PENSIONS AND
LIFETIME SAVINGS
ASSOCIATION

EXHIBITOR
GUIDE

PLSA
CONFERENCES

swapcard

CONTENTS

PENSIONS AND LIFETIME SAVINGS ASSOCIATION

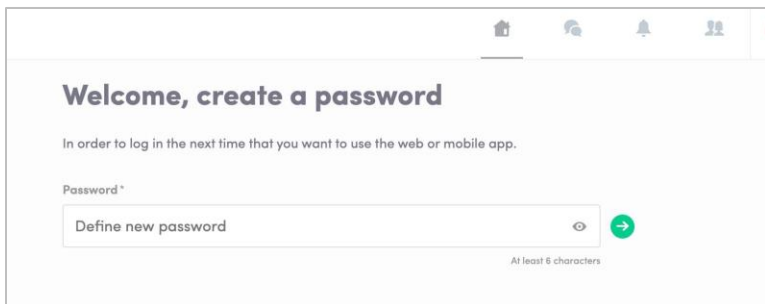**Welcome to the Exhibitor Guide**

The aim of this guide is to assist with the configuration of your **interactive profile** in the **PLSA Events app** which is powered by **Swapcard.** The profile also appears on the PLSA website.

In the **Exhibitor Center** you can add your company information, branding, documents and links, as well as manage your team, and interact with attendees before, during and after the event!

LOGIN INSTRUCTIONS
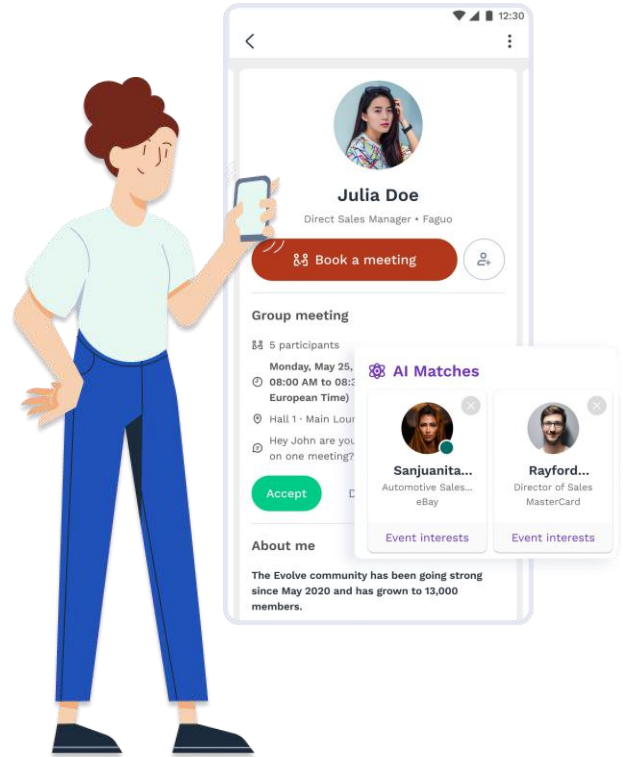
You will receive an email similar to the right with a button redirecting you to a login page or you can visit https://app.swapcard.com/c/plsa and then click 'Log in'. Enter your email address and you will then be prompted to create a password for your account:

You can also access the event from a mobile device by downloading the PLSA Events app (iOS/Android)

PLSA

PLSA Investment Conference 2024

Hello Beatriz,

The PLSA Events app is now live.

The app is your go-to resource in the lead up to and during this year's Investment Conference. Check the programme for updates and register for sessions you want to see.

To get started, click on the button below.

Please note: this link will expire in 48 hours. If the link has expired, simply enter your email address and follow the steps.

Check out the PLSA privacy notice.

GET STARTED!

Note: If you don't see this email in your mailbox, please check your spam folder. Most of the emails are sent from noreply@swapcard.com or events@plsa.co.uk

4

ACCESSING THE EXHIBITOR CENTER

PENSIONS AND LIFETIME SAVINGS ASSOCIATION

Log in to PLSA on Swapcard: https://app.swapcard.com/c/plsa

There are three main ways to access the Exhibitor Center:

1

By clicking the button in your **invitation email**, which will redirect you to the **Exhibitor Center.**

2

Click **'Exhibitor Center'** in the drop down menu.

3

Click on your Exhibitor profile from the home page on the left.

