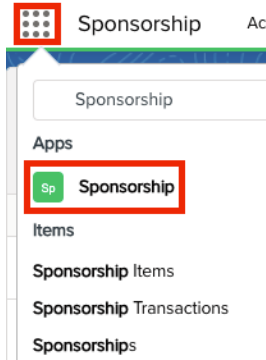


PACK EXPO Connects - Sponsorships Guide

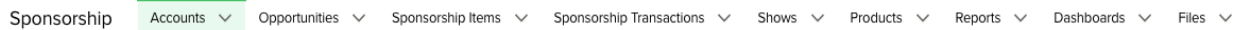
The purpose of this guide is to help you navigate the Sponsorships App in Salesforce as it relates to our virtual show, PACK EXPO Connects. This is a relatively new module in Salesforce that has several different parts and is designed to help the Herndon, Chicago, and O&B teams all work together on Sponsorship opportunities more effectively.

Launching the App

If you go to the App Launcher (9-dots) in the upper-left hand corner, type in "Sponsorships":



This will take you to app with the appropriate tabs for the Sponsorship module:

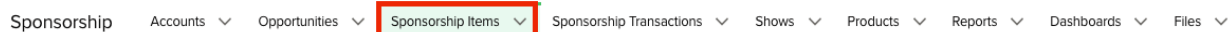


Sponsorship Items

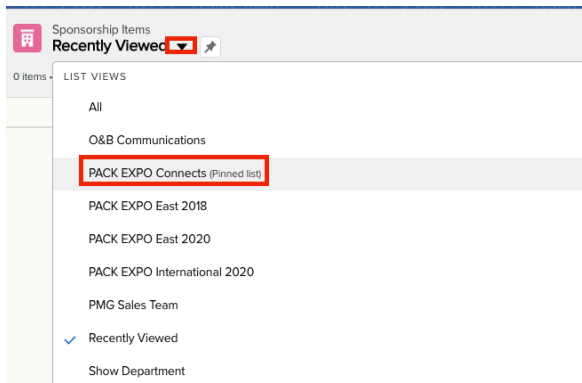
This should be one of the key screens that you use!

The Show Department has overall responsibility for entering in new Products as Sponsorship Items for each show, even those fulfilled by PMG. For PACK EXPO Connects, the Show Department will retain these rights in Salesforce and should be the only ones entering new Sponsorship Products into Salesforce or manipulating pricing for products.

We have created a view for all Sponsorship Items for PACK EXPO Connects, simply click on "Sponsorship Items":



Then filter for "PACK EXPO Connects":



In this view you should be able to see all Products & Sponsorship Items that are available for PACK EXPO Connects:


