

# OPEN BANKING EXPO



## MARKETING → EVENT APP GUIDE

[openbankingexpo.com](https://openbankingexpo.com)  
#obexpo  
@OpenBankingExpo

# WELCOME

Thank you for partnering with **Open Banking Expo!**

We want you to achieve your objective – whether that may be generating business leads, meeting with current clients, amplifying your brand, or launching a new product or service – and this handy guide is intended to help you get the most out of your participation at Open Banking Expo.

## TWO WEEKS PRIOR TO THE EVENT

Please ensure you download the **Open Banking Expo app**; where you can set up your virtual booth, chat with attendees, pre-book meetings in the Networking Zone and view all the leads you capture onsite. Simply click on the relevant button below and follow the login instructions using your business email address. If you have any issues, get in touch.



This document should cover the information you will require for the event, but if we have missed anything, please do not hesitate to [get in touch](#).

**Lillie Cook**

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# PRE-SHOW MARKETING

Don't leave it down to luck on how many attendees might visit your stand. Just by taking full advantage of the following FREE opportunities available to you and a little bit of planning, you can greatly increase the footfall to your exhibition stand.

Leave nothing to chance and promote your presence to customers and prospects before, during and after the show so make sure that investment pays. Let everyone know you are at the Open Banking Expo!

## PR – SPREAD YOUR NEWS

Tell us your news – make sure we know about any product and services launches on your stand, include any new technology and innovations and anything interesting and newsworthy.

Add Ellie Duncan, our head of content, to your press distribution list using: [editorial@openbankingexpo.com](mailto:editorial@openbankingexpo.com).

## USE OUR FREE MARKETING TOOLS

You've invested in being at the event, so to make sure that investment pays - make sure everyone knows you are at Open Banking Expo! Here are some easy but effective free marketing tools for you to download and use:

- **Banners** – whatever size you need, just ask us and we'll provide you with banners that you can use on your website, email signature and other communications to add visual impact and help promote your presence at the event.
- **Email Template** – send an email to your database with information about the event and promoting your presence. We will provide you with an email template so it's quick and easy for you.

Contact Lillie at [lillie.cook@openbanking.com](mailto:lillie.cook@openbanking.com) to request any of these items.

# PRE-SHOW MARKETING

## SOCIAL MEDIA

Make sure you tap into Open Banking Expo's growing community on social by using the checklist below:

- Follow us on [Twitter](#)
- Follow us on [LinkedIn](#) and subscribe to the [LinkedIn newsletter](#)
- Use these hashtags: #obexpo #openbanking #openfinance #opendata #openpayments #fintech #payments

## GUESTING SERVICE

Who do you want to meet? Share with us your top 10 targets and we'll contact them to invite them along to the event for free. We will attempt to secure a meeting between you either at your stand or in our Networking Zone. Let us know who they are, [contact Lillie](#) and we'll invite them right away!

## EVENT APP SET UP

Once you have logged into the **Open Banking Expo** app, you can customize your profile and edit your virtual booth.

### CUSTOMISING YOUR PROFILE

Click on the **edit** button above your name and job title/company, then, proceed to **edit your personal profile**.

Please make sure you add a photograph, check your job title is correct, and add a couple of sentences in your biography, as a minimum.

### EDITING YOUR VIRTUAL BOOTH

Underneath your profile box will be the name of your company and an **edit** button (the pencil).

Click the edit button, and this will open a new tab called '**Exhibitor Center**'. All editing of your booth is done within the 'Exhibitor Center'.

### ASSET SIZES

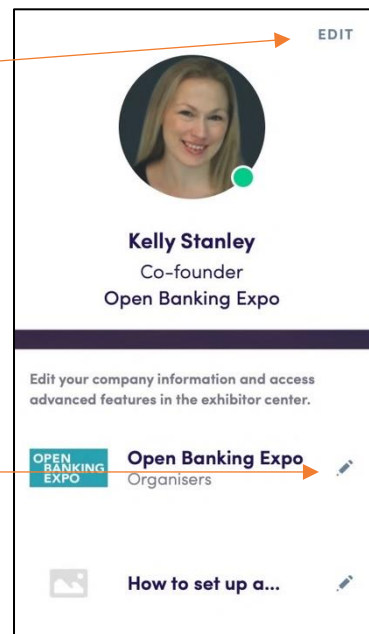
(None should be larger than 1MB)

