

About Matchmaking (Grip)

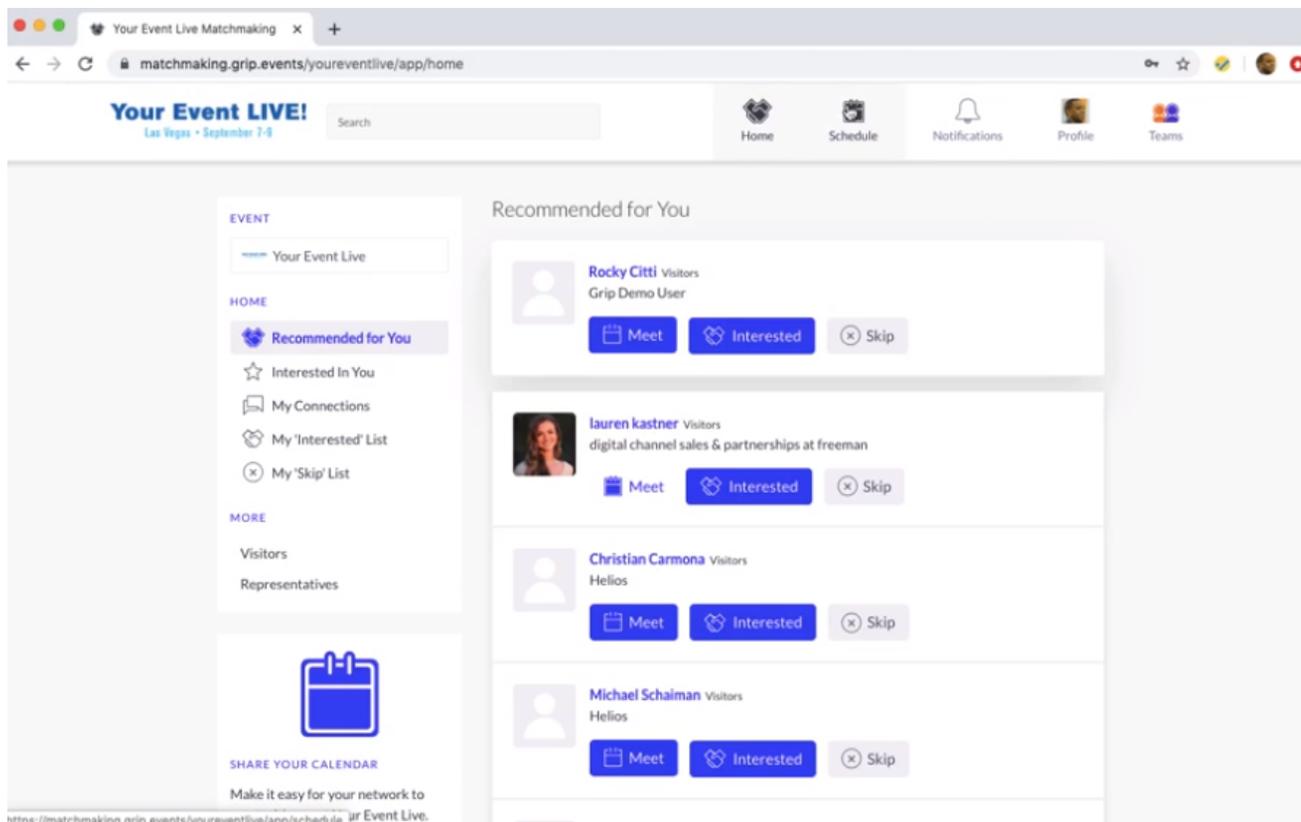
Created by: Carol Kramer

Modified on: Tue, 1 Sep, 2020 at 1:21 PM

Matchmaking is a purchased component of OEPro and is typically implemented within the Networking module. It leverages an artificial intelligence (AI) powered event networking solution called Grip. Grip provides attendees, exhibitors, and sponsors with highly targeted networking recommendations to help them meet other people who are aligned with their professional goals and interests.