Sponsorship Items													New	Change Owner
PACK EXPO Connects													Search this list...	
22 Items - Sorted by Product Thumbnail - Filtered by all sponsorship items - Show - Updated a few seconds ago														
	P, ↑ ↓	Product Item	Product	FRoR	Notes	Cost	Available...	Sold ↑	Hold	Pending	Items Left	Indicator	Show	
1		PI-0000000313	Attendee Countdown Emails - 1 Week Out		An audience of over 60,000, including prospects and re...	\$7,200.00	1.00	1.00	0.00	0.00	0	⊖	PACK EXPO Connects	
2		PI-0000000314	Attendee Countdown Emails - 2 Weeks Out		An audience of over 60,000, including prospects and re...	\$7,200.00	1.00	0.00	0.00	1.00	0	⊖	PACK EXPO Connects	
3		PI-0000000315	Attendee Countdown Emails - 3 Weeks Out		An audience of over 60,000, including prospects and re...	\$7,200.00	1.00	0.00	0.00	0.00	1	✔	PACK EXPO Connects	
4		PI-0000000316	Attendee Countdown Emails - 4 Weeks Out		An audience of over 60,000, including prospects and re...	\$7,200.00	1.00	0.00	0.00	0.00	1	✔	PACK EXPO Connects	
5		PI-0000000317	Homepage Banner		Prospects and participants start their PACK EXPO Conne...	\$5,500.00	4.00	0.00	0.00	0.00	4	✔	PACK EXPO Connects	
6		PI-0000000318	Online Directory Search Banner		Sponsor artwork is featured at the top of the virtual even...	\$10,000.00	4.00	0.00	0.00	2.00	2	✔	PACK EXPO Connects	
7		PI-0000000319	Registration Website & Confirmation Logo		Place your logo on the first email participants receive as ...	\$3,750.00	3.00	0.00	0.00	0.00	3	✔	PACK EXPO Connects	
8		PI-0000000320	Trend Chats - Monday		Sponsor a daily Trend Chat and engage with a targeted ...	\$2,500.00	4.00	0.00	0.00	0.00	4	✔	PACK EXPO Connects	
9		PI-0000000321	Jumpstart - Monday		Exclusive Keynote Sponsorships are promoted to prospe...	\$5,500.00	1.00	0.00	0.00	0.00	1	✔	PACK EXPO Connects	
10		PI-0000000322	Jumpstart - Thursday		Exclusive Keynote Sponsorships are promoted to prospe...	\$5,500.00	1.00	0.00	0.00	0.00	1	✔	PACK EXPO Connects	
11		PI-0000000323	Jumpstart - Tuesday		Exclusive Keynote Sponsorships are promoted to prospe...	\$5,500.00	6.00	0.00	0.00	0.00	6	✔	PACK EXPO Connects	
12		PI-0000000324	Jumpstart - Wednesday		Exclusive Keynote Sponsorships are promoted to prospe...	\$3,500.00	1.00	0.00	0.00	0.00	1	✔	PACK EXPO Connects	
13		PI-0000000325	Pub Trivia Sponsor - Emerging Leaders		Engage, interact, compete and have some fun with Pub ...	\$5,000.00	0.00	0.00	0.00	0.00	0	⊖	PACK EXPO Connects	
14		PI-0000000326	Steps Challenge Sponsor		Your sponsorship will encourage and engage participant...	\$5,000.00	0.00	0.00	0.00	0.00	0	⊖	PACK EXPO Connects	

Each of the Sponsorship products in Salesforce and in Media Planner will have links to the Product Hub at Opportunities.PACKEXPOConnects.com for more details and pictures.

There are several key columns for you to pay attention to:

Available...	Sold	Hold	Pending ↓	Items Left	Indicator
4.00	0.00	0.00	2.00	2	✔
1.00	0.00	0.00	1.00	0	⊖
1.00	0.00	0.00	1.00	0	⊖

- Available per Show = the total quantity of each product available for the show
- Sold = the quantity of items for that particular product out of the total available that have been sold already
- Hold = the quantity of items that are reserved for a particular exhibitor, but not purchased yet
- Pending = the quantity of items that are reserved for a particular exhibitor and pending formal agreement
- Items Left = the quantity of items for the particular product that are still available to offer to an exhibitor
- Indicator = **A quick and easy way to be able to tell if that product is available to offer for sale to an exhibitor, or not**
 - The indicator will have a green check mark if there is at least one of the product available for sale: ✔

- The indicator will have a red circle if there are no more items for that product available for sale: 

If an item has a red circle, it is NOT available for sale. Please do not offer it to an exhibitor!

One of the unique things about the design of this module is that it is designed to handle quantity whereas Media Planner was not. This will help in the management of the overall portfolio of available Sponsorship products for sale, and to help avoid situations where a particular product is offered to an exhibitor when it may not truly be available for sale.

Opportunity Path

There is a separate, dedicated opportunity path for Sponsorships that has its own flow and process that is separate from the Media and Virtual Exhibitor/Refund paths:

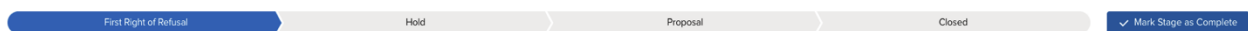
New Opportunity

Select a record type

- Media
Follow the Venator sales process
- Default
Salesforce Default
- IOPP Opportunity
For opportunities for more business related to Association Services
- Show
Opportunities for Show Booth Sales
- Sponsorship
Opportunity to sell sponsorship items for different show
- Virtual Show/Exhibitor Refund
Opportunity option to reallocate funds to either a virtual or future event

(Note: don't create Sponsorship opportunities this way! More on that ahead...)

