Exhibitor how-to guide

Patient Safety
By Informa Markets

Live in-person: 29 Sept - 1 Oct 2022
Online: 22 Sept - 14 Oct 2022

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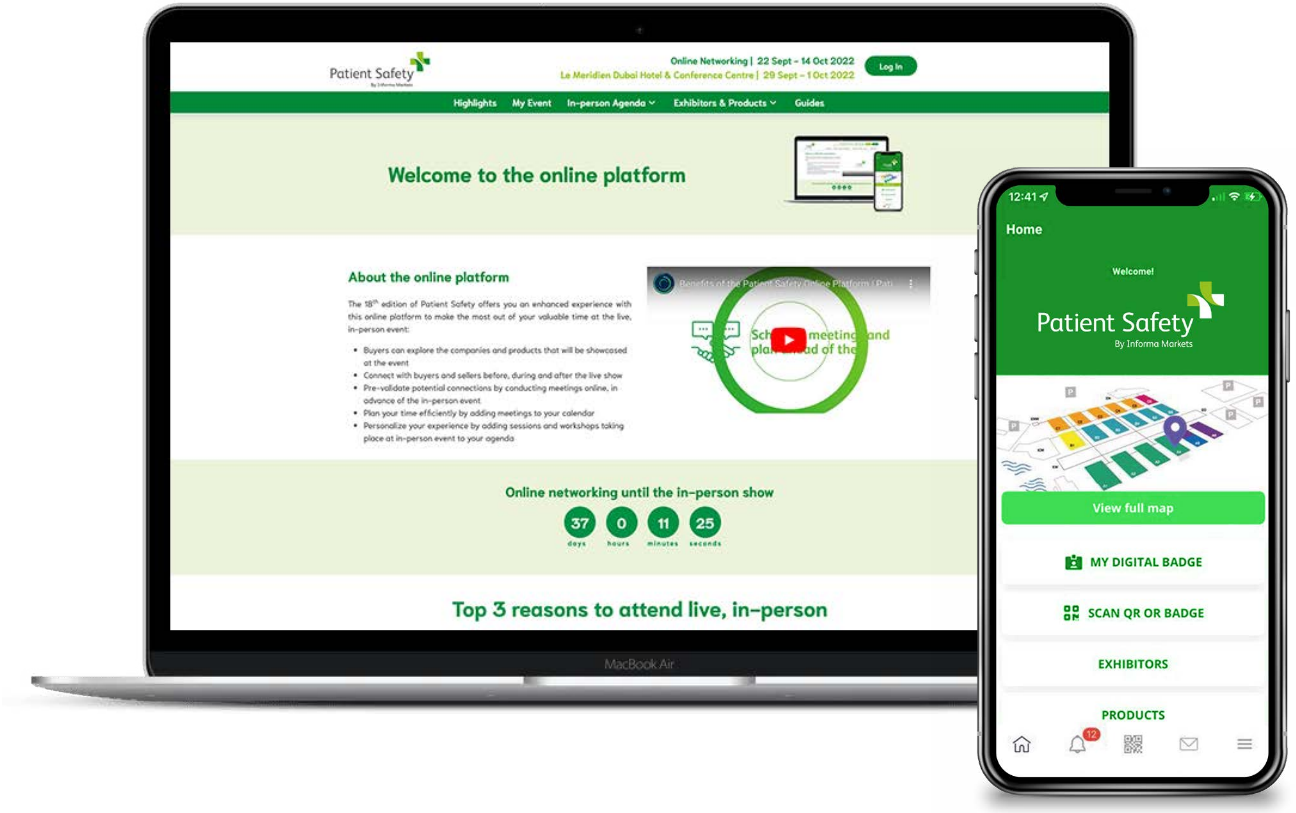
Introduction

Patient Safety Online has been redesigned to give exhibitors a more valuable experience, creating more opportunities to meet and connect with your target audience.

- Represent your company through your online profile
- Access the event via your desktop or through the mobile app
- Get real-time leads from everyone you engage with on the online platform and whose badge you scan onsite at the in-person event
- Connect with potential buyers who share your interests - pre, post event
- Engage with valuable contacts by connecting, messaging or setting up



My event checklist

As admin team member

- **Step 1:** Register badges for all staff in Customer Centre
- **Step 2:** Update my Company Profile & products in the Patient Safety online platform
- **Step 3:** Update my Personal Profile on the Patient Safety online platform
- **Step 4:** Get my digital badge on the Patient Safety online platform and/or the app
- **Step 5:** Add/remove team members as admin

As team member:

- **Step 1:** Update my personal profile on the Patient Safety Online platform
- **Step 2:** Get my digital badge on the Patient Safety Online platform and/or the app

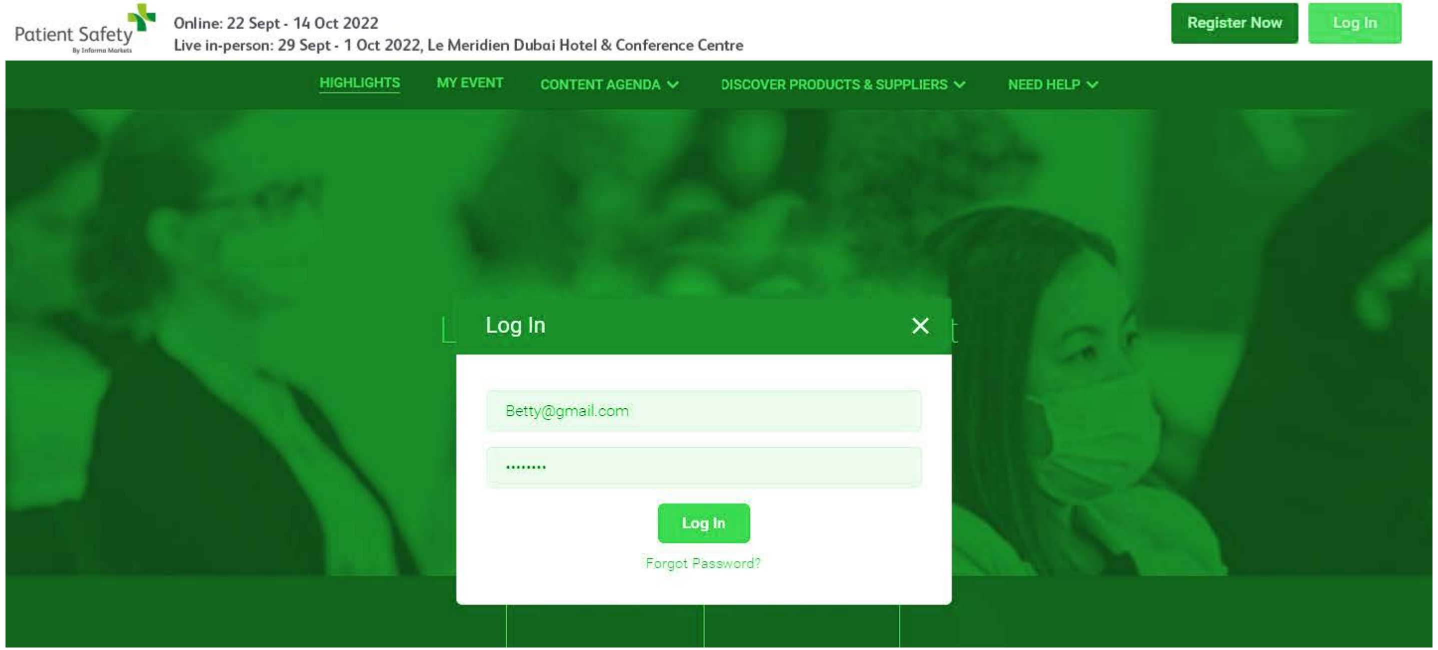
You are now ready to start connecting and learning in the Patient Safety Online platform!

Logging in for the first time

- **Step 1:** You will receive an email from the Patient Safety team with your username and activation link to enter the Patient Safety Online platform*
- **Step 2:** Once you've clicked on the activation link, you will be asked to create your password
- **Step 3:** Log in and start enjoying the platform!

** Check your spam folder if you don't see an email in your inbox*

You can also go to the Patient Safety Online platform directly: connections.Patient Safetyshow.com



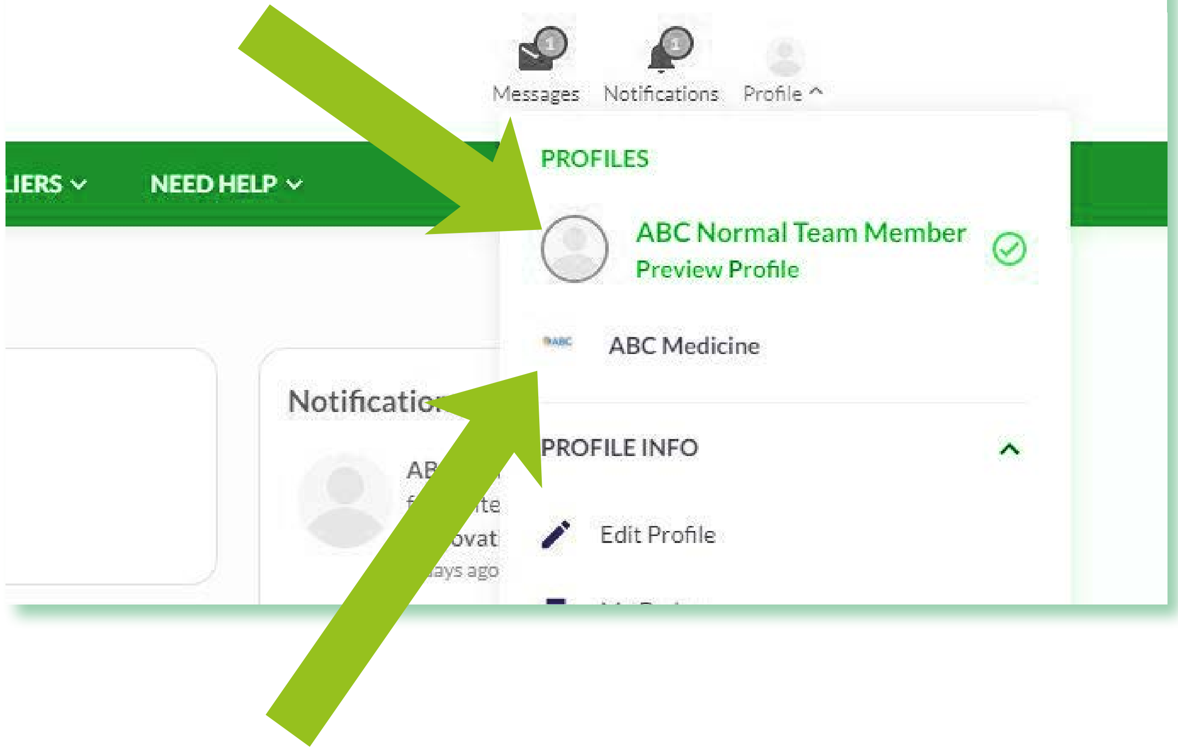
My company profile & products

Overview of profile types

There are 2 different exhibitor profile types:

- **Admin team member**
  - Can update company profile, add products, etc.
  - Has a personal profile that can be edited and can interact with others
  - Can amend other team members' profiles to become admin
  - Can view all team members' meeting schedules
  - Can download all leads captured by the company
- **Team member**
  - Has a personal profile that can be edited and can interact with others
  - Can capture and retrieve their own leads
  - Can view company profile but not edit

Personal profile

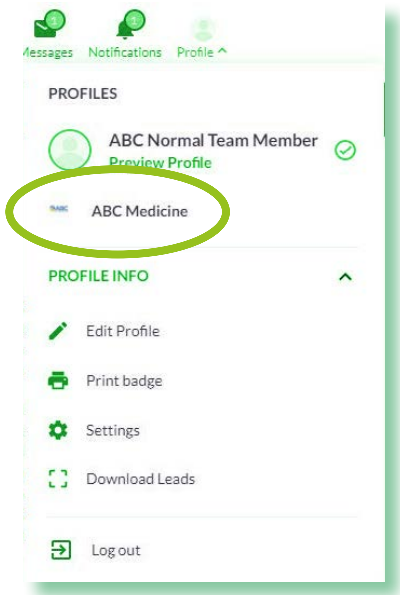


Company profile

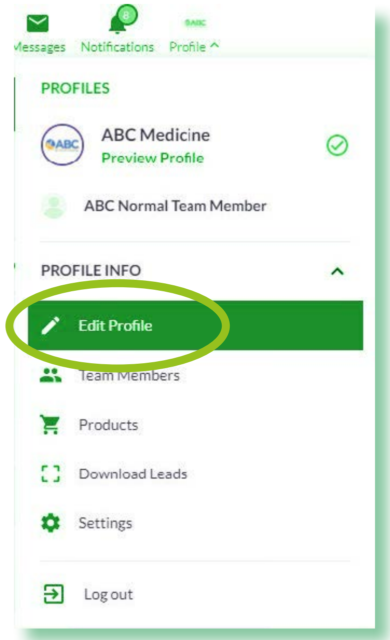
How do I know if I am an admin team member for my company?

If you can edit your company profile, then you are the admin team member. If you are not, then your admin team member can add you as an admin.

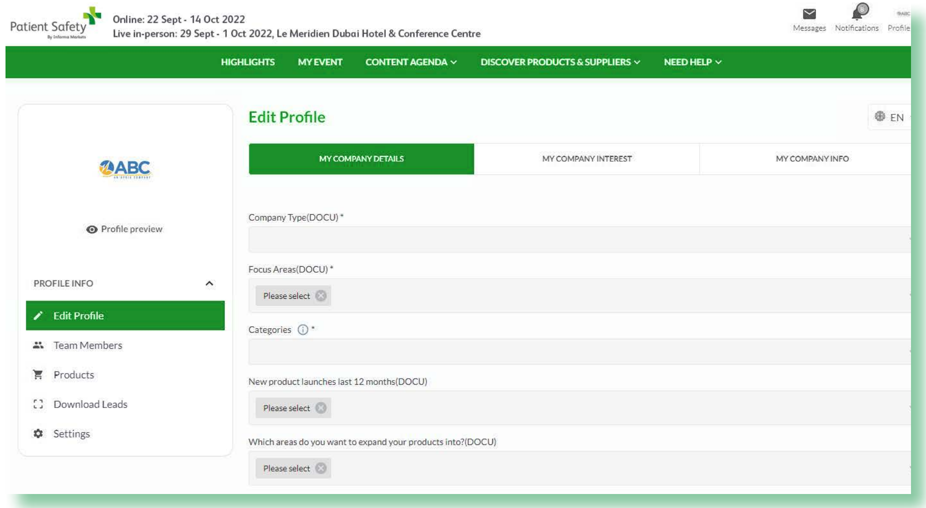
Step 1: Click on your company name to go into your company account



Step 2: Click on edit profile



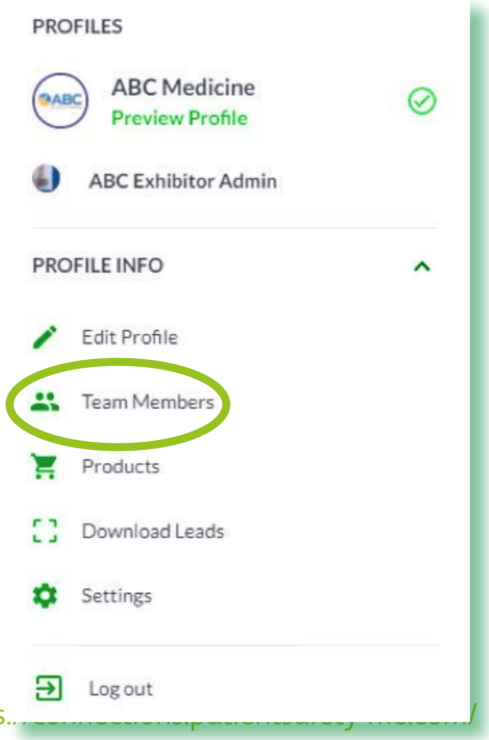
Step 3: Can you edit your company profile? If yes, you are an exhibitor admin. If not, you are a team member



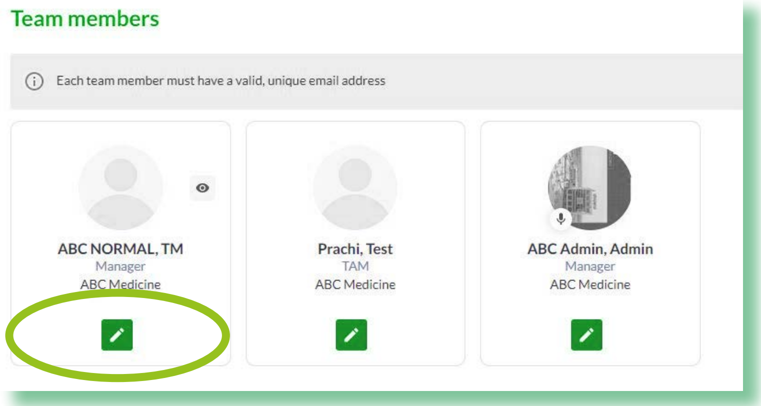
Adding team members as admin

As admin team member, you have access to edit your company profile, products and other functionalities. The admin team member can also add other team members as admins

Step 1: click on "team members" in your company profile



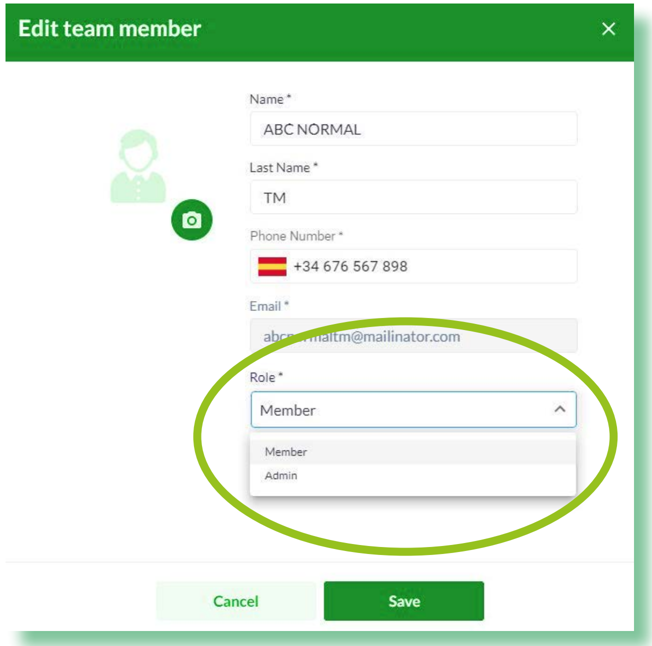
Step 2: click on the team member



Reminder: Cannot see your colleague in the team member list?
If so they are not yet registered. The main stand holder needs to register them via Customer Centre. Once registered you should see all your colleague in your team member's list.

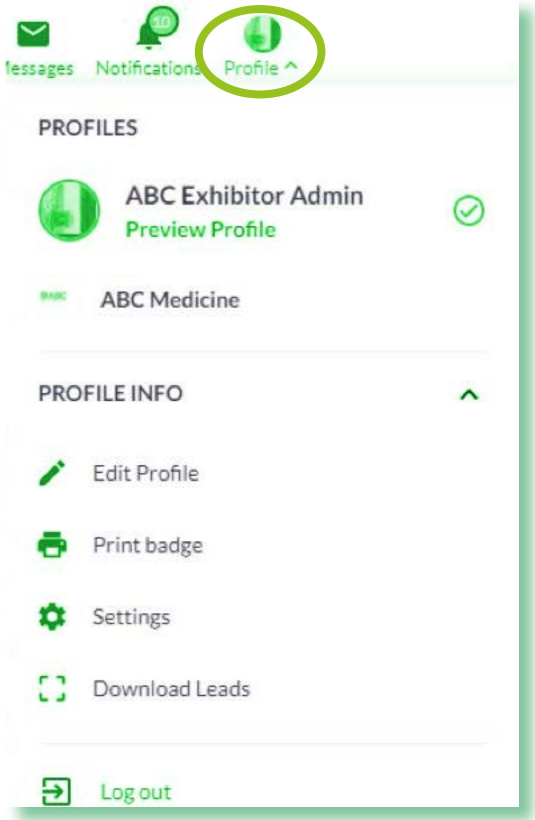
Click here to follow the steps on ading team member through customer centre

Step 3: Change the role of your team member

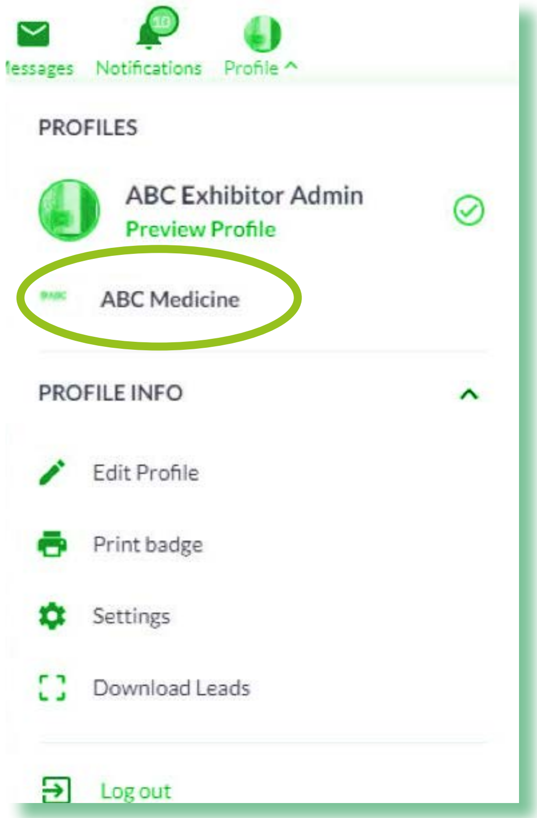


How do I access my company profile?

