MONEY 20/20
by informa

USA
OCTOBER 18-21, 2026
LAS VEGAS

Money20/20 USA 2026

Money20/20 Connect

Step-By-Step Guide for Sponsors

STEP-BY-STEP GUIDE

- / GETTING STARTED
- / PROFILE SETUP
- / MY TEAM (SPONSORS ONLY)
- / EXPLORE ATTENDEE & SPONSOR LIST
- / SHOW INTEREST OR SKIP PROFILES
- / ARRANGING MEETINGS WITH CONNECTIONS
- / SCORING LEADS & ADDING NOTES (SPONSORS ONLY)
- / QUALIFYING QUESTIONS (SPONSORS ONLY)
- / EVENT AGENDA
- / MANAGE YOUR SCHEDULE
- / HOW TO SCAN LEADS
- / HOW TO RETRIEVE LEADS

1. Getting Started

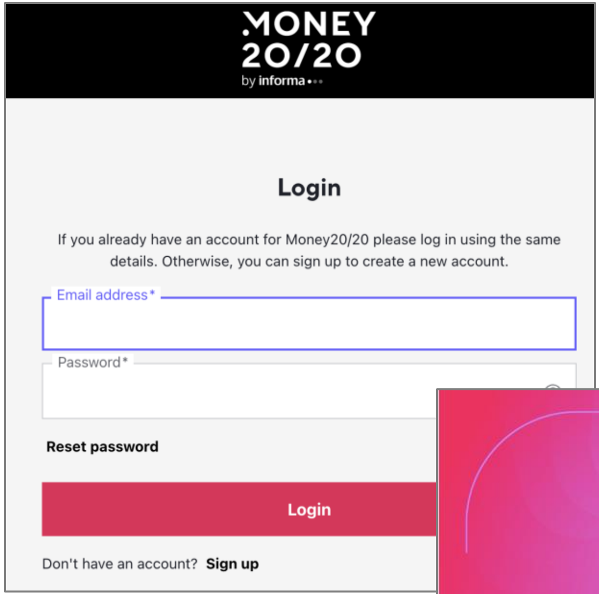
Follow these steps to ensure smooth access to Money20/20 Connect, our official networking platform and app.

/ If you haven't already, please register for a Money20/20 account

- If it's your first time attending Money20/20 USA, register for an 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.

/ Update Your Profile

- Use the **“Update Profile”** tab to:
  - Add or edit your company name
  - Update your bio
  - Update your job title
- **Enable Networking** to access networking features and the attendee list

/ Confirm Your Contact Details Visibility

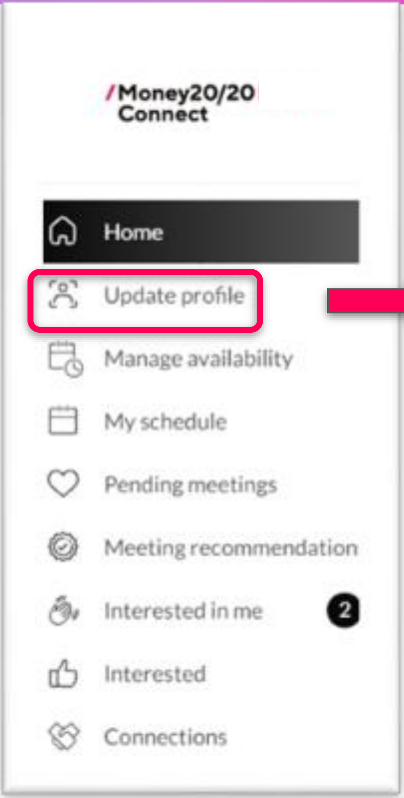
- Decide whether your contact details (email) should be **private or visible for connections.**
- You can adjust this in the “Update Profile” section if needed.

