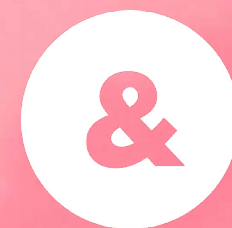


OUT & EQUAL
WORKPLACE ADVOCATES

WORKPLACE SUMMIT

ENGAGEMENT CENTER TUTORIAL



The future of work

TODAY'S AGENDA

- Engagement Center Details
- Pathable Checklist
- New Features
- Dates & Deadlines
- Q&A



ON TODAY'S CALL



**ADAM
MARQUEZ**

Senior Director of Corporate Engagement
He, Him, His



**ANALICIA
HAWKINS**

Senior Events Manager
She, Her, Hers



**MADELINE
PERROU**

Communications Manager
She, Her, Hers



BOOTH REPRESENTATIVE REGISTRATION

You have the opportunity to select up to 6 representatives total to staff your virtual booth during the week of Summit.

- Reference email **"2 Action Items for 2021 Summit: Register for Engagement Center Webinar Tutorial and Booth Registration"** - this was sent to your company's primary contact
- Full conference attendees will need to register through our online registration platform AND complete the booth representative form
- Note that booth representatives who are not registered as a Summit attendee will not be able to access areas outside of your booth

2021 Workplace Summit Booth Representative Registration

If you will be participating in your company's Engagement Center booth this year as a representative, please complete the form below by the deadline of September 17th, 2021.

As a reminder, your company is allowed up to 6 booth representatives total.

Company Name *

First Name *

Last Name *

Email Address (must be same as Summit registration email address) *

If you are registered to attend Summit, please make sure this is the same email address used during your registration.



ENGAGEMENT CENTER OVERVIEW

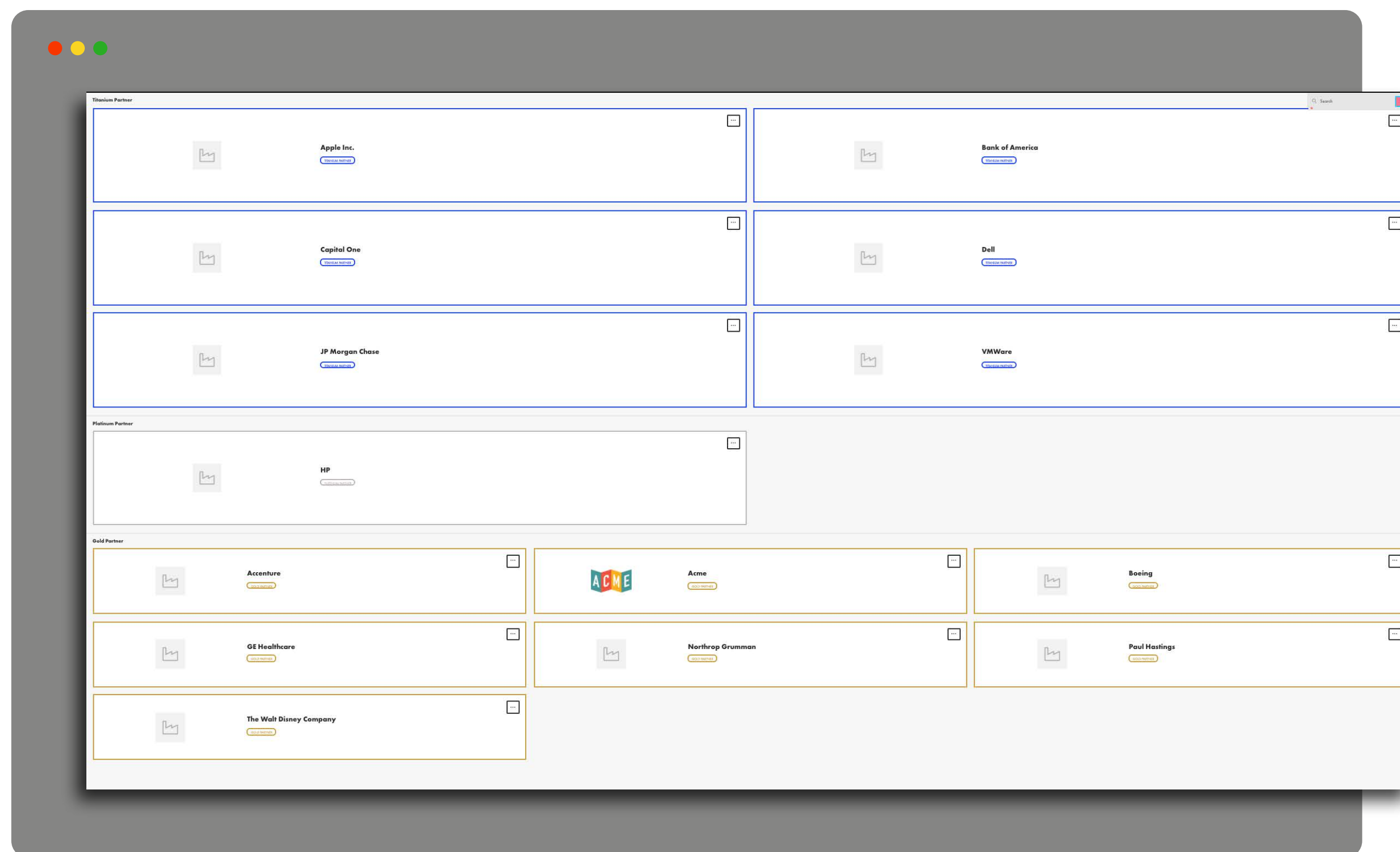
DAILY “LIVE” HOURS

Tuesday (pre-conference day)

12:30 pm – 1:30 pm / 3:30 pm – 5:30 pm ET

Wednesday, Thursday, Friday

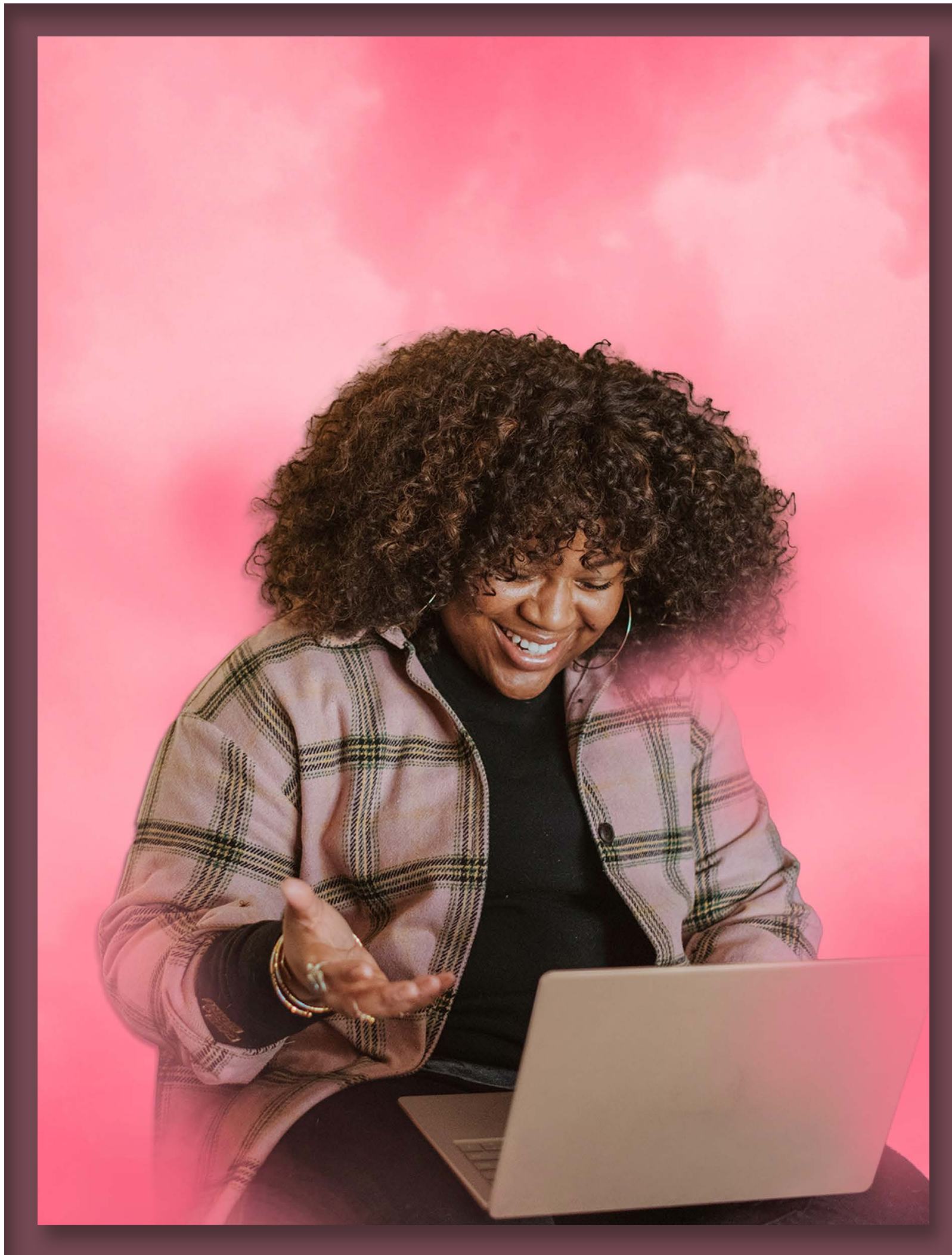
9:30 am – 10:30 am / 2:30 pm – 5 pm ET



ENGAGEMENT CENTER OVERVIEW

Features

- **Company Logo**
- **Header banner** (JPG or PNG file of minimum 1170 x 145 px size)
- **About Us** (short statement around 250 characters about your organization)
- **Website Links** (1-2 links to content relevant to your company's DEI & LGBTQ journey)
- **Job Opportunities** (to feature current job opportunities, add that link to this field)
- **Graphics** (1 graphic that reinforces your brand. Recommend your Summit ad)
- **Videos** (up to 6 videos that tells a story about your company)
- **Files** (up to 4 files that will be downloaded and viewed by attendees)
- **Polls** (create poll questions for attendees to answer while visiting your booth)
- **Discussion Board** (a chat feature for attendees to further engage with your booth reps)
- **Representatives** (up to 6 staff members can be available during "live hours" for live chats – includes headshots, names, job titles)
- **Deals & Promos** (include language or links about specific promotional items or discounts you will be providing to attendees)





