

2016 SelectUSA Investment Summit
“Know Before You Go” EDO Conference Call
May 12, 2016
1:00 pm EST

Vinai Thummalapally: Good afternoon, good day everybody. This is Vinai Thummalapally from Washington D.C. on behalf of my entire team. Several of them are on the call today, a warm welcome to you. Thank you so much for joining the fourth call.

“Know Before You Go” - the title of this – is the purpose of this call really. It's meant for all of you. We want to assist you in every which way to make your experience better, to be good and to be of value.

We just wanted to say thank you. Many of you were involved in the Hannover Messe Trade Show a couple of weeks ago. That was a phenomenal success for all of us, not just SelectUSA or Department of Commerce but for you, those of you who participated.

I just wanted to say a big thank you from all of us because if it wasn't for the partnership we have, it would not have been as good as it turned out. We have a robust agenda today.

We have over 1,500 participants registered for the Summit and over the last few weeks, the rate of increase has gone up because there's a lot of information out there and people are getting ready to plan their activities for June and on beyond.

So we're seeing a big surge in registrations which is wonderful. Today's main topic to cover is the matchmaking platform under the brand of Poken, P-O-K-

E-N, the Poken platform. Suzanna is going to talk about it in a fair amount of detail.

But before Suzanna, we've got a few other items we want to quickly cover in terms of giving you all an update on where we are with the sort of final stretch if you will. We're inside of that one month now, kind of a last stretch, which can make all the difference, so let's get started. I'll hand it over to my colleague Juli Kreko.

Juli Kreko: Thank you so much Vinai and thank you everyone for joining us today. We're going to get started with some general updates. As of today, our registrations numbers - just a couple to highlight - we have over 700 confirmed international firm attendees and over 300 confirmed U.S. EDO attendees.

The current breakdown of exhibitor participants from the 56 U.S. States and Territories is as follows: we have 45 official state EDO exhibitors, two regional EDO exhibitors, three states or territories with participants, and two states and territories that have not registered, but we're hoping to have participation from everyone.

If you work with an official state EDO and have not submitted an application to exhibit or sponsor and still are interested in doing so, please submit your application as soon as possible. Space is limited and filling up rather quickly but we are happy to facilitate that if possible. As always, please feel free to e-mail our events team at SUSAEvents@trade.gov if you have any questions. As a reminder, the Sponsor Prospectus is still available on the Summit website. This is updated weekly and provides the most up to date information on what sponsorship opportunities are available.

And with that, I will pass it on to my colleague Jacqueline who is going to give some additional updates.

Jacqueline Vitello: I wanted to make a special note about housing - the hotel block that we have for the Summit is starting to fill up very quickly so we want to encourage you to book your hotels as soon as possible.

As I mentioned, there's a special room block and the rates are listed on the Summit website. For any hotel reservations concerns that you might have, please call or e-mail Experient Customer Service department correctly. Their contact information is on the Summit website under the Contact Us tab. Please do not call the hotels directly in order to book your room or you will not receive the discounted rates.

Now, I want to move over to the EDO events calendar. EDOs may still submit events to be posted on the EDO events calendar and this is available under the Exhibitor tab on the Summit website.

As a reminder, the EDO side events and reception should be help on Monday, June 20 after 7:30, which is at the end of the State and Local Night at the Summit.

If you are an exhibitor and you have any specific boost requests for State and Local Night, please be sure to contact the hotel, the Washington Hilton, directly. Their contact information is listed in the Exhibitor Kit which you all hopefully have. And now I will turn it over to Felicia who's going to make a couple more announcements.

Felicia Pullam: Hi, everybody. This is Felicia Pullam. Thank you again to everybody who submitted announcements and success stories. We're really excited about what we've seen so far.

We're hoping to feature these on Twitter, the SelectUSA website, blog posts, e-mail blasts, Talking Point to Senior Officials, and you know, potentially another venue at the Summit.

So last week, as an example of how we're using it, we sent an e-mail announcing a deal led by Brownsville Economic Development Council with SATA USA.

The SATA group, which is an Italian manufacturer, announced that it's going to invest \$114 million to build a machining operation in Brownsville, Texas. So that was great news and it's a great sized investment, but we also accept announcements of all sizes, big or small.

So our e-mail blast last week went out to about 33,000 people on our e-mail list and also through Twitter, we reached some other people as well. If you have examples and success stories, please e-mail SUSAEvents@trade.gov.

If you're interested in having it highlighted for the Summit, the sooner the better. Really it's getting quite urgent that we got those in but we're always looking for great examples. So on that note, I'm going to turn it back over to Juli. Thanks a lot, everybody.