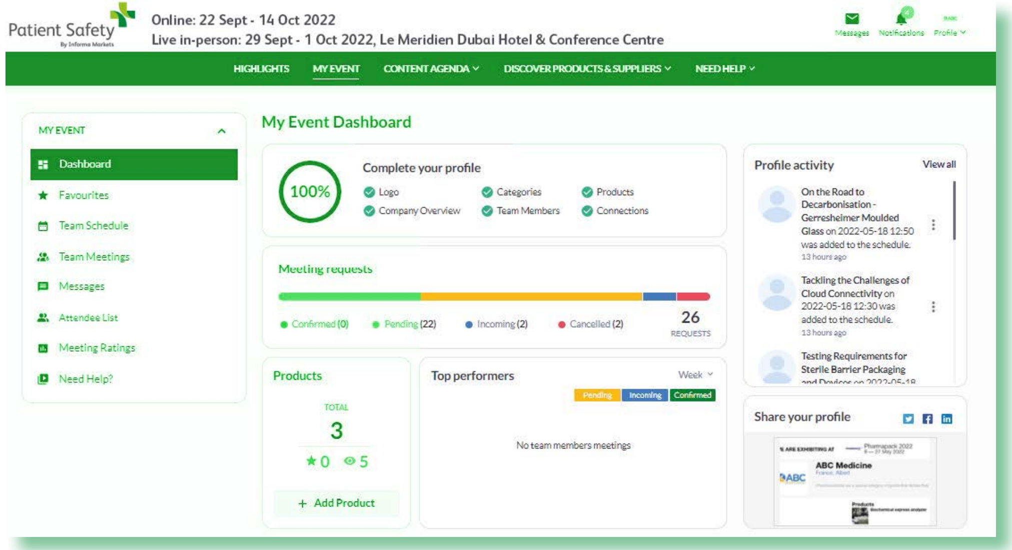
Step 1: Click on profile on the top right



Step 2: Click on your company name



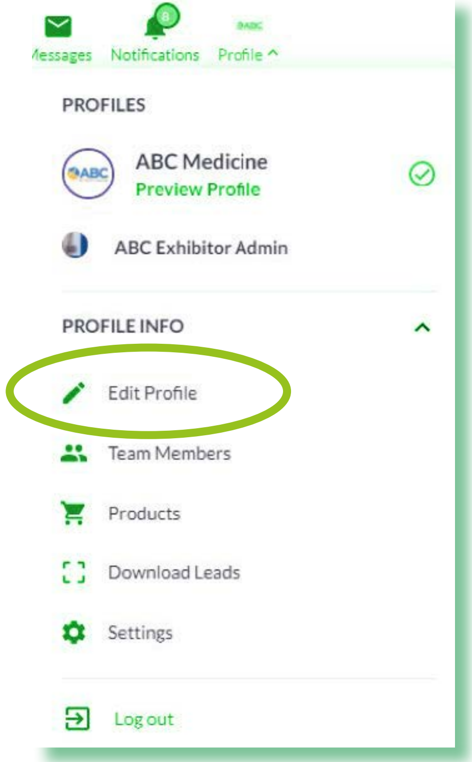
Step 3: You are in your company profile!



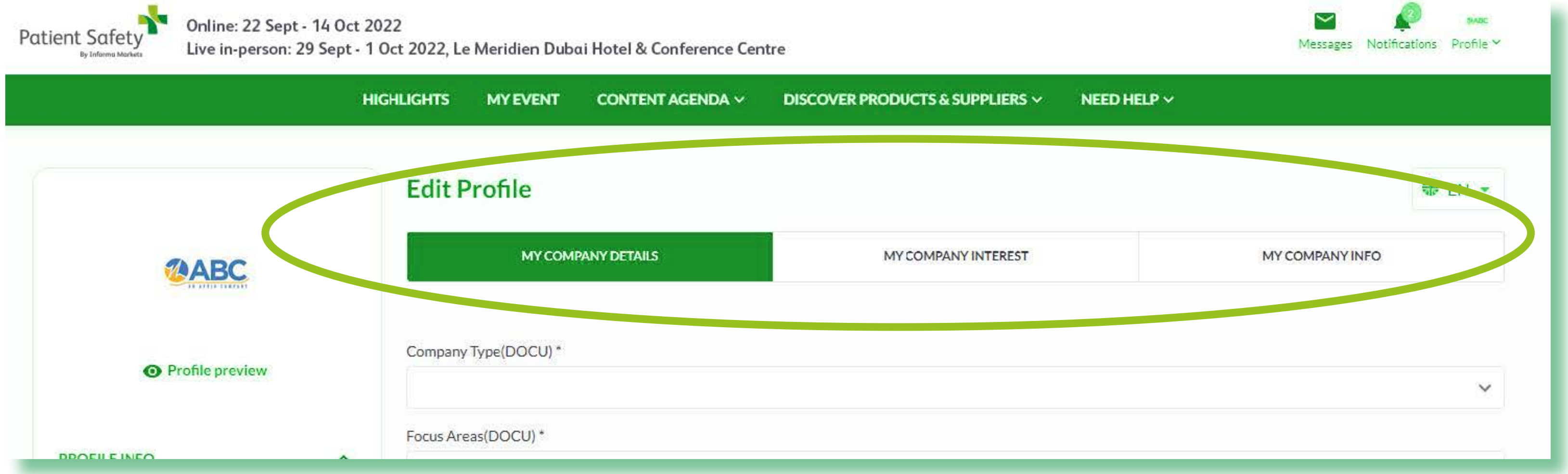
How do I edit my company profile?

As an admin team member, you can edit your company profile and products page. Make sure to take the time to create an engaging, informative and appealing profile. This is the best way to get the most out of the event.

Step 1: Once you are in your company profile, click on edit profile



Step 2: Fill in your company information in the below 3 tabs



Company QR Code: Download your company QR code to display on your stand. Visitors who scan your company QR code will be captured as leads.

As the Admin you can go to your Company Profile, then Settings and click on Company QR code.

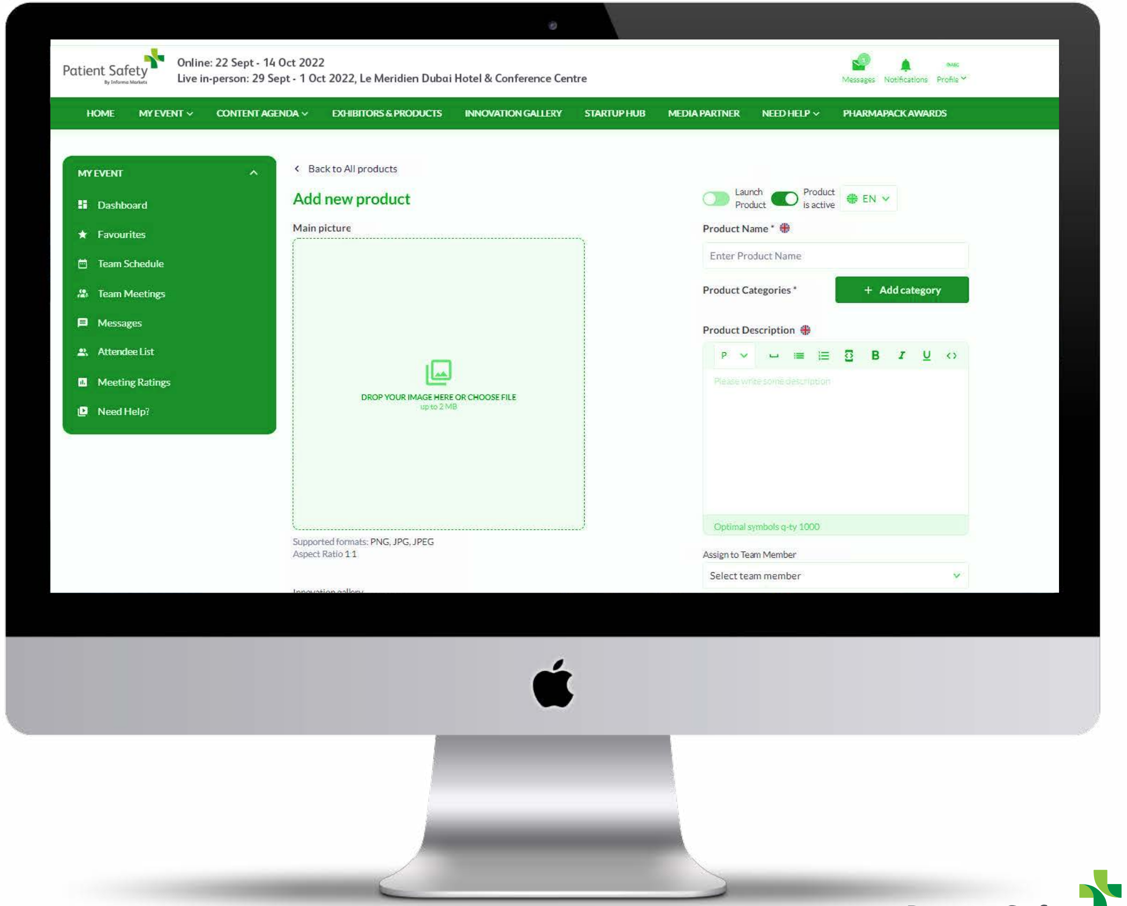
What is my product page?

Each product can have:

- A unique name
- Unique product categories
- A unique product description
- Multiple product images
- Associated documents
- A team member attached if you have a team member who specializes in this product

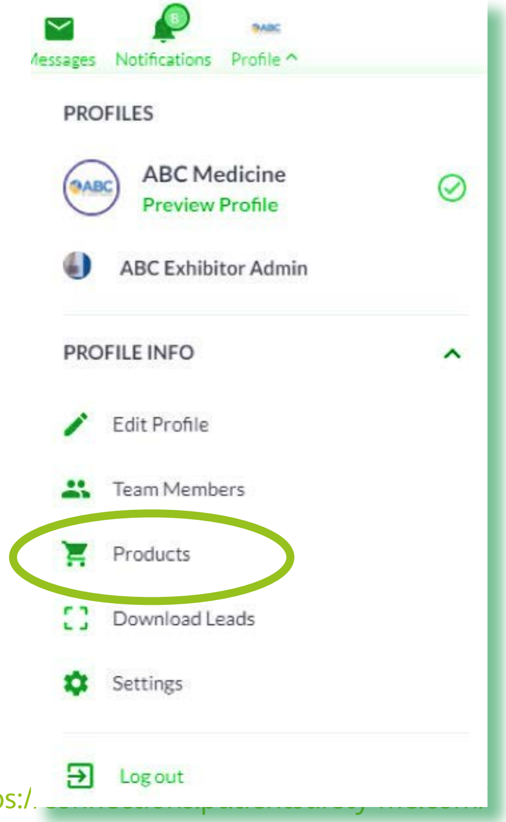
Each product can be toggled to active status, meaning it is visible to others, or inactive status, meaning it is visible only to you. Each product's status can be changed at any time.