ACCESS TO PATHABLE

SEPTEMBER 7TH – BOOTH REPS ARE GRANTED ACCESS TO THE PLATFORM

PLEASE KEEP IN MIND:

- Email granting access will be sent to the email you used during registration
- Sender: **SummitSupport@outandequal.org**
- Subject line: **2021 Summit- Virtual Platform Access for Booth Reps**
- Check your junk folder
- 2021 Summit site will still be under construction
- Access to the Summit Schedule – refrain from reserving a seat in any session until Tuesday, September 28th (this will be audited by O&E staff)
- Please note that your company will not have access to build out your booth until at least one (1) booth representative has registered

PATHABLE CHECKLIST




STEP 1 SIGN IN

- **Returning users with same email address as 2020 registration:** Sign in using the same password used for 2020 Summit registration (option to reset your password)
- **Returning users & new email address:** Sign in using new account
- **New users:** Sign in using new account

Claim your account

First Name
Analia

Last Name
Hawkins

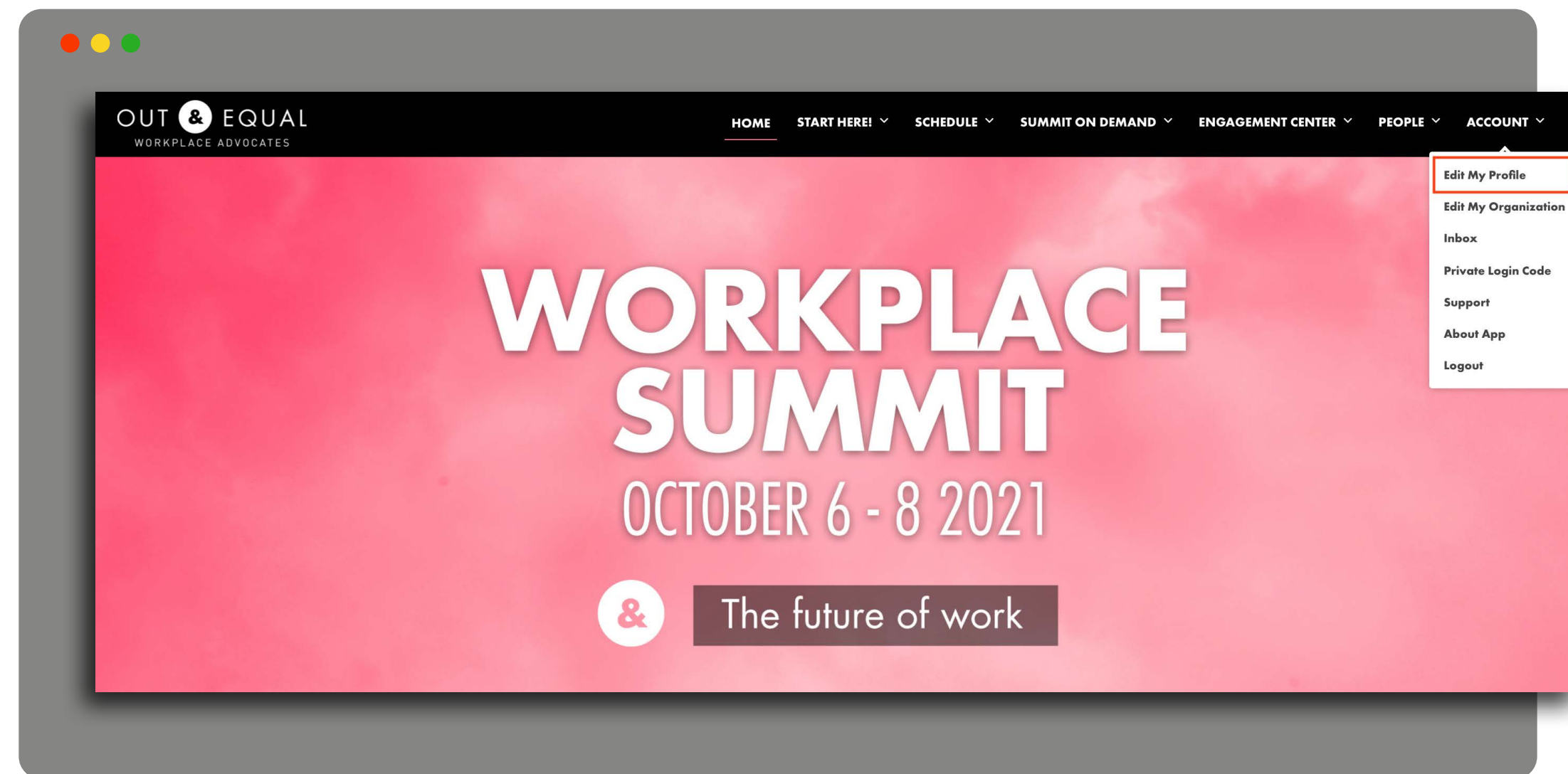
Email 
analiciah@outandequal.org

Create Password

☐ I agree to Pathable's [Terms and Conditions](#) and Out & Equal's [Community Guidelines](#)

COMPLETE PROFILE **CONTINUE TO APP**

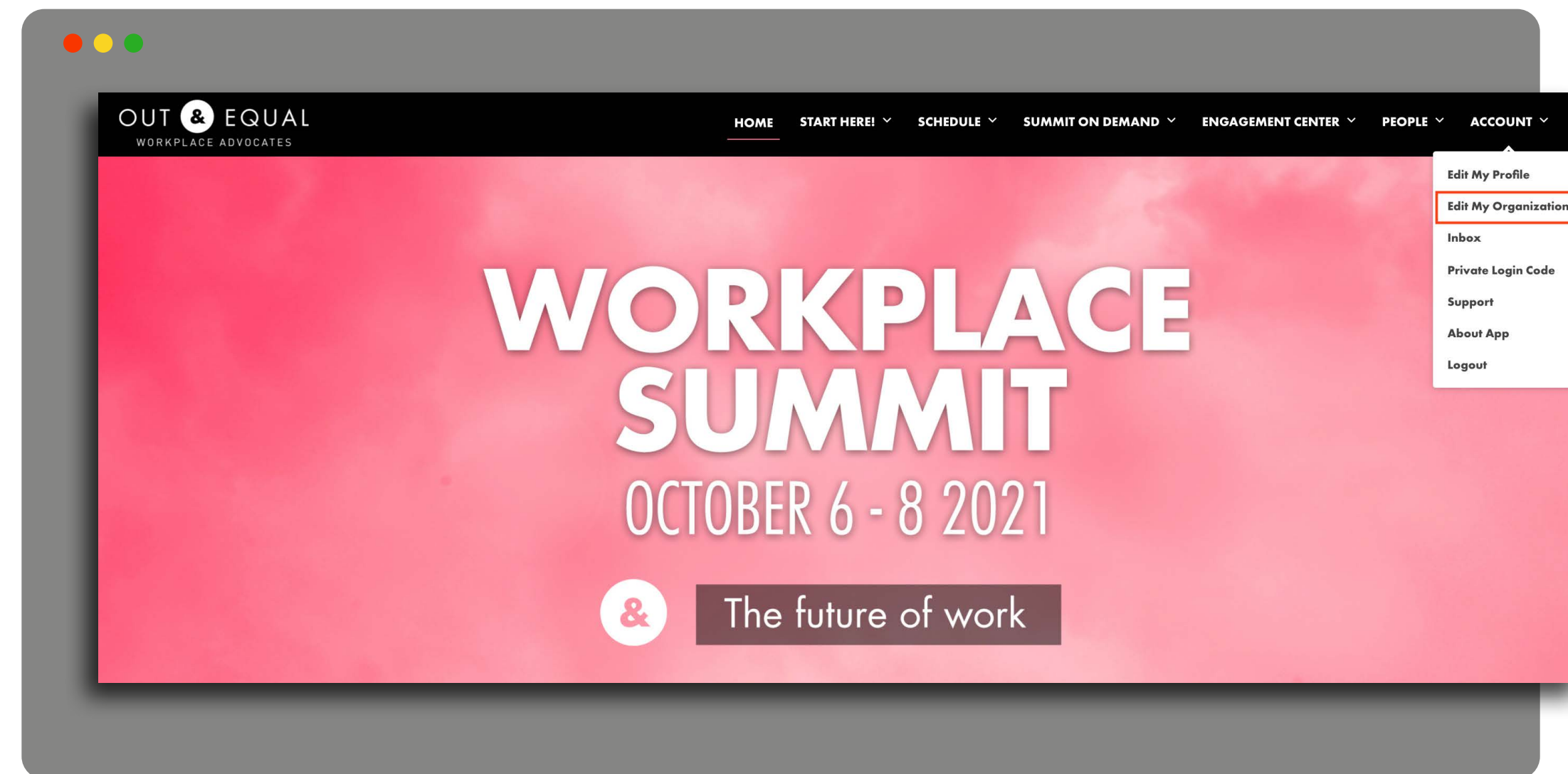
PATHABLE CHECKLIST



STEP 2 EDIT MY PROFILE

- **Complete your profile** - you can also update this at a later time (but needs to be completed by Tuesday, September 28th).
- If you are a returning user from 2020 Summit, your profile information will carry over from last year's event.
- **HELPFUL TIP:** Bookmark this site in your web browser for quick access as you build out your booth