The opportunity path is laid out as follows:

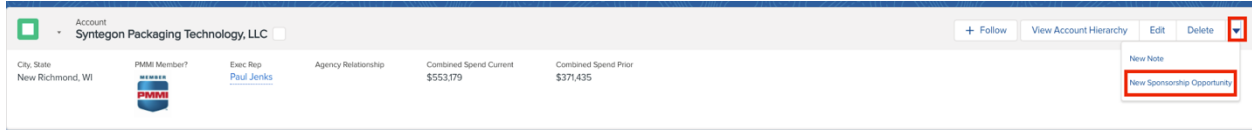


- **First Right of Refusal** – Generally an exhibitor is offered the first right of refusal on a Sponsorship product that they have purchased for a previous show. All sponsorship products must be offered to the prior purchaser first, before being offered to other exhibitors, thus this is the first stage in the process.
- **Hold** – if an exhibitor is interested in a particular Sponsorship product, the Hold stage will “reserve” the quantity of a particular product for this exhibitor, which will keep it from being offered erroneously to other exhibitors when it is not truly available for sale.
- **Proposal** – this stage is for when a particular opportunity progresses with an exhibitor to the point where a proposal has been set to the exhibitor and we are waiting on them to sign any agreements or contracts, or to approve the order.
- **Closed** – like other opportunities, this stage has two flavors:
 - **Closed-Won** – meaning the exhibitor signed the agreement/approved the order and we have successfully sold the Sponsorship to the exhibitor
 - **Closed-Lost** – meaning the exhibitor decided not to purchase the Sponsorship

- NOTE: Any “reserved” products & quantities that were held by a particular opportunity will be released when an opportunity is marked as **Closed-Lost**

Creating a Sponsorship Opportunity

To create a new Sponsorship Opportunity, navigate to the account that is interested in purchasing the Sponsorship. In the upper-right hand corner, you will see a drop-down arrow with a list of actions. Select “New Sponsorship Opportunity”:



Pick the show name, “PACK EXPO Connects” and the close date:

New Sponsorship Opportunity

Account
Syntegon Packaging Technology, LLC

* Show Name
PACK EXPO Connects

* Close Date
Sep 30, 2020

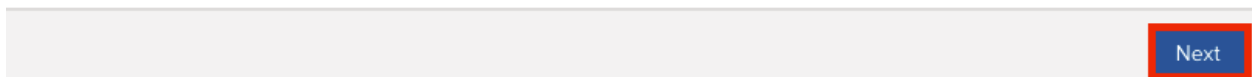
Then select the contact related to the account that you are working with on this opportunity:

Contact Selection

- Bill Burkart - Title: Human Resources
- Angela Zauft - Title:
- Michael Gensheimer - Title:
- Steve Volkert - Title: Sales
- Paul Jenks - Title: Director of Sales & Marketing, Confectionary and Food
- Craig Collett - Title: Director, HFFS Packaging Systems, Confectionary and Food
- Kelly Meer - Title: Product Manager- Packaging, Confectionary & Food

Then click Next (bottom-right corner of the window):

- Matthew Childress - Title: Field Service Manager
- Paul Garms - Title: Marketing Manager
- Scott Low - Title: Sales Manager



Next, you select the stage you would like the opportunity to start in. This defaults to “Hold” so you can just click Next, no need to change anything:

New Sponsorship Opportunity



Select the FRoR Items

Previous

Next

Click next and you will be able to select from the available sponsorship items for this show that the exhibitor is interested in:

New Sponsorship Opportunity



Select Available Sponsorship Products

- "Tomorrow At" Email - Friday Edition - Available: 1 - @ Price: \$7200 - Detail:
- "Tomorrow At" Email - Monday Edition - Available: 1 - @ Price: \$7200 - Detail:
- "Tomorrow At" Email - Thursday Edition - Available: 1 - @ Price: \$7200 - Detail:
- "Tomorrow At" Email - Tuesday Edition - Available: 1 - @ Price: \$7200 - Detail:
- "Tomorrow At" Email - Wednesday Edition - Available: 1 - @ Price: \$7200 - Detail:
- Attendee Countdown Emails - 2 Weeks Out - Available: 1 - @ Price: \$7200 - Detail:
- Attendee Countdown Emails - 3 Weeks Out - Available: 1 - @ Price: \$7200 - Detail:
- Attendee Countdown Emails - 4 Weeks Out - Available: 1 - @ Price: \$7200 - Detail:
- Homepage Banner - Available: 4 - @ Price: \$5500 - Detail:
- Jumpstart - Monday - Available: 1 - @ Price: \$5500 - Detail:
- Jumpstart - Thursday - Available: 1 - @ Price: \$5500 - Detail:
- Jumpstart - Tuesday - Available: 6 - @ Price: \$5500 - Detail:
- Jumpstart - Wednesday - Available: 1 - @ Price: \$3500 - Detail:
- Online Directory Search Banner - Available: 4 - @ Price: \$10000 - Detail:
- Pub Trivia Sponsor - Emerging Leaders - Available: 1 - @ Price: \$5000 - Detail:
- Registration Website & Confirmation Logo - Available: 3 - @ Price: \$3750 - Detail:
- Steps Challenge Sponsor - Available: 1 - @ Price: \$5000 - Detail:
- Trend Chat Sponsor - Available: 4 - @ Price: \$2500 - Detail:

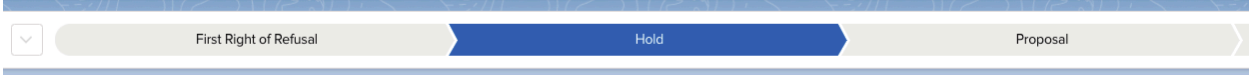
Previous

Next

Note: You may select multiple items, but only available items will be shown on this list

Click Next and you will be taken to the newly created Opportunity record:

Account Name: [Syntegon Packaging Technology, LLC](#) Close Date: 9/30/2020 Amount: Opportunity Owner: [Andy Lomasky](#)



Details Related

Account Name: [Syntegon Packaging Technology, LLC](#) Probability (%): 75%

Show: [PACK EXPO Connects](#) Sponsorship Items Total: \$7,200.00

Opportunity Name: PACK EXPO Connects – Syntegon Packaging Technology, LLC – 2020-08-04

Stage: Hold

Close Date: 9/30/2020

Additional Information

Next Step:

Description:

Sponsorship Transactions (1) [New]

1 item • Updated a minute ago

Sponsorship	Sponsorship Product Name	Amount	Cost	Price	Total	Status
1 SI-000134	Attendee Countdown Emails - 1 Week Out	1.00	\$7,200.00	\$7,200.00	\$7,200.00	Pending

[View All](#)

Notice that the opportunity record has been created with the correct Sponsorship Items Total for the products selected. Also notice that the product has a status of “Pending”, indicating that the quantity has been reserved specifically for this exhibitor and will not be shown as available to other exhibitors.

If you need to change the quantity, that is fine, just select the down arrow next to the Sponsorship Item and click Edit:

Sponsorship Transactions (1) [New]

1 item • Updated 10 minutes ago

Sponsorship	Sponsorship Product Name	Amount	Cost	Price	Total	Status
1 SI-000135	Attendee Countdown Emails - 1 Week Out	1.00	\$7,200.00	\$7,200.00	\$7,200.00	Pending

[View All](#)

[Down Arrow] [Edit] [Delete]

Then change the “Amount” field to the quantity desired:

Sponsorship
SI-000135

Sponsorship Product Name
Attendee Countdown Emails - 1 Week Out

Sponsorship Product
PI-000000313

Available
1.00

Amount
1.00

Cost
\$7,200.00

Total
\$7,200.00

Price
\$7,200.00

Flow Sponsorship Product Summary
1 of Attendee Countdown Emails - 1 Week Out - Total
Price: 7200

Account
Syntegon Packaging Technology, LLC

Opportunity
PACK EXPO Connects -- Syntegon Packaging Technology, LLC -- 2020-08-04

Show
PACK EXPO Connects

Status
Pending

Do NOT manipulate the Price of the product, especially without consent from Allison and Wendy!

From this point in the process, you should discuss the opportunity with the exhibitor and provide a proposal once you've solidified their interest. Once a proposal is in the hands of the exhibitor and pending their approval, you can advance the stage to **Proposal**:



Next Step: Opportunity Matching

Since all Sponsorship items for PACK EXPO Connects will be fulfilled and invoiced by PMG, the orders will need to flow through Media Planner which means that the exhibitor must view and approve a Media Plan containing these Sponsorship items. All sponsorship items will be created in Media Planner, however, this does NOT mean that they are available to offer to an exhibitor, you must make that determination from Salesforce!

