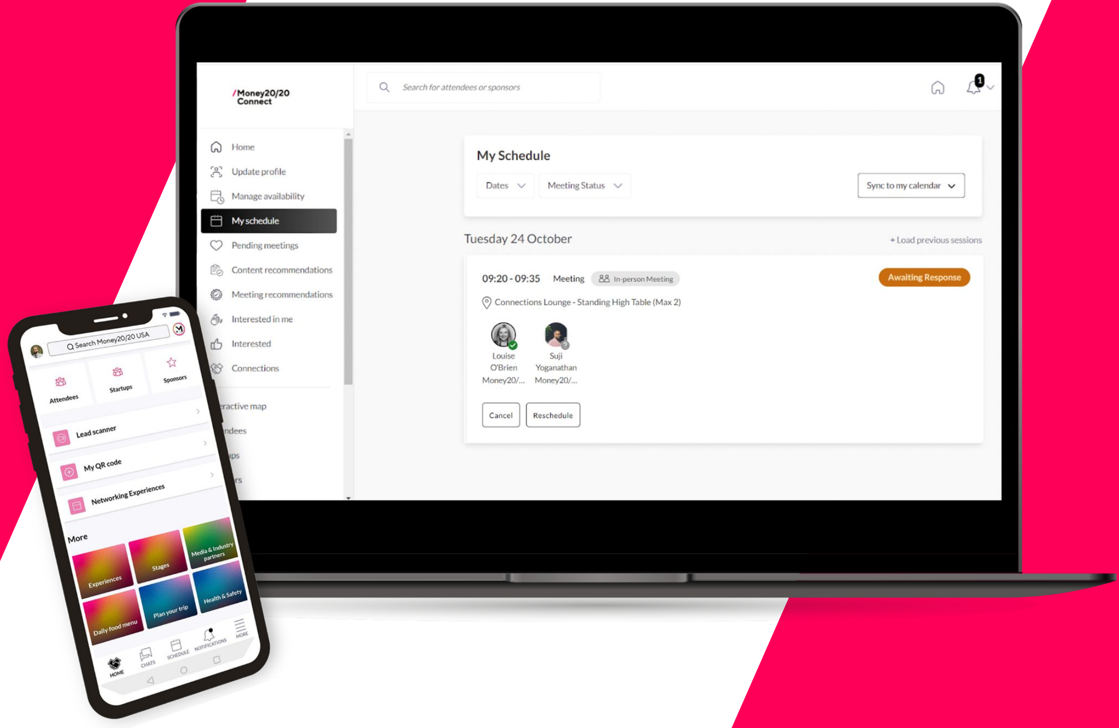
MONEY 20/20

MONEY20/20 CONNECT

STEP BY STEP GUIDE



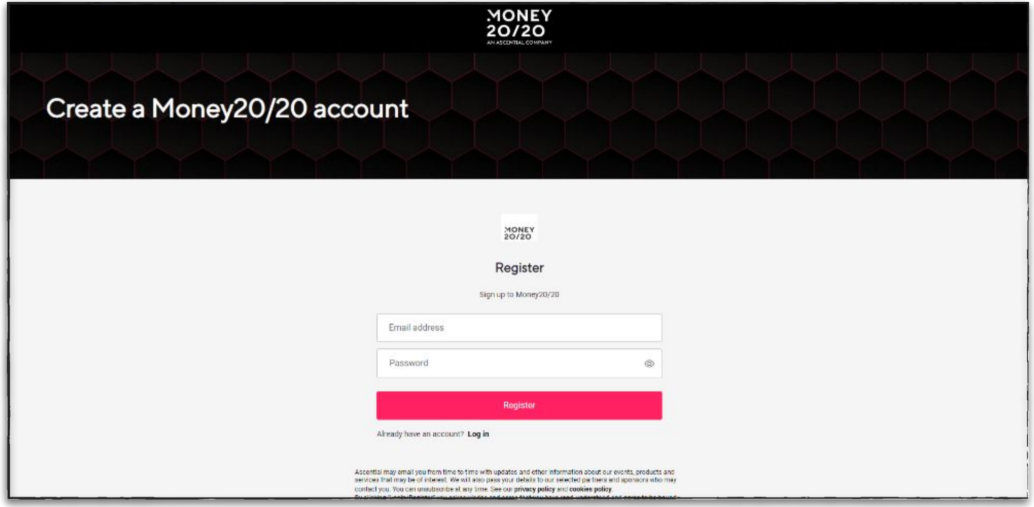
STEP-BY-STEP GUIDE

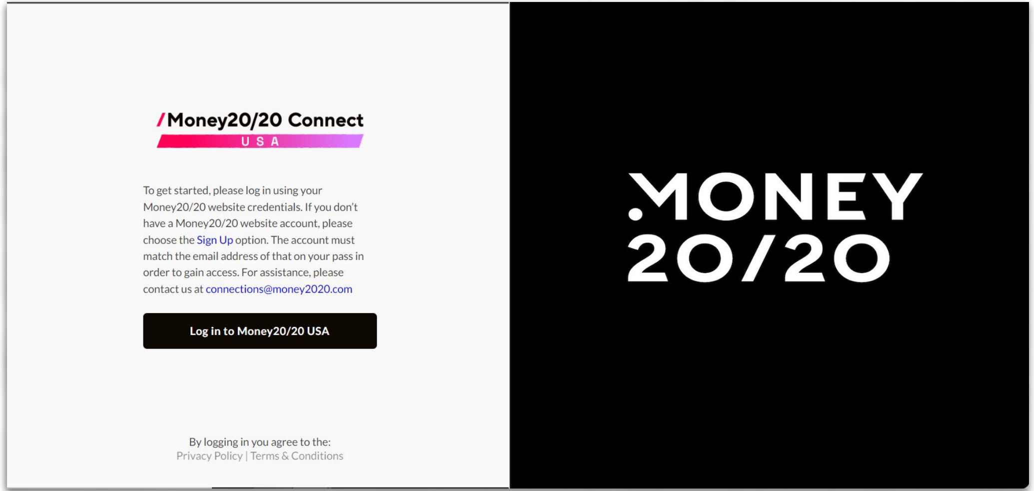
1. GETTING STARTED
2. PROFILE SETUP
3. MY TEAM
4. EXPLORE ATTENDEE AND SPONSOR LIST
5. SHOW INTEREST OR SKIP PROFILES
6. ARRANGING MEETINGS WITH CONNECTIONS
7. SCORING LEADS AND ADDING NOTES
8. QUALIFYING QUESTIONS
9. EVENT AGENDA
10. MANAGE YOUR SCHEDULE

1. GETTING STARTED

Follow these steps to ensure smooth access to Money20/20 Connect.

- **New to Money20/20?**
    - If it's your first time attending Money20/20 USA, register for a Money20/20 account here. Make sure to use the same email address that was used to register your pass.
- **Log In to Money20/20 Connect**
    - Access Money20/20 Connect **using your Money20/20 account login info.**
    - Log in using the **email associated with your pass.**
    - If you're unsure which email was used, contact your internal pass manager who assigned your pass.