FRONT-VIEW OF AN EXAMPLE EXHIBITOR PROFILE

Exhibitor ad

Video or image header

Company information

Customised background

PROFILE SET-UP: COMPANY INFORMATION

We recommend you complete your profile as fully as possible to engage delegates.

Click **'Edit'** and fill in all the editable information in the Exhibitor Center.

Some fields are managed by the organiser so if a field is not editable please contact the PLSA Events Team. 7
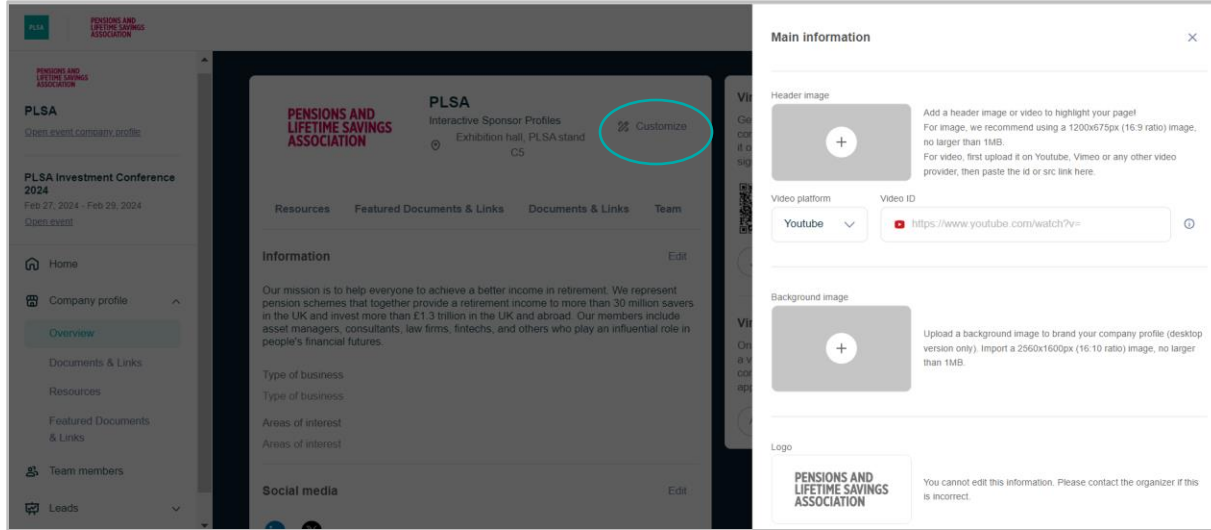
Exhibitor logo

Please supply a full colour and white-out high-resolution logo in eps, ai or transparent png file format to the PLSA Events Team who will upload the logo on your behalf.

If a field is **greyed out**, it indicates that only the organiser can edit it.

Click **'Customise'** to add a header image or video header and a custom background.

Header image or video
Upload an image 1200x675px jpg or png, no larger than 1MB. or add a video url hosted on YouTube or Vimeo, or add an iFrame.

Background image
Upload an image 2560x1600px jpg or png, no larger than 1MB

PROFILE SET-UP: ADVERTISING

Click on **'Add an ad'** to add an advert.

Upload an image 1080x1920px jpg, png or gif and no larger than 1MB.

You can include a link to an external website.

Note: The cover image should be at least **400x400px** (1:1 ratio) and no larger than 1MB.

We recommend **'Featured Documents & Links'** which require a cover image to highlight them. **Paste a link** (with http:// or https://) or **import a file** (pdf, doc, docx, ppt, pptx, png or jpg), then add a name and a short description of what it is. If the url is long, we suggest using a url shortener. You may also want to add tracking to your url.

If you do not have a cover image, then add in the **'Documents & Links'** section instead.

Exhibitor logo (managed by the event organiser)

- Please supply a full colour and white-out high-resolution logo in eps, ai or transparent png file format to the PLSA events team who will upload the logo on your behalf.

Header

- Image: 1200x675px jpg pr png (16:9 ratio) and no larger than 1MB
- Video: hosted on Vimeo or Youtube. Ask us if you host the video on another tool.
  Note: the video will be muted by default

Profile background

Rectangular image (16:10 ratio), size of 2560x1600px jpg or png and no larger than 1MB

Advertising

Rectangular image (9:16 ratio), size of 1080x1920px jpg, png or gif and no larger than 1MB

Documents and links

- Paste a link or import a file (pdf, doc, docx, ppt, pptx, png, jpg) and no larger than 30 MB
- Title: max 80 characters
- Description: max 160 characters
- Highlight featured documents and links with a 400x400px jpg or png (1:1 ratio) image, no larger than 1MB

EXHIBITOR PROFILE QR CODE

As an Exhibitor you can download your virtual booth QR code to display on your physical stand or in digital or print materials.