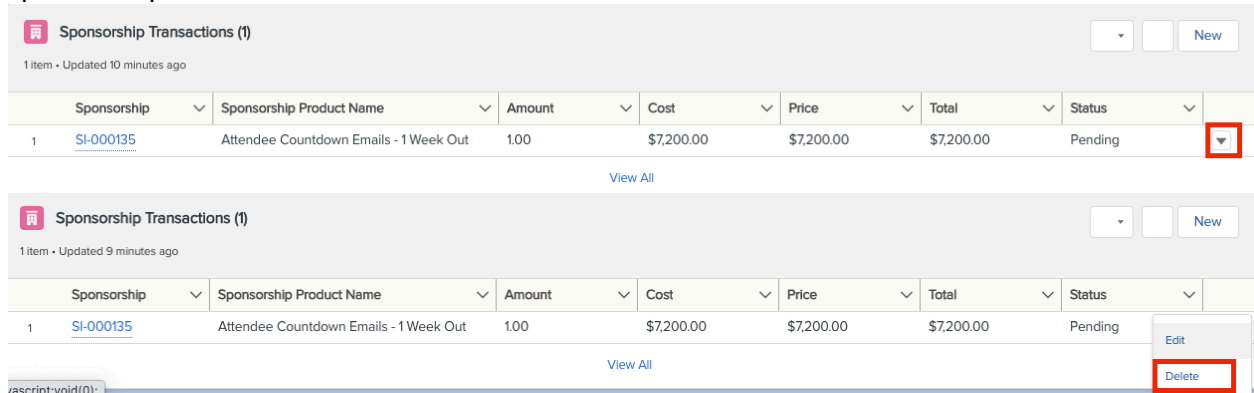
In order to share a Media Plan with Sponsorship items on it, the Opportunity in Salesforce will need to be matched with the Media Plan in Media Planner. We will take advantage of our recently-implemented Opportunity Matching functionality which will display a list of open opportunities for that Company in Media Planner for you to select from, the same way you do currently for Media opportunities in Salesforce. This will be required in order for you to share the Media Plan with the exhibitor for their review and approval. This will also ensure that you can only share a Media Plan for sponsorship items with a customer after you have created the Salesforce opportunity that checks and consumes the available quantity of that sponsorship item.

Closing the Opportunity

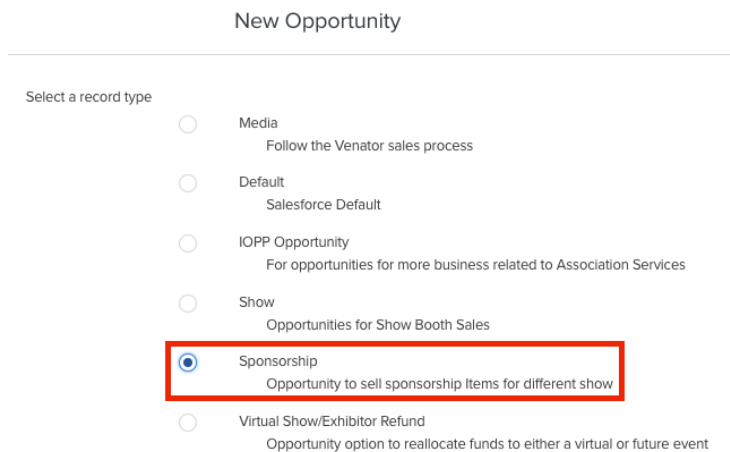
Once the linkage between the Salesforce opportunity and the Media Plan has been established in Media Planner, you should be able to create and share the Media Plan with the exhibitor. Once the exhibitor approves the Media Plan, the opportunity should be automatically marked as Closed-Won in Salesforce. **There should be no need to manually close an opportunity as**

Won in Salesforce. You should only have to manually close as Lost in Salesforce, if the exhibitor decides not to purchase the Sponsorship item.

If an exhibitor reserved two sponsorship items but decided they are only interested in one, you do not need to close or re-enter the Opportunity. Simply click the down-arrow next to the Sponsorship Transaction and click “Delete”:



IMPORTANT NOTE: Do NOT create Sponsorship opportunities from the main screen!



The flow is set up to start from the Account. It is imperative to follow this flow as it will create the opportunity record for you at the end.

That’s it! If you have questions on Sponsorship items or this workflow, contact Andy Lomasky.