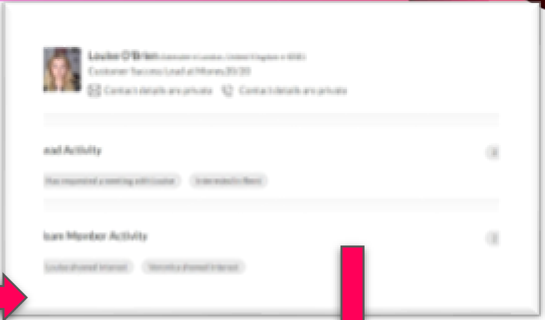
/ Save Changes

- Always **select "Submit"** 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" (on the desktop version only)

- 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

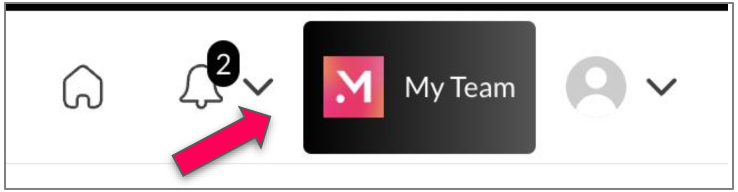
- Check the "My Team" section in the top navigation bar.
- If any team members are missing, email cs.usa@money2020.com.

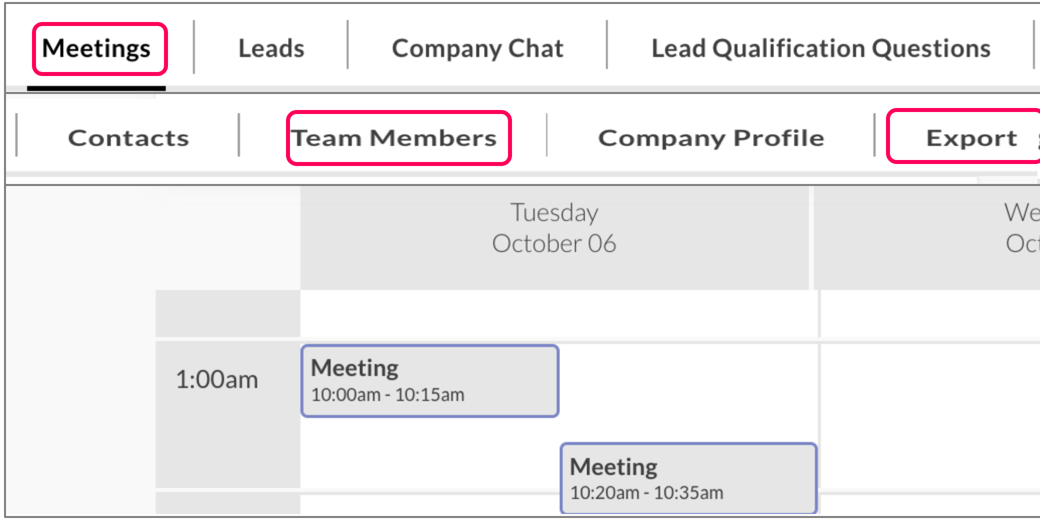
/ Key Functionalities for Sponsors

- View your **team's full calendar** for pre-show planning.
- **Book meetings** on behalf of colleagues.
- Receive **inbound leads** ahead of the show.
- Review all leads in real-time.
- **Export all leads** pre-, during, or post-show.

/ Admin-Specific Permissions (Export)

- Only the admin can export leads.





