tables.
6. Add text and graphics for the event website (here you can definitely copy and paste from previous events of a similar nature)

Step 4: Get the word out

When the platform is ready, move it from demo to live version and make sure all items on the event website are published. Now you can start advertising the event through...

- If attached to another event: The website and communication channels of that event
- The digital NCPs mailing list (so all NCPs can advertise on their national communication channels)
- The EEN digital sector group
- The Ideal-ist website
- The Horizon Europe NCP Portal
- Related NCP network projects
- The digital partnerships whose members and followers might be interested in the event
 - At the same time you can ask the partnerships if they would like to officially support the event, i.e. have their logo displayed on the event website along with a bit of explanation, see e.g. [here](#).
- Ideal-ist social media channels (plan a few reminders)
- Other social media channels – try to find posts by DG CONNECT, HaDEA, partnerships etc. where you could place a comment to advertise the event.

Step 5: Add supporting organisers to help you

The b2match system allows you to add a long list of supporting organisers to help you manage participants. For the purpose of Ideal-ist events, these supporting organisers should be NCPs and EEN partners (if the event is being co-organised with the EEN). Here is what you need to do:

- Invite the co-organisers via the b2match admin platform. For this you will need to enter their e-mail addresses. You can ask an EEN member to spread the word about the event in the sector group and EEN partners interested in supporting the event personally should get in touch with you. Invitations should be sent to individual persons rather than functional mailboxes of organisations.
- Set the rights of co-organisers. You can make it easier for everyone if they can only manage the participants from the country or participant group they are responsible for. You can also set them as supporting offices for participants from their country (this will be displayed in participants' profiles when they log in, so they will know who to contact).



Step 6: Import participants from previous events and invite them

If you have admin access to previous Ideal-ist events, you may consider accessing that previous event and making an export list of participants. You can then import them to the new event. They will automatically be invited to participate and in the import tool you can track their reaction

Step 7: During the event

There are multiple things you as the main organiser should take care of during the event together with your co-organisers. These include

- Checking the completeness of participant profiles and where necessary remind them to complete it (it may help to enable e-mail notifications for yourself and supporting organisers for newly registered participants)
- Checking the completeness of organisation profiles and where necessary contact the owner of the organisation page to ask them to complete it
- Send reminders to participants to accept or decline their meetings (if you have disabled the automatic e-mails for this)
- Checking participant profiles for those who requested NCP support and follow up with them
- Send information about Ideal-ist services to those who request it
- Send information about EEN services to those who request it
- Offer project idea checks to participants
- Check the list of cooperation offers on the marketplace for quality and encourage participants to add more

Note: Important communications should be sent by the main organiser.



2 Guidelines for supporting organisers

Quality checking

Main and supporting organisers should do quality checks on profiles and platform content regularly.

Participant Profile Check

1. Go to the participant list and click on a participant you wish to check. You can get a quick view of the main information in the participant's profile, if you click on the line for the participant.

In this quick view, you can also add notes, to log your interactions with the participants, and the recommendations you have made for them.

Check information provided on each profile tab:

- a. **Profile – General information** (e.g. organisation name, website, description) can be edited on the top part of this page. You may also find out if the person is interested in receiving more information about Ideal-ist and NCP services.

Participants should provide a **meaningful description of their organisation** for the event.

- b. **Profile – Marketplace items** (e.g. project cooperation, expertise, product, etc.) can be added and/or edited here. The most important cooperation offers with respect to Horizon Europe are:

- i. **Project cooperation:** Does the participant have a Horizon Europe project idea, for which they are seeking partners? Please make sure the participant specifies the work programme topic (and part of the topic targeted, if relevant), as well as the type of project. Please make sure the idea is in line with the work programme expectations. Please make sure there is sufficient level of detail on the types of partners they are looking for. If you are in doubt, feel free to ask NCP colleagues.
- ii. **Expertise:** Does the participant want to offer expertise for specific Horizon Europe topics? Please make sure the participant sufficiently describes their expertise and past experience in the area. If possible, the participant should specify Horizon Europe topics where this expertise is relevant.

- c. **Attendance:** Please make sure at least one time slot is selected! If the participant doesn't indicate any **availability**, he/she cannot book meetings.

- d. **Meetings:** This page lists the meetings requested by participants, as well as the meetings requested from participants by others.

If your participant has no meetings, you can remind the participant that he/she can request meetings.

- e. **Settings:** Here you can see if an organisation selected a support office (this is typically relevant for EEN, as they work regionally, whereas NCPs – having responsibilities nationally - are assigned all participants from their country by default).