Delegates can scan the QR code to view your company details in the PLSA Events app, download your resources, start a chat, or request a meeting. Plus, your organisation will be automatically listed in their **My Event →My bookmarked companies**.

ACCESSING THE ATTENDEE LIST

Access the **Attendees** tab for the full delegate list.

From here you can make connections, send messages, video call and book meetings.

You can also do the same for Speakers and the PLSA Team.

Full text search

Attendee filters
(such as role, interests, organisation type)

Book a meeting

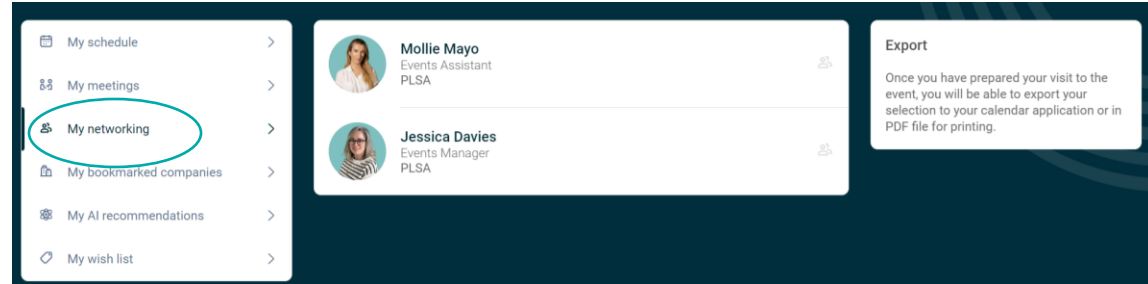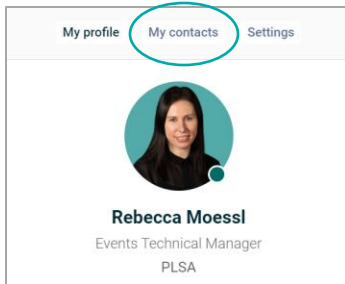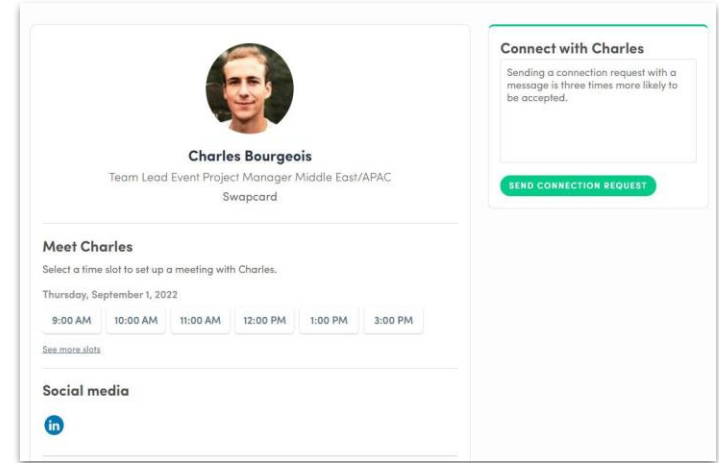Existing contacts

Add a new contact

13

HOW TO MAKE A CONNECTION REQUEST

Go to an attendee's profile via the list of attendees, speakers or a company profile and click on

Send connection request

We encourage you to write a message before inviting them to connect to introduce yourself and explain the reason for your request.

You will be able to find all the people you have been in contact with from **"My contacts"** tab above your **profile** picture, or in the **"My Event"** button in **My Networking** tab.

Connect with Charles

Sending a connection request with a message is three times more likely to be accepted.

SEND CONNECTION REQUEST

Charles Bourgeois

Team Lead Event Project Manager Middle East/APAC
Swapcard

Meet Charles

Select a time slot to set up a meeting with Charles.