Juli Kreko: Thank you, Felicia and at this point I'm going to be reviewing information geared specifically for exhibitors that have already signed up. As a friendly reminder, please be sure to register your booth staff personnel through your exhibitor portal.

Again, each exhibitor booth package no matter the size includes two exhibition hall only or those booth staff personnel passes. You can add on passes through that portal for an additional fee of \$155. You can also add on matchmaking to one of those passes for \$195 and you do also have the option to add additional boost staff with matchmaking included.

I also want to review important shipping dates with all of our exhibitors. As Jacqueline mentioned, the Exhibitor Kit on your exhibitor portal and this document contains valuable and time sensitive information on shipping, additional booth items available for rent and purchase, and critical deadlines. Specific shipping dates are listed on page four of the Exhibitor Kit but we wanted to highlight a few of those key dates now. On Friday, May 20 Heritage will begin receiving freight at the advanced warehouse and to avoid late feeds, all shipments to the advanced warehouse must arrive no later than Tuesday, June 14.

The discount price deadline which allows you to receive advanced order discount rates is Friday, June 3rd and again, these are all available on page four of the Exhibitor Kit so we would encourage you to review those deadlines on the checklist page.

One last important item to note in the Exhibitor Kit - to order internet, any audio/visual equipment, and electrical equipment, you will need to register with the Hilton directly. There's a page with that information. It can be done online but again, please refer to the Hilton section of the Exhibitor Kit for all of that information.

And lastly, I did want to go over booth locations. By now, most exhibitors should have received their booth location in the exhibition hall. Unless you've

applied in the last two weeks, our vendors should have already reached out to you.

So if you do have any questions, please forward them to Laurie Powell, that's LPowell@eventPower.com or of course, you can send those to us at SUSAEvents@trade.gov. We will be placing the exhibition home map on the Summit website shortly so please check back for that.

And as you will see if you've had a chance to view the layout already, the exhibition hall is organized by general region with our sponsors located throughout. And with that, I will turn it over to my colleague, Seth Isenberg.

Seth Isenberg: We've received an interesting amount of interest from large foreign pension funds in attending with Summit. Their goal is to meet with the ideas that have public private partnership style infrastructure projects to learn about financing opportunities.

Some of these groups represent literally hundreds of billions of dollars in funds and there's a good percentage of that money that's focused specifically on infrastructure projects worldwide. They have clearly a decent amount of money to be spending on these projects.

I have two requests of you, I know that the in general, the Economic Development Offices typically are not involved in these sets of projects but if you could please reach out to the offices that are involved, typically it's transportation, it could be environment, it could be energy, really depends on type of project and how your own state and region works.

But if you have those types of projects, please be prepared to discuss them. And so the second request is kind of connected to that and involves our Poken

matchmaking system which Suzanna will get into in a second but if you have those types of projects ready, so please make sure in matchmaking you use the right key words.

So P3, you know, use the key word infrastructure, use PPP as well, use Public-Private, just make sure you have all those types of keywords in there.

And that way we can make sure that when the pension funds join the matchmaking system, they will be able to see that here are the EDOs that have those types of projects and then you know, start setting up meetings that way.

You can feel free to e-mail SUSAEvents@trade.gov and they will forward requests on to me if you have any questions about that. And so now, Suzanna will talk about Poken and matchmaking.

Suzanna Ertz: Thank you so much, Seth. I just wanted to thank everybody for their updates and as Vinai mentioned at the top of this call, our Poken system, the matchmaking portal is now live and we're going to be going over the PDF of slides that you all should have received.

It was in the link of the blast or if you received an e-mail directly from SUSA Events, it was an attachment there. So if you're following along, great, if not, we will be making it available as well as a live demo on our website.

On the Summit website, if you go under the tab that says Attend, there's a matchmaking tab that has the access and some of the start information there at this time. As I mentioned anyone who is a full registrant - so this means they made it through the final approval process - they have received confirmation of their attendance at the event as well as started booking their hotel reservations either via the portal or outside of the portal, they have received at

this time an e-mail directly from Poken in regards to the first step that they need to complete.

So on Slide 2 if you're following along, it shows you the e-mail that has come or has been sent out in regards to a step-by-step process of how to one, set up their profile which we're about to go through and two, schedule the meetings.

So just so that everybody is aware, you may still be waiting on your final confirmation or you might want to check back and see where you are in that process, but this will be on a daily rolling basis so if anybody who was approved yesterday, they will be put into the Poken portal today.

And that e-mail should be sent out the next day after when you receive your final confirmation (if you're waiting for that e-mail). The e-mail will prompt them to log into the portal, so if you're following along, slide 3 has the link to the portal itself.

The login credentials are your username - so whatever e-mail address that was submitted into the registration portal -as well as the password. That is generic at this point - SelectUSA2016 - and you will be prompted to change that password from the default when you first log into the system.

