TOTAL TECH SUMMIT

CEPro | Commercial Integrator | Security Sales & Integration

NOVEMBER 1-3, 2017
ORLANDO, FL

SPONSOR SUCCESS PLAYBOOK

Your step-by-step guide to powerful results

PART OF THE QCX PROGRAM

QCX QUANTUM CUSTOMER EXPERIENCE

1. SET YOUR GOALS

The first step towards a successful experience at the Summit is to define your goals and objectives for participating.
Determine to what extent is your opportunity...

- establishing new business relationships with companies you've had little contact with to date?
- defending and expanding business with existing customers?
- re-establishing business relationships with companies whose business you lost?

You likely have a mix of these types of opportunities to pursue. Considering resource limitations, you may want to choose a single facet to pursue or prioritize a certain objective. Whatever the case, decide in advance and clearly articulate your goal(s) to the team that will be planning and executing the event.

Having produced hosted events for 10 years, we know what it takes for sponsors to achieve success. This playbook is full of strategic advice that will help ensure your investment yields strong results. Ensuring your satisfaction and positive outcomes are important to us. That's why we've implemented our Quantum Customer Experience program. We strongly encourage you to work through the planning steps we've outlined here and also schedule a call with our team to help walk you through this information and develop a solid plan for results at the Summit.

Nancy Franco
Executive Vice President
AE Ventures

2. PLAN ENGAGEMENTS

Once your goals have been identified, the next step is to identify the team members within your organization who can help achieve those goals. **Remember, the Summit is essentially a sales relationship accelerator.** Accordingly, we strongly recommend that you staff the event with the sales professionals who will be working to win and grow business with our guests.

Whether it's boardroom presentations or 15-minute one-on-one meetings, you'll need to develop discovery questions, talking points, presentation materials and, most important, your desired next steps with the guests. And don't forget to ask for referrals at the conclusion of meetings!

You also need to plan the physical space for effective, comfortable execution of your engagements. Refer to the on-site services catalog for ideas on furnishing your exhibit space. Does your product or service lend itself to a demo? If so, get all of those details finalized at least six weeks in advance for maximum savings on shipping and set-up.

3. DETERMINE GUEST PREFERENCES

Selecting the right guests for your engagements is a key component of your success at the Summit. Approximately three weeks prior to the event you will have the opportunity to review the guest list and submit your company's meeting preferences. The guest list will include individual name, title, company, city, state and up to two additional data points of your choosing from the guest profile.

Note: *All meeting requests are based upon sponsor priority numbers, assigned by timing of sponsorship booking date.*

Our customer experience team is eager to assist you with all of these steps to help ensure you have an experience like no other. Please take advantage of our customized engagement planning calls and webinars to ensure you've covered all your bases in the planning stages of the event.

4. REVIEW GUEST PROFILES

Approximately one week prior to the event, you will receive detailed profile information on all the guests you are scheduled to meet. These profiles include firmographics, product category and vertical market involvement, brand penetration in a host of product categories and personal details on guests. Review this information in advance and think through specific rapport-building strategies and sales angles. **Guests expect that sponsors know their company coming into their meetings; don't let them down. Get the most out of your engagements.**

See example guest profile:
www.totaltechsummit.com/playbook/profile

5. EXECUTE AT & AFTER THE SUMMIT

Ensure your team is ready to execute at the event. Prepare on-site staff with the goals, questions, talking points, desired outcomes, schedule of events, guest profiles and key AE Ventures staff contacts and make sure all attend the on-site orientation scheduled for your company.

Plan to close next steps with guests. For boardroom presentations, prepare a customized next steps survey that guests can complete at the conclusion of your presentation.

Download Next Steps template:
www.totaltechsummit.com/playbook/nextsteps

For one-on-one meetings, make sure your team has a way to record the needs they discover during the meeting and plan to confirm the next step with a follow-up calendar invitation and note of thanks ASAP.

After the event, follow up with additional information as requested and work to confirm next steps by email and phone outreach.

6. MEASURE RESULTS

The Summit team will prepare an engagement summary detailing the guests you met with after the event. Be sure to attend your after-action review meeting with our team to review your opportunity to realize strong results with effective follow-through.

Questions you should be asking over time to measure success include:

- How many engagements at the event led to the desired next step?
    - Of those, how many proceeded further in your sales process?
    - Of those, how many resulted in sales within a one-year time frame?
- How many additional opportunities were you able to generate within the year through referrals and by promoting news of your successes with the market-leading companies represented at the Summit?
- What were you able to learn about necessary improvements to your products and processes as a result of engagements and interactions at the Summit?