PATHABLE CHECKLIST



STEP 3

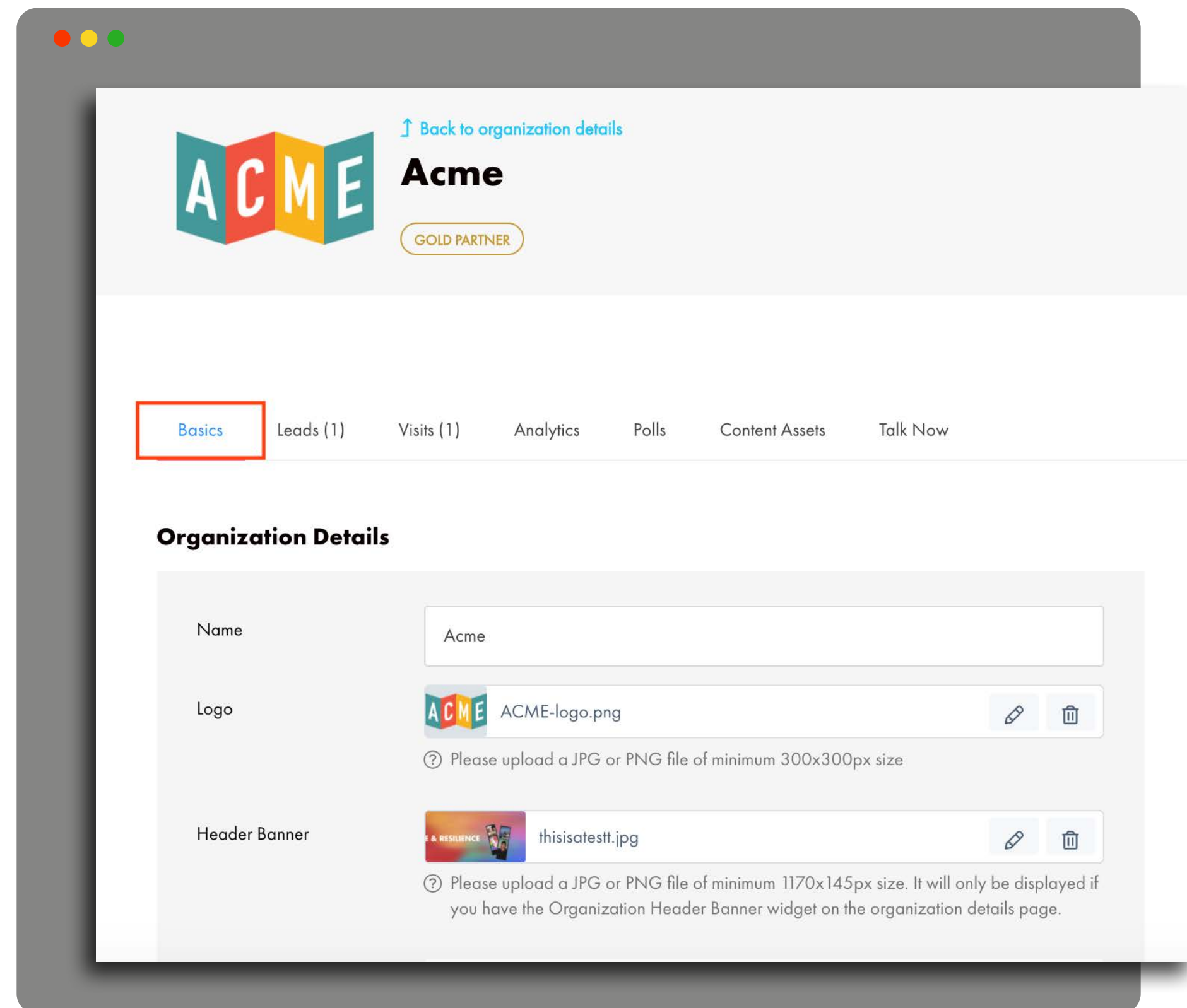
EDIT MY ORGANIZATION

Account

Edit My Organization

Basics tab

PATHABLE CHECKLIST

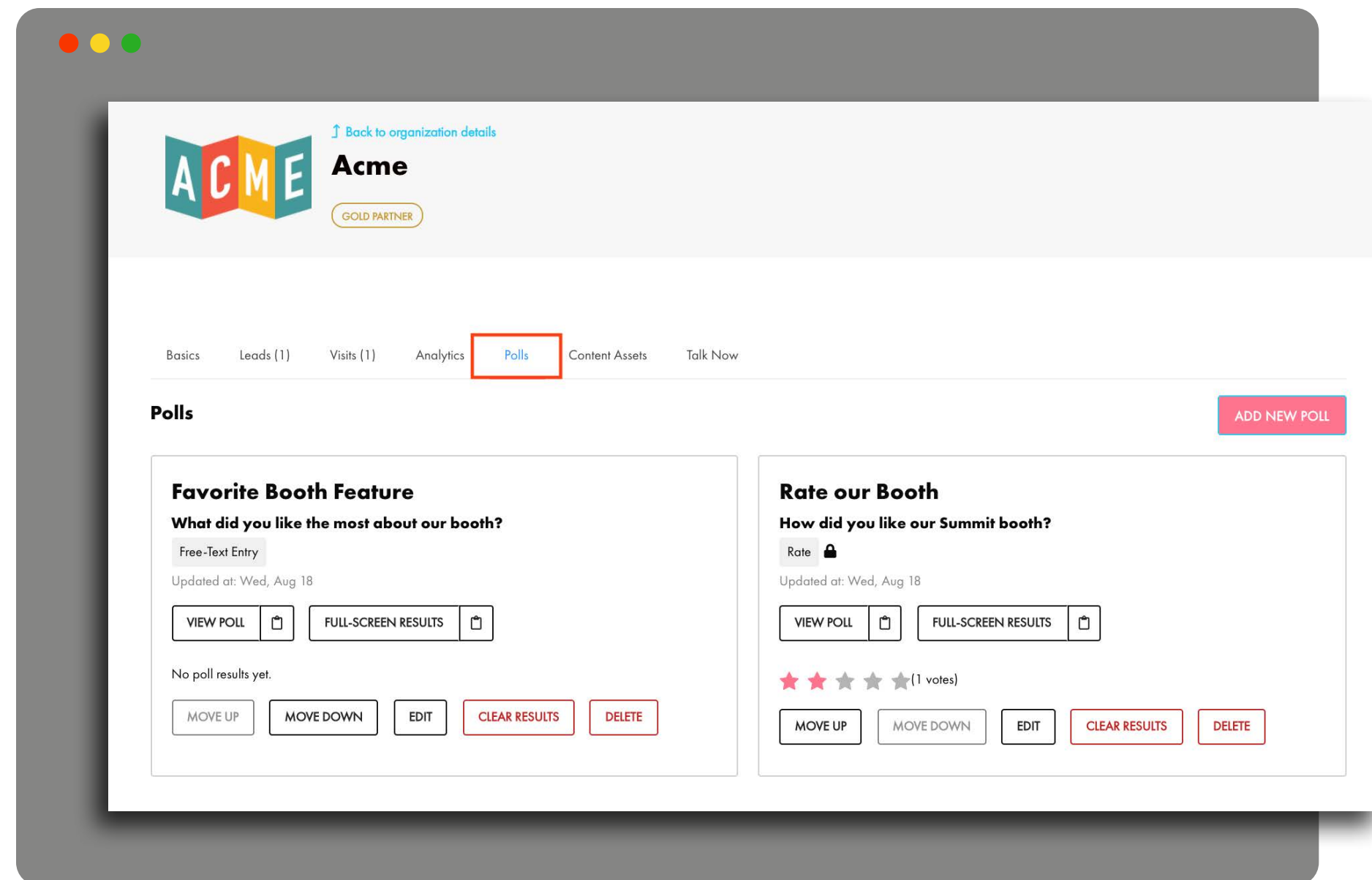


STEP 3 (cont.)