How Matchmaking works:

1. The AI-powered algorithm makes recommendations for connections.
2. Individuals can act on these recommendations to reach out to and connect with other similarly aligned individuals, gather relevant business leads, and schedule meetings for the event. Meeting invitations are integrated with Outlook and Google Calendar.
3. Attendees, exhibitors, and sponsors are able to grow their networks, save valuable contact details, and get business done.

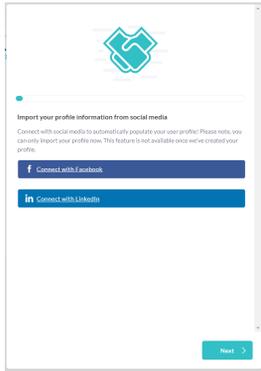


Login to Grip (Matchmaking)

Created by: Carol Kramer

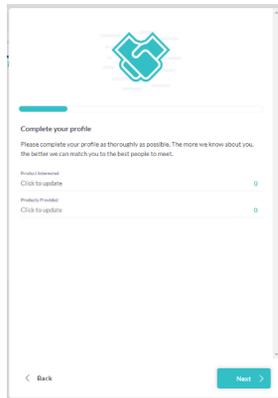
Modified on: Thu, 13 Aug, 2020 at 10:55 AM

To Login to Grip, sign-in to OEPro and select the Networking menu item. The following pop-up will be displayed only on the first time of entry.

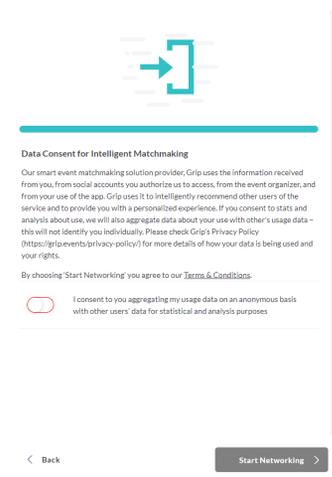


Linking with Facebook and/or LinkedIn will allow the networking tool to work more efficiently with presenting connections. Select one or both, once finished, select the Next button.

For your event, the system may request additional information. This is not mandatory but will allow the networking tool to present better connections for you at the event. Complete fields as desired and select the Next button.



Once next is selected, a consent form is displayed. This must be completed before networking is available.



Manage Connections

Created by: Carol Kramer

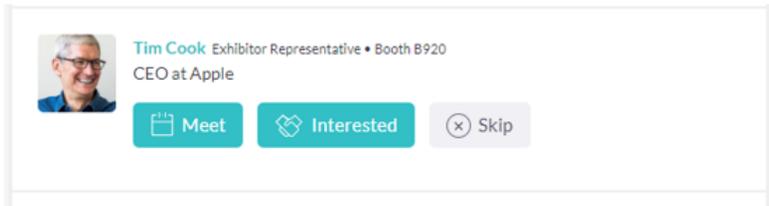
Modified on: Thu, 13 Aug, 2020 at 10:57 AM

Grip provides multiple methods to work with your connections.

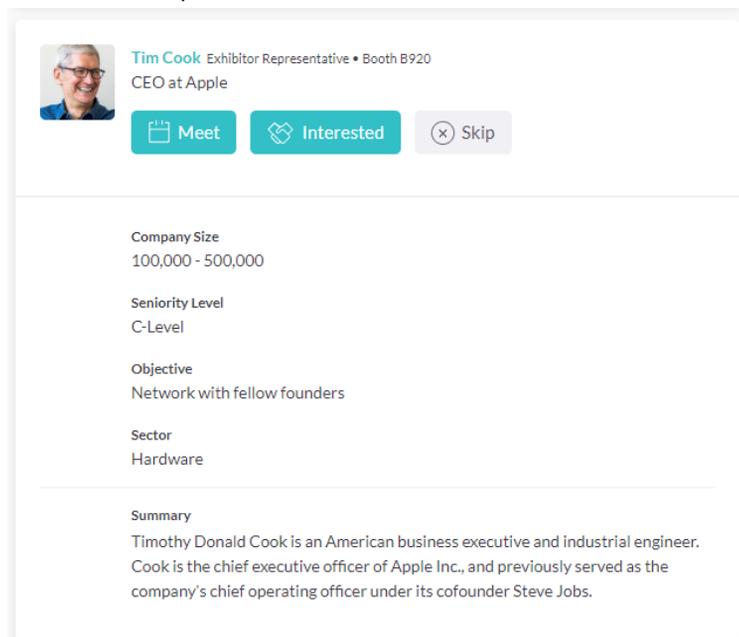
- [About the Person Content Block](#)
- [View Recommended Connections](#)
- [View Connections Interested in You](#)
- [View Your Connections](#)
- [Add Connection to My 'Interested' List](#)
- [Skip a Connection](#)