Header image: **1200x675px** (16:9 ratio)

Logo: **400x200px** (2:1 ratio)

Advert: **1080x1920px** (9:16 ratio)

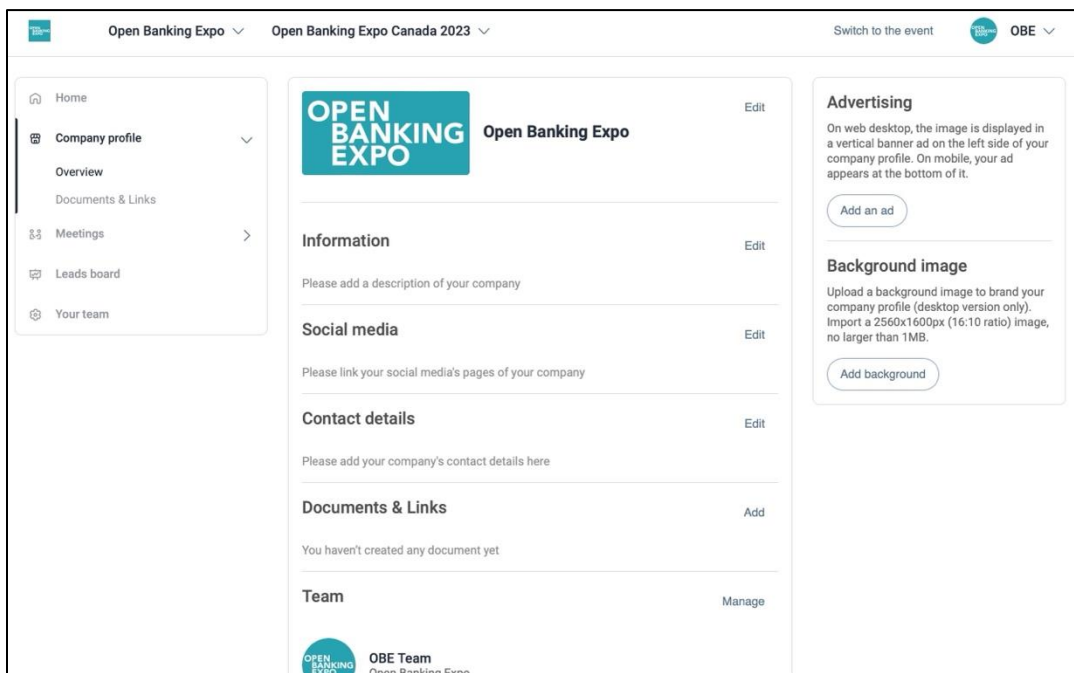
Background image: **2560x1600px** (16:10 ratio)



## EXHIBITOR CENTER

Choose the options in the left hand menu:

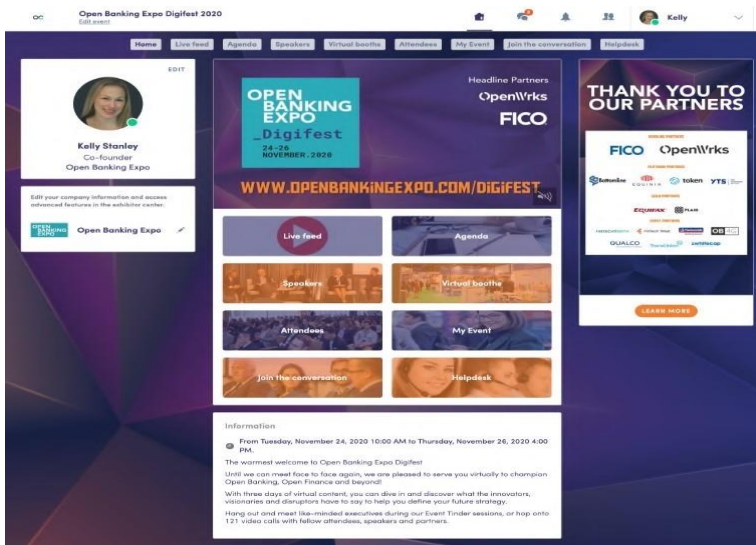
- **Company profile** – here you can set up your virtual booth. You can **upload documents** including brochures, photographs, portfolios of work, whitepapers, etc. You can also add a **web address** and **social media links**.
- **Meetings** – this is where all your teams' meetings with attendees will be listed. Set up meetings in our Networking Zone by contacting someone via the Attendee list and inviting them to a meeting. If they accept, that meeting will display here.
- **Leads board** – this is where all the data from the attendee badges you and your team scan at the event will appear. Please ensure all your staff are in 'Your Team'
- **Your team** – we will manually add your team members to your virtual booth as they are registered for the event. If any are missing, contact us, or send a request to your colleague using their email address here.