EDIT MY ORGANIZATION

- o The "Basics" tab houses the following booth features:
 - Company Logo
 - Header Banner
 - About Us
 - Website/Job Opportunity Links
 - Graphics
 - Deals & Promos
- o **IMPORTANT:** Once you start adding your booth elements, make sure to select "Save" before navigating away from this page.

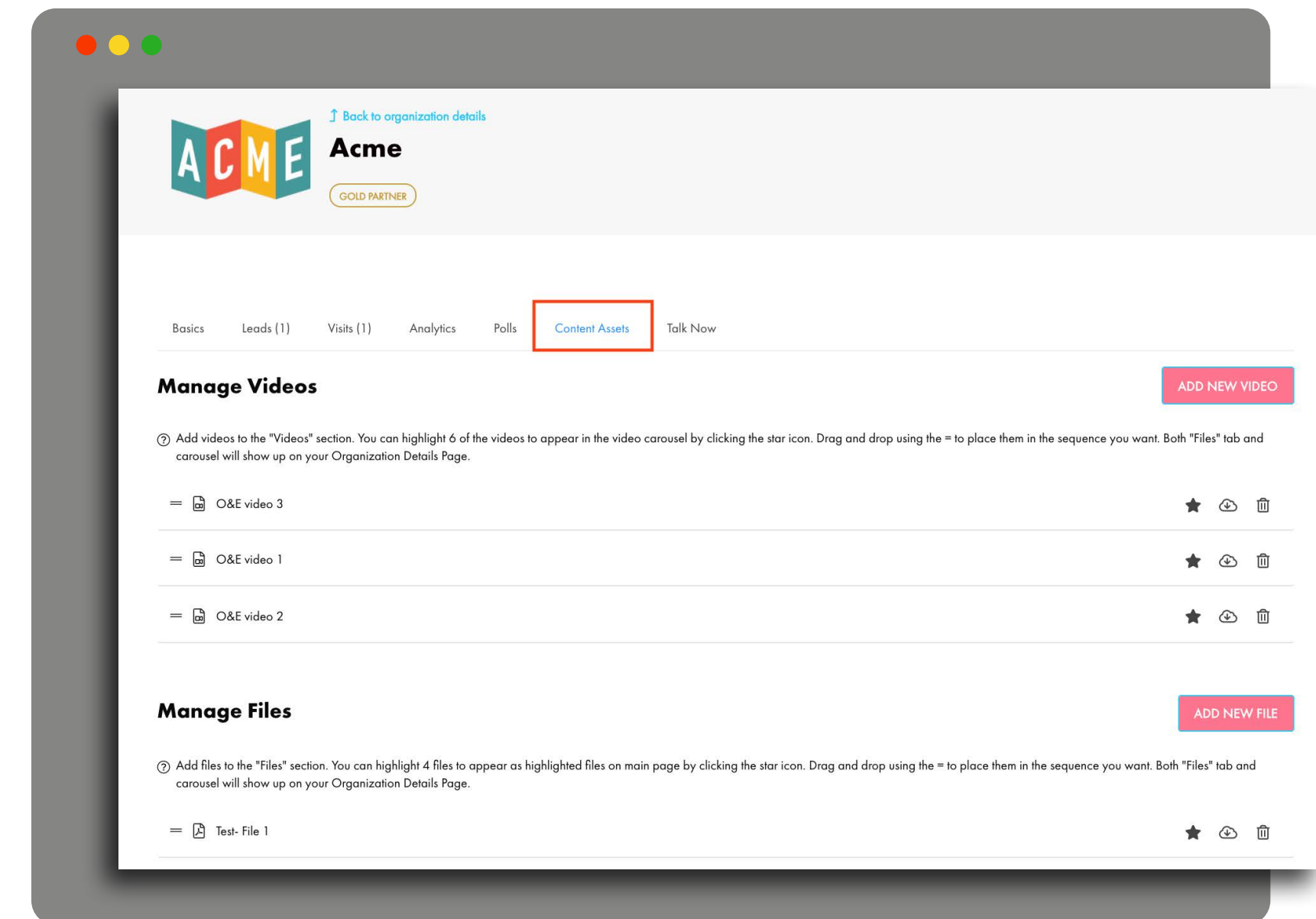
POLLS TAB / CONTENT ASSETS



POLLS TAB

- o Bonus feature your organization may choose to utilize
- o If you want to include a poll for attendees to complete, they will be displayed under the “Polls” tab

IMPORTANT: You will be able to see poll results but not the contact information of the attendee submitting the poll



CONTENT ASSETS TAB

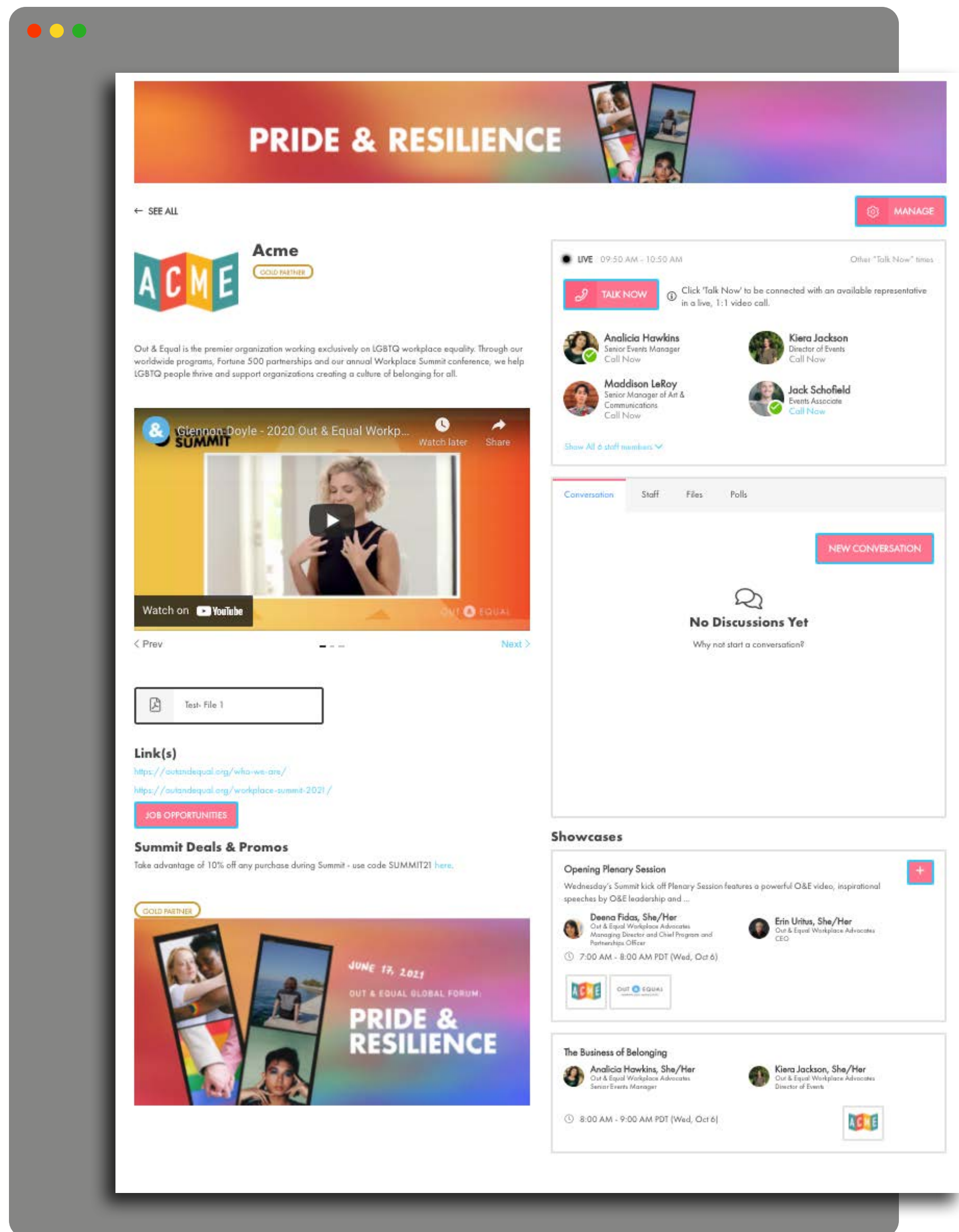
- o This is where you will upload any videos or files you choose to display
- o Videos or files that you choose to “star” will be embedded on your booth page - otherwise they will be displayed under the “Files” tab



