New Tools and Best Practices For Matchmaking Events

Many PTACs sponsor or participate in periodic “Matchmaking” events, which provide small business vendors the opportunity to meet face-to-face with buyers from a number of different agencies and large primes. These can be extremely productive opportunities for both buyers and sellers, but represent an enormous undertaking for the organizers. Fortunately, a new tool is now available that makes registration, scheduling and logistics management much easier. When coupled with best practices developed by some of our most experienced PTACs, the result is smooth and professional event that is a positive, productive experience for your small business, agency, and prime contractor participants.

New Technology Infrastructure for Matchmakers

If you’ve attended APTAC Conferences over the years, you know how much easier registration, check-in and session/credit tracking has become. These improvements are thanks to a technology infrastructure created for us by Matt Gonzales, of IVSN Group, which includes a registration system and database plus the hardware required for self-check-in and session barcode scanning. Most recently, we’ve enjoyed the addition of a Conference app, which allows our attendees to have all of the information they need at their fingertips, including real-time updates and notices.

Matt has taken the system a giant step further for Matchmaking events.

The registration database is optimized to collect information important to you not only for the event itself, but for follow-up purposes. Documenting business information such as: socio-economic certifications (8a, WOSB, VOSB, HUBZone, or not certified but think they’re eligible), relevant NAICS codes, previous government contracts – yes/no, and whether or not they are currently a PTAC client, can all provide useful intelligence that will help you to easily follow-up afterward, targeting your outreach to offer services most relevant to each company.

But the system’s starring feature is the Matching capability. Small business registrants are asked to select the agencies with which they would like to meet from the list of confirmed buyers. The event Organizer (you!) sets the maximum number of meetings that each person may request. Once the request period closes (usually a few days prior to the event), the software does the rest, setting the schedule and notifying each participant of their appointments via email and the event app. Should there be a last minute cancellation by a buyer, the schedule can be reset and notices (and new schedules) sent to all of the affected parties. A master schedule can then be printed off for use onsite to allow walk-ups to fill any schedule vacancies.
How does this look and feel in practice? Carter Merkle of the Oklahoma Bid Assistance Network PTAC was enthusiastic about sharing his experience with their Indian Country Business Summit – an annual two day event with a full day of matchmaking - held in partnership with the Tribal Government Institute PTAC just this past August. It started with a custom website for the conference, which included - in addition to general conference information – information for exhibitors, profiles of the speakers, registration for participants and exhibitors, and sign-up for Matchmaking appointments (scroll down to view). Feel free to click around and explore the ICBS website. This template can be used – or modified – for your own event.

Onsite at the conference, check-in is streamlined as participants check-in by scanning the bar code received with their registration confirmation or by typing in the first few letters of their name – just as we do at APTAC Conferences. As part of the process, they automatically print their bar-coded name badge. If you like, you are able to scan session attendance to gather valuable insight about which topics are of greatest interest generally, or the interests and activities of specific participants for follow-up purposes.

Key to the participant experience is the Event App. Once again similar to APTAC’s recent Conference apps, it includes event information; the agenda; detailed information on sessions, speakers, exhibitors and Matchmaking buyers; and the ability to populate an individualized calendar by selecting “favorites”. It has the capacity to push out notifications in real-time, post documents for download, and even host the final evaluation survey. But it is particularly helpful for facilitating the Matchmaking sessions, by allowing easy schedule updates and notices of vacancies and other opportunities. Feel free to download the ICBS 2015 app from the iStore or Google Play store if you’d like to review it.

Carter shares, “In recent years we wanted to expand to include more than federal and state buyers by reaching out to the procurement offices of our largest tribes and to prime contractors looking for subs. We already had pandemonium during the match making day so we eagerly jumped at the chance to use this software to streamline our agency and participant signup and to organize the appoint assignments and inevitable changes in appointments. We were shocked by how smoothly it all went this year. Once the matches were made we still had many open slots, but the rosters and easy access to the main database made it easy to fill in the vacancies with walk-ins. The process also greatly improved last minute changes such as agencies or primes pulling out, etc. . . .

