



Contract 15.ESI.OP.029
“Support to the Implementation of the Supply Chain Action Plan”

Terms of Reference for Business to Business (B2B) event

Prepared for the European Defence Agency (EDA)



Date: July 2016

Mr. Richard Evans

Director: Aerospace, Defence and Security Consulting

IHS Global Limited

Tel: +44 208 544 7872

Email: richard.evans@ihs.com

Table of Contents

TERMS OF REFERENCES FOR BUSINESS TO BUSINESS EVENT B2B.....	3
Definition of participating stakeholders and beneficiaries.....	3
Definition of specific objectives of the matchmaking / clustering event	3
Organisation and logistics	5
Definition of the event's content.....	8
Key efficiency indicators	9
CHECKLIST FOR ORGANIZATION OF A B2B MATCHMAKING EVENT.....	10

TERMS OF REFERENCES FOR BUSINESS TO BUSINESS EVENT B2B

Definition of participating stakeholders and beneficiaries

A successful event should incorporate a broad mix of stakeholders representing buyers and suppliers across the supply chain. It is noted that many B2B matchmaking events, including Aerospace & Defense Meetings Sevilla 2016, highlight two broad categories of stakeholder:

- Those wanting to sell capabilities, products or services
- Those wishing to meet suppliers and manufacturing partners

However, a successful feature of the 9 March B2B matchmaking event was the inclusion of representation from EDA, Netherlands Ministry of Defence, Netherlands Ministry of Economy and Netherlands NDIA. This allowed companies present to understand the wider policy environment and mechanisms available to support SME in particular.

We therefore advise that future events are established with four categories of stakeholders in mind:

Sellers of product, capability or services	Sales, Marketing, Business development	<ul style="list-style-type: none"> • Identify new business opportunities / partners • Network with other firms and industry stakeholders • Understand supply chain issues and mechanisms for support
Buyers or those looking for partners	Supply chain, Procurement, Purchasing, R&D	<ul style="list-style-type: none"> • Build supply chain resilience • Identify innovation and new technologies • Understand supply chain best practices
Industry representation	NDIA, Geographical / Industry clusters	<ul style="list-style-type: none"> • Network with industry • Understand industry challenges and identify means to improve • Promote your association and members
Policy representatives	EDA, MoD, Industry Dept.	<ul style="list-style-type: none"> • Understand supply chain and wider industry issues • Identify new technologies and approaches • Promote and explain industrial/ sector policies

Segmentation in this way will allow organisers to craft specific communications to the various stakeholders, explaining the benefits of attending the event.

Definition of specific objectives of the matchmaking / clustering event

Objectives for attendees

Feedback provided by attendees to the 9 March event indicated that the most important objectives included the opportunity to network; to develop new business; and, promote the capabilities of their company and its brand. It would therefore be important that any event is structured so that these

objectives can be easily realised by attendees. This will be discussed in more detail in the section considering the event's content.

Objectives for organisers

The B2B Events organised by IHS were intended to promote a specific geographical region within the EU (Baltics and Benelux) and a specific area of capability (cyber and training & simulation), as per EDA instruction. Such clear policy (or even political) objectives are valuable and appropriate to the overall objective of promoting cross-border cooperation within the EU and enhancing SME access to upper tier firms. However, they *potentially* detract from the success of an event as perceived by attendees who are only interested in developing business and enhancing their supply chains. It is therefore recommended that any future such event organiser objectives are evaluated against possible restraints they may place against organising the event or those attending it. Criteria may include:

Geography:

How many SME are in the intended geographical location?	<i>The total number of SME within a region will impact the size of an event</i>	<i>The more SME attending an event the more time will need to be given for to one-to-one meetings</i>
Where do the SME in the region sit within the supply chain?	<i>An unbalanced spread of SME from across Tiers 1-6 may detract Primes and upper tier firms from outside the region attending</i>	<i>If all SME in the region are at Tier 6 this may inhibit the willingness of Primes to engage with the companies directly</i>
What is the 'quality' of SME in the geographical region?	<i>Are the SMEs recognised as effective suppliers?</i>	<i>If the SME or more generally the region is not well-regarded by upper tier firms, it may prove difficult to attract attendees</i>
How easy is the region to access?	<i>What costs will upper tier (and possibly SME) firms incur for attending the event</i>	<i>Travel within the EU is generally not too arduous or costly. However, anyone considering attending an event will ultimately ask 'how much effort is involved and how much will it cost me?' Generally events near multiple transport nodes (air, rail and car) and in proximity to quality accommodation will be more attractive than those that are not.</i>

Capability

Is the capability sufficiently defined?	<i>Is it clear who should attend the event? Is it explicitly clear who should not attend?</i>	<i>There was a degree of confusion initially with regards to the Benelux event between Training & Simulation and Simulation & Modelling</i>
How many SME in the region have demonstrable capability in this area?	<i>What expertise do SME in the region have?</i>	<i>The attending SME will need to demonstrate strong and/or innovative capabilities to</i>

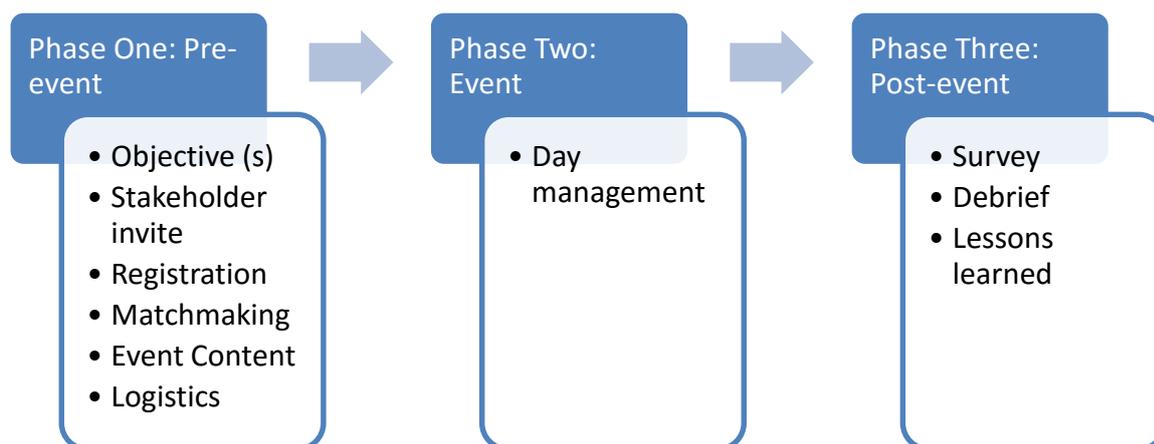
attract upper tier firms from outside the region

Is the identified capability an area where upper tier firms have struggled to build resilient supply chains? *What do SME in the region have that upper tier firms currently lack or cannot access from their traditional suppliers?*

The questions above are far from exhaustive but point to the depth of analysis that must be undertaken at an early stage of planning. They can be summarised more succinctly as what attractions and distractions could the subject and location of the event have on attendees.

Organisation and logistics

For any event to be successful careful planning and event management is required. This can be broken down into a series of steps or tasks.



Phase One: Pre-event

Objectives:

This has been discussed in more detail in the [Definition of specific objectives of the matchmaking / clustering event](#) section. In determining the objectives for the event it is important that they are sufficiently clear that all stakeholders (for example, EDA, NDIA and MoD) not only accept them but can support them as well.

Part of setting objectives should also include an understanding of what ‘success’ looks like and what to do if success is not achieved. The decision to not run the Latvia event was taken after all stakeholders concluded that there was not sufficient SME and upper tier interest in the event. That decision was informed by a counting of confirmed attendees and a consideration of the mix of attendees (how many SME compared to upper tier firms, how many were from the Baltic states, how many were from outside the Baltic region).

