The BIO One-on-One Partnering™ BIO Digital Tutorial

**Instructions for BIO's
One-on-One Virtual Partnering™ System**

Logging In

- Typically, you will receive a confirmation with login instructions from BIO Partnering within **one to three business days after applying for** partnering.

- If you used BIO's partnering system at a previous event, you may use the same password. The email will also contain a link to reset your password in case you have forgotten it.

- If this is your first time using BIO's partnering system, you will need to reset your password using the link provided in the email.

Please Sign In

Email address:
william@bio.org

Password:
••••••••

Log In

I forgot my password

Click here to reset your password

PLEASE NOTE: *Access to partnering requires that delegates use a company email address with their name attached to it. Generic (e.g. info@company.com, personal (e.g. Gmail/Hotmail) and executive assistant email addresses do not qualify.*

Home Page

ONE HOME **1** PROFILE **3** SEARCH **4** CALENDAR **5** MESSAGE CENTER New request **6** ★ BOOKMARKS

Return Home

Log out/Reset Password Access Delegate Profile

3 Search for companies and start sending requests More ›

1 Company/Investor Profile
Add company information
Add company logo

2 Delegate Profile
Update your Time Zone
Add personal information
Update notification preferences
Add your personal profile picture

3 Search
Search for companies
Bookmark companies
Save custom searches

1 Bio
60%
Your company profile is visible
Update

Your Delegates profiles
Me 30%
15 timeslots
Update

2 Alvarez Eduardo 10%
0 timeslots
Update

4 39
Meetings scheduled

View in Calendar
Get your Calendar ›

5 154
Requests
View all

Your Company's requests
17 Incoming requests
8 Pending

4 Calendar
Update availability
Add events & programming

5 Message Center
Send, accept, or decline requests
Manage outgoing & incoming requests

6 Bookmarks
View bookmarked companies, delegates, assets, products, and services

Company Profile

- Complete all applicable fields, especially those in the **Description, Areas of Interest, Financials,** and **Contact Information** sections

- Add **Assets, Services,** and **Market Products** if applicable

- Upload your company's logo

- Upload documents, graphics, and videos to the "Content" section

TIP: There are no required fields, but all information entered is searchable. The more thorough your Company Profile, the better visibility your company will have in search results!

Click here to upload your company's logo

PLEASE NOTE: *Your profile is published by default. Click "Unpublish" to temporarily unpublish it and keep it hidden in search results.*

PUBLISHED

Biotechnology Innovation Organization

Your profile is PUBLISHED | Unpublish

Description

Company type | Public, NPO, govt., economic dev...

Keywords
BIO, biotechnology, business forum, purchasing program, BIO business solutions. membership

Click ✓ to save or X to cancel for each field

Brief description
BIO is the primary advocacy organization for the biotechnology industry. T

✓ ✗

74/255

Description
The Biotech... represents... institutions,... organization... than 30 other national... members around the globe to help fuel, feed and cure the world by being involved in the research and development of innovative healthcare, agricultural, industrial and environmental biotechnology products. BIO also produces the BIO International Convention, the world's largest gathering of the biotechnology industry, along with industry-leading investor and partnering meetings held around the world. We also offer BIO Business Solutions, the

TIP: Craft a Brief Description, which will be directly visible in search results.

Assets

Manage assets

Services

Manage services

Member services
Other

Market Products | Manage market products

Management

Edit

Jim Greenwood | CEO

Joanne Duncan | President, BIO Int'l Convention

Delegates

Christine Orsini
Coordinator, Partnering Innovations

Elizabeth Gaskins
Managing Director, Membership

...ovations

Access individual Delegate Profiles

Liz Colangelo
Senior Manager, Sales & Sponsorship

Macken...e Kno...
Manager, ...rtnerin... Op...at...s

Melissa Arndorfer
Manager, Sales & Sponsorship

Nareg Sagherian

Assets, Services, and Market Products

1. Click **Manage drug assets, services, or market products**
2. Type in the item's name to add a new name, or click **Add** to re-add existing item
3. Click **Create**
4. Complete all applicable fields, especially those found under **Description** and **Classification**
5. Upload supporting documents, graphics, and videos

Click "X" once finished. All information is automatically saved.

Specify whether the asset is partnered or unpartnered

Is this asset already partnered ?   Unpartnered

(What does it mean?)