COMPLETED EXAMPLE BOOTH

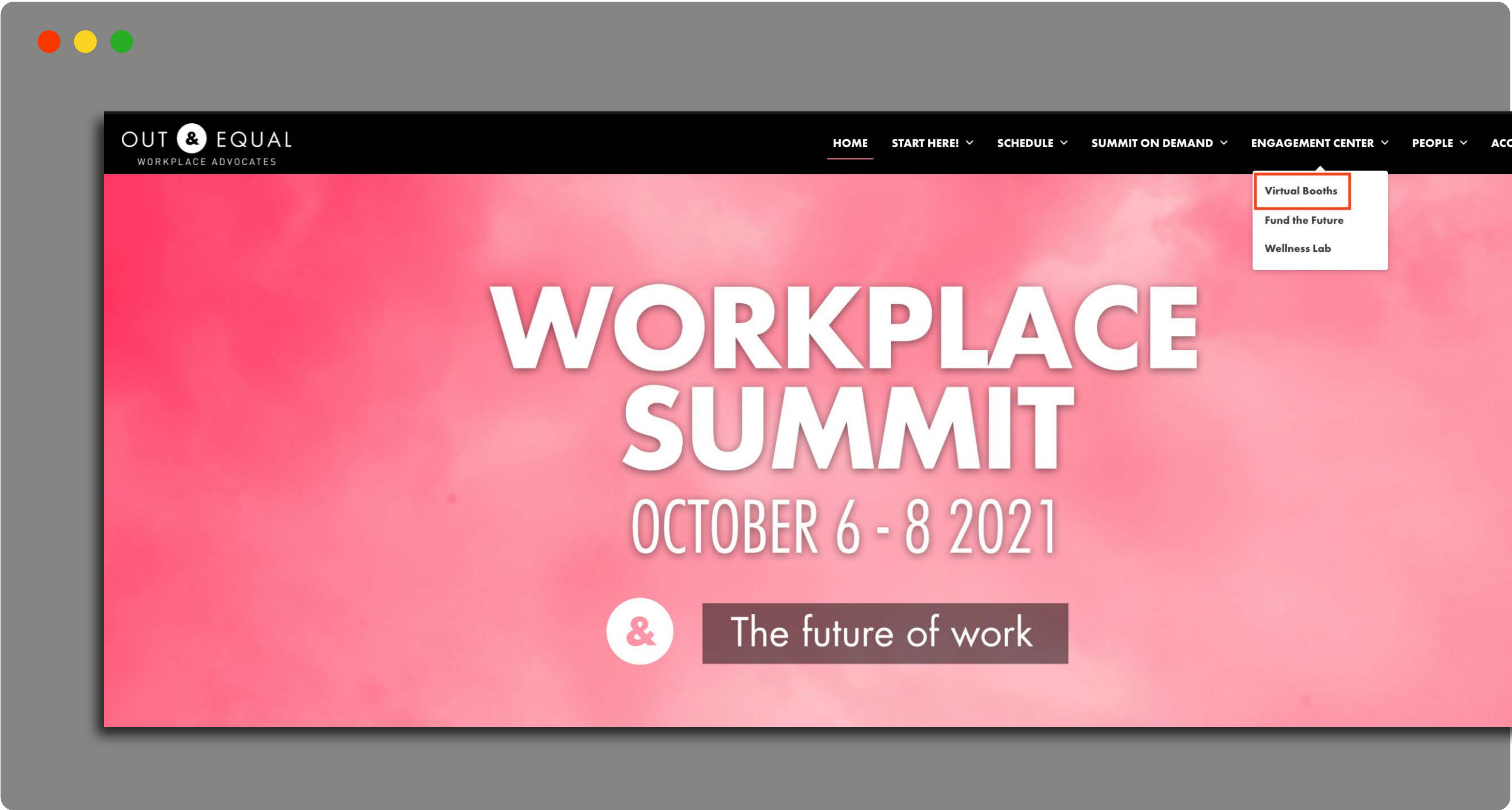
Please note:

The “Showcase” section is a feature that Out & Equal will manage. So if your company is presenting during a session, these will automatically appear in your booth.