Under the image for your product, you have the option to download a QR code specifically for this product. You can download this and display it on your stand, which then allows visitors to scan it during the in-person event. Anyone who scans your QR codes will be captured as one of your leads.

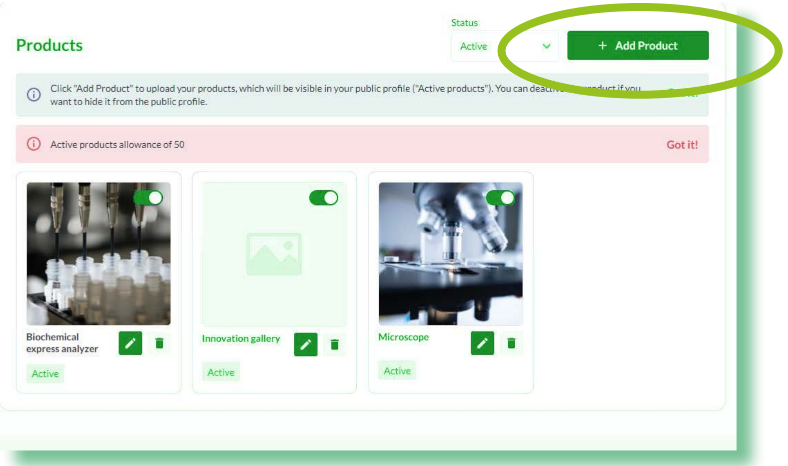


How do I edit/add/update my product page

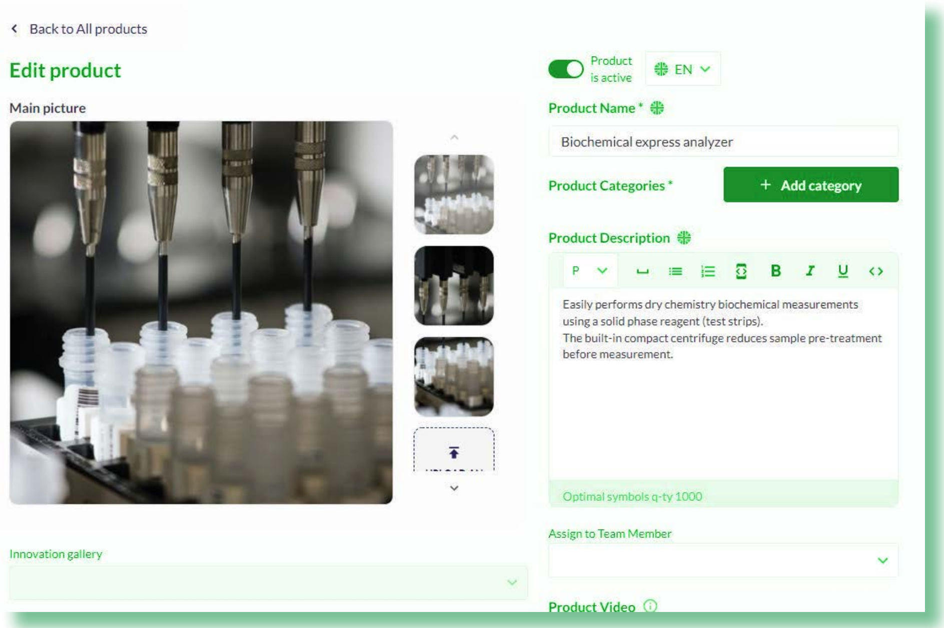
Step 1: Click on “Products” from your company profile view



Step 2: Click on “Add Product” or to edit your product



Step 3: Start editing your product information

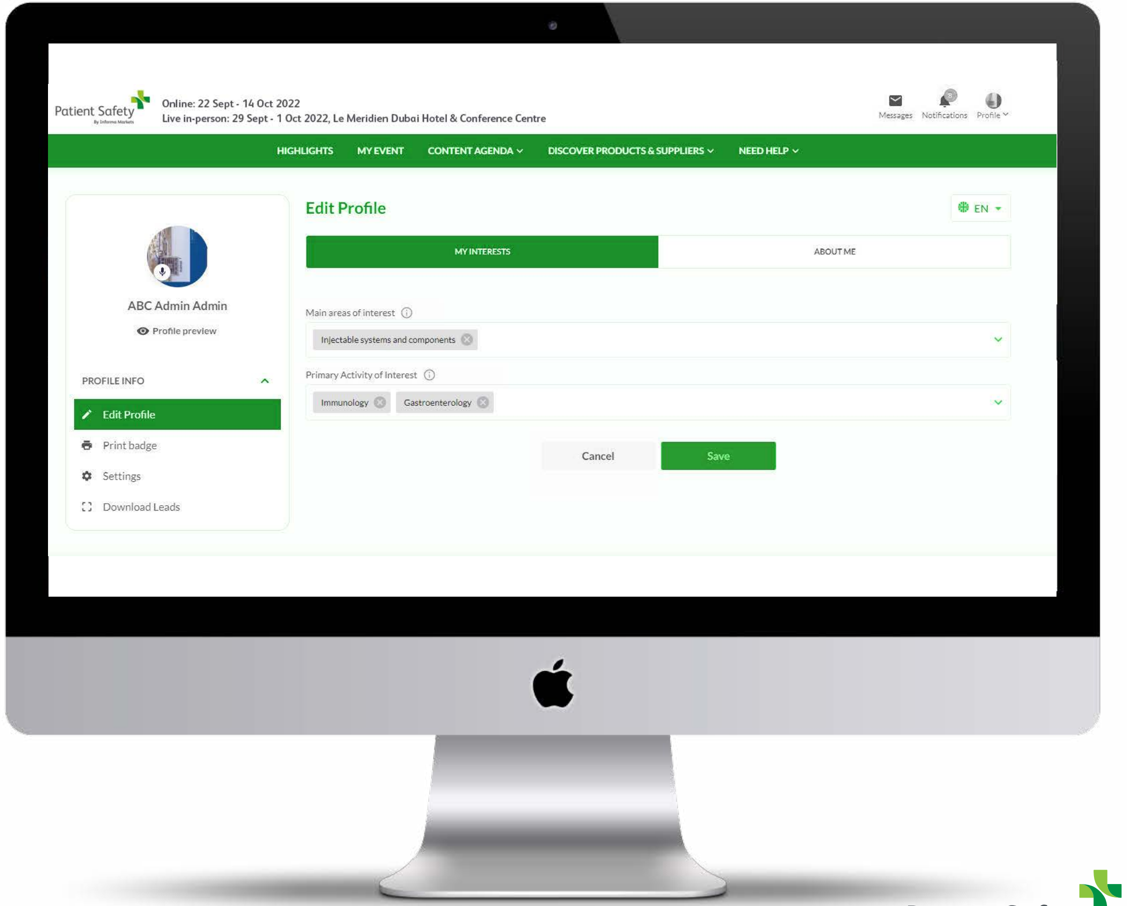


My personal profile

What is my personal profile

As a team member, your profile is where you can:

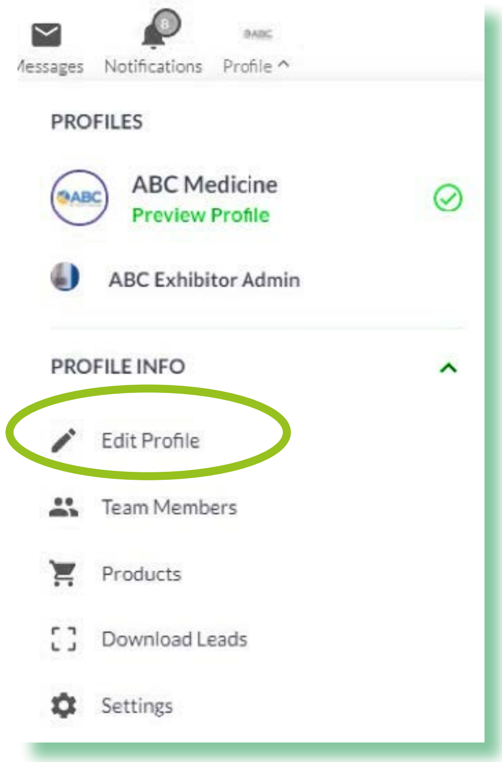
- Update your profile information & contact details
- Give more information about what you are looking for by answering the additional questions
- Add a photo to be easily recognised
- Choose your notification settings
- Find your badge
- Download your leads



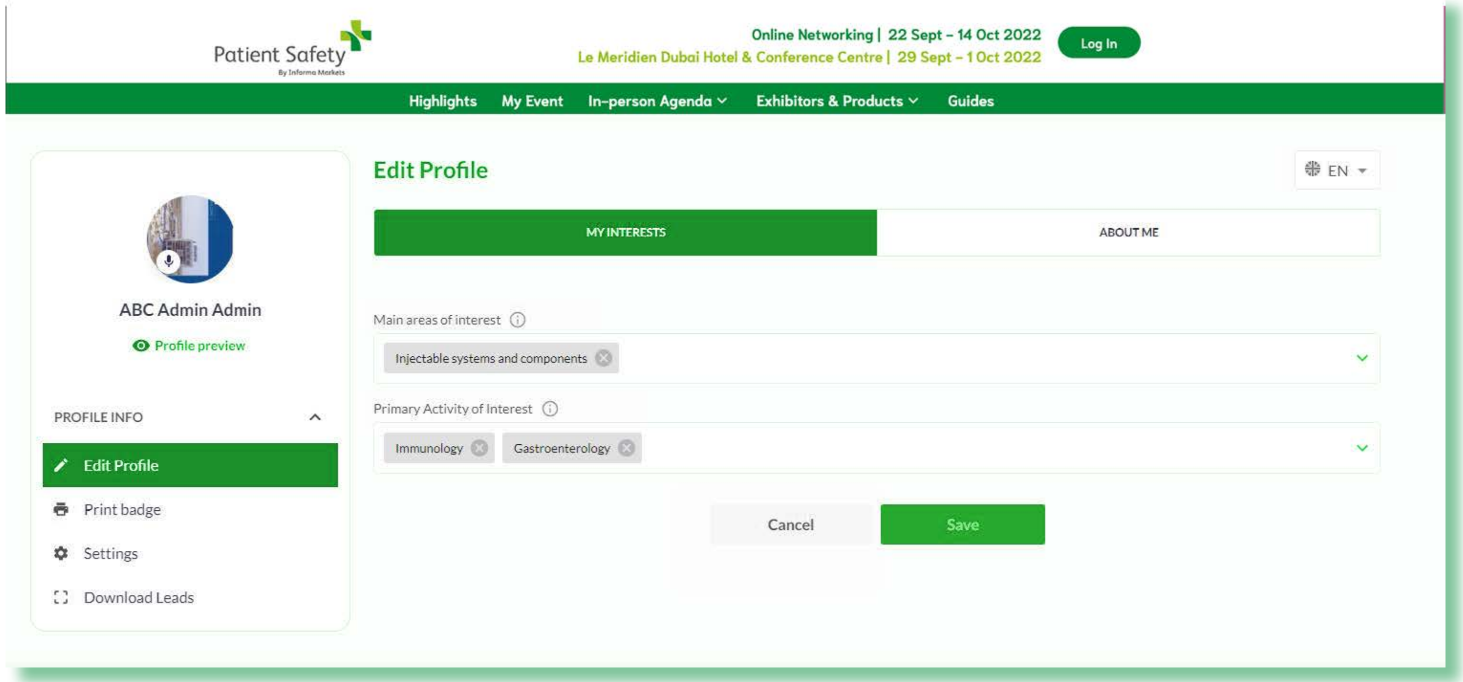
How do I edit my personal profile?

