

The Serendipify.Me Search Administrator Manual

Serendipify.Me helps you set up a **discovery channel for partnerships** between the people you invite to be part of this process. You effectively help them **scale up their networking** and discover people who are closest aligned with each other, based on matching private interests.

The **participant's value** is in the **partnerships that they can build** (and develop into successful collaborations) using this process

The **organizer's value** is in better **engaging, retaining and empowering their community**, and learning more about their needs through match analytics.

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2. **Manage** the search group participation
 - a. Tweaks for improving likelihood of matches and for protecting privacy
 - b. Reminder and template **for you to email participants the group link**
 - c. Analytics tools that show you the performance of the group: Tag Cloud, Matches Matrix
3. **Send invitations** to the targeted participants
 - a. You should have anywhere between 20 to 100, ideally even more participants in any group, to get good results. The invite needs to be sent from your personal email, to convey trust and increase the participation, it is not an email from the Serendipify.Me.

B. The invited **Participant Steps**:

1. Follow the invitation link
2. Lists interests for matching
3. Initiate connection requests
 - a. Matches appear automatically - user will (filter and) select the ones that are of interests and can initiate a connection request.
 - b. The user targeted with this connection request gets an email from the system detailing common interests, and the email of the request originator
 - c. At this point the connection is made, and the conversation can be had outside Serendipify.Me

C. Final Notes, FAQ

A.1. Search Group Setup

In order to help the people in your community, professional circle, or event that you are organizing to discover powerful (workable) connections in an efficient manner, you need to set up a matching channel where the participants can privately list their interests.

You do this on the Serendipify.Me webpage, by locating the **"Get Started here"** button.

ABS: Always Be Searching

Set up your search channel - and invite everyone you know to identify profitable collaborations

You will have to manage your own "Executive Search"

- Identify some opportunities that you are passionate about
- Set up your search channel with *matching terms* that reflect these potential collaboration ideas
- Invite the *targeted people* to describe their own interests, and ideally identify shared goals.

Get Started here: Set up your Search Channel

NEW Search Group

Organizers, start a Matching Group

Doing this leads to a sign-up page which explain the purpose and the means of managing effectively the search group.

Start a new search group

and invite the people who can lead to great matches

(will email you instructions upon group creation)

The role of this group

You are the organizer (and owner) of a matching pool that will help its participants to discover people with shared interests.

- Select a name that is easily recognizable by the people you do this for, example: *purpose_groupname_date*
- Identify all the people who should be part of this matching experiment, and **email them the group link** generated below, together with instructions on what will help them identify matches

Pretty much everybody will need to have a private account (or use social media credentials - LinkedIn) to fully be capable of discovering and contacting new people.

We take privacy very seriously:

- We don't use your account/email for purposes other than notifying you of connections or messaging advice about improving your outcome from participation in these groups
- We don't use your private interests beyond the match generating process - as you will notice, *there are not advertisements on our pages, so we don't leak your profile to outsiders*
- We even delete the interests that you specify for the groups that have expired (*we have a default 2 week expiry policy on all groups*).



Create and Manage your search group using a very basic and ALWAYS FREE account:
(You need to have an account to manage a matching group)

Sign In / Register to continue

UserName
Password
Sign in
LinkedIn Login

Back to creating the group, once you are logged in, you will see a very simple form where you need to:

1. **select the name of the group**, (something that uniquely and intuitively describe the setting of your search), and
2. **provide a mandatory description** that should help your group participants to get matches.

STEP 1. Choose a name to identify your search group :

booth_launch_winter_2016

STEP 2. Enter a meaningful description, so that the people that you invite into this search will understand the purpose, the participants, and the best criteria for them to discover interesting and valuable partnerships.

Dear 2016 Winter cohort, Welcome to Booth!

We invite you to participate in this search group where you can discover valuable connections that you should pursue early on to make them into long term partnerships.

Using your interests in a private fashion, this service identifies for you the people who are most aligned to your goals, helping you to effectively network broadly and deeply in our community.

Create a new search group

Once you hit the "Create a new search group button", **you have created the group**. What is left is to customize it and to invite participants to be matched up.