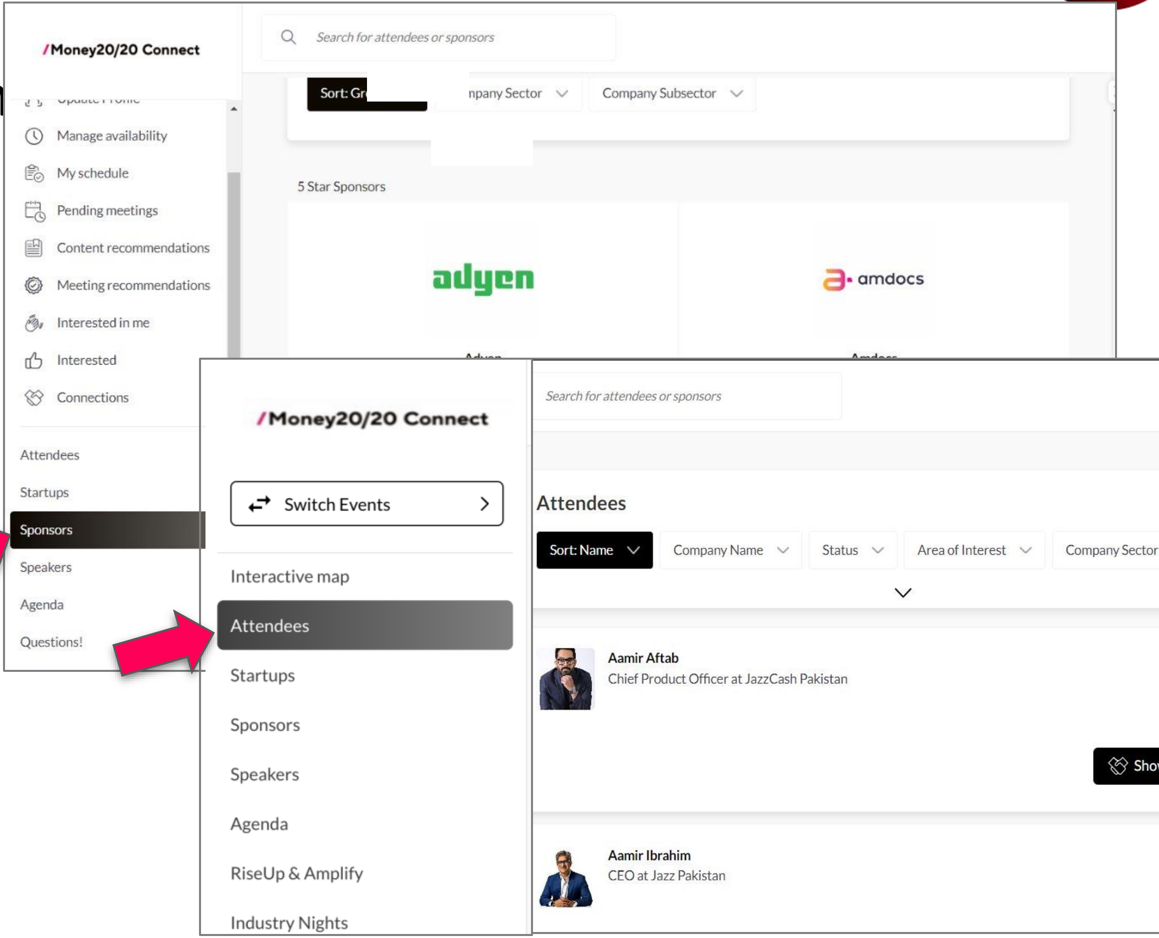
Top Tip: Ensure none of your colleagues are missing from the "Team Members" area. If they aren't tagged as a team member, they won't be able to download any leads post-show.