# OPEN BANKING EXPO

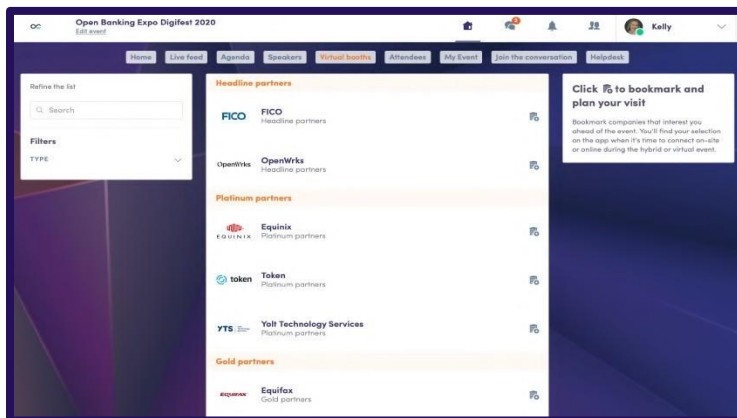
## VIEWING YOUR BOOTH AS AN ATTENDEE

Navigate to the **event home screen**, by clicking the 'HOME' menu option:



To view your **partner booth as it will be viewed by attendees**, click on the **Partners** button or menu option.

Once on the **Partners** page, the screen will look like this:



Click on your **company**. This will take you to your **virtual booth**. From here you can see what the audience will see.

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# OPEN BANKING EXPO

## MANAGE YOUR MEETINGS

In this section you can:

- **Display the meetings** of your team
- **Filter meetings by status:** Pending, Validated or Declined, Cancelled.
- **Assign a meeting to a member of your team:** click on « answer » on the meeting request, and choose the person to assign.
- **Accept or decline meeting requests**
- **Export the full list of meetings** from your team

**Meeting request**

01/31/2020 • 9:54 AM  
01/01/2023 • 7:30 AM to 8:00 AM  
Elio's hall • table 1

Requester

**Abby Gonzalez**  
Inside Salesperson  
Verizon

Host

**Charles Benizri**  
Product Owner  
Swapcard

ACCEPT DECLINE

**Export meetings**

Get all meetings from your team in an Excel file.

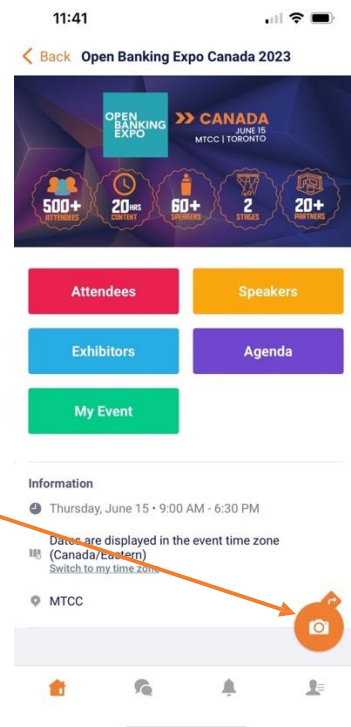
EXPORT MEETINGS

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## ON-SITE

Before and during the event make sure you do the following to keep the momentum and your marketing and promotional efforts on track:

- **Announcements** – Make sure you let us know of any networking or press events you have planned on your stand, we can include in live announcements on the show floor and via notifications on our event app.
- **Social** – Use social media to promote your presence up to, during and after the event. Keep an eye on the event hashtags and get involved in the conversation during the show!
- **Offers and competitions** – Keep us up to date with any promotional offers or competitions you're running for delegate engagement so we can amplify across social and in the event app.
- **Leads** – Use the camera icon within the event app to scan the QR code on attendee badges to capture their contact details for future follow up. All data will be available in real-time in your event app exhibitor center.