- f. **Activities:** This page is for information. You can follow the important steps the participant has taken within the system, such as registration and meeting booking.



2. You can help participants edit further information, if you login as the user.
 - a. **Login as User** If you are helping the user navigate and change information, you can click on the “Login as User” button, to see what the user sees.
 - b. **Edit my profile:** when logged in as a user, basic profile information can be edited, such as the name, job position, telephone number, profile picture, organization (name, description, logo), country, address, areas of activity.

Encourage participants to add their **profile picture** to ease recognition, as well as a **mobile number** for easy contact at the event.

Areas of activity: Participants should indicate Horizon Europe topics of interest to them.
 - c. **Cancelling participation:** if a user wants to cancel participation, you can use the “Login as User” button, go to the “Attendance” page, and click on “CANCEL PARTICIPATION” (in red).

(Please note: participants are reminded via central emails of the need to cancel, if they are not able to participate).

Important: For all cooperation offers, participants should use **descriptive texts** with important **key words**, in order to ensure their profiles end up in **search results**.

3. Feedback to participants (see Annex 1.1 for an e-mail template)

Organisation Profile Check

ORGANISATION PROFILES		
✓	Organisation description	Brief summary of company activities, e.g.: <ul style="list-style-type: none"> - In general - Framework programme experience
✓	Participant	<i>Highly recommended:</i> picture, for better chances of recognition at meetings
✓	Participant	Mobile phone number is requested so we can reach participant during the event for changes, cancellations
✓	Areas of activity	Should select at least one Horizon ICT area

1. Organisation profile **is complete** → **nothing more to do here**
2. Organisation profile is **NOT** complete
 - a. Prepare e-mail to participant (see e-mail template in Annex 1.2)
 - b. **Notes:** Leave comment with date, name and short description to ensure all are aware of current status of profile and follow up measures completed so far (e.g. 15.07 – Jane Doe asked participant for photo, better org description)
3. If you think a profile needs to be deleted, please contact the event leaders.



Market Place Entry Check

1. Cooperation profile is **NOT** complete or – in case of projects – not in line with the ICT work programme
 - a. Prepare e-mail to participant (including feedback from quality team, if feedback was requested) (see e-mail template in Annex 1.3 for project ideas and Annex 1.4 for expertise)
 - b. **Notes:** Leave comment with date, name and short description to ensure all are aware of current status of profile and follow up measures completed so far (e.g. 15.07 – Jane Doe asked participant to align project idea to ICT WP)
2. If you think a profile needs to be deleted, please contact the event leaders.

COOPERATION OFFER ON MARKETPLACE		
Expertise		
✓	Topic	- Which Horizon 2020 ICT areas is it addressing (if relevant)? The relevant tag can be selected, plus a specific a call topic identifier can be included in the description
✓	Description	- Is description relevant to the selected ICT areas? - Is there sufficient detail provided for matchmaking, e.g. <ul style="list-style-type: none"> - brief description - potential application area - work programme topic(s) (if relevant) - innovative aspects - target partner sought

PROJECT COOPERATION		
✓	Work Programme Topic	- Which Horizon ICT (or other) topic is it addressing?
✓	Type of Project	- Research & Innovation Action (RIA), Innovation Action (IA), PCP, CSA, etc.
✓	Project objectives	- Clear statement of objective - Target technical outcome(s) - Target socio-economic impact(s)
✓	Wanted	- Competences & skills wanted (e.g. technical, design, coordination, writing etc.) - Type of partner sought (e.g. industry, SME, RTD centre, university, user-groups, etc.) - Work to be performed (e.g: prototyping, programming, system integration, dissemination, engineering, etc.)
✓	Participant's skills	- Description of participant's skills, competences and expertise relevant to the project idea

OTHER (NON-HORIZON 2020 ICT) RELATED COOPERATION OFFERS (e.g. product, investment)		
✓		EEN uses own quality criteria



Annex 1: E-mail templates

1.1 E-mail template for feedback on participant profile

Subject: Your organisation profile for the <event name>

Commented [HA1]: Fill in the event name

Dear <ParticipantName>

Commented [A2]: Fill in the participant's name

Thank you for your interest and registration for the <event>. I am contacting you as your National Contact Point for digital technologies in Horizon Europe.

Commented [HA3]: Fill in the event name

I would like to recommend that you extend your participant profile in order to maximize your chance of being booked for well-targeted meetings.

The more concrete your profile is (e.g. your experience in Horizon Europe) the better visibility and the more interest it gets.