4. Explore Attendee & Spon 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

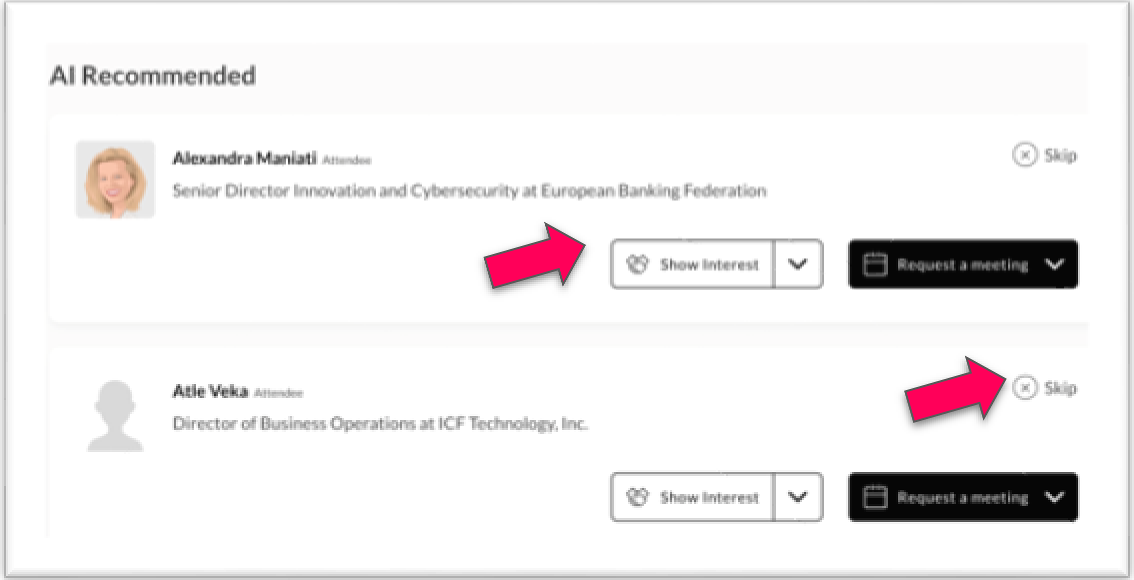
- Select profiles of attendees you wish to connect and meet with

/ Skip Profiles

- Avoid profiles of attendees you'd prefer not to engage with.

/ Understand Matching Process

- Your **preferences and interests are used by AI to match you with attendees.**
- Note: There's no guarantee you'll meet the exact attendees you show interest in, but technology aims 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 in and message sponsors.

6. Arranging Meetings

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

/ Request Meetings

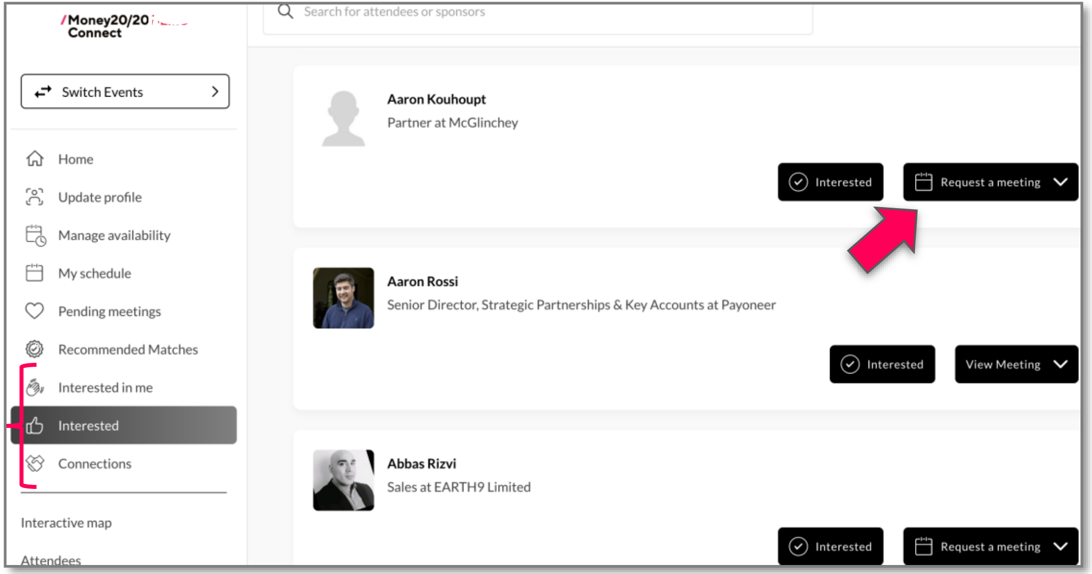
- Go to “**Connections”** to see accepted connection requests and schedule a meeting.
- Review "**Interested"** and "**Interested in Me"** sections to request meetings.