FAQs

How do we select our boardroom groups and one-on-one meetings?

Selection of guest engagements begins three weeks in advance of the Summit. Sponsors select boardroom groups first, and one-on-one meetings are selected after boardroom group assignments are communicated to sponsors. This provides sponsors conducting both boardrooms and one-on-one meetings an opportunity to avoid redundant engagements or to double up meetings strategically with key guests. Boardroom groups are pre-formed and stay intact for the duration of the Summit.

The selection process works as follows:

- **Tue., October 10** – All sponsors receive guest list information including name, title, company, city, state and up to two additional data fields in Excel spreadsheet format for review and analysis. Sponsors with boardroom presentations receive boardroom group rosters.
- **Thu., October 12** – Sponsors with boardroom presentations complete and return Boardroom Group Preference Forms, ranking top preferences for boardroom presentation(s).
- **Mon., October 16** – Boardroom assignments are made and communicated to sponsors.
- **Thu., October 19** – Sponsors complete and return One-on-one Meeting Preference Form, ranking top preferences for meetings.
- **Tue., October 24** – 1-on-1 meeting assignments are made and communicated to sponsors; guest profile information for all scheduled engagements and schedule of engagements are sent to sponsors in PDF and Excel format.

AE Ventures will be coordinating more than 200 boardroom presentations and 4,000+ one-on-one meetings at this year's event and therefore must adhere strictly to schedules for selection. Sponsors that comply with the schedule and provide the preference info requested will optimize their selections.

Please note: *assignments of boardroom groups and one-on-one meetings are made using our priority selection process. Priority numbers are based on loyalty of participation and timing of sponsorship commitments.*

How do we use profile information to plan engagements?

Guest profiles are compiled using the information collected from guest applications. They include contact information, firmographics, involvement with products and vertical markets and substantial detail on brand usage in a host of product categories. They also include biographical info on the individual guest.

Review the available data points:
www.totaltechsummit.com/playbook/guest-datapoints

Here are our tips for review and use of profiles:

- First, review the brand usage information in your product categories and complementary categories to understand your position and potential with the guests you'll be meeting. If the guest is aligned with a competitor for whom you have a good switching strategy or a complementary product, be ready to steer your discussion into those fertile grounds.
- Review the firmographics to understand the size and scope of the guest's operations and determine how your product can be positioned to be right for their business.
- Review personal information to find bonding and rapport opportunities. We capture not only industry bios, but also hometown, sports followed and favorite food and drink. We're sure you'll find many ways to connect with guests on a personal level.
- Do an advance read-through, conduct additional online research, think creatively and note your thoughts in writing to remember them, then refresh on site shortly before the engagement to ready yourself. Remember: interested is interesting!

FAQs

How do we get the most out of our 1-on-1 meetings?

One-on-one meetings are 15 minutes in duration and take place at the sponsor's exhibit based on a schedule established in advance for sponsors and guests. Exhibits open at 2:00 p.m. on Nov. 2 and meetings begin at 3:25 p.m. On Nov. 3, exhibits open at 1 p.m. and meetings begin at 1:40 p.m. There are 10-minute intervals between meetings,and meeting slots conclude at the end of exhibit hours—7 p.m. on Nov. 2 and 4 p.m. on Nov. 3.

The physical environment for your meetings is at your discretion and may or may not include static product reviews or product demonstrations. For meetings that will be more conversational, we recommend highboy tables with stool-height chairs for a comfortable one-on-one discussion.

With regard to the substance of the meeting, we recommend the following:

- Dedicate five to seven minutes to discovery—uncovering critical business needs and pain points of the guest. The detailed company profile and biographical information you'll receive in advance will provide clues on where to probe. You'll likely know whether guests are carrying a competitor's products, so you can explore strengths and weaknesses and uncover "loose bricks" you can address with your products and programs. The Summit general session content also puts you in a position to ask about business process improvements and product mix changes the guest is contemplating—more fertile ground for uncovering challenges, pain and needs you can address.
- With good, efficient discovery on the front end of your meeting, you can use the second segment to present a flyover of your most relevant product and service information.
- The final one to two minutes of your meeting should be reserved for closing next steps. Be as specific as possible on this—identifying time, place, purpose, agenda and additional stakeholders who will be involved. **Get your next meeting calendared!**

How do we get the most out of our boardroom presentations?

Basic Operation. Boardroom presentations are scheduled for the morning and early afternoon of Nov. 2 and morning of Nov. 3. Boardrooms are 35 minutes in duration and take place in convention center meeting rooms set conference style or U-shaped with a projector and screen provided (order additional A/V through AE Ventures).