ATTENDEE PERSPECTIVE



NEW FEATURES

Polls

Discussion Board

Talk Now

Call Now

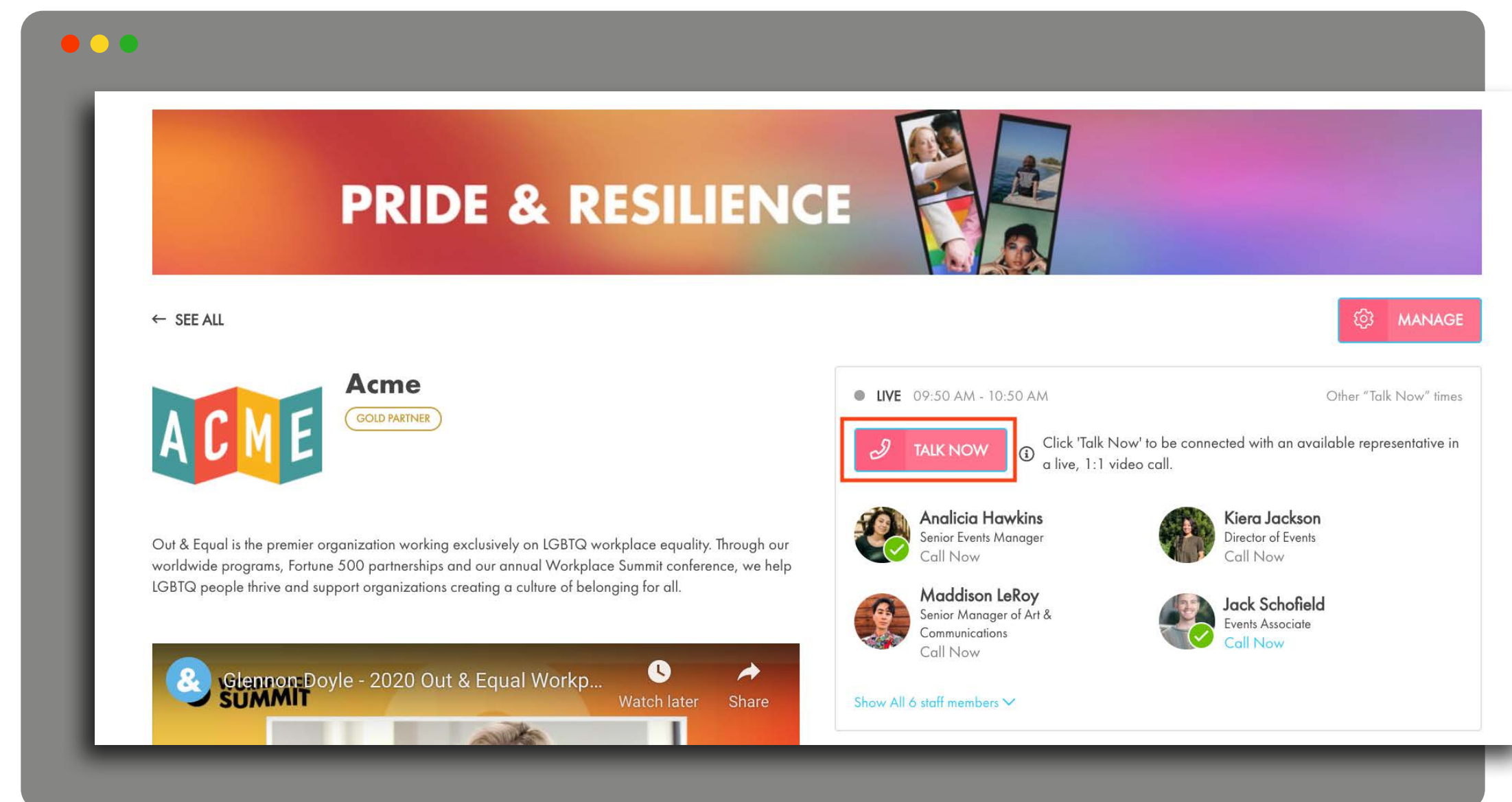
Updated Booth Metrics

Leave Your Card



TALK NOW

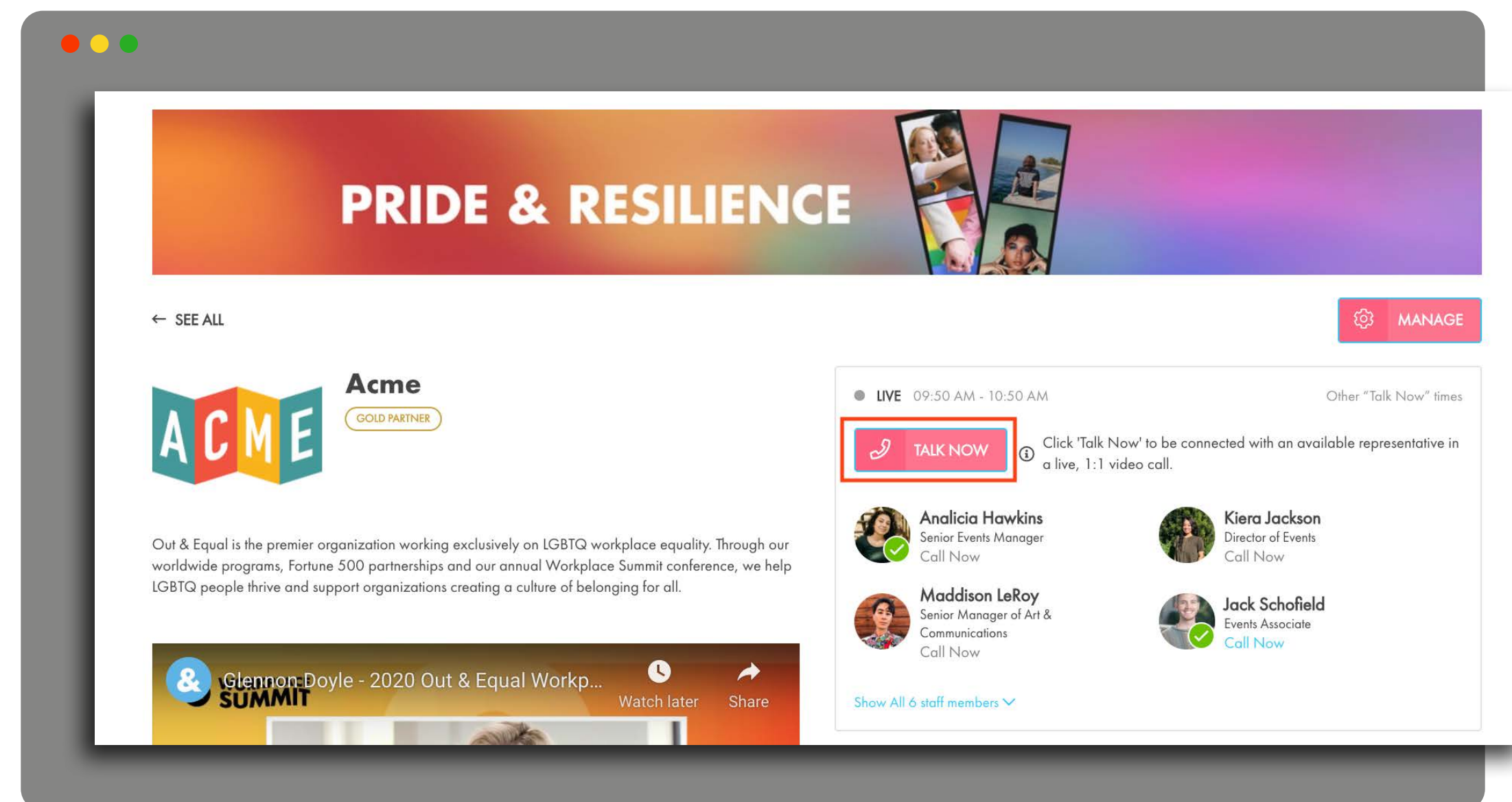
- o Talk Now replaces the group meeting feature, allowing attendees to make 1:1 video calls to Engagement Center representatives in a round-robin format. **Important note: Zoom is not required in order to use this feature.**
- o After each completed Talk Now call, the system will make the staff member unavailable. Once you are ready for the next call, you will need to make yourself available again, by toggling your availability status back on.
- o Talk Now only works on laptops and computers. It does not work on mobile devices including cellphones, or tablets (Android or iPads).



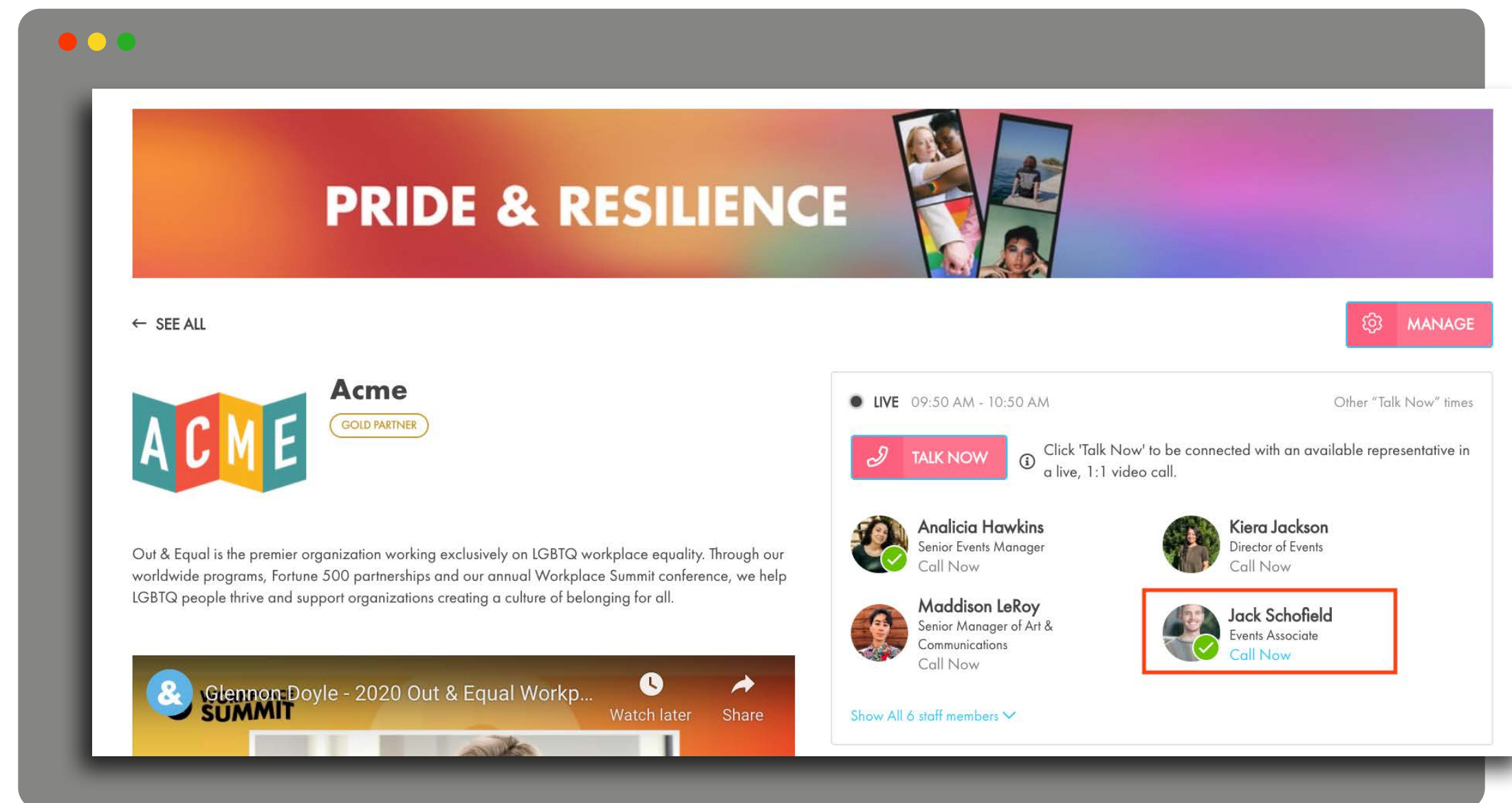


TALK NOW_(cont.)

- o Link to tutorial video for booth rep Talk Now experience:
<https://vimeo.com/pathable/exhibitortn>
(Please note: the “Enable Talk Now” overview for individual representatives in this video does not apply as this feature is automatically enabled)
- o Link to tutorial video for a booth rep and attendee comparison <https://vimeo.com/pathable/tinsidebyside>
- o All booths will have Talk Now (and Call Now) capability enabled unless your company chooses to opt out from this feature by September 17th