/ Meeting Location

- **A Connections Lounge 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 & Add Notes (SPONSORS ONLY)

Follow these steps to effectively track, organize, and manage your connections. Use the desktop version to:

/ Add Lead Notes

- Record vital **information about connections to avoid forgetting key details.**
- Access notes by going to **My Team > Leads > Total Leads > View Lead Details** on a connection's profile **> Add a Comment**

/ Score Leads

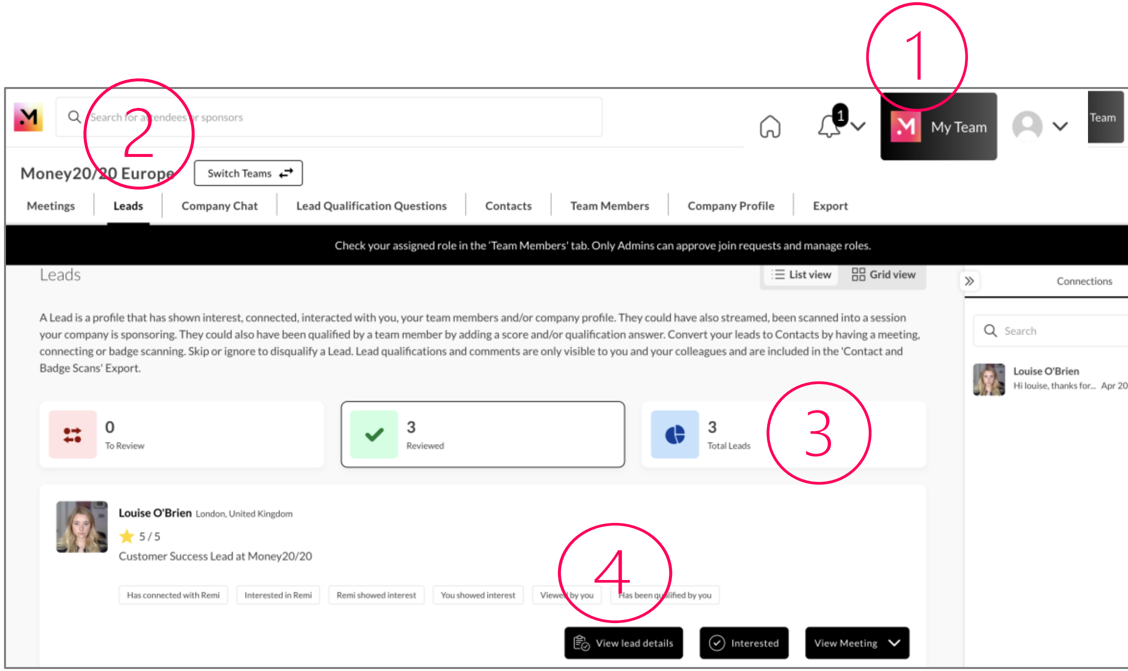
- Rate leads **from 1 to 5** to help organize connections post-event.

/ Download Lead Information

- Sponsors can download **contact and meeting details, including lead notes and scores.**

/ Mention Team Members in Lead Notes

- Tag team members who contributed to forming the connection or need to follow up.
- Specify **who should manage the relationship** during or after the event.



