

# Standard Operating Procedure (SOP) for Running a FINOS Ambassador Event

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## **Purpose:**

This SOP outlines the steps and responsibilities for FINOS Ambassadors to plan, promote, and run a successful event. It ensures alignment with FINOS's mission and helps ambassadors manage events effectively while leveraging FINOS's resources.

## **Scope:**

This SOP applies to all FINOS Ambassadors who organize meetups, webinars, or other events under the FINOS brand. It includes guidelines for event planning, promotion, and post-event follow-up.

## **KPIs:**

- Short Term:
    - Number of registrations
    - Number of attendees
    - Number of post/article reactions
    - Number of post/article impressions
  - Long Term:
    - Number of views (video/blog)
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## **Procedure:**

### **1. Event Concept and Theme**

- **Responsibility:** FINOS Ambassador
- **Description:**
  - Choose a theme or topic that aligns with FINOS's mission and projects. The event should focus on open-source initiatives in finance, with an emphasis on specific projects or contributions relevant to the FINOS community.
  - Event name: "OS in Finance Meetup." or "OS in Finance Roundtable."
  - Examples of topics:
    - Contributions to a FINOS project.

- Open-source tools for financial institutions.
  - Real-world applications of open-source technology in finance.
- **Deliverable:** Defined event topic/theme.

## 2. Event Planning and Logistics

- **Responsibility:** FINOS Ambassador
- **Description:**
  - **Venue/Platform:** Decide if the event will be held virtually or in person. For in-person events, FINOS can help with looking for a venue. For virtual events, FINOS can provide a Zoom.
  - **Event Date and Time:** Select a time that works for your target audience, ensuring no conflicts with major holidays or FINOS events or other major conferences.
  - **Event Format:** Choose the format (e.g., panel discussion, presentation, hackathon) and prepare an agenda.
  - **Speakers/Panelists:** If applicable, confirm any guest speakers or panelists. These may include contributors from relevant FINOS projects.
  - **Event Length:** Recommended time is 1 to 2 hours, depending on the format. For in-person events, make sure to include a dedicated time for networking.
  - **Event Sponsoring (Optional):** Events can be sponsored to provide food & beverages. All sponsoring inquiries must be approved by the FINOS team. The FINOS team can also help ambassadors in finding sponsors throughout its network. For catering, <https://ezcater.com> (US) and <https://www.edencaterers.london/> (London) should be considered. Some venues require caterers to be selected from an authorized list.
- **Deliverable:** Event logistics (date, time, platform/venue, and agenda).

## 3. Event Registration

- **Responsibility:** FINOS
- **Description:**
  - **Supporting Documents:** FINOS will provide marketing materials (such as logos, event banners, and templates) for the ambassador to use for further promotion.
  - **Registration:** Registration for the event will be handled through FINOS's registration system. Attendees can opt-in to share their information with event sponsors if applicable.
- **Deliverable:** Registration link and supporting materials.

#### 4. Event Promotion

- **Responsibility:** Split but primarily Ambassador led
- **Description:**
  - **Ambassador Promotion:** The ambassador should promote the event within their networks, using social media and outreach to target attendees.
  - **Promotion by FINOS:** FINOS will promote the event through its official channels, including social media and newsletters.
- **Deliverable:** Event promotion plan

#### 5. Event Execution

- **Responsibility:** FINOS Ambassador
- **Description:**
  - **Hosting the Event:** The FINOS Ambassador is responsible for running the event, including introducing speakers, managing the agenda, and ensuring smooth transitions between sessions.
  - **Engagement:** Encourage audience engagement by incorporating Q&A sessions, polls, or interactive segments.
  - **FINOS Support:** FINOS will provide any necessary technical or logistical support, such as managing the registration platform or answering attendee questions related to the registration process.
  - **Recording (Optional):** If applicable, record the event (with permission) for later distribution or posting on FINOS platforms. Attendees must be informed at the beginning of the session that the event is recorded.
- **Deliverable:** Successful execution of the event (including participant engagement and session management).

#### 6. Post-Event Follow-Up

- **Responsibility:** FINOS Ambassador and FINOS Marketing Team
- **Description:**
  - **Thank You Notes:** Send thank you emails to attendees, speakers, and any sponsors. Include any relevant follow-up materials (e.g., presentation slides, links to recordings).
  - **Performance Metrics:** Review attendance numbers, survey feedback, and any other engagement metrics (such as social media mentions, number of registrations) to assess the event's impact.
  - **Follow-Up Reporting:** The ambassador will share an event summary with the FINOS team, including key takeaways, feedback, and suggestions for improvement.
- **Deliverable:** Post-event follow-up emails, survey results, and event report.

#### 7. Event Documentation and Reporting

- **Responsibility:** FINOS Ambassador
  - **Description:**
    - Prepare a brief event blog, interview or social post, including:
      - Number of registrants and attendees.
      - Key takeaways and participant feedback.
      - Suggestions for future events.
    - Share this report with FINOS to document the event's success and contribute to the overall ambassador program's growth.
  - **Deliverable:** Post-event blog or interview submitted to FINOS for publishing or social media shared for amplification by FINOS.
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## **Roles and Responsibilities:**

- **FINOS Ambassador:**
  - Select the event theme, manage logistics, and host the event.
  - Promote the event through personal channels.
  - Collect post-event feedback and share a blog with FINOS.
- **FINOS Marketing Team:**
  - Support event promotion through official FINOS channels.
  - Provide registration and logistical support.
  - Supply branding materials (logos, templates) to the Ambassador.
- **Speakers/Panelists (if applicable):**
  - Present or participate in the event, providing valuable insights and knowledge related to the event's theme.