YOUR PROFILE

We highly recommend that you add further details to your **participant profile**, e.g:

- Briefly describe yourself in the pitch and biography fields
- Describe your research & innovation experience, especially within the EU Framework Programme(s).
- Indicate your availability for matchmaking in the "My availability" tab in your dashboard.
- Select specific call topics that you are interested in for better, more focused meetings.
- We also recommend including a profile picture as experience shows that this significantly increases your chance of being booked for meetings.

Commented [A4]: If profile description is insufficient – only list missing items

Commented [A5]: Only if picture is missing

PUBLISH A HIGH-QUALITY CO-OPERATION PROFILE

In addition, we highly recommend that you publish your **cooperation interests in the marketplace**. Cooperation offers give you the opportunity to spotlight, publish and promote your collaboration interests: Horizon Europe project ideas, expertise offers, requests, products and investment offers. You can submit several cooperation offers. All participants of the event will be able to see your organisation details and your published cooperation offers.

A statistical analysis of many matchmaking events showed that high quality profiles are visited about 50 to 150 times before the event and will still be viewed after the event. **Your profiles are the best impression other organisations receive from you.**

Commented [A6]: Recommend that participants publish cooperation profiles for better targeted meetings (HE project ideas, HE expertise offers, innovation offers / requests

Don't hesitate to contact us if you have further questions.

Best regards,

<YourName>

Commented [A7]: Fill in your name



1.2 E-mail template for feedback on organisation profile

Subject: Your organisation profile for the <event name>

Commented [HA8]: Fill in the event name

Dear <ParticipantName>

Commented [A9]: Fill in the participant's name

Thank you for your interest and registration for the <event>. I am contacting you as your National Contact Point for digital technologies in Horizon Europe.

Commented [HA10]: Fill in the event name

I would like to recommend that you extend your organisation's profile in order to maximize your chance of being booked for well-targeted meetings.

The more concrete your profile is (e.g. your experience in Horizon Europe) the better visibility and the more interest it gets.

YOUR ORGANISATION'S PROFILE

We highly recommend that you add further details to your **organisation description**, e.g:

- Briefly describe your key activities and services.
- Describe research & innovation experience, especially within the EU Framework Programme(s).
- Select at least one ICT area, for better, more focused meetings.
- We also recommend including a company logo as experience shows that this significantly increases your chance of being booked for meetings.

Commented [A11]: If organisation description is insufficient – only list missing items

Commented [A12]: Only if picture is missing

Don't hesitate to contact us if you have further questions.

Best regards,

<YourName>

Commented [A13]: Fill in your name

1.3 E-mail template for feedback on Project Idea

Subject: Your Horizon Europe Project Idea

Dear <ParticipantName>

Commented [A14]: Fill in the participant's name

Thank you for your interest and registration for the <event>. I am contacting you as your National Contact Point for digital technologies in Horizon Europe.

Commented [HA15]: Fill in the event name

You requested a project idea check from Ideal-ist. We provide a template on our website that we would like to ask you to fill in. You can find this here:

<https://www.ideal-ist.eu/project-idea-check>

Please download the template, fill in as much information as possible and then send the template to the digital technologies NCP in your country.



If you do not know who that is, you can find their contact details on the Ideal-ist website:
<https://www.ideal-ist.eu/representatives>

Your NCP will be in touch with you to give you feedback on your project idea. Don't hesitate to contact me if you have further questions.

Best regards,
<YourName>

Commented [A16]: Fill in your name

1.4 E-mail template for feedback on expertise offer

Subject: Your Horizon Europe expertise offer

Dear <ParticipantName>

Commented [A17]: Fill in the participant's name

Thank you for your interest and registration for the <event>. I am contacting you as your National Contact Point for digital technologies in Horizon Europe.

Commented [HA18]: Fill in the event name

You submitted an **expertise offer**. To make your participation as successful as possible **please include information on:**

DESCRIPTION OF EXPERTISE OFFERED:

- Expertise, staff, equipment and commitment offered
- Topic (if relevant, please specify the topic(s)/subtopic(s) as defined in the [ICT \(or related\) work programme](#))

PREVIOUS EXPERIENCE IN EUROPEAN PROJECTS:

- Please describe your experience in projects you have coordinated or participated in – please list those most relevant to the topic you selected.

ADDITIONAL RECOMMENDATIONS:

- Please ...

Commented [A19]: Please insert here whatever you feel necessary

We encourage you to submit several cooperation offers in the marketplace: including project cooperations, expertise offers etc.

Please inform me after finishing your updates so that I can review your profile.

Don't hesitate to contact me if you have further questions.

Best regards,
<YourName>

Commented [A20]: Fill in your name