## LEAD CAPTURE

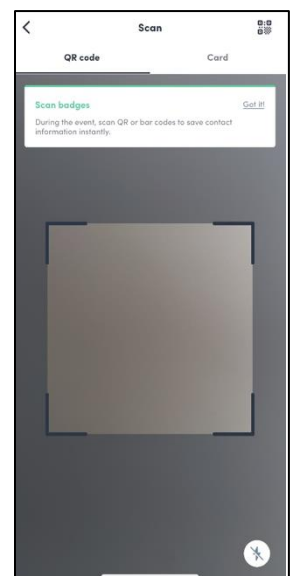
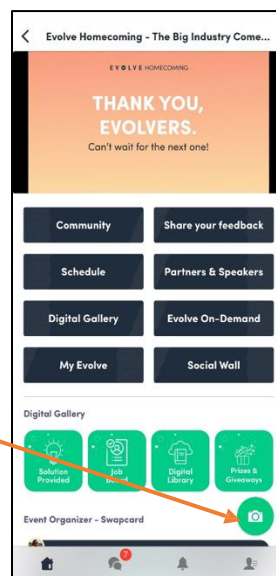
### Before lead scanning

1. Before scanning make sure all your colleagues are team members of your virtual booth. If they are not, their leads will not land in the team's contact list.
2. Make sure that contact sharing is on. Go to "Your team" and click the pencil on each of your team members to check that the toggle is on for sharing:



### How to lead scan?

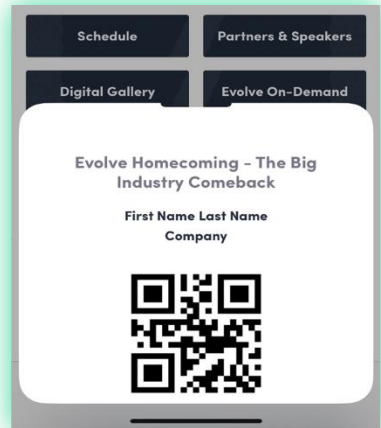
1. Ensure all of your team members have downloaded the Open Banking Expo app onto their mobile device, are logged in and have accessed the Open Banking Expo UK & Europe event
2. Click the camera icon on the bottom right. This opens up a QR code/barcode scanner.



# OPEN BANKING EXPO

## How to lead scan? (cont.)

3. Scan the QR code on the attendee's badge OR:
4. Scan the QR code in the Event app – just ask the attendee to click on 'Your ticket' on the home screen and this will appear:

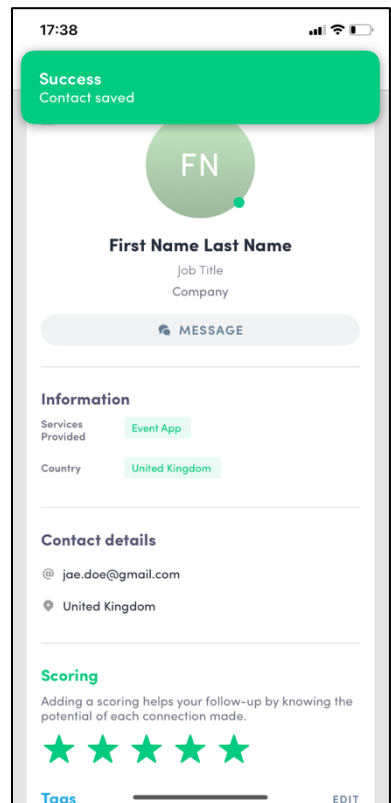


## Options after scanning

A pop-up will tell you if the scan was successful.