This year we also expanded to include some financial institutions and one business service program (the local Minority Supplier Development Council office). Having stations offering information on something other than procurement forecasts and procedures complicated matters a little, but the added convenience of the software enabled us to blend it all very easily.”
The Georgia Tech PTAC was the first to test drive (or in APTAC VP Chuck Schadl’s words “torture test”) IVSN’s Matchmaking technology system, and they gave it glowing reviews. In fact, their formal, post-event report recommends, “...the event sponsor and the participating agencies/prime contractors should consider purchasing or leasing IVSN’s proprietary event management hardware and software to conduct future events. In addition, the deployment of event technology should be expanded to allow for complete tracking of all matchmaking appointments, along with post-event reporting to participants.” Click here for a more general write-up of the event. Other PTACs that have utilized the system this past year are the LaGuardia Community College PTAC, the Vermont PTAC, and the Washington State PTAC – and outside agencies are beginning to express interest in using it as well.

If would like to learn more about IVSN's Matchmaking technology system, please make sure to visit with Matt at APTAC’s Fall Conference or contact him at mattg@ivsngroup.com.

Other Best Practices

Smooth logistics are important, but are only one factor in a successful event. Just as critical is the level of preparation that vendors and buyers bring to the day.

Matchmaking is only productive if you have sufficient information to match vendors with the agencies that are buying what they have to sell. So make sure that your agencies and primes come with specific needs in mind – and that they communicate these to you. Specifically:

- Insist that they identify contract opportunities in advance of the event, organized by NAICS codes.
- Insist that they come prepared to speak about specific upcoming contract opportunities.
- Insist that they come with a sufficient number of personnel to support the overall event and the matchmaking sessions.
- Ask that they provide a digital copy of presentation materials, hand-outs, forecasts, etc. This will allow you to make this information available via the app.

Likewise, small businesses need to be prepared to make the most of their brief but priceless face-to-face opportunities to introduce themselves. Be proactive in emphasizing with your clients the importance of doing their homework ahead of time, including:

- Identifying whom among the participating buyers actually has a requirement for their product/service and limiting their appointments to these organizations. (If possible, provide them access to the digital materials provided by the agencies and primes)
- Reviewing carefully these tips for preparing to attend
- Know how to deliver an elevator speech and practice, practice, practice
• Have an effective capabilities statement and bring plenty of copies, not only for meetings with buyers but to provide to potential teaming partners they might meet.

There are many strategies for helping your clients to be prepared – and you may find it worth your while to go the extra mile and provide pre-matchmaker training. PTACs are increasingly offering workshops and webinars in the weeks prior to matchmakers to make sure their small businesses know what to expect and how to best represent themselves. Another possibility – create and record a presentation that can be posted on YouTube (and your website) and include a link on your Conference registration page.

The most hands-on approach was developed a few years ago by APTAC Region 6 Director Mary Turner of the Illinois PTAC. They piloted a “Webinar – Coaching – Matchmaking” program which included an initial Webinar tutorial followed by group coaching sessions prior to the Matchmaking event. Mary was awarded APTAC’s 2013 Outstanding Project Award for this initiative.

Post Event Follow-up

After the dust settles, you recover from event burn-out, and you dig out from your overflowing inbox, don’t miss the opportunity to reinforce the goodwill and relationships gained by following up with your participants. Suggested actions include:

• Provide your small business participants a spreadsheet with participating agencies and primes as well as any presentation materials, forecasts, etc.
• Provide to the primes and government agencies a spreadsheet listing all of the small business vendor participants.
• Reach out to any small business attendees who are NOT active PTAC clients and invite them to explore further services you can offer. Make note of details specific to their business (ie: socio-economic status, specific industry such as IT or construction) and make them aware of events or services especially relevant to them.
• Follow-up 6 – 9 months later to inquire if any lasting relationships resulted from your event, including contract opportunities, subcontract opportunities, or potential teaming partnerships.

Do you have tips or suggestions for successful Matchmakers that you don’t see in this article? Please share! Send us a note at headquartes@aptac-us.org, and we’ll add them to our compendium that all PTACs can draw upon in the year ahead. We want to support PTACs in continuing to set the gold standard for Matchmaking Events.