As a Team Member, you can edit your personal profile. Make sure to take the time to create an engaging, informative and appealing profile. This is the best way to get the most out of the event.

Step 1: Click on "Edit Profile"



Step 2: Fill in & update your profile

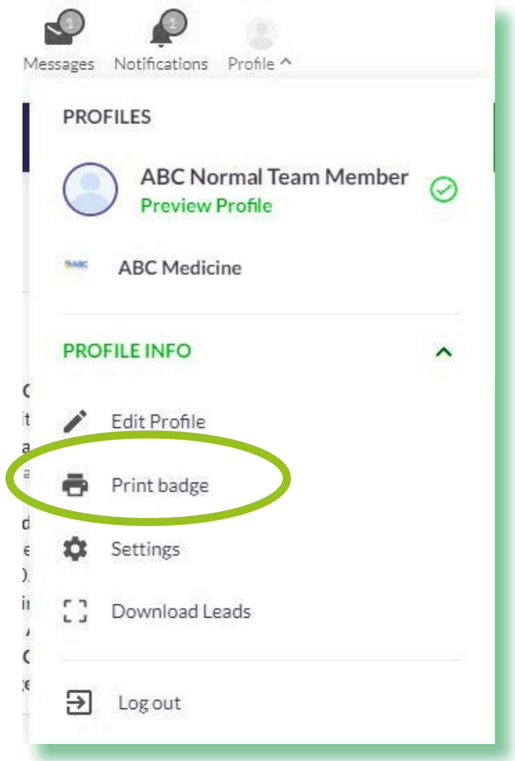


My digital badge

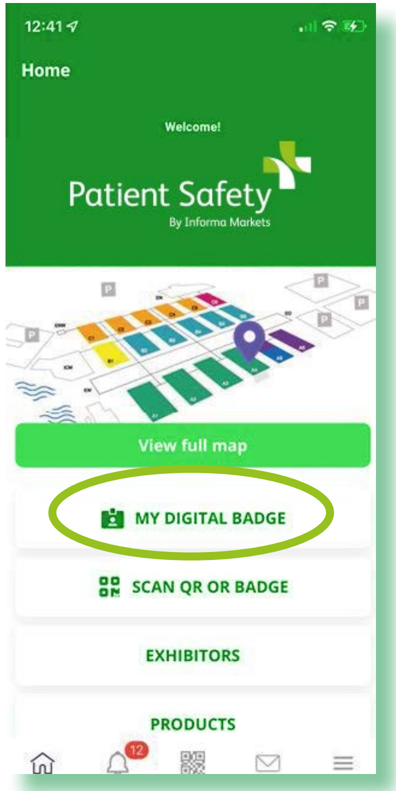
Accessing my digital badge

Once logged in you can access your badge from your desktop or in the mobile app.

Desktop: In the desktop click on "profile" and then my badge



App: In the mobile app click "my digital badge" on first screen



You have your badge!

Mobile app available one week prior to the event

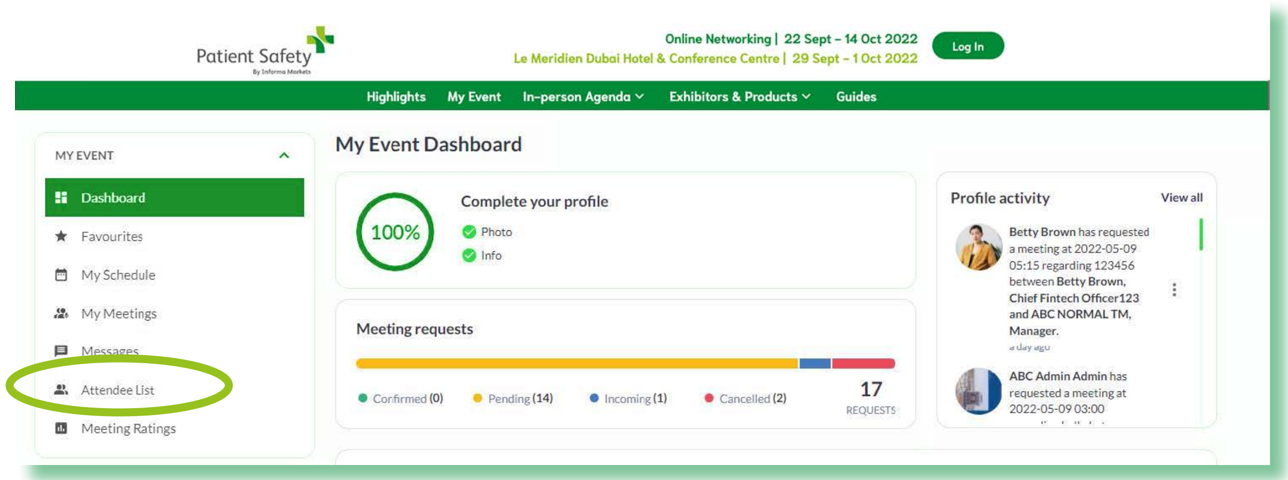
Networking

How to find attendees

only available from July 11

You will find the attendee list under "My Event" page as shown on the right.

- This is where you can start **building your pipeline of valuable contacts,** conversations and customers. Use filters to best find who you want to contact and meet.
- Each person's profile can be clicked for additional details about that person. There are also icons that allow you to **add the person to your list of favorites, send them a message, or request a meeting.**

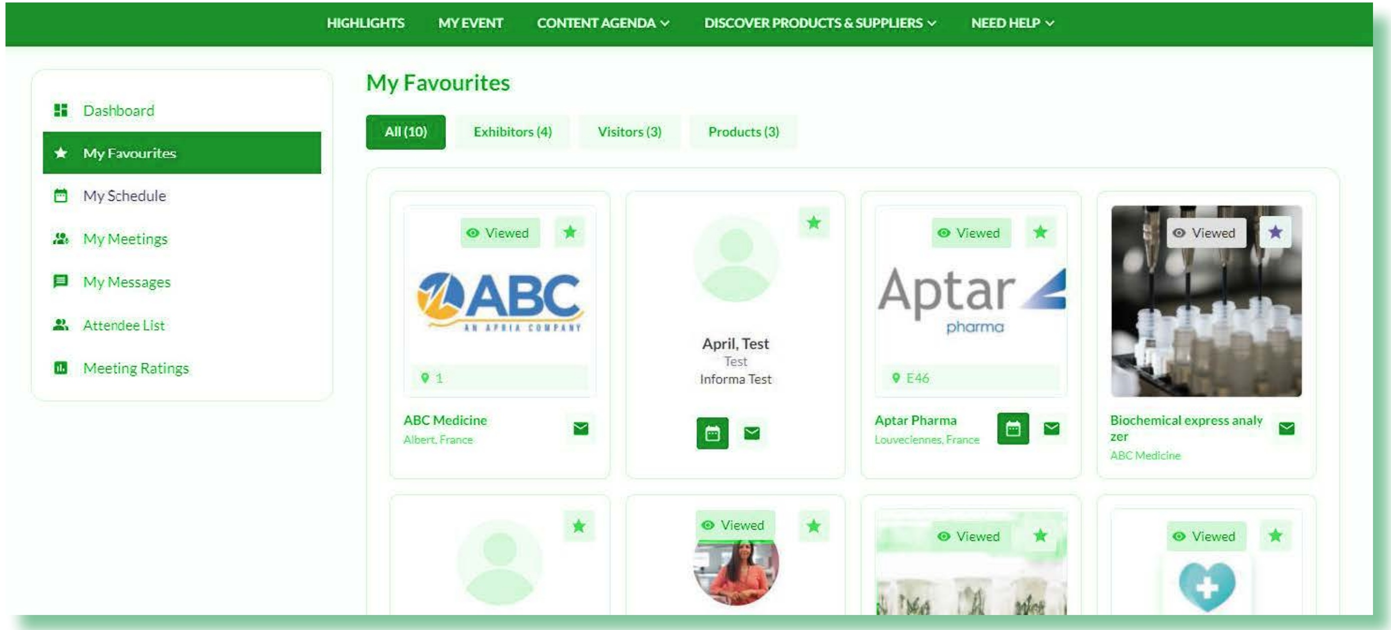


Saving and viewing favorites

You can save a person's profile, company or product to your list of favorites by clicking the star icon on the profile card.

An item that you have already favourited will have a solid star, while a not yet favourited item will have a hollow star.

To navigate to your list of favorites go to:
- My event
- Find my favorites in drop down menu



Messaging & meetings

Sending & viewing messages

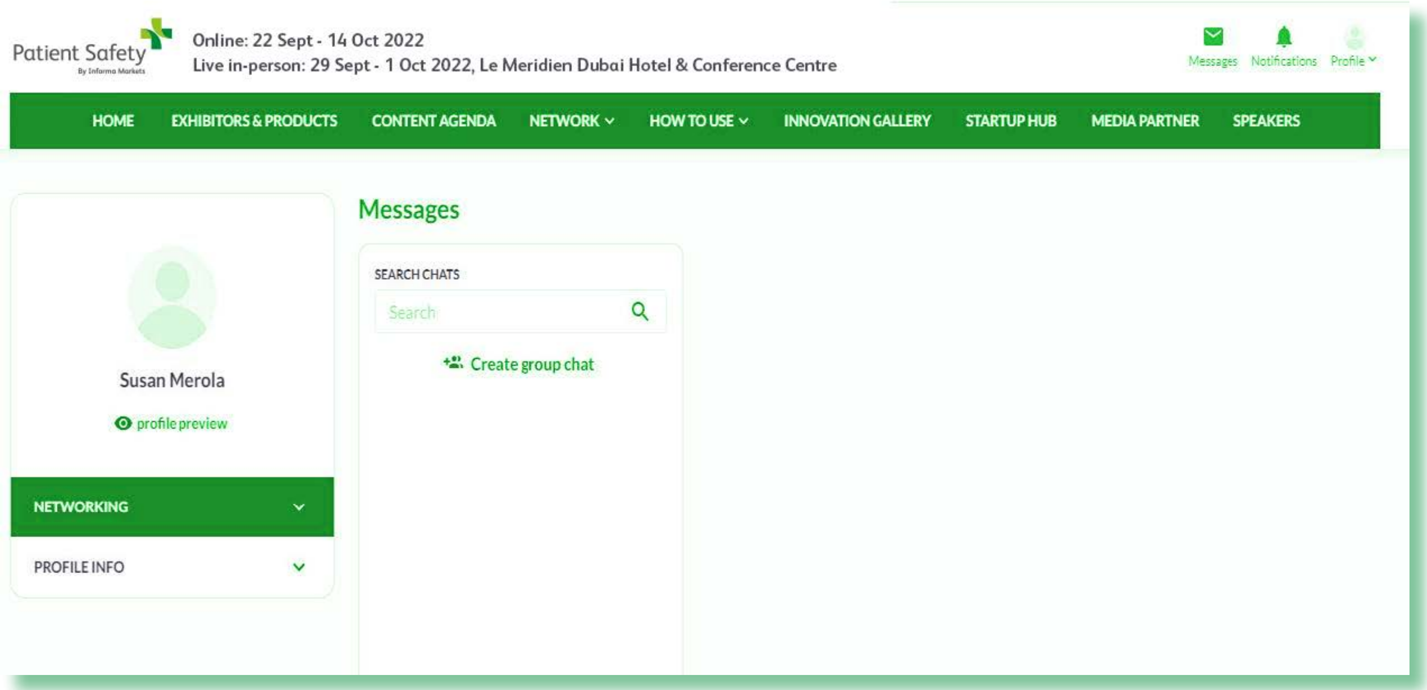
Throughout the platform you will see this message icon on most company, product and people cards.