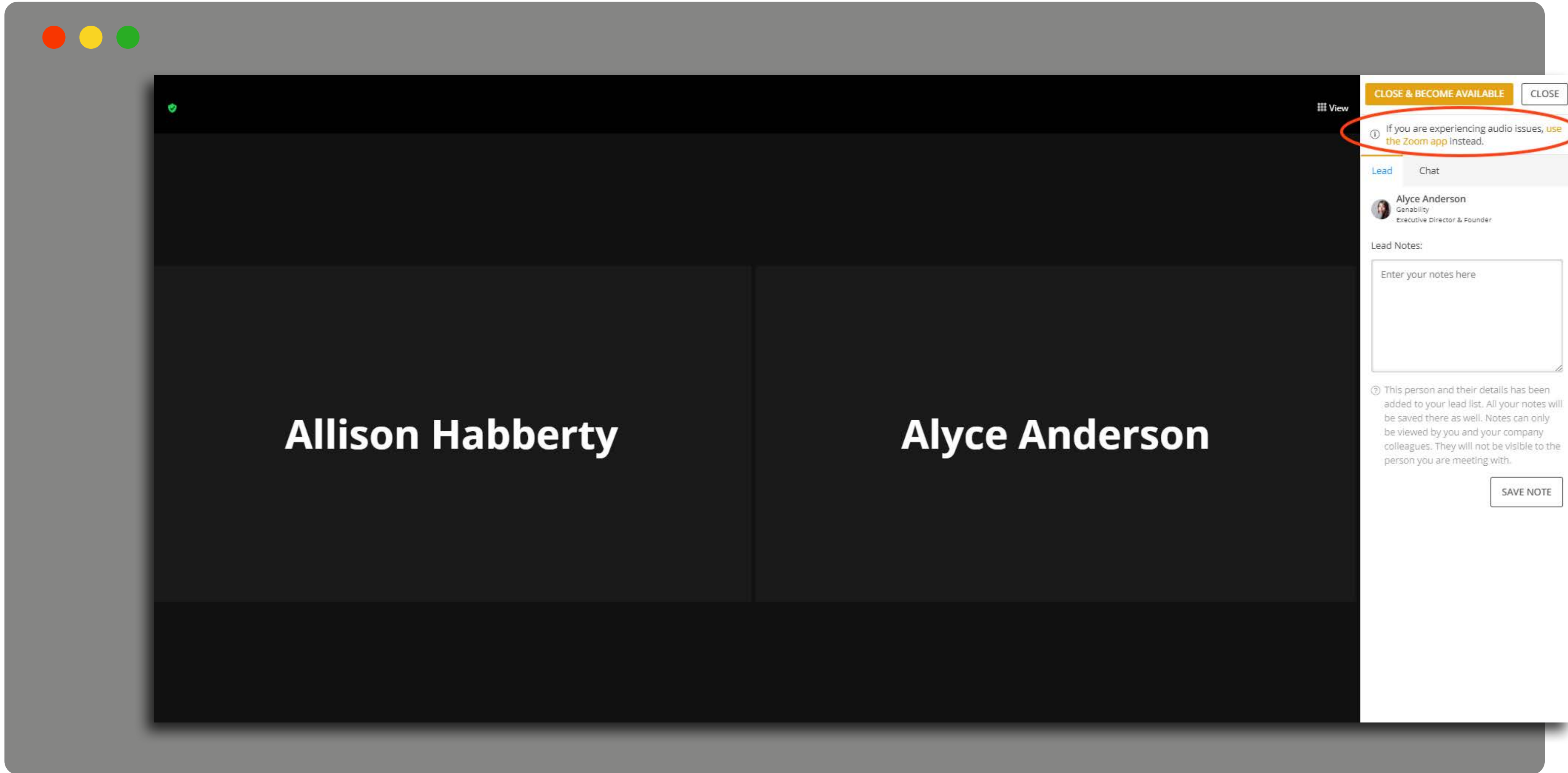
CALL NOW



- o The Call Now feature allows direct calls to selected individual booth representatives, rather than exclusively being a “round robin” format.
- o Similar to the Talk Now feature:
 - (1) The system notifies a staff member of an incoming call by displaying a popup message, with options to accept or decline, and playing a ringtone.
 - (2) Zoom is not required in order to use Call Now
 - (3) After each completed Call Now call, the system will make the staff member unavailable and you will need to toggle your availability status to **ON** when ready.
 - (4) Call Now only works on laptops and computers. It does not work on mobile devices including cellphones, or tablets (Android or iPads).



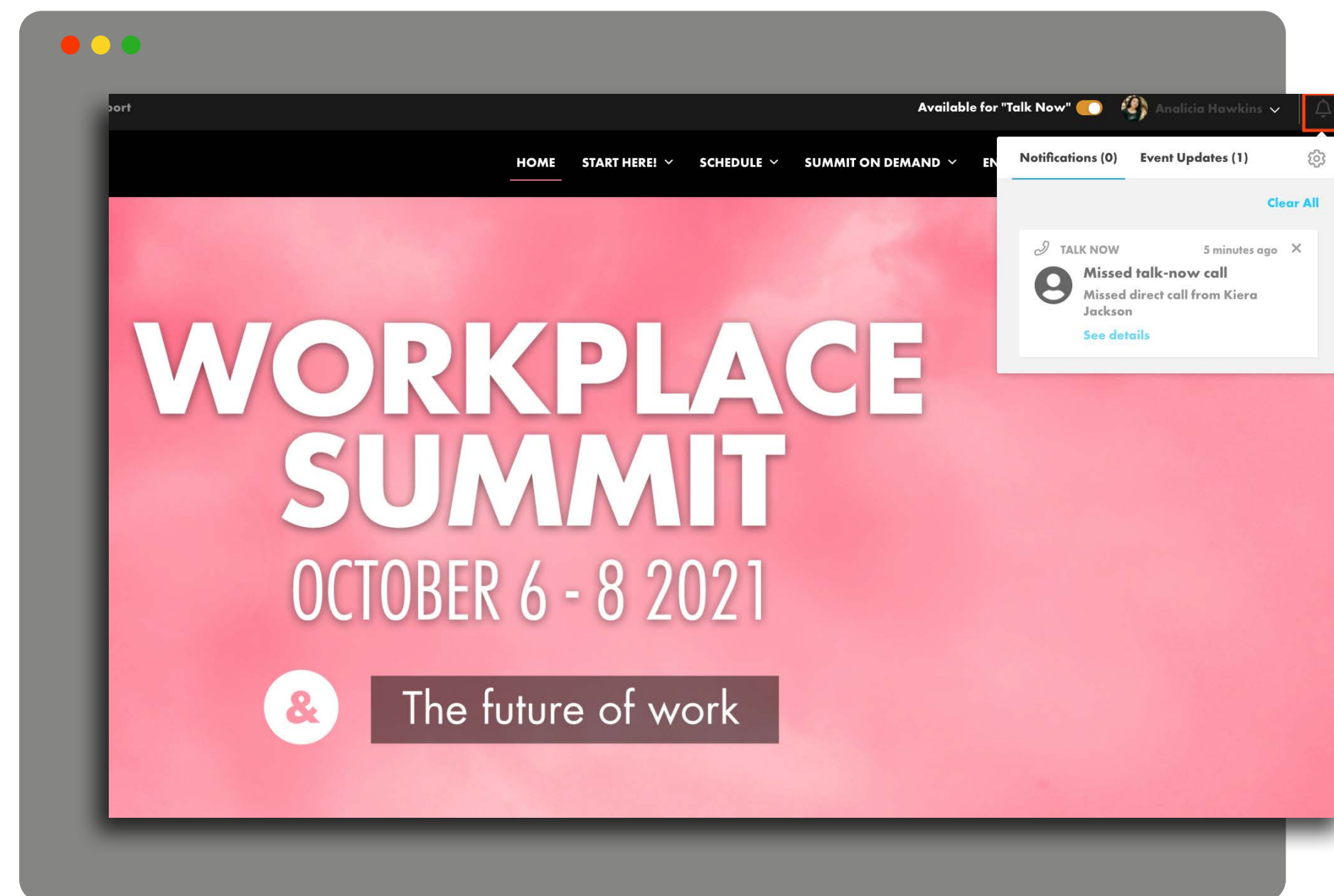
TALK NOW & CALL NOW TROUBLESHOOTING



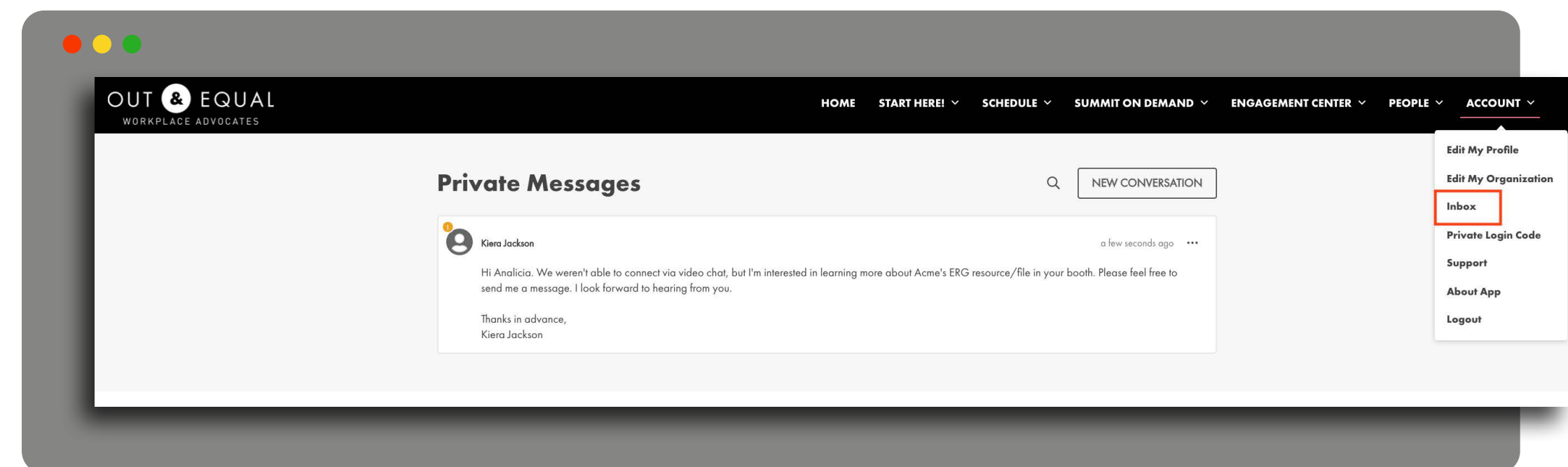


TALK NOW & CALL NOW: MISSED CALLS

All missed calls will be displayed as a notification within the bell icon.



Attendees have an option to leave a written message for booth reps if the video call goes unanswered. If a message is sent, it will appear in your “inbox” dropdown field.



- **Talk Now:** Booth reps video call will ring for 30 seconds to answer before the call is routed to another staff member
- **Call Now:** Booth reps will have 30 seconds to answer before the call ends
- **IMPORTANT:** If you miss a call, the platform will automatically toggle your “Available for Talk Now” status to unavailable. You must toggle it back on after you have missed a call.