Scanning will automatically create a connection between you and the person you scan. They will then land in your own contact list as well as the team's contact list.

You can then add details about this lead. You have the option to **score**, **tag**, **add a note**, and **delete** the contact, as well as view the **context of the connection**.

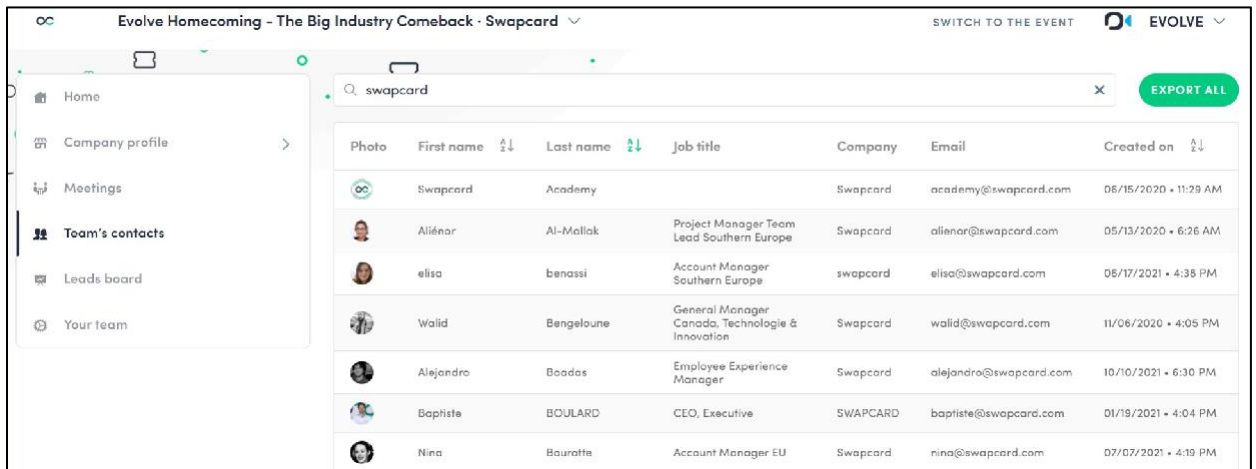


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


# OPEN BANKING EXPO

## How to export the leads

To export the leads go to the **Exhibitor Center** ([team.swapcard.com](https://team.swapcard.com)) and to **Team's contacts**. Click **EXPORT LEADS** on the top right.



The screenshot shows the Swapcard Exhibitor Center interface. The page title is "Evolve Homecoming - The Big Industry Comeback · Swapcard". The search bar contains "swapcard" and there is an "EXPORT ALL" button. The table below lists team contacts with columns for Photo, First name, Last name, Job title, Company, Email, and Created on.

Photo	First name	Last name	Job title	Company	Email	Created on
	Swapcard	Academy		Swapcard	academy@swapcard.com	06/16/2020 • 11:29 AM
	Aliénor	Al-Mallak	Project Manager Team Lead Southern Europe	Swapcard	alienor@swapcard.com	05/13/2020 • 6:26 AM
	elisa	benassi	Account Manager Southern Europe	swapcard	elisa@swapcard.com	06/17/2021 • 4:38 PM
	Walid	Bengeloune	General Manager Canada, Technologie & Innovation	Swapcard	walid@swapcard.com	11/06/2020 • 4:05 PM
	Alejandro	Boadas	Employee Experience Manager	Swapcard	alejandros@swapcard.com	10/10/2021 • 6:30 PM
	Baptiste	BOULARD	CEO, Executive	SWAPCARD	baptiste@swapcard.com	01/19/2021 • 4:04 PM
	Nina	Bourlatte	Account Manager EU	Swapcard	nina@swapcard.com	07/07/2021 • 4:19 PM

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## **POST-SHOW**

Keep the momentum up, make sure you follow up on those all-important leads and touch base with those who visited your stand.

- Follow up your leads quickly with tailored information for each prospect
- Send post-show press releases to us with interesting news about your achievements and activities at the event. This can be shared and amplified via Open Banking Expo news channels
- If you have post-event marketing opportunities included in your partnership, be sure to get these planned in quickly following the end of the show for enhanced legacy content.