To send a message, click on the icon and begin typing your message.

At the top right of the page you'll see messages and notifications. When you receive a message, it will appear in messages and you will receive all notifications under notifications.

You can view and search all of your messages by clicking on the profile picture in the upper right, then choosing messages in the networking section of the drop-down menu.

From this page you can also create group chats.



Requesting a meeting

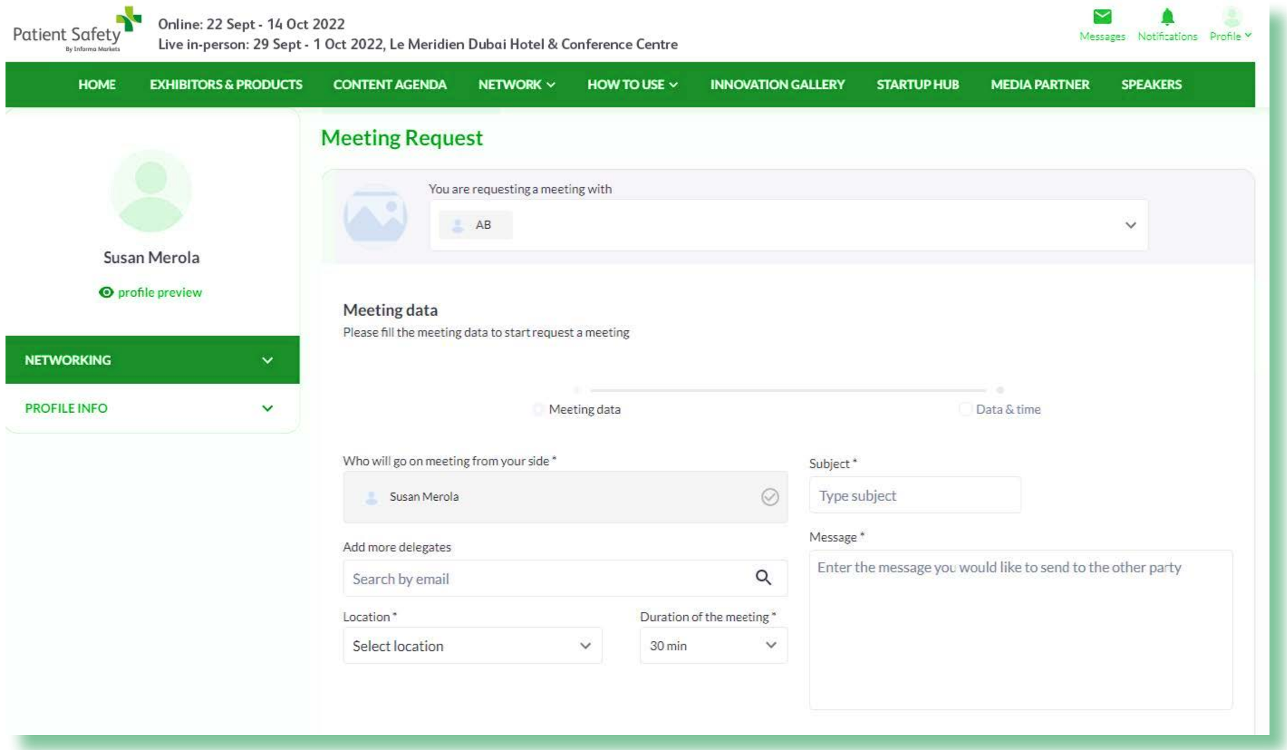
Throughout the platform you will see this meeting icon on most company, product and people cards.

To request a meeting, click on the icon and begin filling out the form.

In the first step you'll be asked for:

- Subject - what is the purpose of the meeting?
- Message - a short message about why you want to meet
- Others you wish to invite (optional) - invite others to join your meeting using their email address
- Location to meet (online or at event)
- Duration of the meeting

In the second step, you'll be asked to select a date and time for the meeting and then your meeting request will be sent to the other party when you click the request meeting button.



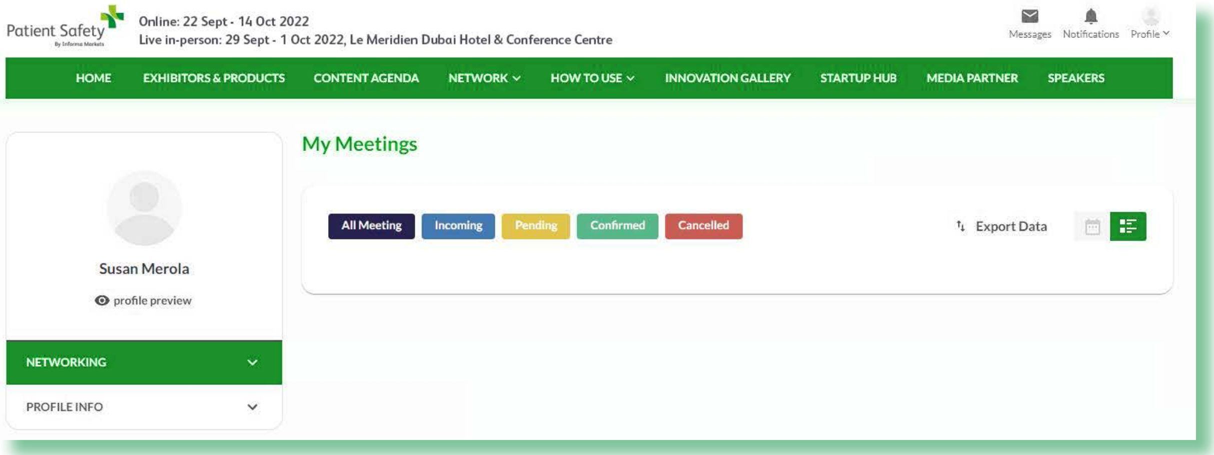
Viewing & managing personal meetings

On the my meetings page, you can see all your meeting requests along with the status of each.

To navigate to my meetings, click on the profile picture in the upper right, then click on my meetings in the drop-down menu under networking.

On this page you can accept or decline a meeting request, as well as reschedule or cancel a confirmed meeting. It is good business etiquette to action all meeting requests that you receive.

There is both a list view and a calendar view.



Viewing & managing your team's meetings

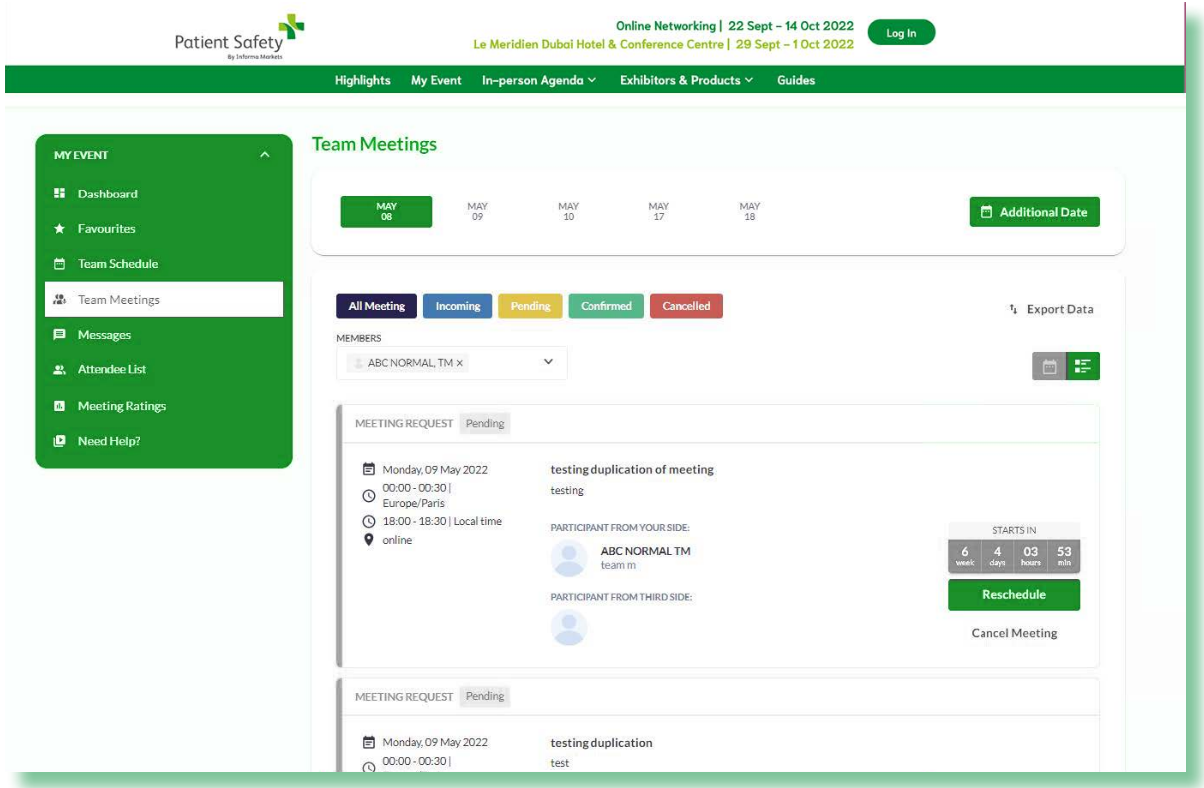
On the team meetings page, you can see meeting requests for all your team members, along with the status of each meeting request.

On this page you can view meeting requests by:

- Status
- Team member
- Date

There is both a list view and a calendar view.

As a reminder an overview of meeting requests count and top performing team members can be found on the company dashboard page.