ACME

Acme

GOLD PARTNER

Back to organization details

Basics

Leads (1)

Visits (1)

Analytics

Polls

Content Assets

Talk Now

Call Log

DOWNLOAD .CSV

Caller	Called at	Responded By	Responded At	Call Duration	Status
Jack Schofield	08/18/2021 - 10:07 AM PDT	Analicia Hawkins	08/18/2021 - 10:07 AM PDT	1 minute	Responded Call ended at 08/18/2021 - 10:08 AM PDT
Kiera Jackson	08/17/2021 - 4:22 PM PDT	NA	NA	NA	Hung up Hung up at 08/17/2021 - 4:23 PM PDT

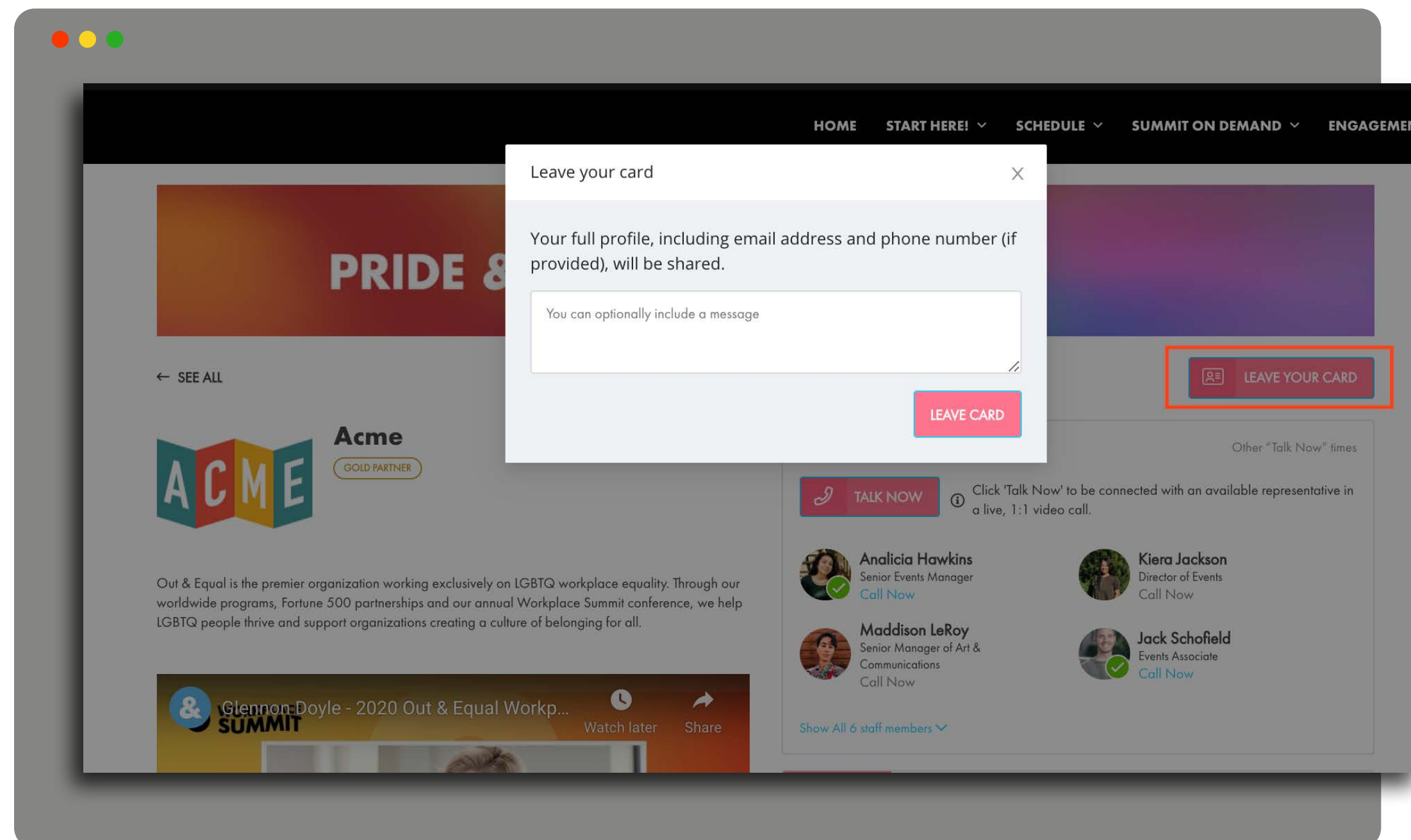
CALL LOG

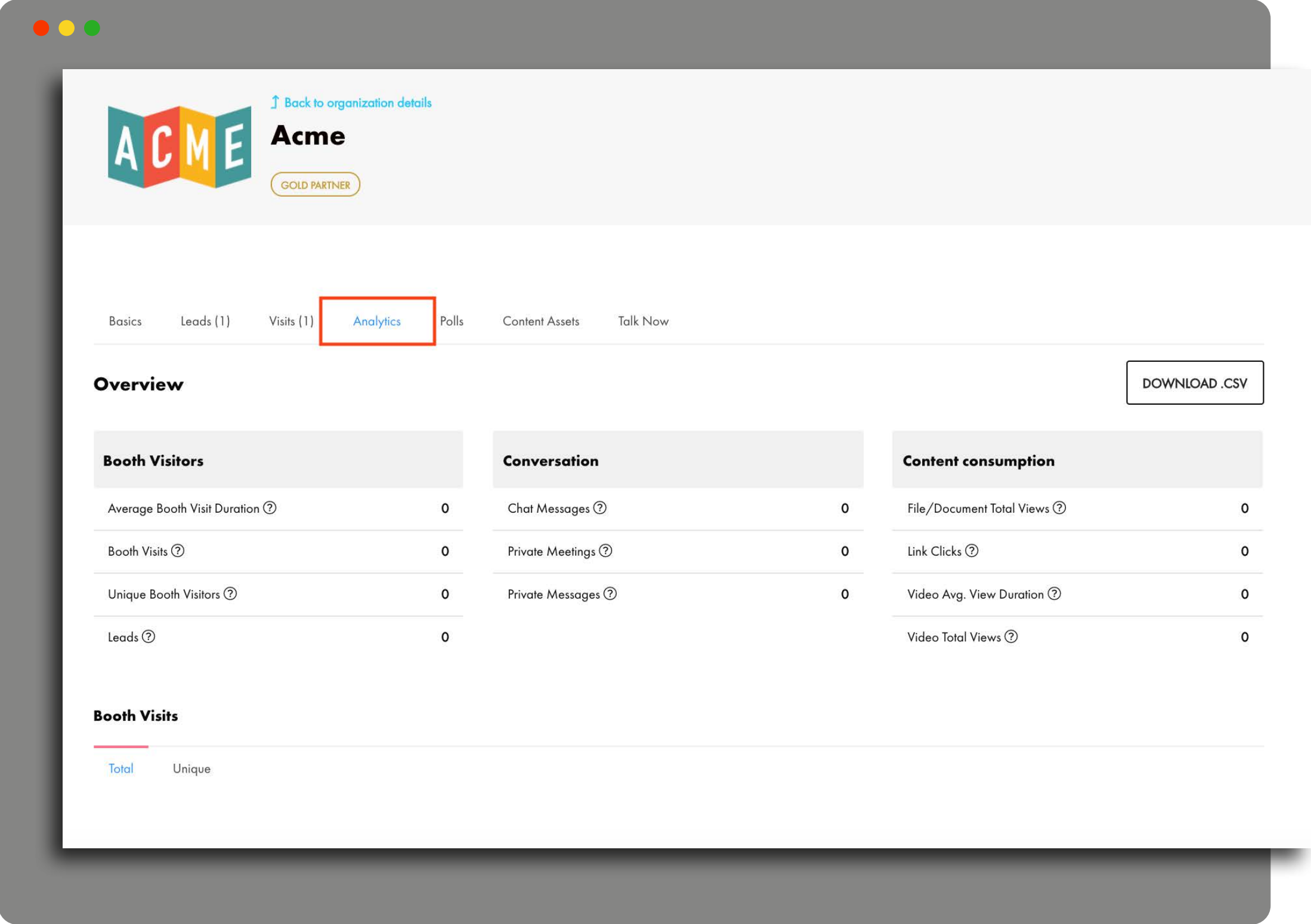
- o Call Log under Talk Now tab will house all call information
- o Notes from specific calls can be found using the following pathway: navigate to the “Responded At” column and select the timestamp for that specific call



LEAVE YOUR CARD

- o Attendees who visit your booth may choose to leave their contact information and request information through the Leave Your Card button
- o If an attendee leaves their card, their information will be counted as a lead





BOOTH METRICS

Booth representatives can view metrics through the Analytics tab.

- o Booth Leads & Visits
- o Conversations
- o Content Consumption
- o Total and Unique Booth Visits Chart



KEY DATES & DEADLINES

AUGUST 6

Booth representative registration open

SEPTEMBER 7

Engagement Center elements ready to upload and access granted for booth buildout

SEPTEMBER 17

Opt out of live video talk features (must submit via the link below
- 1 submission per company)

<https://airtable.com/shrCCqVqk7H8LnLEp>

SEPTEMBER 17

Deadline to register Engagement Center representatives

SEPTEMBER 24

Deadline to complete virtual booth

SEPTEMBER 28

All attendees can access virtual Summit

OCTOBER 29

Final day for booth reps (and attendees) to access the platform

OCTOBER 29

Final day to download (1) leads, (2) visits, (3) talk now and (4) analytics information from the platform



QUESTIONS &

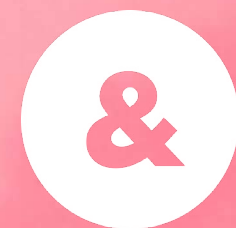
ANSWERS





SEE YOU AT THE 2021

WORKPLACE SUMMIT



The future of work