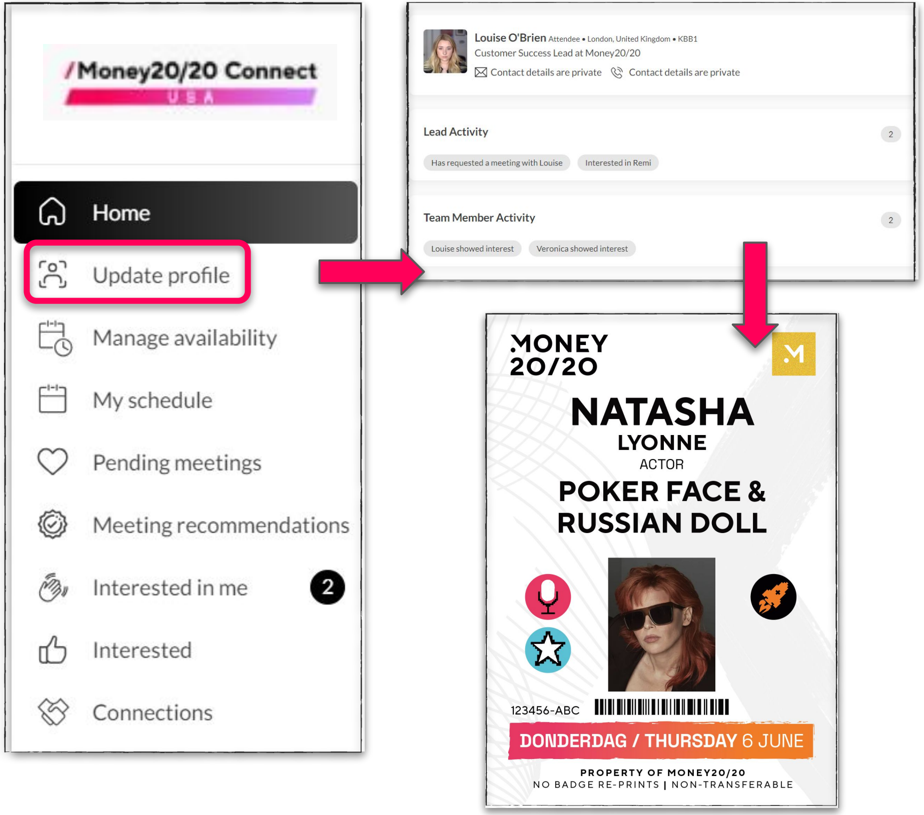




2. PROFILE SETUP

By following these steps, you'll ensure your profile is optimized for networking and event participation.

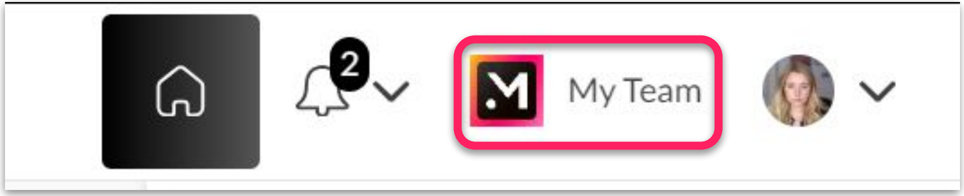
- **Confirm Your Contact Details Visibility**
  - Once logged in, decide whether your contact details (email, phone #) should be **private or visible for connections.**
  - You can adjust this later in the "Edit Profile" section if needed.
- **Update Your Profile**
  - Use the "Update Profile" tab to:
    - Add or edit your company name.
    - Write or update your bio.
    - Update your job role.
  - **Enable Networking** to access networking features and attendee list.
- **Save Changes**
  - Always **select 'Submit'** at the end of the page to save your updates.
- **Profile Updates = Badge Updates**
  - Any changes made to your profile will be reflected on your badge at the show.

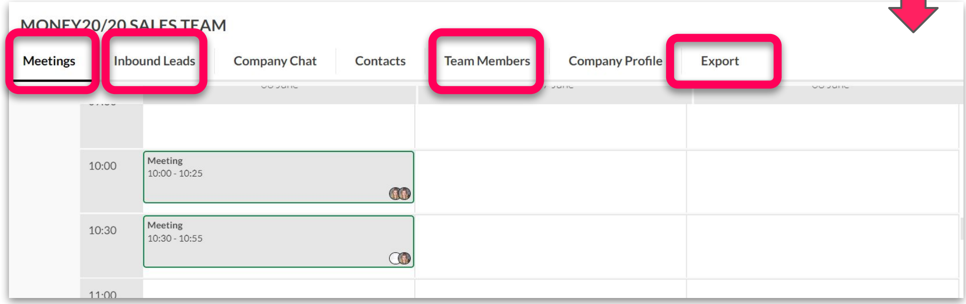


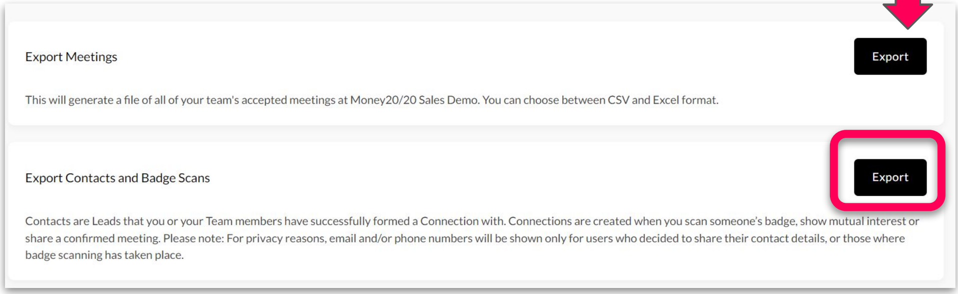
Top Tip: Networking needs to be enabled to benefit from our networking features. Without this turned on, you won't be able to see the attendee list, message or schedule meetings and other attendees won't be able to view your profile.