Person Content Block

Connections will be displayed in a Person Content block. Each Person Content Block on the display is collapsed upon initial entry and contains the Individual's Image, Name, Profile type and Title along with buttons providing actions for the user.



The block is expandable when clicked.



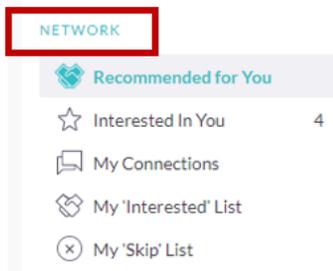
The expanded block contains Additional profile information depending on the configuration.

Actions available within the Person Content Block include Meet, Interested, Skip and Chat.

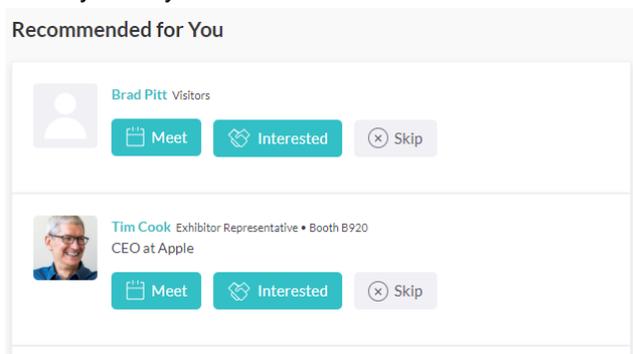
- **Meet:** When selected, a Meeting Schedule Pop-Up is displayed highlighting the profile of the individual selected with a scheduler to request a meeting with the individual.
- **Interested:** When selected, the attendee is removed from the current list (Recommended for you) and can now be found in the My 'Interested' list. By selecting this button, Grip will update the user's profile to provide better recommendations for other participants to meet.
- **Skip:** When selected, the attendee is removed from the current list (Recommended for you) and can now be found in the My 'Skip' list. By selecting this button, Grip will update the user's profile to provide better recommendations for other participants to meet.
- **Chat:** Allows the user to send a message to the other party. It will only display if the other party has expressed interest in the user or the two have already connected.

View Recommended Connections

There are two methods to view recommended Connections: Select 'Recommended for You' from the Home Icon in the Navigational bar or in the Network Sub-Menu.



Based on information provided, the system has determined connections within the event who have common interests and with which you may want to meet.

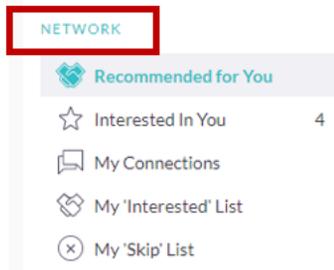


Each profile type is listed by the Name. Actions available for each connection include:

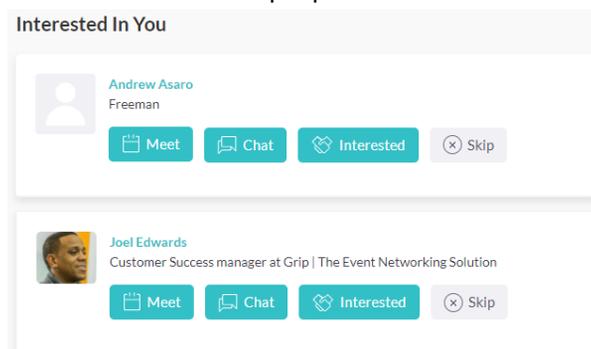
- **Meet:** When selected, a Meeting Schedule Pop-Up is displayed highlighting the profile of the individual selected with a scheduler to request a meeting with the individual.
- **Interested:** When selected, the attendee is removed from the current list (Recommended for you) and can now be found in the My 'Interested' list. By selecting this button, Grip will update the user's profile to provide better recommendations for other participants to meet.
- **Skip:** When selected, the attendee is removed from the current list (Recommended for you) and can now be found in the My 'Skip' list. By selecting this button, Grip will update the user's profile to provide better recommendations for other participants to meet.