Starting your virtual meeting

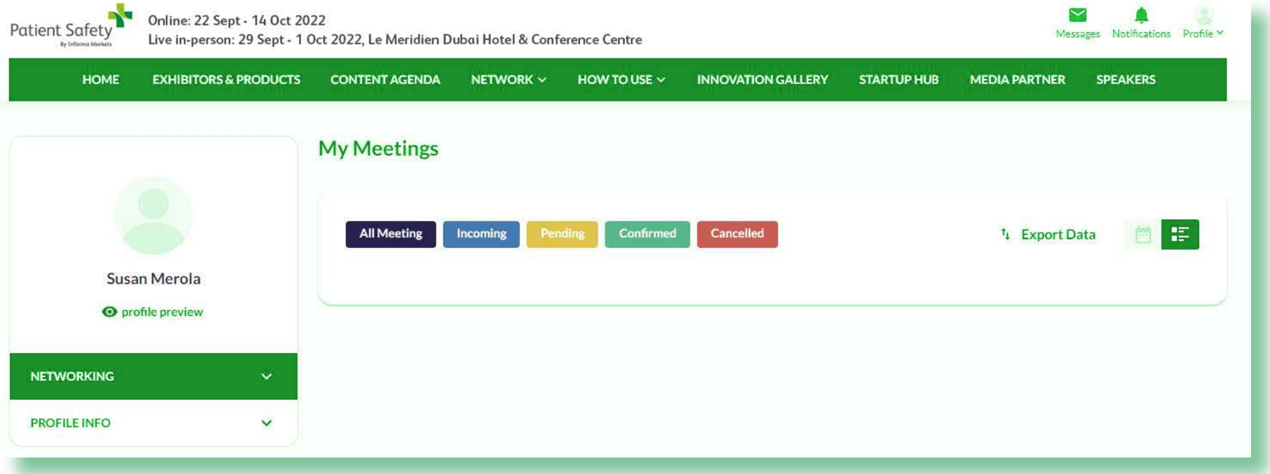
The my meetings page is also where you'll go to join your meetings.

For each of your meetings you'll see a countdown clock and a greyed out join button as seen here:

When it's time for a meeting, the join room section will turn green, and you can simply click it to join your meeting.

On the next screen, click continue so a quick microphone and camera check can be done, then on the next screen click join room.

Please note, you can join up to 10 minutes before the start of your meeting. The meeting room will also stay open should the meeting run over.

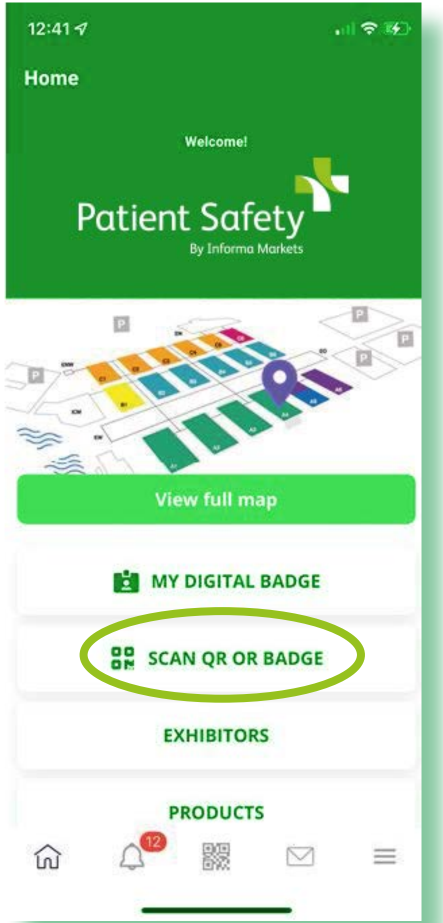


Lead retrieval

Scanning badges

Step 1: once logged into the app, click "scan qr or badge" tab on main screen.

This will open your camera so you can scan the badge. When the camera is pointed at the badge, it will automatically scan.



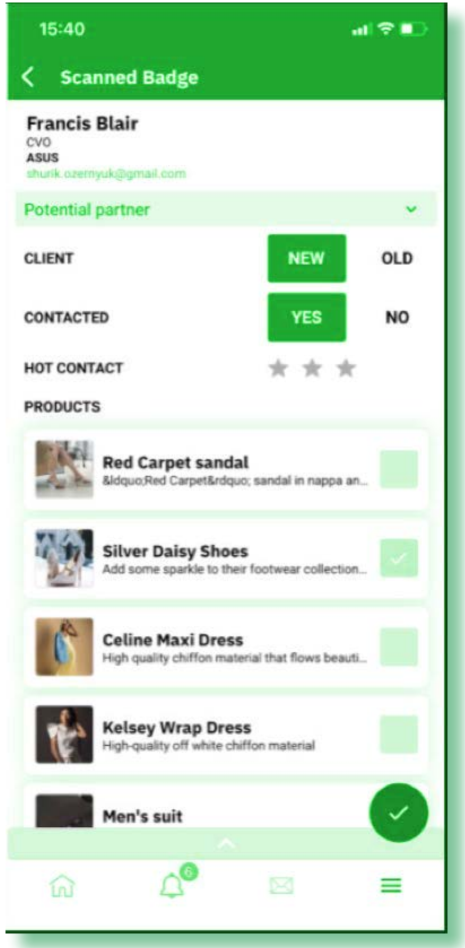
Step 2: after scanning add your notes on the next screen.

On this screen you can add:

- What type of lead they are (potential partner, potential client, supplier, other)
- What type of client they are (new/old)
- If they've been contacted (yes/no)
- Lead rating (1-3 stars)
- Which products they are interested in

Below the products section, there is also a box to type in any additional notes about the lead.

At this time, it is not possible to create custom questions. This is in development and will be available by the next edition of the event.

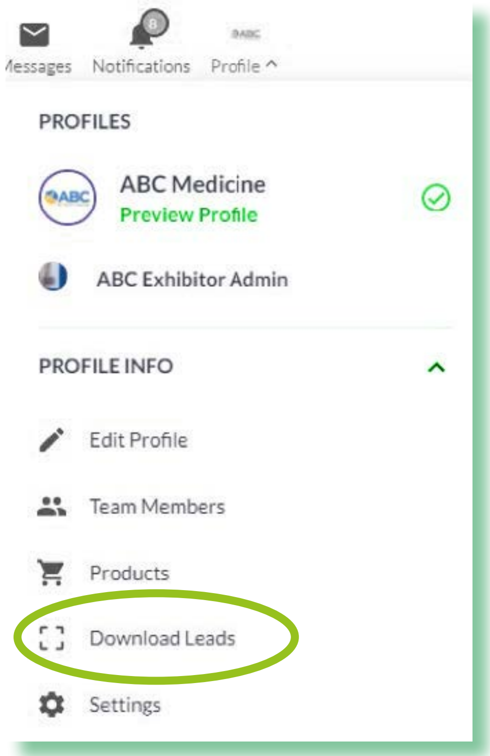


How to download my leads?

Leads can be downloaded from your desktop.

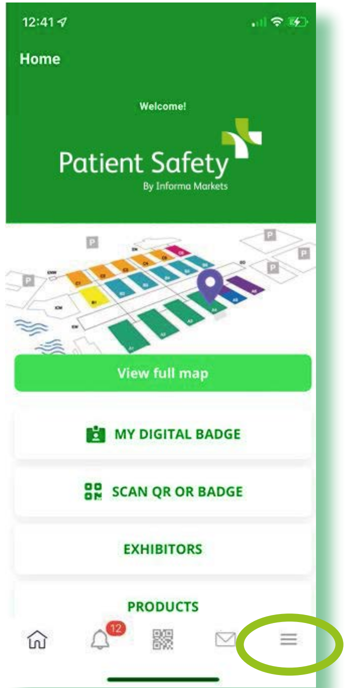
From your personal profile you can only download your own leads. With an admin profile you can download all leads collected by your company under the company page.

On your desktop go to your profile & download leads

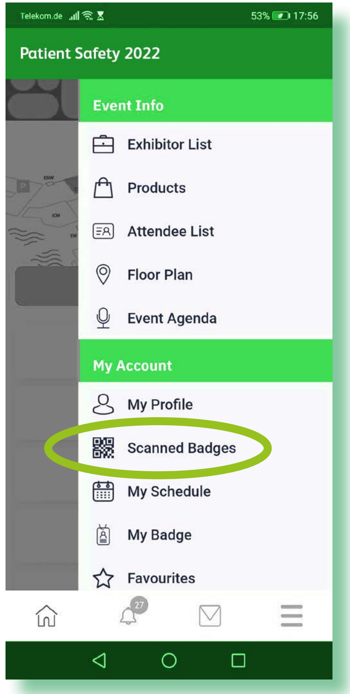


In the mobile app:

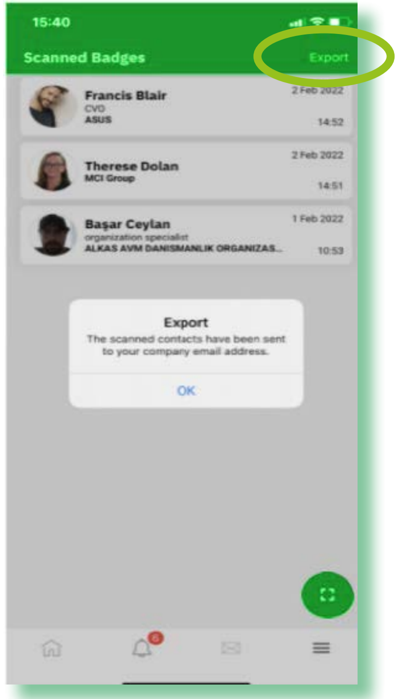
Step 1: Go to menu in the bottom right of your screen