Description

Company	Biotechnology Innovation Organization
Name	Test 123
Type	
URL	
Keywords	
Description	

Classification

Devt phase

Clinical Ind

Mech. of Action

Technologies

PUBLISHED

Biotechnology Innovation Organization

Your profile is PUBLISHED   Unpublish

Assets   Manage drug assets

Services   Manage services

Market Products   Manage market products

Add asset

Create new asset

Test Asset 123

Create

Or

Choose from existing assets

Test Asset 456
There is no description for this asset   Add

Investor Profile

✓ Complete all applicable fields, especially those in the **Investor Profile, Description, Investment Preferences,** and **Contact Information** sections

✓ Upload your company logo

✓ Upload documents, graphics, and videos

Click here to upload your company's logo

PUBLISHED
Bio
INVESTOR
ZZZ ABC Capital

Your profile is PUBLISHED   Unpublish

📰 Investor profile

Investor type	VC/Corporate VC
Assets managed	350 million USD
Typical allocation	100 million USD

Allocation preference
Diversified with focus on energy in emerging markets

📄 Description

Keywords
women's health oncology pr...

Year founded   1990

Brief description
Seed round non-disclosure agreement pivot alpha assets MVP. Social media business-to-business iPad mass market innovator. Ecosystem growth hacking churn rate direct mailing. Iteration entrepreneur founders agile development twitter buzz churn rate stealth

Description
Buyer advisor bandwidth. Backing advisor lean startup launch party venture gamification MVP.

💲 Investment preferences

Investment stage	Seed Early stage
Company types	Biotech or pharma, therapeutic R... Other R&D services
Asset types	Small molecule Vaccine
Therapeutic areas	Endocrine disease Neoplasm
	...testing

TIP: Craft a Brief Description, which will be directly visible in search results.

🛠 Management   Edit

Sonia Dixon   Partner

👤 Delegates

Dorothy Whitlow

Julie Burns

Melissa Gonzalez

Access individual Delegate Profiles

Content   ☁ Upload file ▾

📄 2015 Fact Sheet.pdf   ☁ ✕

Delegate Profile & Notification Preferences

✓ Set your Time Zone

✓ Complete all applicable fields, especially **Job Title**, **Professional Background**, and **Area of Expertise**

✓ Upload your headshot

✓ Tailor your notification preferences

Click here to upload your photo

PLEASE NOTE: *Your local time zone will be autodetected by the partnering system, but it can be changed in your delegate profile.*

TIP: *As with your Company or Investor Profile, there are no required fields, but all information is searchable.*

TIP: *Click here to CC an additional recipient, such as an assistant or a colleague helping to manage your meeting activity, on your email notifications.*

Calendar

- ✓ Update your availability

- ✓ View your scheduled partnering meetings

- ✓ Add programming sessions and presentations

- ✓ Add personal events

- ✓ Export your individual and/or combined company schedule

Export your individual or entire company schedule

View and add programming

PLEASE NOTE:
Times are displayed in both Pacific Daylight Time (PDT)/UTC (-7:00) and your local time zone.

Updating Calendar Availability

1. Select the appropriate delegate from the top left drop-menu

2. Select the correct day of the week

3. Click **Change availability**

4. Mark the timeslots available (or unavailable) by clicking **Change**, or update the entire day

5. Click **Save and return to calendar**

PLEASE NOTE: By default, your Calendar will be marked unavailable for every timeslot. If you wish to have a meeting scheduled during a certain time, please mark it as available.

Search & Advanced Search

Export your specific search results into Excel

Search by investors only

Save specific search criteria and monitor results

Search tips   Saved searches   Search history   Export

🔍 Type text here to search the directory   Search   Advanced search   ⇅ Modification date ▾

Investors only ⬤   Filters (0)

Conduct an Advanced Search to search by specific criteria or combine multiple filters

Sort your search results

📋 Companies (25)   👤 Delegates (63)   🔗 Assets (14)   📊 Market Products (4)   📄 Services (11)

Start with ▾

Search by Companies, Delegates, Assets, Market Products, or Services

PEPTIDE WORLDWIDE   Biotechnology Company
0 notes   [...EST]
                                                                                     Make a note

ZZZ DUNDER MIFFLIN   United States   PUBLIC: DNDR   ✉ NEW REQUEST ⭐
0 notes   Make a note
The people person's paper people

ZZZ BIOTECH   Biotechnology Company   United States   PUBLIC   view website   ACCEPTED ⭐
0 notes   Make a note
Biotechnology and pharmaceutical companies both produce medicines, but the medicines made by biotechnology companies are derived from living organisms while those made by pharmaceutical ... basis.

NEW ZZZ VIRTUAL COMPANY   Academic/Research Institution , Bank, ...   Germany   PRIVATE   SCHEDULED ⭐
1 prior meeting   0 notes   Make a note
Leaders in Virtual Partnering

Send meeting requests

ZZZ BIOTECH ANALYTICS   REQUESTED ⭐
0 notes   Make a note

PLEASE NOTE: When viewing your own company in search results, you will not see the "New Request" or "Bookmark" buttons. However, other companies will see these buttons next to your company.