View Connections Interested in You

There are two methods to view Connections Interested in You: Select 'Interested in You' from the Home Icon in the Navigational bar or in the Network Sub-Menu.



Once selected a list of people who have shown an interest in you will be displayed.

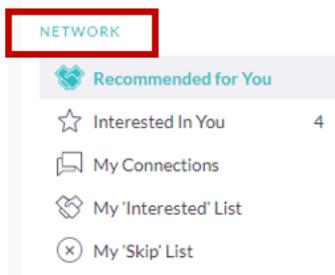


Actions available for each connection include:

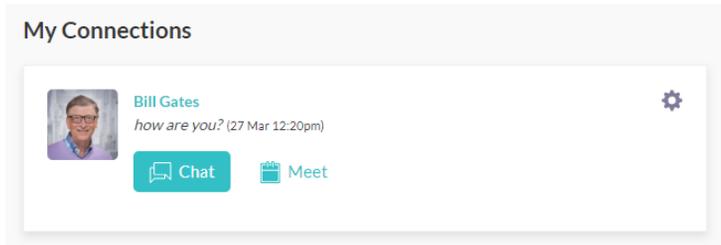
- **Meet:** When selected, a Meeting Schedule Pop-Up is displayed highlighting the profile of the individual selected with a scheduler to request a meeting with the individual.
- **Interested:** When selected, the attendee is removed from the current list (Recommended for you) and can now be found in the My 'Interested' list. By selecting this button, Grip will update the user's profile to provide better recommendations for other participants to meet.
- **Skip:** When selected, the attendee is removed from the current list (Recommended for you) and can now be found in the My 'Skip' list. By selecting this button, Grip will update the user's profile to provide better recommendations for other participants to meet.
- **Chat:** Allows the user to send a message to the other party. It will only display if the other party has expressed interest in the user or the two have already connected.

View Your Connections

There are two methods to view your Connections: Select 'My Connections' from the Home Icon in the Navigational bar or in the Network Sub-Menu.



Once selected a list of your connections will be displayed. A connection is defined as anyone you have a meeting scheduled with or have a mutual handshake.



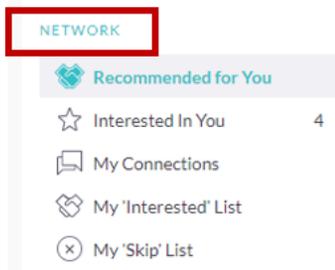
Actions available for each connection include:

- **Meet:** When selected, a Meeting Schedule Pop-Up is displayed highlighting the profile of the individual selected with a scheduler to request a meeting with the individual.
- **Chat:** Allows the user to send a message to the other party. It will only display if the other party has expressed interest in the user or the two have already connected.

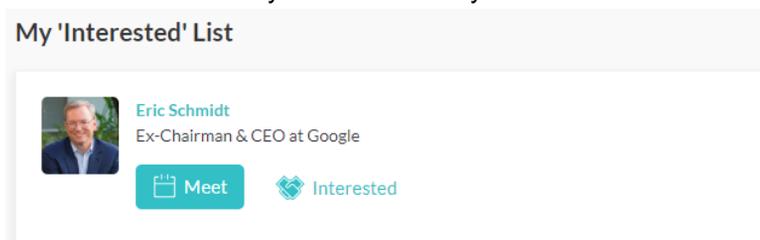
Add Connection to My 'Interested' List

By selecting the 'Interested' button in any Person Contact Module, the person displayed will be moved to your 'Interested' list.