3. MY TEAM (SPONSORS ONLY)

- **Access "My Team"**
  - In the top navigation bar, you will find "My Team".
  - **The first person from your company to login will automatically become the admin. If this person should not be the admin, they can reassign admin access to another user within the "Team Members" space.**
- **Ensure Every Team Member is Listed**
  - Check the "My Team" section in the top navigation bar.
  - If any team members are missing, email cs.usa@money2020.com.
- **Key Functionalities for Sponsors**
  - View your **team's full calendar** for pre-show planning.
  - **Book meetings** on behalf of colleagues.
  - Receive **inbound leads** ahead of the show.
  - Activate your **'Lead Scanner'** to capture leads.
  - Review leads in real-time during the event.
  - **Export leads** pre-, during, or post-show.
- **Admin-Specific Permissions**
  - Only the admin can export sensitive data, such as lead scans with email addresses.







Top Tip: Ensure none of your colleagues are missing from the "Team Members" area. If they are not tagged as a team member, they won't be able to download any leads post-show.

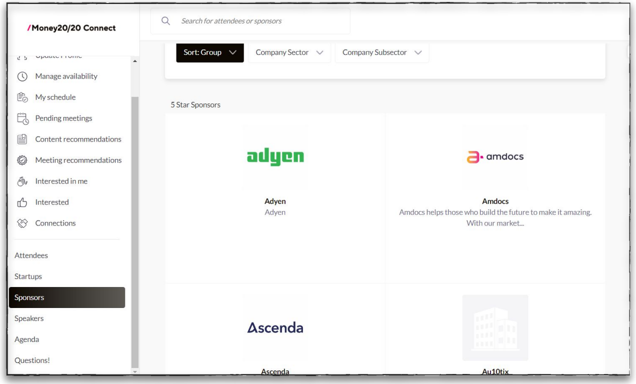
4. EXPLORE ATTENDEE AND SPONSOR LIST

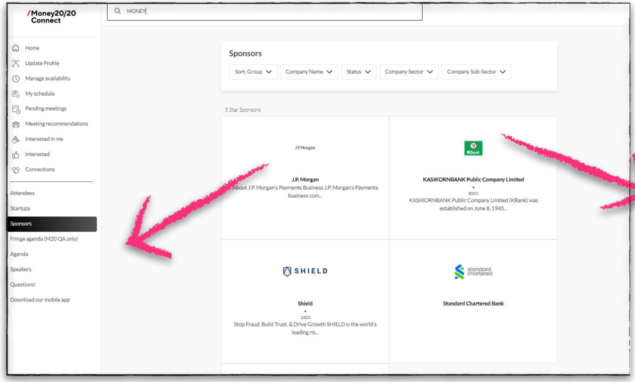
Via the sidebar, you will be able to access the attendee list. **Filter via job title, region, sector and more, to find the people you want to meet with.**

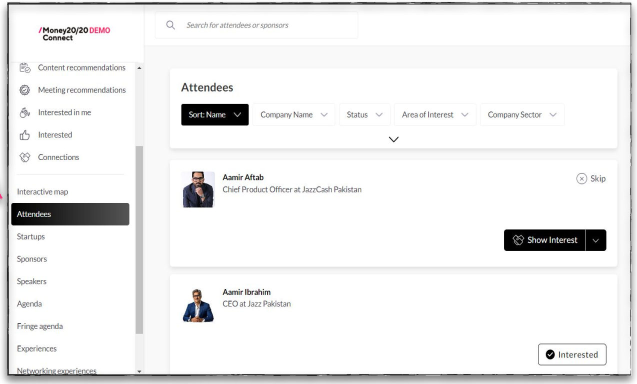
You can also navigate the speaker and sponsor list in similar fashion.

Note: these lists are continuously updated, so make sure to revisit regularly.

Top Tip: Use the search bar at the top to search attendees or sponsors by name or company. There is also a filter included in the results page.