Stakeholder buy-in

Securing buy-in of senior decision-makers is especially critical and fundamental when executing an event but under any circumstance achieving this level of 'buy-in' can be a tricky and politically sensitive endeavour.

The events in Latvia and Netherlands involved senior decision-makers from the EDA along with respective MoD and NDIA. It is necessary for each to comprehensively understand what is required of them to make the event a success.

Stakeholder invites:

This task requires a series of sub-tasks.

Stakeholder identification and evaluation

As discussed, it is necessary to identify the stakeholder communities to be invited to the event based on the event's objectives (for example geographical focus and capability). The most ready source of information on stakeholders was provided NDIA and through using IHS Jane's industry information. This stakeholder information needs to be evaluated to assess whether there are sufficient number of potential invitees to make the event a success.

Invitees will be selected on the following indicative criteria: roles and responsibility; geographical location; and sector/organisation. Depending on the concept of the matchmaking / clustering event it is necessary to seek a balance between buyers and suppliers and level within the supply chain.

Communication

Event organisers

It is necessary to maintain effective communication between all event organisers, especially when this involves multiple organisations. A detailed and shared project plan is advisable along with regular progress calls; these should be structured in such a way to aid swift decision-making on whether the event will meet objectives and what actions are necessary if objectives are not being met.

Invitees

Communication with invitees is essential. For the Latvia and Netherlands events two primary forms of communication were employed; email and telephone call. Email was used to send invites and reminders to register while a direct call phone campaign was employed by IHS to encourage upper tier firms to register. Neither approach had enormous success.

Key insights gained from the process include:

- **The need to communicate early:** Fifty percent of attendees at the Netherlands event said they required three months' notice to make a decision to attend a B2B event while 36% said they required six months' notice. This indicates that invites and need to be sent early to meet attendee planning cycles.
- **The need to communicate often and in more detail:** Anecdotal feedback from the Netherlands event focused on a desire for more information about the event, especially which other companies were attending.
- **More communication channels:** In organising the events only email and telephone were used. A multi-faceted communication strategy would be preferable employing tools including websites, social media and – potentially – advertising. 'Channel' partners should also be employed, including NDIA, clusters and government to promote the event.

Attendees

Communication with registered attendees is similarly essential. As discussed, anecdotal feedback from the Netherlands event suggested attendees wanted more information about who else was going and the content for the day.