Thursday, September 1, 2022

9:00 AM   10:00 AM   11:00 AM   12:00 PM   1:00 PM   3:00 PM

See more slots

Social media

My profile   My contacts   Settings

Rebecca Moessl
Events Technical Manager
PLSA

My schedule
My meetings
My networking
My bookmarked companies
My AI recommendations
My wish list

Mollie Mayo
Events Assistant
PLSA

Jessica Davies
Events Manager
PLSA

Export

Once you have prepared your visit to the event, you will be able to export your selection to your calendar application or in PDF file for printing.

14

HOW TO CREATE A GROUP CHAT

The Group Chat feature gives attendees the ability to engage in a discussion with up to 10 people. It also allows them to send messages, files, reactions, and even have group video calls.

To create a group chat, click on the message icon to the right of "search a contact" then add the list of people from your contacts list you want to include in your group.

By default, the person creating the group chat is the Admin. This will give them the rights to:
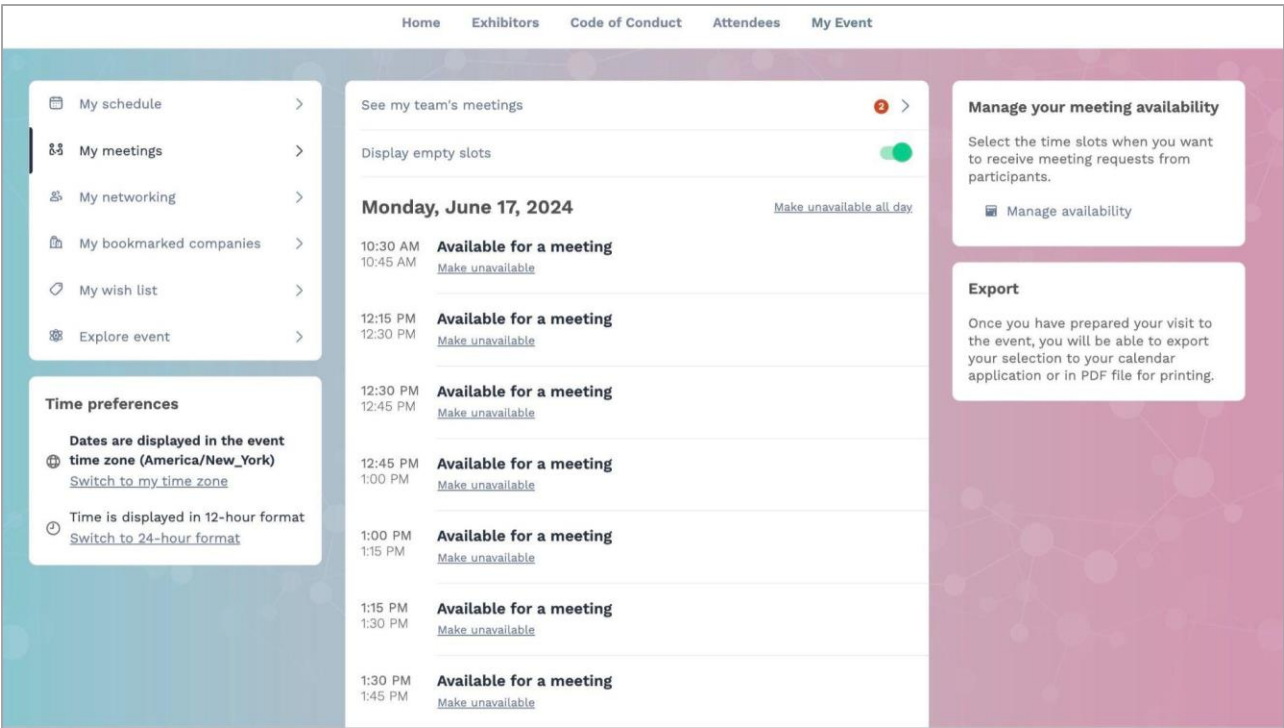
- Add and remove members
- Rename the conversation
- Assign or demote other Admins
- End the conversation

