

I'm an Event Planner

We know you've got tons to do, so let's get right into how you can get the most out of Incentli.

1. Awareness (The Most Important Step)

We recommend you make the coin-earning and incentives a focus of your event. Be sure to explain to all of the stakeholders that attendees can earn coins for being engaged/taking action and the coins can be exchanged for incentives.

Tips:

- Promote the coin earning/incentives system in your marketing materials before, during, and after your event.
- Be generous with awarding coins! Manually award coins to participants before the event (ex: for registering early, sending in pictures or quotes, promoting the event on social media, attending pre-event sessions/training).

2. Account Setup

Access to Incentli: You do not need to wait until your Incentli account is connected to your event platform. You can set it up and test it by accessing the links below.

Incentli Dashboard: dashboard.incentli.com

Test Store: store.incentli.com (requires email authentication of a Player)

Step 1 - [Account settings](#) - set up your logo, coin image

Step 2 - Once your Incentli account is connected to your event platform, set the coin values to reflect the behaviors you want to encourage. For example, if generating leads for your exhibitors is a priority, then increase the coin value for those actions.

Tips:

- Be sure to communicate the coin earning actions/values on the Incentli Information page. This will be communicated to the attendees on the Incentli Store. You should also use this information in your promotional material and in your opening announcements.
- [Invite Admins](#) to help manage Incentli. Each role has permissions that will allow/prevent access to certain parts of the dashboard.

3. Adding Players (Attendees)

[Players](#) will be pushed to Incentli from the event platform.

4. Adding Teams

Incentli has the ability to segment Players into different [Teams](#) based on your criteria. Each Team has its own leaderboard and can be connected to specific incentive Stores. Players need to be assigned to Teams from the event or registration system.

5. Adding Stores

A [Store](#) is a collection of incentives. You can assign a Store to an exhibitor or manage it yourself. Players can access the incentives from the Stores their Team has been assigned to.

6. Exhibitors

If you have exhibitors and sponsors that are contributing incentives to the Incentli store, be sure to give them the “[I’m an Exhibitor](#)” guide to get them started. This guide will help them with:

- How to list items, best practices, strategies, lead capture, reporting etc.

If you don’t have exhibitors/sponsors and are managing the incentives on your own, use this same “I’m an Exhibitor” guide.

Tip:

- Create a Store for each exhibitor/sponsor/affiliate
- On the Incentli dashboard, under Admins, invite Exhibitors/Sponsors/Affiliates and assign them the role “Store clerk”. This allows them to manage the incentives/orders/data in their Store.
- Connect their Store to the appropriate Teams.
- Exhibitors can give coins to Players for actions such as booking a demo, signing up for a trial etc.

7. Data and Reporting

The [Transactions](#) can be used to gain data about many things, including:

- The actions players took to earn coins
- Which incentives were purchased
- Incentive order management

Tip: On the dashboard, enter a Team or Store to filter the Transactions

That’s pretty much it! If you’re running consecutive events, you can keep your Incentli account active and encourage post-event engagement.

If you need any help, please reach out to us through our helpdesk at help.incentli.com

Have a great event!

The Incentli Team