ZZ   ...vaccine   [Investor]   Endowment/Foundation   3 REQUESTS ⭐
3 prior meetings   0 notes   Make a note

Bookmark items

Advanced search   Search now   ✕

📋 Companies   👤 Delegates   🔗 Assets   📊 Market Products   📄 Services

Company name
Enter text...

Company types

Previously met company
◯ Yes
◯ No

Licensing objectives

Primary therapeutic areas   Select
No primary therapeutic areas selected

Secondary therapeutic areas   Select
No secondary therapeutic areas selected

Ownership
◯ Private
◯ Public

Message Center

PLEASE NOTE: *The Message Center is set up at a company level. The same content will be displayed for all members of your company attending the conference.*

Export your Message Center contents into Excel

Sort by date, status, sender, or recipient

Meeting Requests that are "Accepted" but with no timeslot available to schedule it will be marked with a red "No Mutual Availability" tag.

The number of Meeting Requests that are "Accepted" and ready to be scheduled

Refine and combine multiple filters

Filter by...
1. **Personal Tag**
2. **Unread Messages**
3. **Incoming & Outgoing**
4. **Meeting Status**

Sending Meeting Requests

1. Click **New Request** at the top of the page, or the envelope in your search results

2. Type in the name of the company you'd like to meet with in the **To** field

3. Add a tailored subject and message in the **Title** and **Message** fields

4. Update meeting participants and availability, if necessary

5. Click **Send Request**

PLEASE NOTE: The default participant will be you. Don't forget to replace yourself with another participant if you do not intend to attend the meeting, or add additional participants as necessary.

New meeting request ✕

To

2 Company (start typing to display results)

Request subject and message

3 Title

Message

Meeting duration (by default 30min)
☐ Request 1h meeting

Meeting priority What does this mean?

Priority
MEDIUM ✕

Participants 4 [Choose]
Delegate

Me

5

Cancel   Send request

PLEASE NOTE: Outgoing requests are sent to companies rather than individuals. The receiving company will determine which participants to add to the meeting.

Pick participants   Save   Cancel

Jessie Armstrong   View calendar
70 free timeslots
Click to remove as participant

Joanne Duncan   View calendar
No free timeslot

John Sloan   View calendar
22 free timeslots
Click to add as participant

Karen Hurst   View calendar
No free timeslot

Kristina Flower   View calendar
No free timeslot

Laura Greenwood   View calendar
No free timeslot

Mackensie Knorr   View calendar
66 free timeslots
Click to add as participant

Melissa Arndorfer   View calendar
No free timeslot

"Reply Only" to Meeting Requests

- Click **Reply Only** to create or a continue a conversation in an existing meeting request

- This will allow you to add an additional comment or question, or respond to the thread *without* changing the request's status

- This is useful if you would like more information before accepting a request, or if you would like to follow up with additional details

Accepting, Declining, & Canceling Meeting Requests

Accept
1. Click **Accept Request**
2. Include an explanation in the **Message** field (optional)
3. Update meeting participants and availability, if necessary
4. Click **Accept Request**

Decline (not pictured)
1. Click **Decline Request**
2. Include an explanation in the **Messages** field (optional)
3. Click **Decline Request**

TIP: *If you accidentally decline a meeting, or your change your mind, you will have the option to undecline the meeting. This will revert meeting's status back to "Requested."*

PLEASE NOTE: *The default participant will be you. Don't forget to replace yourself with another participant if you do not intend to attend the meeting, or add additional participants as necessary.*

Scheduling an Accepted Meeting Request

TAGS AND TAGGED DELEGATES

Edit Tags

ZZZ Biotech Biotechnology Company
Outgoing

ACCEPTED

Select "Schedule" to display mutually available timeslots for this meeting

Schedule | Cancel request

ℹ **SELF SCHEDULING:** This meeting needs to be scheduled.

The system will let you know if you are viewing an accepted meeting that has not been scheduled.

utumn Participants | Edit

👤 **ZZZ Biotech Participants**

Add or remove participants from your company to this meeting

👤 Autumn Leaf

👤 Betty Brown

👤 **ZZZ Autumn linked resources** | Edit

👤 **ZZZ Biotech linked resources**

No linked resources added yet

No linked resources added yet

Message meeting participants in partnering system

Add or remove linked resources from your company profile's content section or your company's listed assets, market products, or services

💬 **Virtual Meeting @ BIO Digital**

Reply only

PLEASE NOTE:
This is the panel window that is displayed on the right side of the page when selecting a meeting in the Message Center, seen on the previous slides.