Step 2: click on scanned badges



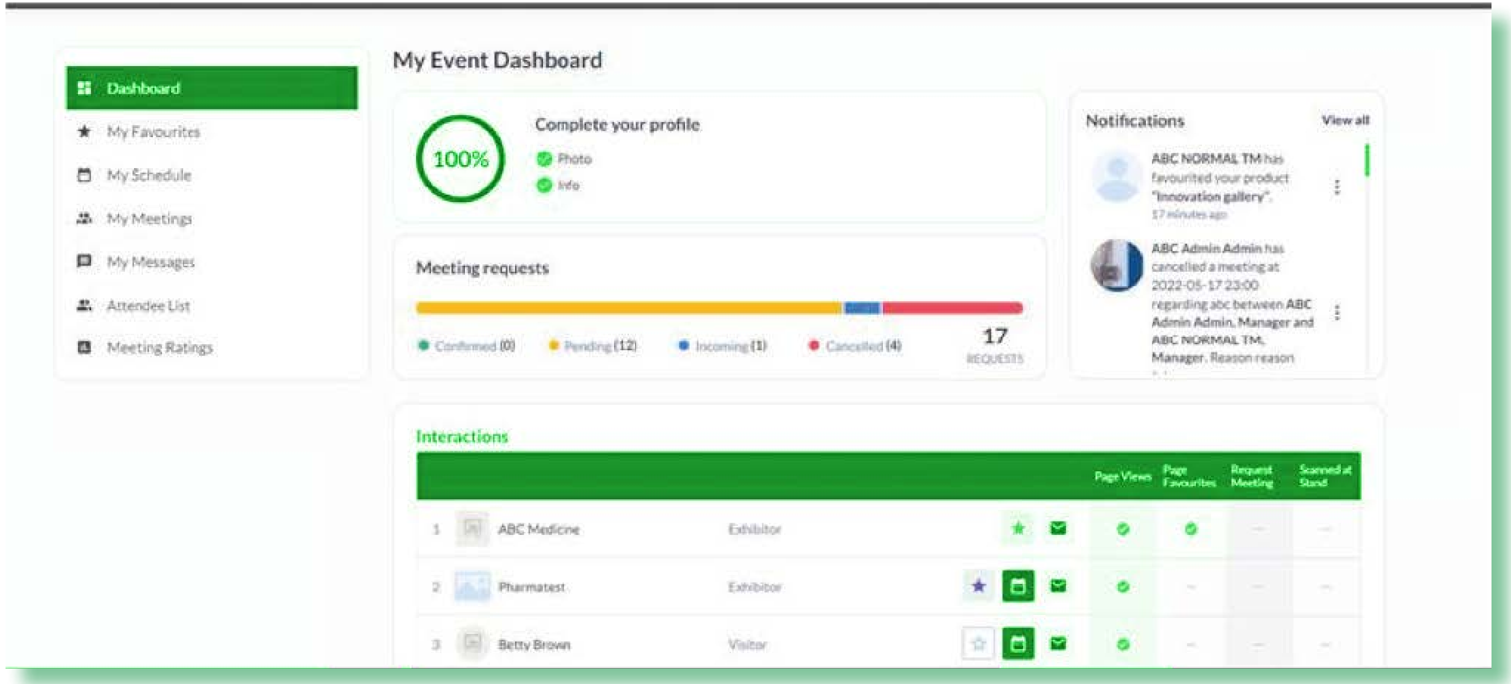
Step 3: click on export



Note: Visitors will also be able to scan exhibitor badges. If a visitor scans your badge then they will be captured as one of your leads.

Analytics

My personal dashboard page



When logged in with your personal profile, this version of the dashboard page is displayed.

You can also click on “my event” on the top navigation bar to get to this page.

In the dashboard you can see:

- Personal profile completeness
- Number of personal meeting requests, by status
- Notifications
- Interactions (favorites, contacted, scanned etc…)

Personal interactions dashboard

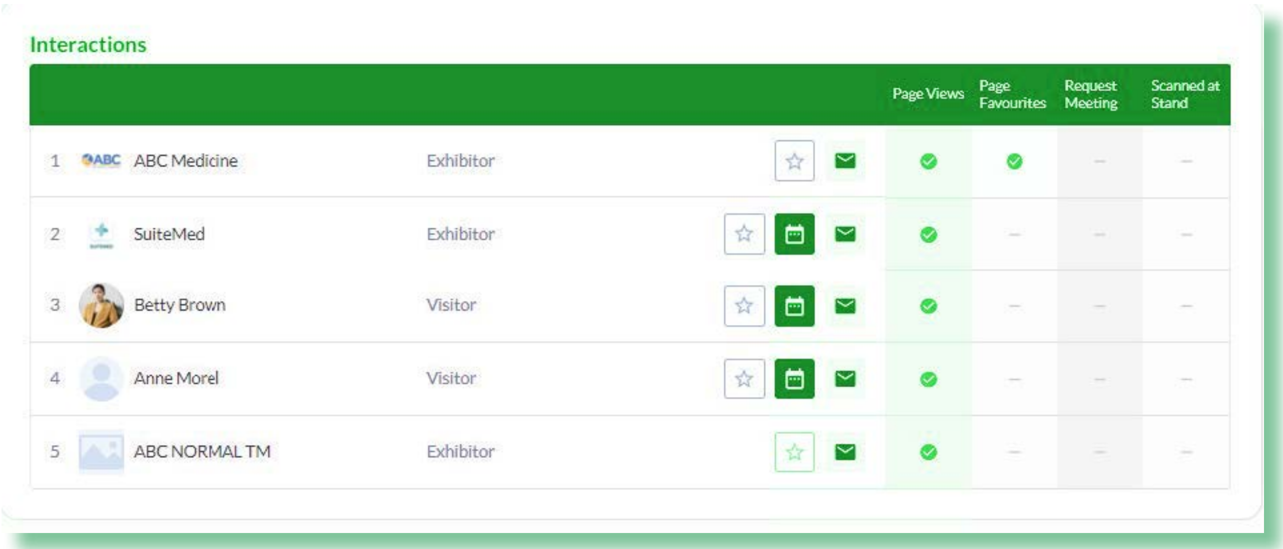
At the bottom of the dashboard page, you will see a list of who has interacted with your profile and who you have scanned onsite.

Interactions displayed are:

- Personal profile page viewed
- Personal profile favourited
- Meeting requested
- Scanned at stand

On this page you can:

- Click into a person's profile to see additional details about them
- View all leads from both the website and mobile
- Add a person to your favorites
- Send a message
- Send a meeting request



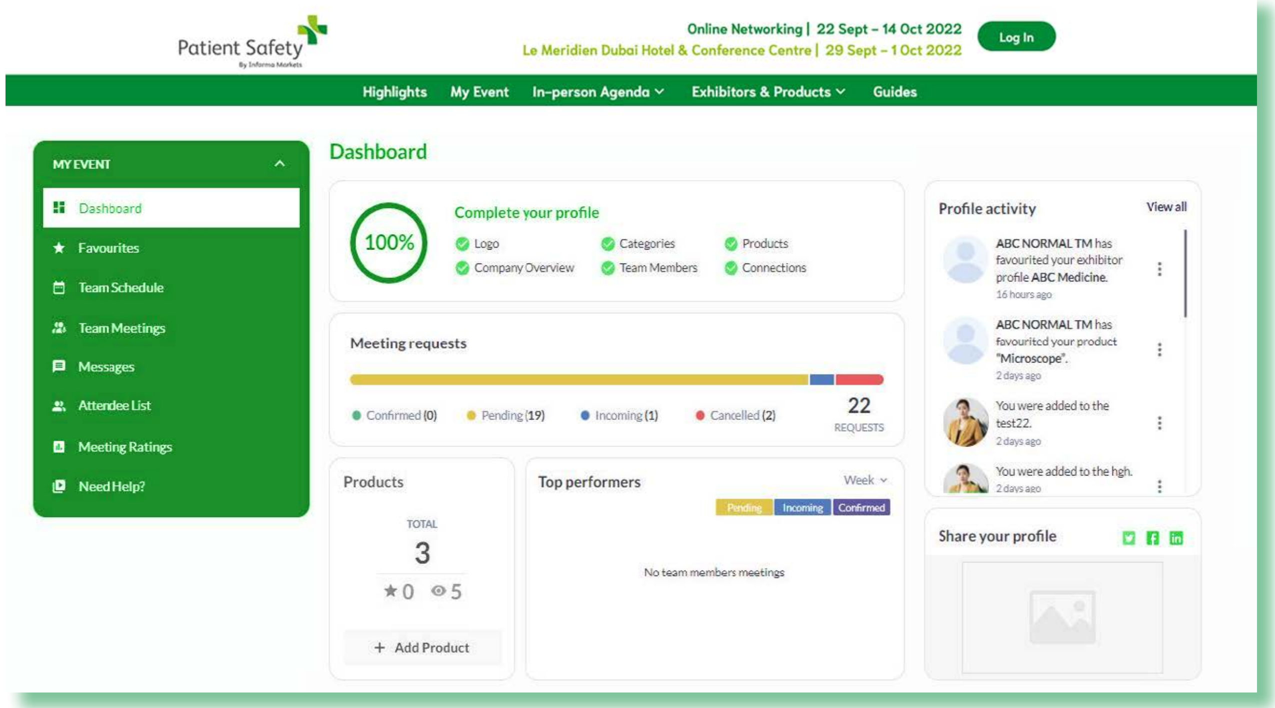
Company dashboard page

When logged in as an admin team member accessing the company profile, this version of the dashboard page is displayed under my event.

In the dashboard you can see:

- Company profile completeness
- Number of meeting requests, across all team members, by status
- Product stats
- Company profile activity
- Top performing team members

You can also share your profile from this screen.



Company interactions dashboard

At the bottom of the dashboard page, you will see a list of who has interacted with your company

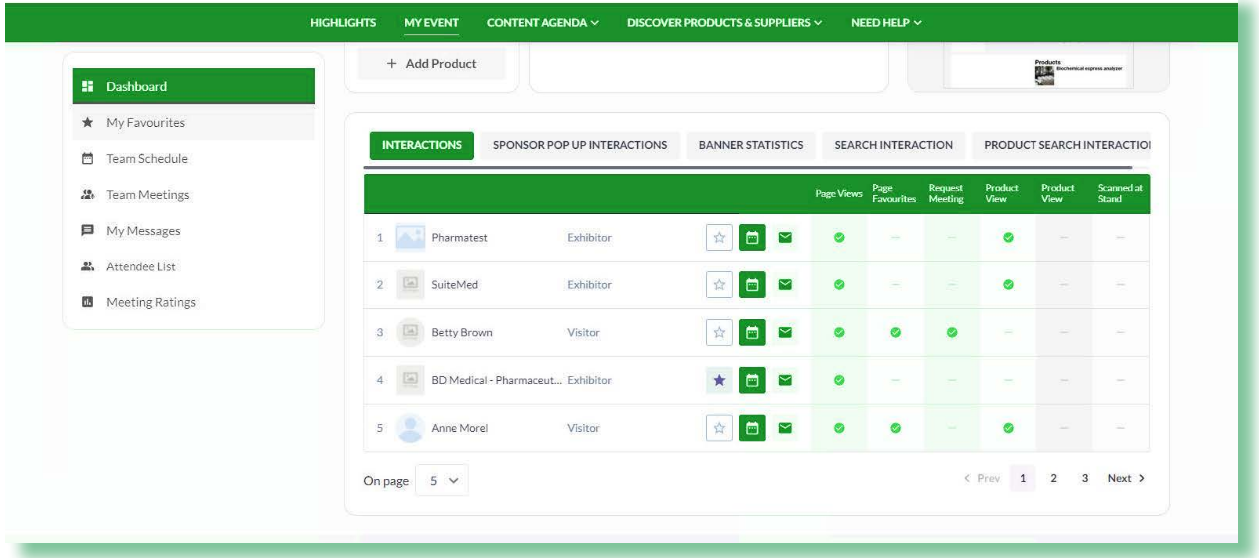
Interactions displayed are:

- Company profile page viewed
- Page favourited
- Meeting requested
- Product viewed
- Product favourited
- Scanned at stand

If you have any additional sponsorship add-ons such as banners you can also see the stats here.

On this page you can:

- Click into a person's profile to see additional details about them
- View all leads from both the website and mobile
- Add a person to your favorites
- Send a message
- Send a meeting request



Patient Safety

By Informa Markets

Live in-person: 29 Sept - 1 Oct 2022
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