Boardroom guest groups are delivered to your room by group leaders at a pre-scheduled time. Groups arrive slightly before your scheduled start time, so be prepared to start promptly. Given the tight scheduling of the Summit, boardrooms need to conclude on time, and our guest leaders will assist you by providing a five-minute and two-minute warning and gathering the group together for movement to their next activity promptly upon the stopping time. Sponsors with one or two boardrooms packages should prepare for rapid set-up and/or exit from their boardroom to facilitate the sponsor next in line to present in the room. Sponsors with three to seven boardroom packages are able to do more extensive set-up for product demonstrations and displays. Coordinate freight and decorating for these plays with our Customer Experience staff.

Presentation Substance. Boardroom presentations represent an opportunity to make a powerful impression on guests and gain positive sales traction. You have 35 minutes, so structure a presentation that communicates the most important and relevant facts, covering topics like new products and the sales and profit opportunities they open up, new support or pricing programs that create a bottom-line impact or your product/technology roadmap. Case studies are perhaps the most compelling content. Guests are seeking ideas on how to grow and improve their businesses at the Summit. Show them how you've helped other top integrators grow and improve, and you'll get their attention and interest and win next steps. Some companies take a focus group approach, asking our business leader guests for feedback on products and programs under development.

Boardroom Staffing. Staff your boardroom not only with presenters but additional team members who can monitor and record the reactions of individuals in the group. At what points were they connecting with your presentation and where were they lost or resisting? This knowledge provides a better starting place for your next step engagements whether at or after the event.

FAQs

How do we get the most out of our boardroom presentations? (cont.)

Closing Next Steps. Given that you are presenting to a group of 10 or more guests, it's not likely you'll be able to converse one-on-one at the conclusion of the presentation regarding their interest levels and preferred next steps. For that reason, we recommend you develop a customized "Next Steps Survey" for the guests to complete during the last minute or two. Pre-fill with name and ask guests to identify their product interests and preferred type and timing of follow-up. Consider providing an incentive for guests that complete a form and agree to a next step.

See a sample form:
www.totaltechsummit.com/playbook/nextsteps

How do we design and staff our exhibit?

In terms of exhibit design and decoration, our basic recommendations are as follows:

- Bring/rent furnishings to support meetings—most common and efficient are highboy tables and stool-height chairs.
- Dedicate approximately 36 sq. ft. of space for each meeting area. One meeting area per 15 meetings.
- Decorate with identity signage and product graphics to support meetings and attract stop-by traffic.
- Consider adding product kiosk style elements to enliven meetings and attract stop-bys.
- Don't invest in an unecessary, extensive, expensive booth property!

In terms of staffing, you'll need at least one staff member for every 15 meetings you have scheduled at the exhibit, plus one or two floater staff to connect with stop-by visitors during scheduled meeting times.

Register your staff members in advance with our Customer Experience team. Your staff will pick up their credentials during your sponsor orientation meeting.

Note: *There are two types of sponsor registrations: Executive Registrations grant admission to all Summit general sessions and social functions in the Summit market segment you are focused on. Exhibits-Only Registrations grant access to the exhibits for set-up, visiting hours and tear-down. Specific allocations of registrations are included in your sponsorship package. Additional or converted registrations require additional fees.*

How do we get the most out of our general session sponsorship?

General session sponsorships are multifaceted opportunities to exhibit thought leadership and promote brand and products. Components include a presentation of 10-12 minutes to all Summit guests (or those of a specific Summit segment) as part of a general session, branding and literature distribution at the event and post-event promotion and publicity.

- For the presentation, we recommend focusing on new products and programs, introducing new corporate capabilities or showcasing how your company is contributing to the success of bigger, better integrators. Most important, include a call to action that stimulates next steps with your company. This often includes an invitation to connect at your exhibit, and, again, incentives like a prize drawing or fun giveaway can be helpful in stimulating response.
- For literature distribution, less is more—one pager and pocket-sized literature that reinforces your call to action and the central points of your presentation are key.
- Branding is a simple matter of working with our Customer Experience team to get your desired identity and message highlights across in the room.
- AE Ventures' communications staff will work closely with your team to develop a wrap-up story that captures your message and the positive responses you get from the Summit's integrator VIPs. The story creates a ripple effect among the broader integrator market we reach with our promotional databases.

FAQs

How do we maximize results from networking at general sessions and social functions?