15
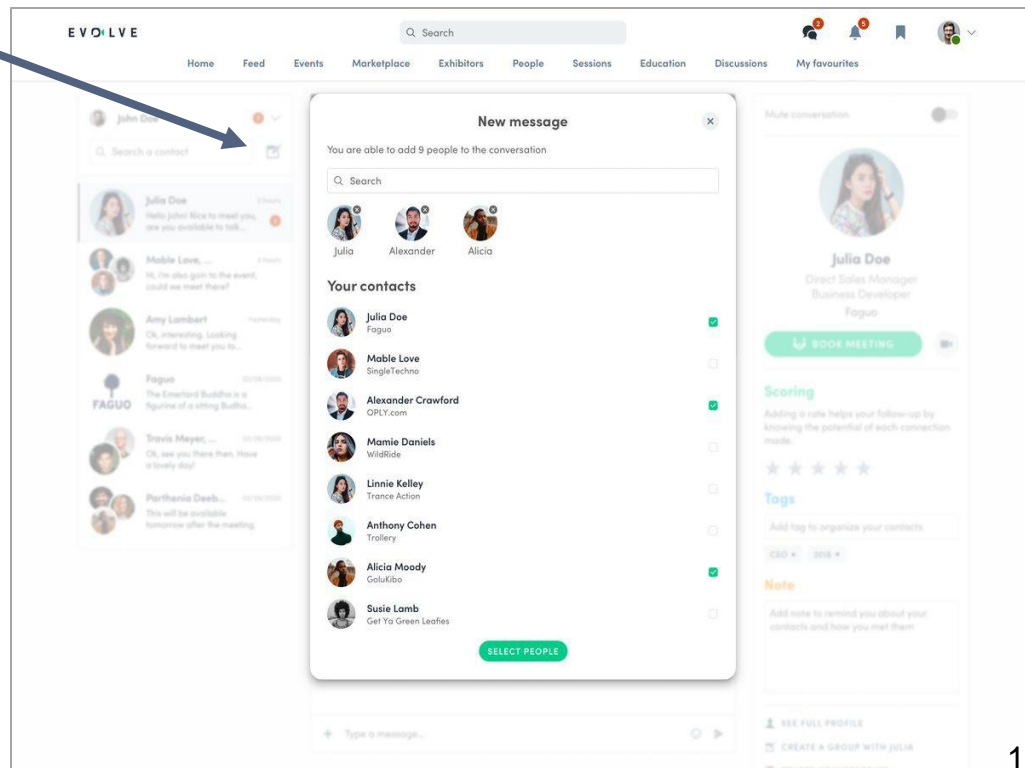
Go to **My Event** and then **My Meetings** where you will find the Manage availability option.

Once you click on **Manage availability**, you will see a list of all the available Meeting Slots in the networking periods. You simply need to de-select the slots that you want to make yourself unavailable.

HOW TO REQUEST A MEETING WITH AN ATTENDEE

PENSIONS AND LIFETIME SAVINGS ASSOCIATION

1 Open an attendee's profile by going to the list of attendees, speakers, or a company profile.

2 Select one of the suggested meeting slots.
If you want to see other slots, click **"See more slots."**

3 Select a Meeting location.

4 Write a message to accompany your meeting request, then click **'Send meeting request'**

17

10

1. **Manage your availability** (you just need to unselect the time slots where you are not available)

2. **Assign a meeting:** reply to the meeting request and select a team member to assign.

3. **Accept or decline** meeting requests or cancel an existing meeting.

4. **Filter meetings by status**: Pending, Confirmed, Cancelled or Declined.

5. **Export** the full list of meetings.

19

As a team member in the interactive Exhibitor profile you have access to a shared inbox with your other team members.

Messages in the inbox are generated when an attendee visits your interactive profile and types a message into the **"Talk to…"** window. The chat is private between the attendee and your team.

For the attendee, **the message appears within the booth as a 1:1 chat.** For the exhibitor team, the message generates a notification in the platform, and appears as a message in the exhibitor inbox.
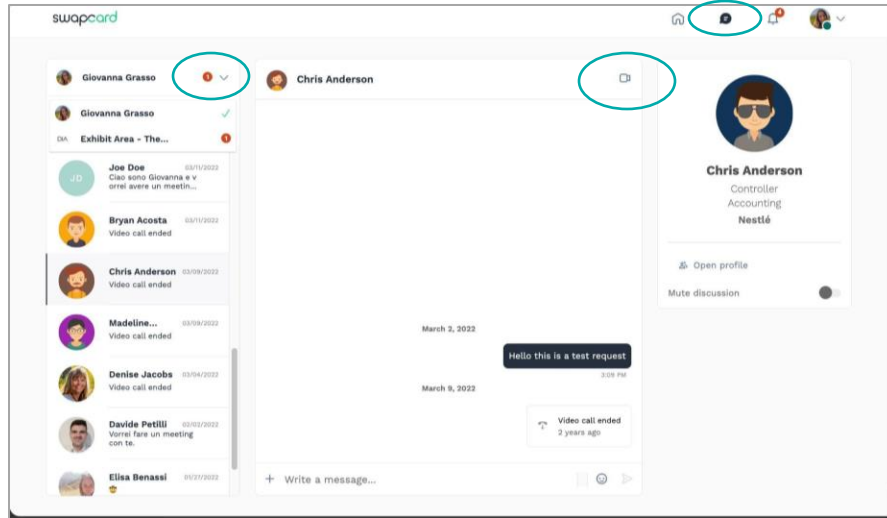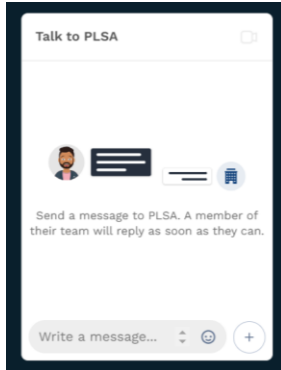
To view your interactive exhibitor inbox, click the **chat bubble** icon along the top menu. Switch between your personal inbox and the interactive exhibitor inbox by clicking on the dropdown box.