There are two methods to view connections you have shown Interested In: Select My 'Interested' List from the Home Icon in the Navigational bar or in the Network Sub-Menu.



Once selected a list of your connections you have shown interested in will be displayed.



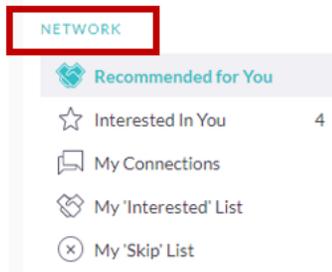
Actions available for each connection include:

- **Meet:** When selected, a Meeting Schedule Pop-Up is displayed highlighting the profile of the individual selected with a scheduler to request a meeting with the individual.
- **Interested:** When selected, the attendee is removed from the current list (Recommended for you) and can now be found in the My 'Interested' list. By selecting this button, Grip will update the user's profile to provide better recommendations for other participants to meet.

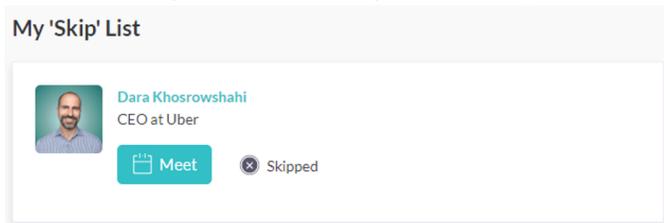
Skip a Connection

By selecting the 'Skip' button in any Person Contact Module, the person displayed will be moved to your skipped list.

There are two methods to view connections you have Skipped: Select My 'Skip' List from the Home Icon in the Navigational bar or in the Network Sub-Menu.



Once selected a list of your connections you have skipped will be displayed.



Actions available for each connection include:

- **Meet:** When selected, a Meeting Schedule Pop-Up is displayed highlighting the profile of the individual selected with a scheduler to request a meeting with the individual.
- **Skip:** When selected, the attendee is removed from the current list (Recommended for you) and can now be found in the My 'Skip' list. By selecting this button, Grip will update the user's profile to provide better recommendations for other participants to meet.

Manage Schedules

Created by: Carol Kramer

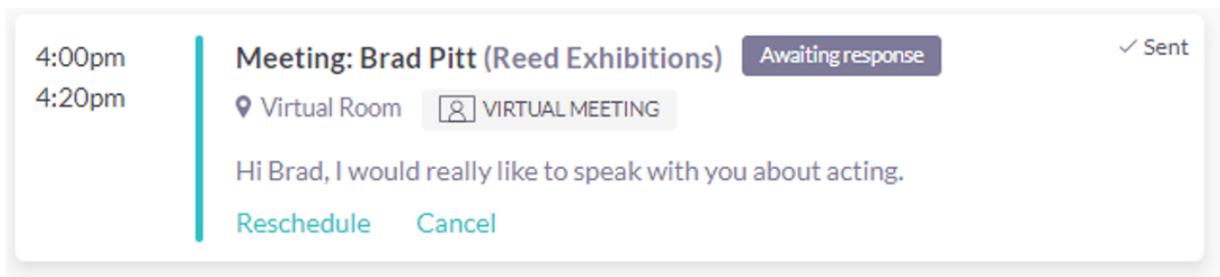
Modified on: Thu, 13 Aug, 2020 at 10:58 AM

Grip provides a schedule to view all of your meetings.

- [Meeting Content Block](#)
- [Meeting Schedule Pop-up](#)
- [View Schedule](#)
- [View a Meeting](#)

Meeting Content Block

Meetings are displayed in a Meeting Content Block.



Each Meeting Content block contains:

- Time of meeting
- Name of the other meeting participant (if on Inviter's schedule, it is the name of Invitee and vice versa). The name provides a hyperlink to the Meeting Schedule Pop-up.
- Place of Meeting
- Personal Message sent on invitation
- Status of the meeting
- Pending: displayed on Invitee's view when no response has been given.
 1. Awaiting Response: displayed when no response has been received.
 2. Sent: displayed when invitation has been sent.
 3. Seen: displayed when the invitation has been read.
 4. Once the meeting has occurred, additional options are displayed to provide input on the meeting.