Note: Leads will not see your notes

8. 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

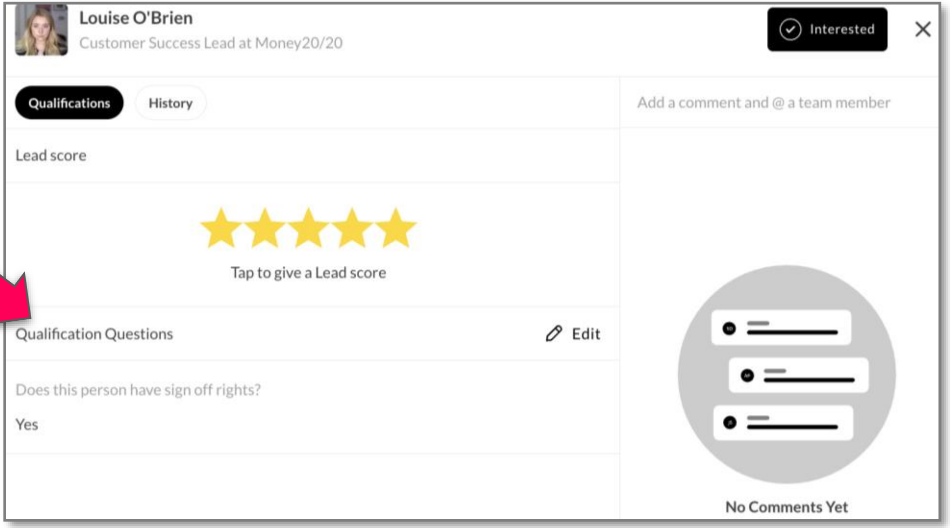
- On the desktop version Go to **My Team** > **Lead Qualification Questions** to input your qualifying questions.

/ Add Answers to Qualifying Questions

- Go to **Leads > Total Leads > View Lead Details > Edit** to add answers to questions

/ Download Qualifying Question/Lead Information

- Answers to qualifying questions will be included in lead downloads available on the desktop version (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.

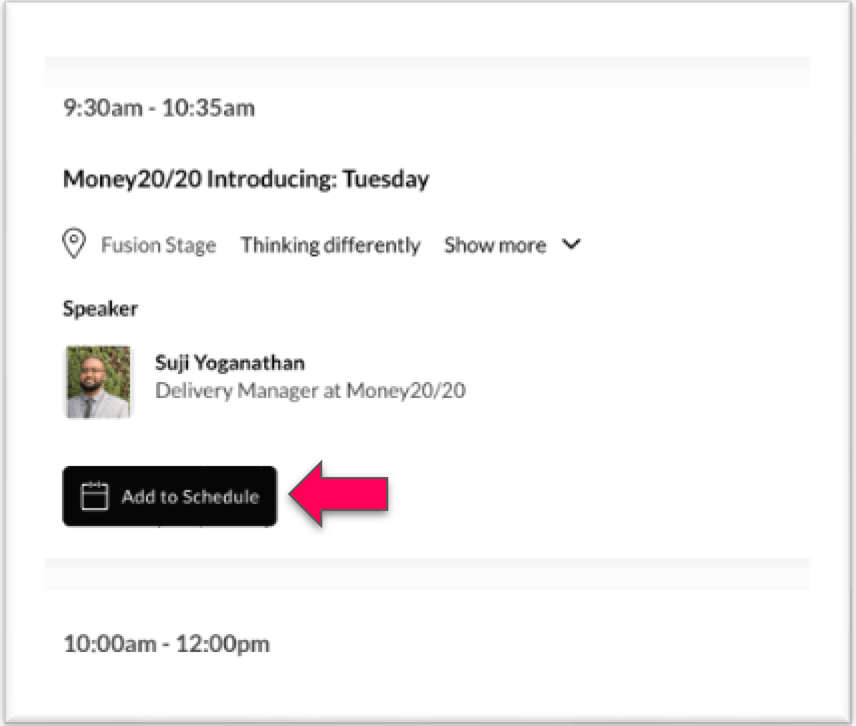
/ Add to "My Schedule"

- 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!