All team members will see a **red notification circle** over the **chat bubble icon** after each new message. Once any exhibitor team member reads the message, the red notification circle disappears for the entire team.

Click on the video icon to launch a **video call** using the integrated video calling feature. Click here for more information.

20

LEAD CAPTURE SET UP

The PLSA Events app can be used to scan delegate badges and business cards. As exhibitors you can capture and store the data for each contact and meeting that your team hold. You can also rate, make notes and add tags for follow up. All of this can be exported via the **Exhibitor Center** for follow up or to upload into your own CRM system.

To track your team's networking activity, make sure that everyone from your organisation is added as a **team member** to your company profile and that they have toggled on **'Share contacts with the team'.**

Everyone representing your company at the conference should download the **PLSA Events app** (iOS/Android)

GDPR
When an attendee submits a message to your company profile or connects with your team, they tacitly agree to share information with you. You therefore retrieve this information in accordance with the GDPR.


21

EXPORTING LEADS

Scan delegate badges and business cards via the **camera icon** on the app home screen.

By going to the **Leads dashboard** in the Exhibitor Center you can view and export all the contacts collected by you and your team before, during, and after the event.

Note: Check that all of your team members have toggled on **'Share contacts with the team',** in order that their scans will be available in the Leads dashboard.
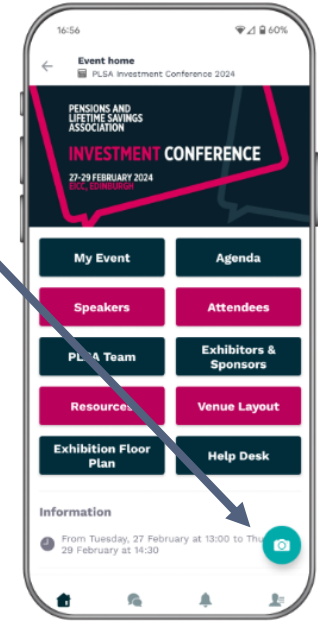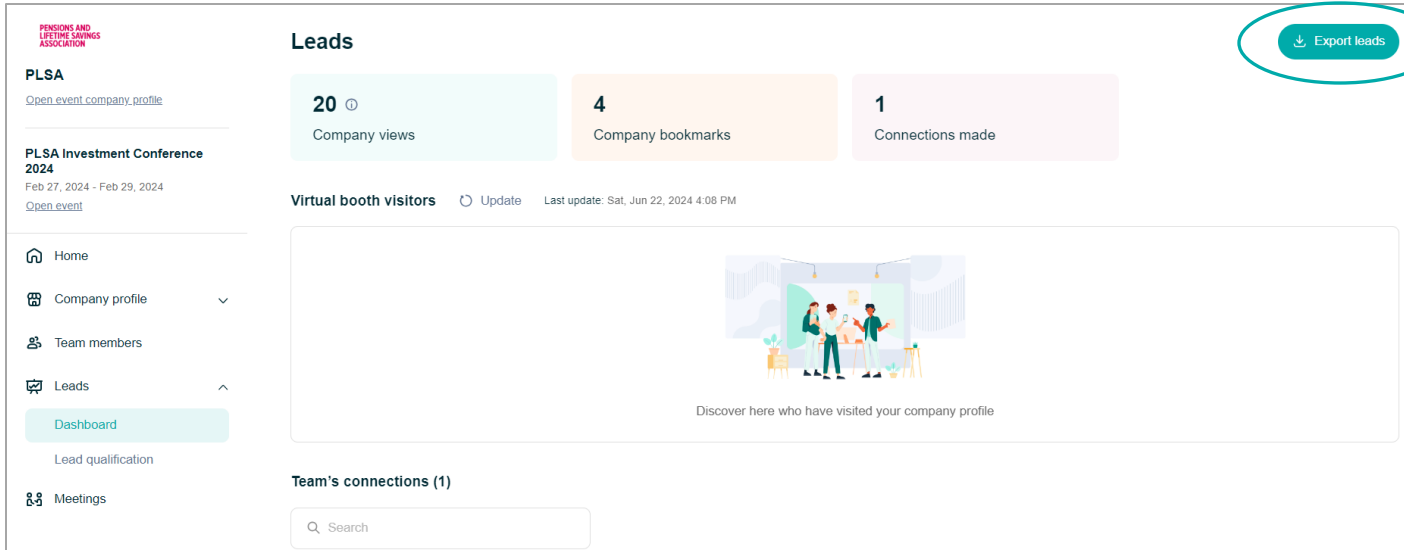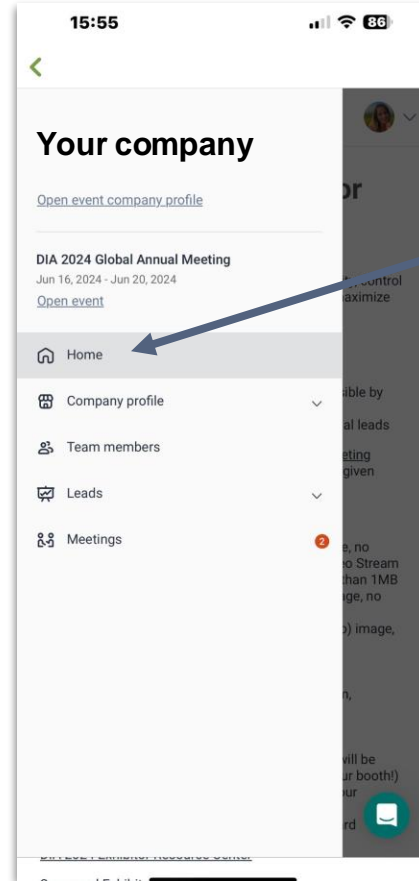

You can also export any contacts made yourself, as an excel file, by going to your contacts in your profile and clicking on "export".

22

PENSIONS AND LIFETIME SAVINGS ASSOCIATION

Go to your **profile** to access the Exhibitor Center
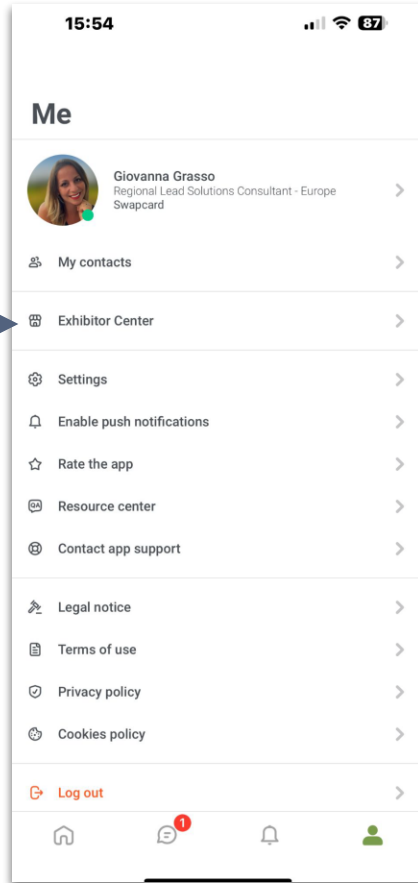
Exhibitor Center

Exhibitor Center Menu

All the same Exhibitor Center features on desktop are also available in the app

23

There are resources available for Exhibitors on Swapcard's website here: https://help-attendees.swapcard.com/en/

You can also contact the PLSA Events Team if you need further assistance events@plsa.co.uk

PENSIONS AND
LIFETIME SAVINGS
ASSOCIATION

EXHIBITOR
GUIDE

PLSA
CONFERENCES

swapcard