Scheduling an Accepted Meeting Request

- If you accept an incoming meeting request, you will receive a popup in the **Message Center** asking if you would like to schedule the meeting now or later.

Schedule your accepted meeting

Thank you for accepting a meeting with Pharma Company 1.
Now someone from your company or Pharma Company 1 should schedule the meeting. You can schedule the meeting now, schedule the meeting later, or wait for someone from Pharma Company 1 to schedule the meeting. To schedule it later, someone from your company or Pharma Company 1 can return to the accepted meeting and press the Schedule button.

Schedule now   Schedule Later   ☐ Don't show again

PLEASE NOTE:
If you select "Don't show again," but would like to receive this notification again when you accepted meetings, reset your notifications under "Notification Preferences".

Scheduling an Accepted Meeting Request

- Click on an available timeslot to bring up your choices for the meeting location

- Both the conference time zone and your own time zone will be displayed on the left-hand side

Scheduling an Accepted Meeting Request

- Within the scheduling window, you will encounter all available timeslots.
- Opening more timeslots increases the chances of having mutual availability to schedule your meeting.

Changing Availability

1. If you would like to change your availability without returning to the calendar page, click **Edit Participants** on the left hand side of the scheduling screen. This will bring up a list of your company's delegates.

2. Second, click **View Calendar** to edit your delegates' availability without leaving the scheduling page.

Legend

- Available for scheduling
- Not available for scheduling, please check your availability
- Not available for scheduling, conflicting meetings
- No partnering at that time
- This meeting is currently scheduled at that time
- ⊗ Number of delegates who have a conflicting meeting
- ⊗ Number of delegates who are not taking meetings at this time
- ⊙ Location is not available at this time

Biotechnology Innovation Organization

Nicholas Zuccaro

Edit Participants

Pick participants   Save   Canc

Filter company delegates here

Can't find your colleague in this list ?   Invite by email

Nicholas Zuccaro   View calendar
6 free timeslots
Click to remove as participant

Willie Reaves   View calendar
40 free timeslots
Click to add as participant

Changing Availability Within Scheduling

PLEASE NOTE:
*This is the panel that displays if you view your meeting participants' calendar. Here you may edit their availability, which will update the meeting scheduler on the left. Remember to click **Save** after making changes!*

Scheduling an Accepted Meeting Request

Select a time slot

Select a location

PDT (-07:00)
EDT (-04:00)

MON 8
TUE 9
WED 10
THU 11

01 04
02 05
03 06
04 07

The teal highlighted area is the time slot that you have chosen.

Select the location

Monday Jun 8, 01:30 - 02:00 (UTC-07:00)

Enter meeting location

You may specify a location of your choosing or add a link to your preferred conference or video call solution. Please be sure to include any needed access codes

Use your own virtual meeting location provided by you or your company.

Using your own Virtual Meeting Space

1. If you have previously saved a meeting location, click in the "Re-use a saved location" field to select your location

2. If you want to create a new location, input the name or url, any dial-in numbers, and a brief description

3. If you plan on using this location again, click the box that says "Save this location…", then select **Use this location** to confirm your meeting

Select the location ×

Monday Jun 8, 01:30 - 02:00 (UTC-07:00)

1 Re-use a saved location

OR specify a new location

Enter the meeting location name, URL or phone number

https://global.gotomeeting.com/join/504872255

2 Enter any additional location information here

Dial-in: 1-646-555-3127, Code: 701-555-398 (One-touch: 1-646-555-5124,,5587974#)

3 ☐ Save this location to use again later

Cancel   Use this location

Links will be displayed in the message center, in the calendar, and on any external calendars

PLEASE NOTE:
*Once you click **Use this location**, you will be taken to the summary screen.*

Summary of Meeting

- After you have confirmed a meeting, you will be brought to the "Summary" page to review and confirm your meeting.

- Click "Change" (**1**) to go back to the previous screen to edit any of the meeting details.

- If you are scheduling a meeting for another delegate within your company, you can click the box next to "Send me a copy" (**2**) to also receive the reservation information to your email on file.

- All attending delegates will automatically receive an email containing the reservation details.

- After reviewing the information, click **Confirm and schedule** to finalize the information. Details can be updated in Message Center

PLEASE NOTE:
After selecting to confirm and schedule, the meeting will show up on all of the meeting delegates' calendars within the BIO One-On-One Partnering™ system

Updating Meetings

- Once a meeting has been scheduled, you can return to your Message Center at any time to update details of the meeting.

Contact Information

Email: BIOpartnering@bio.org

Phone: +866.356.5155 (U.S.)

+1.202.962.6666 (International)

🐦 @bio1x1

Customer Service: Monday–Friday, 9 AM-5 PM ET