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

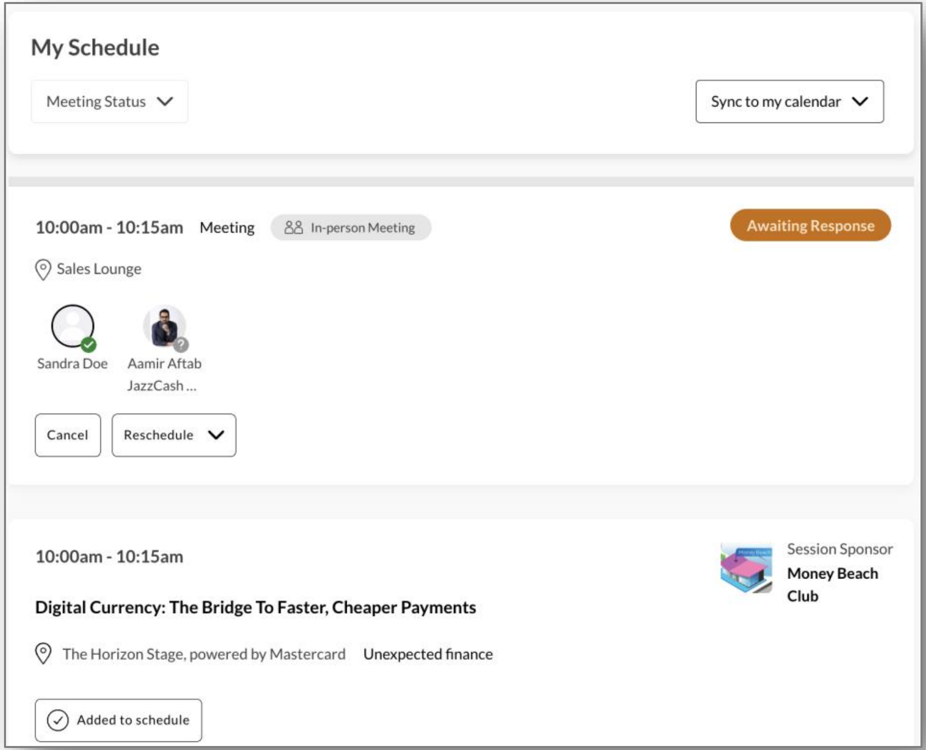
- Add content sessions and show floor events to your schedule to organize your day effectively.

/ 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 onsite

- Make meeting updates, changes, and **access live information directly through the app during the event.**



11. How To Scan Leads

Follow these steps to scan the barcodes of attendee badges at the show. Any badges scanned will be categorized as a connection and you will receive contact information for that person.

/ The day before the event, you'll notice a "Scan to Connect" bar within the app.

- When you click on it, the app may prompt you to grant camera access. To enable this, simply go to your device settings, search for the **Money20/20 Connect**, and allow camera access.

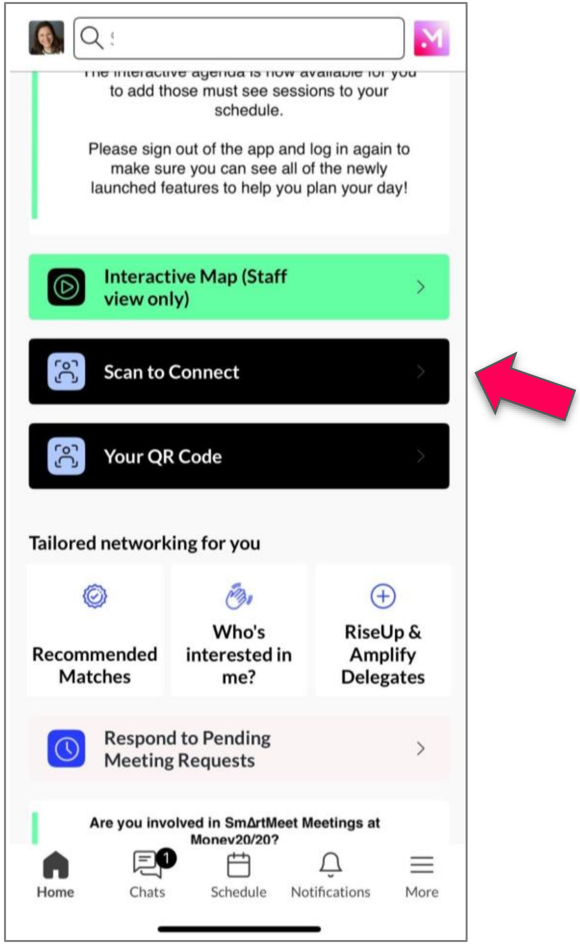
/ Once you've granted permission to access your camera, return to the app, click on "**Scan to Connect**," and your camera will be ready to scan the barcodes on attendee badges.