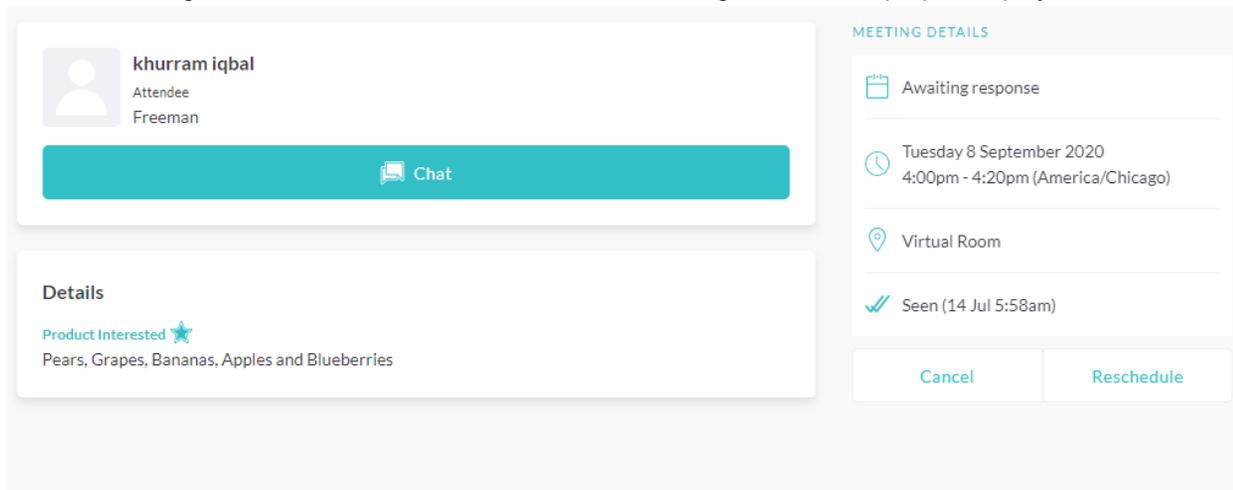
These will be used by the system to improve provided recommendations.

Actions available within the Meeting Content Block can vary based on whether the user is the invited or inviter, if the meeting has been accepted, etc. The actions that could be available are:

- [Reschedule](#)
- [Cancel](#)
- [Accept](#)
- [Message or Chat](#)
- [Decline](#)

Meeting Schedule Pop-up

When a meeting is viewed or an action is selected, the Meeting Schedule Pop-up is displayed.



The left of the screen will display profile information about the other participant of the meeting. The right will display the meeting details:

- Status
 - a. Pending: displayed on Invitee's view when no response has been given.
 - b. Scheduled: displayed once meeting has been confirmed by both parties.
 - c. Awaiting Response: displayed on inviter's view when no response has been received.
 - d. Sent: displayed when invitation has been sent.
 - e. Declined: the meeting has been declined by either party.

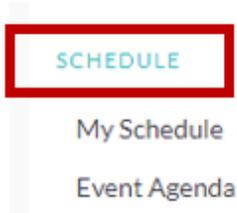
- Date/Time
- Location
- Seen Status – if the other participant has viewed the meeting.

Action available within the Meeting Schedule Pop-up can vary based upon the status of the Meeting.