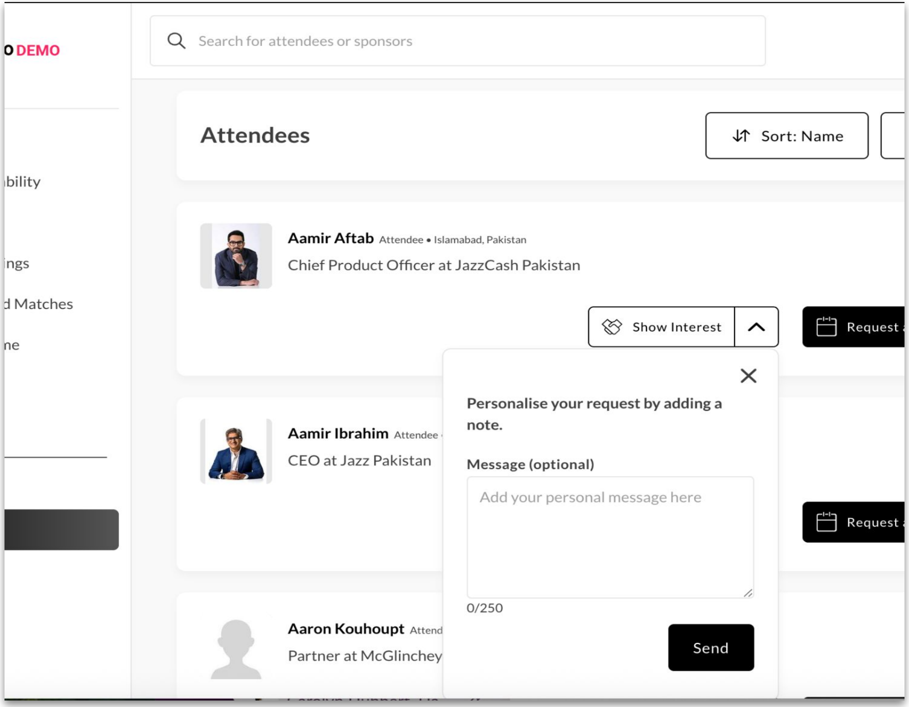




5. SHOW INTEREST OR SKIP PROFILES

By following these steps, you'll help the platform tailor your meeting opportunities for a more productive event experience.

- **Show Interest**
  - Select profiles of attendees you wish to connect and meet with.
- **Skip Profiles**
  - Avoid profiles of attendees you prefer not to engage with.
- **Understand Matching Process**
  - Your **preferences and interests will be used by AI to match you with similar attendees.**
  - Note: There's no guarantee you'll meet the exact attendees you show interest in, but the technology will aim to match you with similar profiles.

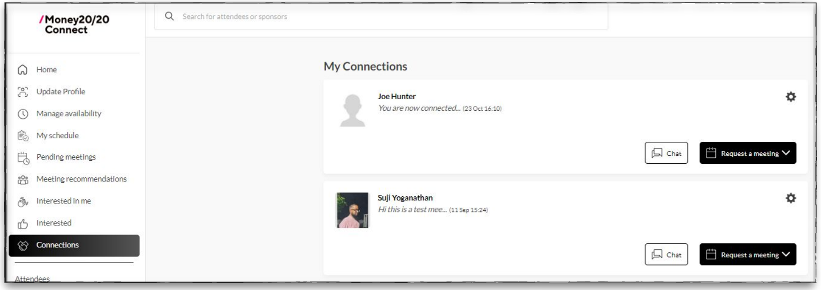


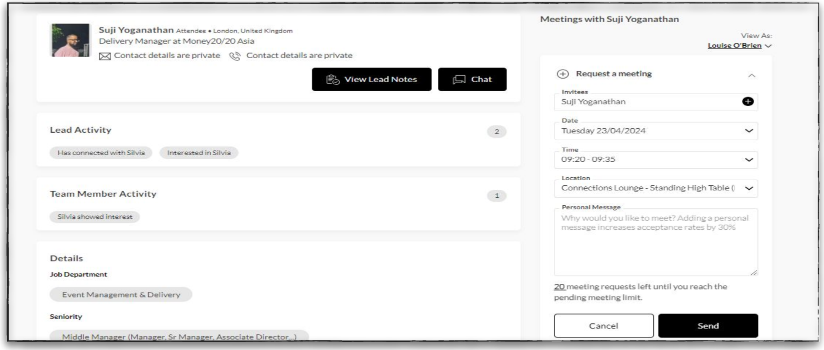
Top Tip: The more you use the recommendations function, the more the technology improves its suggestions. You can also show interest and message sponsors.

6. ARRANGING MEETINGS WITH CONNECTIONS

Follow these steps to manage your connections and schedule productive meetings.

- **Check Your Connections**
  - Go to “**My Connections”** to see accepted connection requests.
- **Arrange Meetings**
  - Use “My Connections” to schedule meetings with new connections.
- **Choose a Meeting Location**
  - Select **your booth or the Connections Lounge** (dedicated networking area).
  - **A table number will be provided once both parties accept the meeting.** Pending meetings will not have a location assigned.
- **Add Attendees**
  - Click the **“+” symbol** next to the initial attendee to add more participants to the meeting.