Sponsor staff with Executive Registrations have access to the Nov. 1 Connections Reception and general sessions for the guest segment with which they are aligned throughout the Summit. Attending these elements represents an important networking opportunity with VIP guests. You will be seated among guests at general sessions. Introduce yourself. Watch how they respond to the content presented and ask them what they think. It's a great way to build rapport and potentially uncover pain points you can address with your products and systems. Invite guests to visit with you at your exhibit during open visiting hours and give them a card with your booth number and a keyword on why they should visit you. Follow up after the event with a "nice to meet" note and a request to connect by phone to learn more about their company's needs and goals.

Both sponsor staff with Executive Registrations and Exhibits-Only Registrations can participate in the Pub Crawl at Pointe Orlando on the evening of Nov. 2. The crawl is a no-host excursion to three drinking establishments, where guests and sponsors can connect in a casual setting.

How do we maximize and accommodate stop-by visits at our exhibit?

Effective networking and promotion during boardroom presentations (and general session presentations if your package includes them) help build stop-by traffic. Some sponsorships also include product showcase spots and dedicated email blasts designed to stimulate stop-by traffic. On-site promotions, signage, etc. are also available at an additional fee to do the same. Our Customer Experience team can provide options and pricing.

How do we make our sponsorship count with effective post-event efforts and activities?

Effective post-event efforts to consummate new relationships with integrators or to expand business with existing customers start with closing next steps on site. The key is to take a guest's conceptual agreement to a next step and turn it into a reality. Like any selling, it comes down to blocking, tackling and persistence. Remind the guests of the need/pain point you uncovered in the engagement, send the follow-up information you promised, send calendar invites to get next steps scheduled, call and email behind those invites to get confirmations and ensure the next step happens. If the prospect goes dark—go back to pulling pain. Trying to get them on the phone for 10 minutes to see if you misread their needs or failed to understand their evaluation process—you will discover whether you have a real opportunity or need to "close the file" and move on.

One specific piece of advice is to recognize the "consensus selling" required at most bigger, better integrators. There is no single decision-maker. Rather, executive, technical, sales and financial management weigh in on various elements of taking on a new vendor or product line. Ultimately you'll want as much contact as possible with the various influencers and approvers. Trying to get additional stakeholders involved in the next step meetings you arrange during the Summit can be a good idea and a means of accelerating the decision-making process.

Need help from AE Ventures? *Our team can help with: lost contact info, a note of support for your post-event outreach, database information we may have on other stakeholders at a guest company and more.*

Ask the Customer Experience team for assistance.

Timeline for Success

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12+ weeks prior to the event

- [ ] Understand sponsorship components and engagement opportunities
- [ ] Execute planning call to discuss strategies and solutions for success on site.
- [ ] Determine staffing requirements for the event
- [ ] Book your staff hotel rooms
- [ ] Meet with your team to set goals for the event
- [ ] Make all payment arrangements to ensure timely meeting selections
- [ ] Submit your online company listing

5-12 weeks prior to the event

- [ ] Order booth furnishings and services
- [ ] Book staff air travel
- [ ] Register your team for their event badges
- [ ] Attend pre-planning webinar
- [ ] Schedule/attend personalized planning meeting with Summit Customer Experience team

1-4 weeks prior to the event

- [ ] Submit your meeting preferences
- [ ] Design meeting purpose and desired outcomes
- [ ] Prepare on-site materials—collateral, meeting notes templates for sales team
- [ ] Ship materials to the Summit

1 week prior to the event

- [ ] Prepare customized next steps survey
- [ ] Meet with your team to reinforce plans and strategy
- [ ] Review guest profiles

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At the event

- [ ] Participate in sponsor orientation
- [ ] Execute boardroom presentations/one-on-one meetings; attend general sessions and social functions as appropriate for your registration type
- [ ] Book next steps with guests with whom you are meeting throughout the event
- [ ] Notify Summit staff of any missed meetings or other disconnects at the event

Week after the event

- [ ] Re-confirm meetings booked with guests at the event via calendar invite and phone call
- [ ] Hold meeting with your team to debrief on action items from the Summit
- [ ] Complete post-Summit sponsor survey
- [ ] Schedule after-action review with our Customer Experience team

Three weeks after the event

- [ ] Check status of follow-up efforts
- [ ] Brainstorm ways AE Ventures can help with follow-up
- [ ] Conduct after-action review meeting with our Customer Experience team
    - [ ] Review engagements summary provided by AE
    - [ ] Confirm suitability of sponsorship renewal or required adjustments
    - [ ] Set date/time for review and planning with AE as required