/ **When a badge is scanned:** you receive more lead information, including name, email, company, and title.*

/ **For accepted meetings:** you'll receive the name, job title, and company.*

/ If you have Lead Insights, it will provide additional information.*

*Information shared depends on privacy settings chosen by the attendee



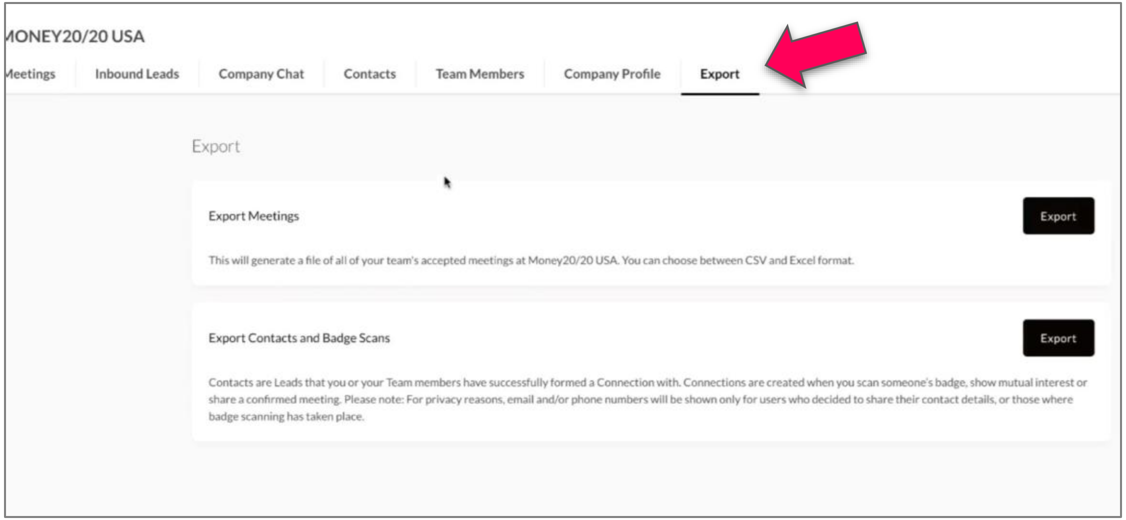
12. How To Retrieve Leads

Follow these steps to download your team's leads.

/ **If your sponsorship package includes <u>Lead Insights</u> (NEW for 2026!), you will receive an email with instructions on how to access your lead data.***
/ **Log in to the desktop version of Money20/20 Connect**
/ Navigate to **My Team** > **Export**
/ On the **Export** tab, you can access all leads associated with your team. **These are leads that you or your Team members have successfully formed a Connection with.** These leads include individuals who have used the Connect platform to:

- **Have their badge scanned by a team member**
- **Had a confirmed meeting with a team member**
- **Showed mutual interest and connected with a team member**

Please note: For privacy reasons, email and/or phone numbers will be shown only for users who decide to share their contact details or for those for whom badge scanning has taken place.



Top Tip: Since the platform and app remains active for 30 days post-event, you still have time to connect. To do so, express interest in a lead; if they reciprocate, a connection is formed, and their lead details become accessible.

***To confirm if your sponsorship package includes Lead Insights or to learn more,**
Contact Customer Success at <u>cs.usa@money2020.com</u>.

MONEY20/20 USA

OCTOBER 18-21, 2026

IF YOU EXPERIENCE ANY DIFFICULTIES WITH MONEY20/20 CONNECT, PLEASE REACH OUT TO CONNECTIONS@MONEY2020.COM FOR MORE HELP.

BOOK A DEMO

WITH THE CUSTOMER SUCCESS TEAM