After you complete those steps, there is the building out of your profile, so you'll be asked a series of 10 questions and the key word field.

Seth mentioned some of the key words that you might be interested in adding in but really any key words that represent you well or could add value should be entered into that field to make up your full profile.

So based off the answers to these questions, the system will automatically score you with other compatible attendees. So it's very, very important that you are logging in at this point, sooner rather than later, to complete this first step.

We had three post calls this week with our colleagues overseas. We know a lot of their delegations are starting to fill out their profiles and they're already looking for certain states to be able to start scheduling those meetings with, so the sooner the better in regards to getting logged in and filling out that profile.

So if you're following, we're moving on to slide 6. Once your profile is actually completed, it'll be, you will be taken to your personalized web portal which will show your agenda and your schedule.

There is a map of where the matchmaking rooms are as well as this great matchmaker widget where there will be a number of profiles that are already populating based off of the top scores. So you'll be scored out of 10 and those are based off of those answers.

So the capability score is out of 10 and the highest scores will be shown automatically in your box.

Now, you can search - so moving on to Slide 8 if you're following along - you'll be able to search by name - if you're looking for specific business organizations, you'll be able to search by the organization, you'll be able to search by the key word that we referenced earlier as well as they'll be able to search by state.

You can always search by country because that information will also be pulled in by their registration information. You can also search by categories. So

there's a drop down next to the search bar where you could search by categories.

If you're looking for international firms, then we would switch that automatically to search the full list of international firms. Once you find somebody that you might be interested in with meeting with, all you'll have to do is click on their name and then it will show you their full profile.

So within the profile, they can have listed a web page, possibly a website, and all the answers to the questions that were needed to complete their profile. If you want to continue with selecting a meeting, you'll click the "Schedule a Meeting" bar and a pop up will appear that you will be able to create your meeting.

Some of the required meeting details can go in the name of the meeting; this can be simply stated like "Blank State meeting with X company". It can go into more detail if there is more detail that is needed but it can be as simple as that.

A date will need to be selected - so one of the two dates at the Summit - a time, a location, and there's a description field, however that is not needed. All meetings will be defaulted to a 30 minute time period, however if more time is requested, you can adjust the time.

One of the great features about this tool is you can automatically add a guest in with you, so if somebody is exhibiting with you or you have another attendee that needs to be in the meeting with you all instead of just the one on one meeting, you can add a guest by searching their name, e-mail address, organization, or company in the search field and add them directly to the meeting. Therefore, when the request goes out, it will be on all of the people's

schedules, not just the one on one and then trying to add people in after the fact.

If you're following the PowerPoint, we're going to move to Slide 10. So say you have added the name, you've already picked a date that's possibly going to work, and then you've added in any other guests. Now is the time to really secure a time for the meeting.

Under the "Find a Time" tab, you'll be able to view the other attendees' schedules and this gives their best availability or the opportunity to find the time that will really work well for both of you. Under the "Locations" tab, you have two options as exhibitors or EDOs.

The first option is a predefined location, so this will be a drop down menu where you can choose from the meeting or the matchmaking rooms that are already loaded in the system based on the number of guests and the availability. Or, there's the location text field where you can add a booth number - if you fill that in, any of the meetings should be done at your booth.

So once all of that information is added into the system, you will simply click "Send Invitation" or the international firms will send you an invite. This invitation will be sent to you e-mail directly.

The e-mail will go out and an e-mail will be received with an "accept" or "decline" button directly in the e-mail. If you want to accept a meeting, you click that option. Your portal will come up and it will be added to your schedule automatically.

Now this schedule that is in the Poken matchmaking portal can be linked up with a personal account. So, say you have a Google Calendar or an Outlook

Calendar that you want it linked up with, you do have the availability to do that.

You also have the option to print your schedule. So if you're following along, Slide 13 walks you through the “printing schedule” process. As the days lead up to the Summit, you will be receiving a number of e-mails from our Poken colleagues reminding you to finalize your profile and also request the meetings.

If you have any meetings that are pending, you will be sent reminders of those meetings that are pending. When you log into the system, you will also have a notification bar that tells you if you have any meetings that you have not replied to.

And lastly, a couple days before the Summit, they will remind you to print your calendar. You don't have to do that, we also will have some people on-site from our Poken personnel and they will be able to assist with any changes of your schedule, additions to your schedule, as well as printing if needed.

So what does this Poken portal really look like on-site? On-site, Poken is essentially a digital business card. It's also going to be very helpful in tracking any interactions, meetings, networking, as well as checking into your sessions.

At each of the panel sessions, there will be a check-in point where you will be able to touch the small hand or the device to the touch point and receive any of the flyer information, PowerPoints, or any additional information that our speakers want to share with you.