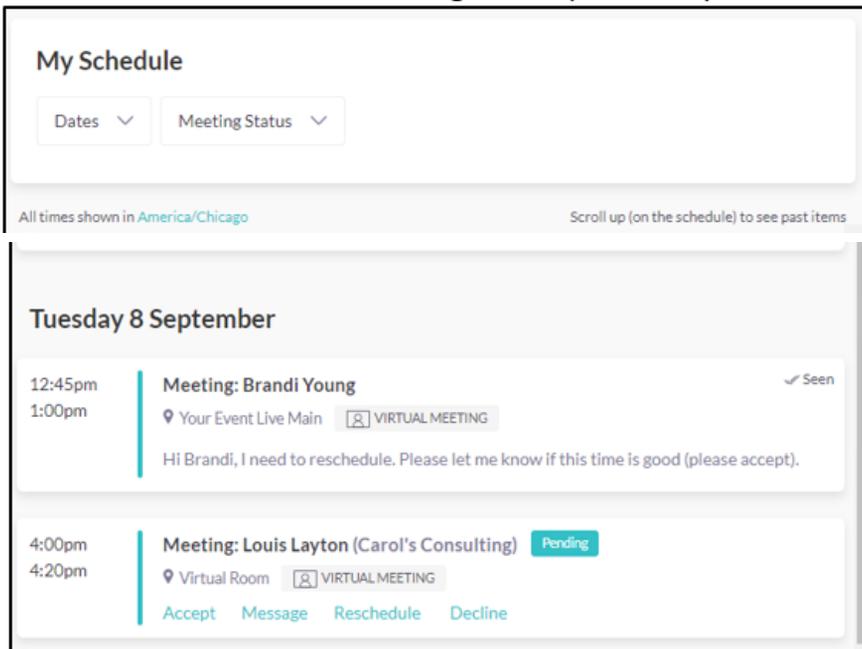
- **Reschedule**
- **Cancel**
- **Accept**
- **Message or Chat**
- **Decline**
- Open Virtual Meeting Room: this option displays once the meeting has been accepted. The Virtual room will be active 5 minutes before the meeting. The room will remain available for the attendees as long as they need it, i.e. they are not shut out of the meeting room after the initial 20 minutes.

View Schedule

There are two methods to view your Schedule, select My Schedule from the Home Icon in the Navigational bar or in the Schedule Sub-Menu.



Upon selection all meeting content blocks which have been personally established or awaiting response are displayed.



Filters are provided to select a specific date or by meeting status: Scheduled, Pending, Awaiting Response and Declined.

Actions Available for each Meeting are:

- Reschedule
- Cancel
- Accept
- Message or Chat
- Decline

View a Meeting

Anytime a meeting is selected either via the View button on the email, a notification, or within the schedule meeting content block, the Meeting Schedule Pop-up will be displayed.

Request a Meeting

Created by: Carol Kramer

Modified on: Thu, 13 Aug, 2020 at 11:06 AM

When the Meet Button is selected on a Person Content Block, a Schedule Meeting pop-up is displayed highlighting the profile of the individual selected with a scheduler to request a meeting.

Schedule Meeting Pop-Up

Back

Brandi Young
Attendee

Interested

GET IN TOUCH

Date
Monday 07/09/2020

Time
5:40pm - 6:00pm (America/Chicago)

Location
Virtual Room

Personal Message
Hi Brandi, It would be great to meet with you

Request Meeting

The user will select the

- Date: Dates available will be each day of the conference. These are also configurable by event. The event planner may only want to allow meetings on specific dates.
- Time: these are listed in 20-minute increments. Although these are predefined, the meeting is not limited to 20 minutes, it can be shorter or longer. These are also configurable by event as well as by the participant's schedule. As noted in **Profile**, a participant has the ability to manage their own availability.
- Location: defaults to Virtual Room, but there could be multiple locations depending on the event.

The user can then add a personal message and select the Request Meeting button. The screen will refresh with the options to reschedule or cancel.

Brandi Young
Attendee

Interested

MEETING DETAILS

Awaiting response

Monday 7 September 2020
5:40pm - 6:00pm (America/Chicago)

Virtual Room

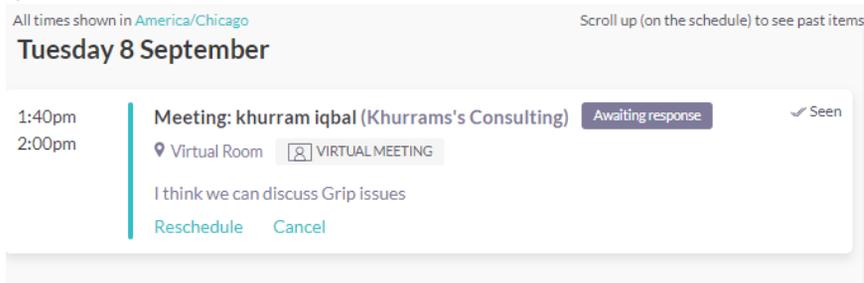
Sent

Hi Brandi, It would be great to meet with you.