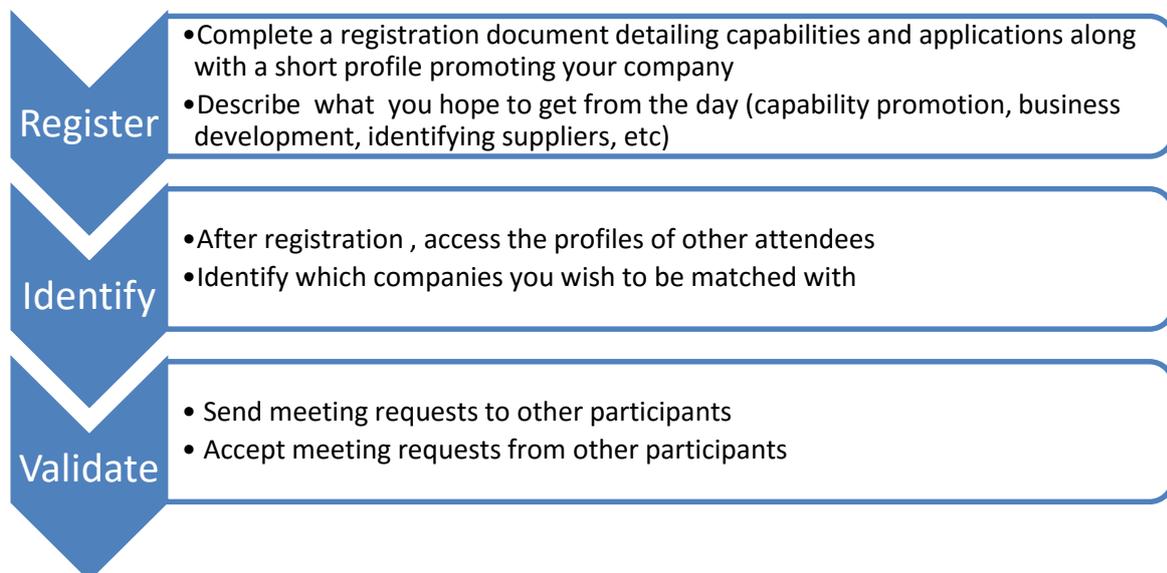
Registration

Approaches

There are two broad approaches for registration – a manual system or an automated system. The approach chosen for the two trial events was manual. This choice was made because it was felt that the likely number of attendees could be easily managed manually and that a manual process (i.e. direct communication between the event organiser and the registrant) would help aid buy-in and ensure the registrant attended the event. If a greater number of attendees was planned an automated system (web-based) would be desirable. There are numerous companies that provide such software and offer additional services around these tools.

Process

With either approach the process for registration will be similar, as below.



Identification and validation should, preferably, take place before the event.

Questions

The precise questions that will be asked of registrants during the registration phase will be determined by the nature of the event. However, all will have common characteristics including:

- **Organisation information:** company profile, areas of capability
- **Cooperation information:** what is the company wanting from matchmaking (for example, new sales, research cooperation, technical cooperation)

Event Content

To be discussed in the next chapter.

Venue

An appropriate venue would need to be selected soon after the decision to hold the event is taken. The suitability of the venue would be determined by a series of factors not least the anticipated number of attendees. For a B2B event additional factors include:

- Capacity to host a number of (reasonably) private one-to-one meetings
- Capacity to host plenary sessions for all attendees (for workshops / industry briefings)

Phase Two: Post-event

Survey

It is essential that attendees complete a survey following the event. The survey should be designed to identify successes and failures with the event. In addition it would be desirable to survey attendees six months after the day to assess the value of the event to business development and supply chain management.

Debrief

Similarly to surveying attendees, debrief of stakeholders should be undertaken to identify successes and failures. Debrief should specifically focus upon the event's success in meeting objectives.

Lessons learned

The survey and debrief should be used to identify lessons learned that could then be factored into future events.

Definition of the event's content

Fundamentally a B2B matchmaking event should pair interested companies and arrange one-to-one meetings. The matchmaking should take place prior to the event and be driven by the responses the registrants give during the registration process. However, flexibility should be built into the system so that attendees can arrange meetings on the day of the event.

The EDA Supply Chain Action Plan (SCAP) aims to improve information-sharing and business opportunities among relevant supply chain actors. If the B2B event was only organised on the basis of responses by attendees there is a high likelihood that attendees would only chose to pair with companies that they already know or choose meetings based on pre-conceived notions of what they require. While this is important it may inhibit opening the European supply chain and exposing companies to innovative new approaches or technologies.

Therefore means to overcome these pre-conceived approaches are desirable. The two trial events planned an 'informal' approach to matchmaking that placed attendees into small groups in order to work together and share ideas. The concept was that in working together they would learn about the capabilities of other attendees.

Other approaches have been posited including the requirement for each participant to briefly present the capabilities of their company in plenary sessions to all attendees or to allow attendees to demonstrate their companies. Indeed, it seems that many B2B matchmaking events are organised alongside exhibitions and conferences to facilitate this.