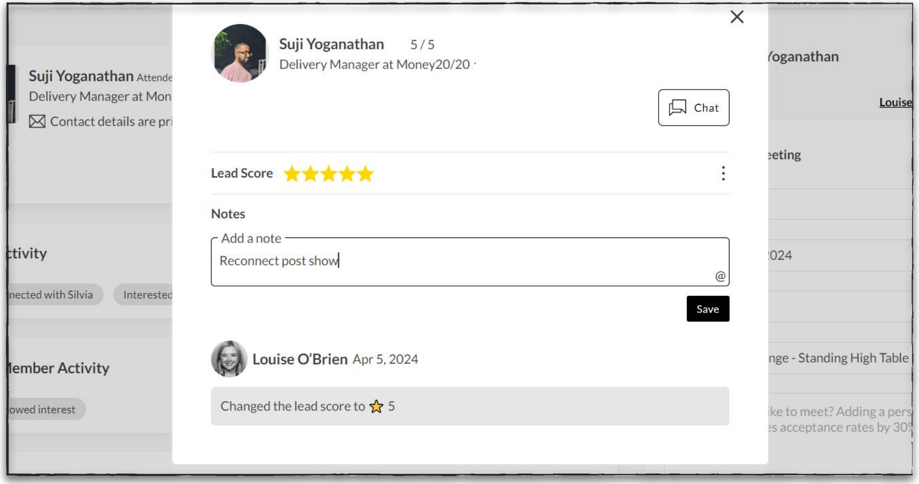


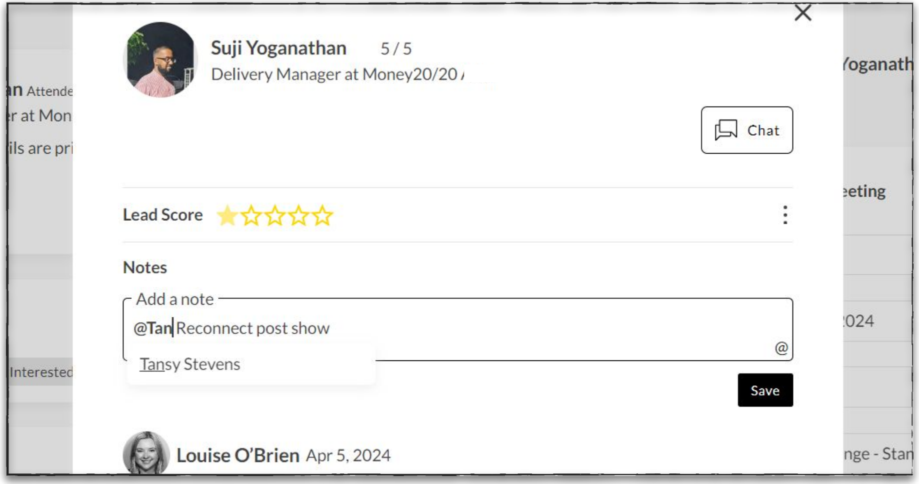
Top Tip: When requesting a meeting, it is advised that you become a connection first. Also, it doesn't hurt to send a welcoming “personal message” with the meeting request. This increases your chance of a connection being made.

7. SCORE LEADS AND ADD NOTES TO THEIR PROFILE (SPONSORS ONLY)

Follow these steps to effectively track, organize, and manage your connections.

- **Add Lead Notes**
  - Record vital **information about connections to avoid forgetting key details.**
  - Access notes by selecting **"View Lead Notes"** on a connection's profile.
  - *Note: Leads will not see your notes.*
- **Score Leads**
  - Rate leads **from 1 to 5** to help organize connections post-event.
- **Download Lead Information**
  - Sponsors can download **contact and meeting details, including lead notes and scores.**
- **Mention Team Members in Lead Notes**
  - Highlight team members who contributed to forming the connection.
  - Specify **who should manage the relationship** during or after the event.