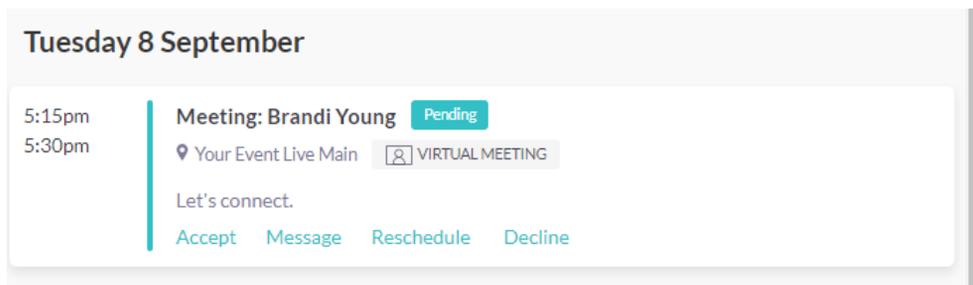
Cancel Reschedule

Once the request is made, the system performs additional actions:

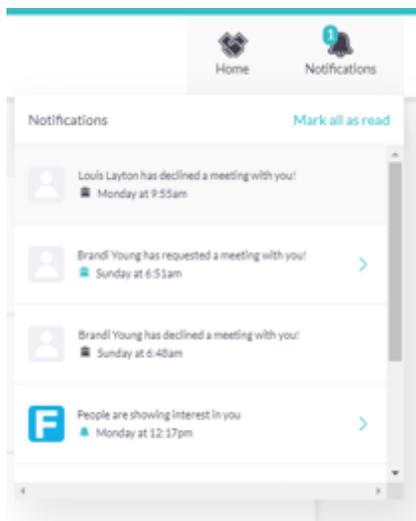
- Block the Grip calendar of both participants.
- Update the inviter's schedule.



- Display a Meeting Content Block on the invitee's schedule.



- Send a notification to the invitee.



- Send an email to invitee's registration email address.

Your Event Live meeting with Louis Layton at Your Event Live Main



Louis Layton
Vice President

Product Interested:
Apples, Blueberries and Pears
Products Offered:
Apples and Blueberries

Event: Your Event Live
When: Tuesday, 08-09-2020, 02:15:00 pm (GMT -07:00) ⓘ
Where: Your Event Live - Your Event Live Main
Status: Pending
Action: [Accept](#) [Message](#) [Decline](#) [View](#)

Official invite through [Your Event Live](#) powered by Grip.

You are receiving this courtesy email at the account carol.kramer@freeman.com because you are an attendee of **Your Event Live**.

To stop receiving future updates for this event, decline this event. Alternatively, you can [unsubscribe](#).

Forwarding this invitation allows any recipient to modify your RSVP response.

Cancel a Meeting

Created by: Carol Kramer

Modified on: Thu, 13 Aug, 2020 at 11:00 AM

If the inviter chooses to cancel a meeting, Grip makes the following updates depending on if the meeting had been accepted.

- Remove the meeting Invitee's Grip and Outlook schedule.
- Remove the meeting Inviter's Grip and Outlook schedule.
- Sends a notification to the Invitee that the meeting was canceled.
- Removes the blocks from the Grip calendar of both participants.

Send a Message/Chat

Created by: Carol Kramer

Modified on: Thu, 13 Aug, 2020 at 11:01 AM

A participant is only able to chat with another participant when a connection (handshake) is made. A connection can be comprised of:

- Both participants showing interest.
- A Meeting request has been sent (allows the invitee to message the inviter).
- A Meeting request has been accepted.

When the Message or Chat button is chosen, a chat box will be displayed on the screen where messages can be sent/received. If a user accesses the Chat button externally to the system, i.e. from a meeting request email, they will be redirected into the platform where the Chat box is displayed.