So all of this is put into your portal and you will be able to go back in, make any notes about meetings, as well as download all of that information directly from your personalized portal.

Additionally, if you're following along Slide 7, it really shows you where the rooms are located as well as the Poken Help Desk. Again, we will have some of our Poken colleagues there and any of our SelectUSA team will be there to assist you with that.

Lastly, we believe that this tool is going to be a huge benefit, not only in highlighting and pointing you all in the right direction to possible great matches, but also in suggesting meetings that will be meaningful. It also helps in maximizing business opportunities on-site, as profile information is able to be transferred quickly. And lastly, it's really going to create a full schedule for your show.

So we are very excited about this tool and we are looking for feedback as always. If you have any questions or additional concerns, we ask that you reach out to us at any point.

So with that I'm going to hand it back over to you if you want to open up the Q and A session.

John Wilson: I'm wondering about the contact information through Poken. I haven't found any web links in any of the contact cards and I'm also curious about whether every company will eventually be listed on Poken.

Suzanna Ertz: Thank you, John. So the website is not a required field for them to add, however the company name is. So that's why some have listed website links

as well as LinkedIn links, however not all of them are required to add that field.

In regards to your second question, everyone who has applied and is registered for the full Summit will have access to add their information into Poken, so they have to fill out the profile in order for them to be in the search area.

This is the first week and Poken has really just sent out that first welcome e-mail. Next week they're going to get a little more aggressive with reminding people to fill out their profiles so until they fill out the profile, they will not be in that search area.

Stephanie Dipsky: Good afternoon, this is Stephanie Dipsky from the State of Colorado. I'm wondering if you could give us a little bit more information on the videos you spoke about - the opportunity for EDOs to submit videos that highlights a FDI success story by tomorrow, May 13.

Could you elaborate on that and who we send those to and how we submit those through Dropbox or another preferred method? Thank you.

Suzanna Ertz: Thank you, Stephanie, for that question. We can definitely reach out to you directly but that will go to our SUSAEvents@trade.gov e-mail. If you could just send us a quick note there, we'll be able to kind of move forward with figuring out the size of it.

It might have to go through our Dropbox account which we would have to send you directly if it's too large of a file so if you'll just send us an e-mail there, we can definitely provide some additional information.

Stephanie Dipsky: OK and does that May 13 deadline still hold?

Suzanna Ertz: That still holds really for announcements so we would like it – the sooner the better of course - but within probably the next week is definitely a hard deadline.

Ben Cooper: Hi, I'm wondering how to go back and add additional key word once you've already logged into your account.

Suzanna Ertz: Thank, Ben. I do not have that directly on me right now as far as how to go back and edit your profile. I believe there is a function in your top right corner but we'll make sure that we send out that FAQ.

Mary Lilly: Yes, I want to know if I need to go ahead and fill out my profile on the Poken website or do I want it to come through SelectUSA?

Suzanna Ertz: If you have already completed you registration information, so if you have a confirmation that you have been confirmed to attend the SelectUSA Summit, then we do ask that you move forward with filling out your profile information.

John Wilson: Thank you. I have another question. Is there a way to pull out all of the lists and put it into an Excel spread sheet? I find it difficult to work with it and sort it and frankly, we're sorting it into green, yellow, and red, people that we would like to see first and the lower scores are the ones that are green and the higher scores are the ones that are red.

So we're wondering if we're doing something wrong with that profile?

Suzanna Ertz: You aren't doing anything wrong with your profile. The score number is really what you're looking at as far as out of 10, the higher the score, the better the compatibility. I'm not sure why it's showing vice versa colors there but we can look into that portion.

As far as pulling the full list out, that portion isn't until you actually have meeting notes in there. You can also pull out the list or the schedule that you've created but at this point, there's no export feature for the full list that's in there.

John Wilson: OK we set up the green, yellow, and red ourselves. We're trying to create a spread sheet of the people that we want to see and we're finding that the people we want to see have the lower scores as far as the matches, matching is concern.

Suzanna Ertz: That's still completely fine. If there are specific people that you really want to meet with, we still encourage that by all means. The score is really just based off of the answers so if there are specific people that you still want to talk to, we're not saying that you cannot meet with them.

This is just a way of highlighting some of the answers that they have indicated during their profile creation.

Vinai Thummalapally: Once again, this is Vinai; we would like to just wish you success. Thank you so much for joining the call today. Thanks for the questions and I also want to thank my whole team here for staying on top of things. Your feedback is important to us, so please don't wait for the next call if anything pops up on your radar. Please let us know and then we can get to it- for your benefit and really for the benefits of others and all the stakeholders. On behalf of all of us here at headquarters in Washington D.C., thank you and have a good day.