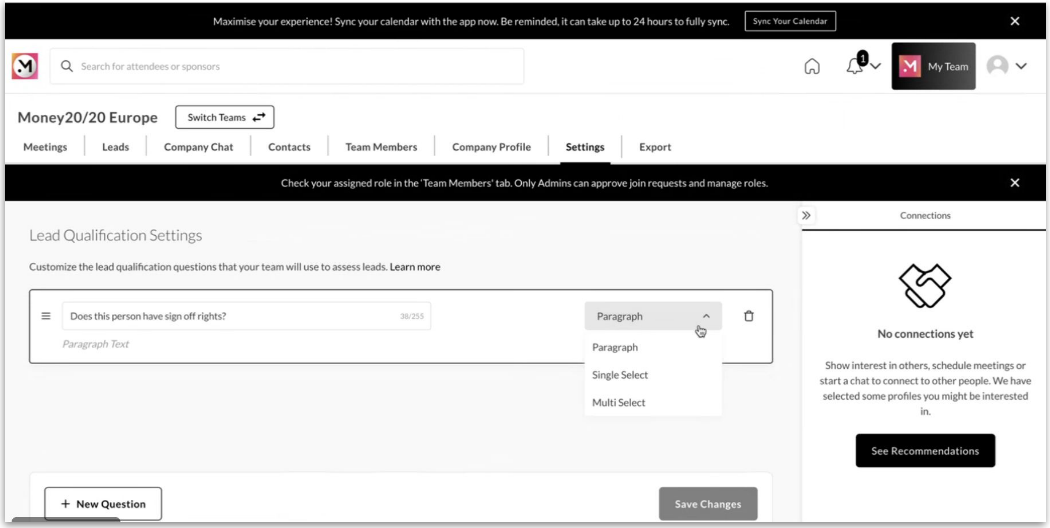




8. NEW! QUALIFYING QUESTIONS (SPONSORS ONLY)

Follow these steps to gather valuable insights and optimize your lead qualification process.

- **Understand Qualifying Questions**
  - Use these to assess if a lead is a good fit for your product or service.
  - Examples:
    - Is this person the primary decision maker?
    - What solutions are they currently using?
- **Set Up Your Questions**
  - Go to **My Team** > **Settings** > **Lead Qualification Settings** to input your qualifying questions.
- **Download Qualifying Question/Lead Information**
  - Answers to qualifying questions will be included in lead downloads (admin users only).



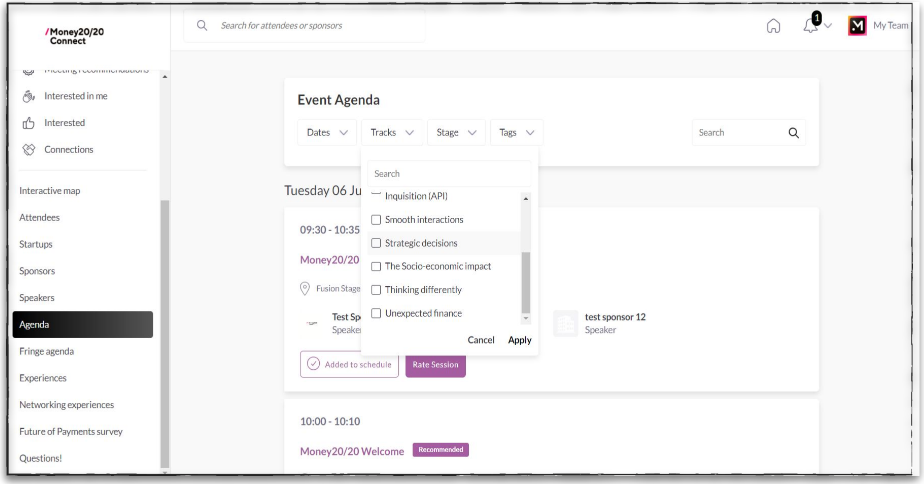
9. EVENT AGENDA

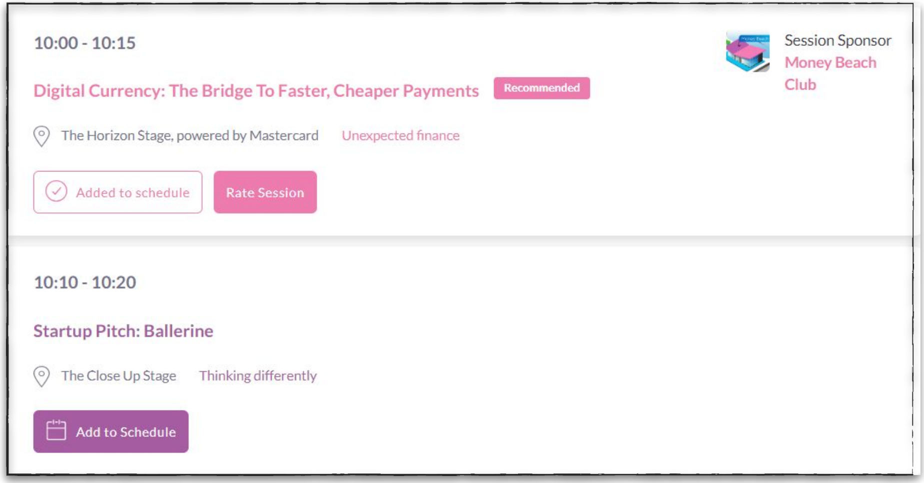
Follow these steps to plan your event experience effectively.