Key insights from the two events

- **Formal matching is best:** Anecdotal feedback from attendees at the Netherlands event stressed that the main draw was the opportunity to meet directly with other attendees. This

is not to say that alternative approaches were not appreciated but that the ‘formal’ was the most favoured matchmaking concept

- **Informal needs a chaperone:** Specific feedback following the Netherlands event emphasised that groups needed to be facilitated better to ensure that collaboration was fostered. Each group should be assigned a facilitator whose job involves ensuring that team discussions stay on track and maintaining professional, respectful and inclusive team dynamics. Facilitators have a considerable amount of influence on the trajectory of group discussions and a capable facilitator can suggest – both directly and subtly – particularly bold approaches to enhancing collaboration in an informal environment.

Key efficiency indicators

The performance of the B2B matchmaking will be judged through evaluation of its objectives to:

- Improve access to information;
- Identify business opportunities;
- Enhance regional and cross-border cooperation.

Key efficiency indicators are grouped around three core areas.

Focus	
<i>Geography/ Capability</i>	<ul style="list-style-type: none"> • Stakeholders and event attendees will be invited to provide feedback on the appropriateness of geographical and capability focus of the event
Participation	
<i>Attendees</i>	<ul style="list-style-type: none"> • Data around attendees including number, position within the European defence supply chain (Tier 1-6), capabilities, and how representative this is of the wider European defence supply chain. • This data can be collected via the registration process
Results	
<i>Attendee objectives</i>	<ul style="list-style-type: none"> • As part of the registration collect data on what attendees hope to achieve • Post-event survey to assess how well the event met attendee objectives
<i>Attendee outcomes:</i>	<ul style="list-style-type: none"> • Six month survey post-event to assess whether it had a material impact on the attendees business (measures to include new business won, new relationships developed, new capabilities/technologies identified)
<i>Stakeholder objective</i>	<ul style="list-style-type: none"> • Evaluation of how far the event met stakeholder objectives to enhance regional and cross-border collaboration.

CHECKLIST FOR ORGANIZATION OF A B2B MATCHMAKING EVENT

The below form can be used to assess the value of investing in a proposed B2B Matchmaking Event.

<p>Name of event: Consider a descriptive title for the event that captures audience interest</p>
<p>Location: Identify the proposed location for the event. Consideration will need to be given to the focus of the event in terms of geography and also sector (cyber, training & simulation). An assessment must be made as to whether there is a sufficient number of SMEs in the desired geographical location</p>
<p>Venue: It is beneficial to select a venue of inherent interest to the purpose of the event. For example, if the event is focused upon air platforms, a museum on air warfare could be an attractive location. It is essential that the venue is large enough to support the number of attendees, has a sufficient number of rooms for various sessions and briefings to be held during the day, and has adequate facilities to include catering and audio visual equipment.</p>
<p>Dates: Select a date at least six months in advance and ensure it does not conflict with other key industry events or significant dates in the host city/country (public holidays).</p>
<p>Event summary: The event organiser should be able to succinctly summarise the purpose of the event and its main beneficiaries. This should highlight the unique 'selling' proposition of the event that will be used in subsequent promotional material to invitees.</p>
<p>Event Content A summary of the event content is required, especially if an 'informal' approach is to be undertaken (what attendees be asked to do?). Determination of speakers should also be considered along with subjects they will brief to attendees.</p>
<p>Invitees A first draft invitee list is essential demonstrating an appropriate mix of SME and upper tier firms from within the geographic region and from outside. Consideration of an 'anchor' prime or primes should be made and used if available. This will help attract SMEs.</p>
<p>Risk Management The event organiser must determine the success metrics for the event and be able to quantify these for evaluation. For example: a one-day event with 50 attendees (40 SME from the region and 10 upper tier firms from within the EU). Risks to the event's success should be identified and risk management protocols identified. Critically, a series of event 'check-gates' should be used to evaluate the likely success of the event. Failure to meet expectation following a check-gate will trigger remedial action, including possible cancellation of the event. For example, if the event is to have 50 attendees but eight weeks before it is to be held only 20 companies have registered to attend, the event organiser may choose to cancel the event.</p>