- **Explore Content Sessions**
  - View the agenda for details on days, times, speakers, themes, and stage locations.
- **Use Filters**
  - Sort sessions by location or interest to find what suits you best.
- **Add to "My Schedule"**
  - Select sessions that interest you to add them to your personal calendar.
- **Get More Information**
  - Click on a session for further details and context.
  - Discover similar session suggestions to expand your options.

Top Tip: Make sure to check out the **Sponsor Event Agenda*** so you don't miss out on the sponsor-led events on the show floor!

*Reminder: you can still submit to [host a Sponsor Event] until October 22.

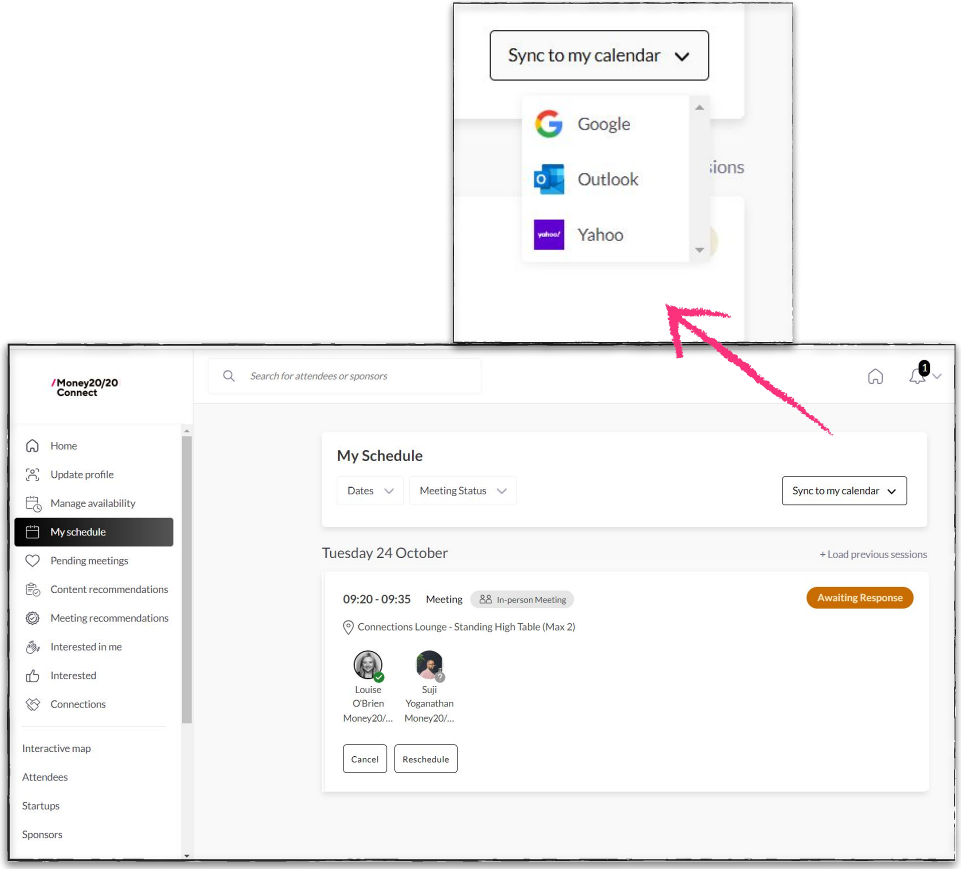




10. MANAGE YOUR SCHEDULE

Follow these steps to stay organized and maximize your event experience.

- **Track Your Meetings**
  - Go to **"My Schedule"** to view meetings you've arranged or that have been arranged for you.
- **Review Notifications**
  - Check your app notifications for any pending meeting requests. You will also receive emails regarding meeting requests.
- **Plan Your Day**
  - Add content sessions and show floor events to your schedule to organize your day effectively.
- **Export Meetings**
  - Export your **meetings to your personal calendar via your email provider.**
  - *Note: Sync times may vary depending on the provider.*
- **Use the App at the Event**
  - Make meeting updates, changes, and **access live information directly through the app during the event.**



BOOK YOUR 1:1 DEMO HERE.

IF YOU EXPERIENCE ANY DIFFICULTIES WITH MONEY20/20 CONNECT, PLEASE CONTACT CONNECTIONS@MONEY2020.COM FOR FURTHER ASSISTANCE.