Next you are redirected to a management console (**Dashboard**) from where you can tweak the experience of your users, direct them to participate, and monitor their involvement (see section A.2 below)

At the same time, **you will receive an email with instructions to manage this group further:**

1. First it will remind you to send out the invitation to people who are supposed to participate in this group.
2. It will also provide you with the link to managing this group in the future, and with help in setting it up (also see the Managing Section below)

[Action Required] Your Serendipify.Me search group needs attention.



Serendipify.Me x

 Serendipify.Me support@serendipify-me.appspotmail.com via m3kw2wvrgufz5goc
to me ▾

7:10 PM (20 minutes ago) ☆



Serendipify.Me

Identify the people that are most valuable to you

Dear Search Group Initiator,

You just created a group called **booth_launch_winter_2016**. Your next step is to invite several acquaintances to participate in a partner-discovery process based on matching up similar interests.

In order for everyone to have a good chance at finding valuable partners, you have to do two things:

1. Make sure that there will be a significant number of participants in this search group. For this purpose, you need to email those who are great candidates for your intended matching topic the following group participation link, using an email message with a content like the example below:

Dear friend,

I would like to **ask** you to participate in the **invitation-only search** group called **booth_launch_winter_2016**, which I will be running for the next 2 weeks. This will help **all** of us **discover** valuable **connections** with those included in this search, based on shared interests.

A.2. Search Group Management

You will notice several features:

1. You have a QR code that you can distribute to participants, in case they want to use a mobile phone to join. Our web application is phone friendly.
2. You see the statistics for this group (initially no users, no matches, and an expiry in 14 days)
3. You can update the group description - this will help you tweak the message for the new participants, to understand how to increase their chances of finding matches.
4. Some very handy **User Helper Tools**:
 - a. An option to display the "Tag Cloud for the Group" - this makes it easier to generate connections in the group, by giving participants an idea about what others care about. The Tag Cloud is displayed on each participant's group page, right below where they enter their interests for matching in this group.
 - b. An option for you, the organizer, to automatically populate the new user's interest lists with default keywords (e.g. "career"), which automatically generates connections across the whole community
 - c. Privacy mode: On or Off, allowing others to see user names when they get matches, or to limit them to a generic "Matched Person" entry for further privacy


Group Management Dashboard for **booth_launch_winter_2016**

Below you can configure the details of your search group (i.e. group description explaining to the participants the goal of this search and tips to generate matches, displayed on all the group pages) and can monitor the health of the candidate matching pool, by means of visualizing user participation, number of interests listed, and current matches

If you need to improve your search group's effectiveness, email your users asking them to revisit your group's page, and to express more detailed interests.

1. Group Setup

You Group's QR code. Send it to the invited participants



Group Statistics:

- User Count: 0
- Matching Terms: 0
- Days till Expiry: 14

Group Description:

Dear 2016 Winter cohort, Welcome to Booth!

We invite you to participate in this search group where you can discover valuable connections that you should pursue early on to make them into long term partnerships.

[Set Group Details](#)

User Helper Tools

- Show aggregate group **Tag Cloud** on users' preferences page (see example below using button "Display Group Tag Cloud" below)
- Provide **Preselected Keywords** to facilitate preference listing and match generation
- Privacy Mode:** hide matched user names to avoid user preference leakage

A.3. Send out the invitations:

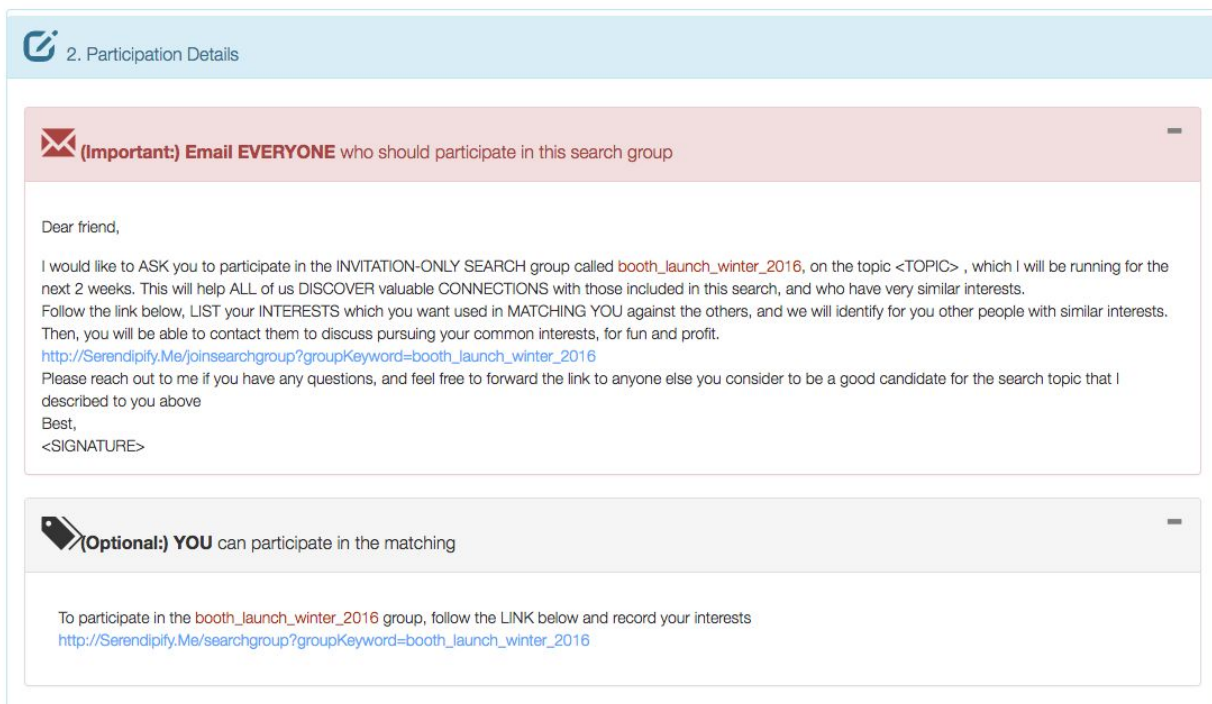
Both the email and the "Participation Details" section in the group dashboard give you suggestions on sending out the group link to the targeted participants.

The group link is of the form:


<http://serendipify.me/joinsearchgroup?groupKeyword=demo>

We provide you with a template email that should inspire you to encourage participation. Remember to state in your email the purpose of this group, who is likely to attend, and what kind of interests are likely to lead to matches (is this a career discussion group, and entrepreneurial group, or an outdoor activity planning group?).

✦ TIP: Sometimes this link will be rejected by your spam system. Use a url shortener (e.g. <http://goo.gl>) to get the link through to the users.



2. Participation Details

 **(Important:) Email EVERYONE** who should participate in this search group


Dear friend,

I would like to ASK you to participate in the INVITATION-ONLY SEARCH group called `booth_launch_winter_2016`, on the topic `<TOPIC>`, which I will be running for the next 2 weeks. This will help ALL of us DISCOVER valuable CONNECTIONS with those included in this search, and who have very similar interests. Follow the link below, LIST your INTERESTS which you want used in MATCHING YOU against the others, and we will identify for you other people with similar interests. Then, you will be able to contact them to discuss pursuing your common interests, for fun and profit.

http://Serendipify.Me/joinsearchgroup?groupKeyword=booth_launch_winter_2016

Please reach out to me if you have any questions, and feel free to forward the link to anyone else you consider to be a good candidate for the search topic that I described to you above

Best,
<SIGNATURE>

 **(Optional:) YOU** can participate in the matching

To participate in the `booth_launch_winter_2016` group, follow the LINK below and record your interests

http://Serendipify.Me/searchgroup?groupKeyword=booth_launch_winter_2016

We recommend that you iterate on the group participation and features - to help your users to generate matches.

B. User Interaction

When users receive a group join invitation, they land on a page that looks like the one below. The page will give the users

- system-generated group statistics and
- the previously (admin-) generated description about the purpose of the group.



You were invited to participate in the **search group** `chicagobooth_fall_2016` within which we will help you **discover your best potential partner**.

Currently there are only **2** users in this group
which expires in about **62** days

Description for the group: `chicagobooth_fall_2016`

Matchmaking for the Booth community

Using this tool will ideally help you discover **valuable partnerships** that help you utilize your full potential and reach your goals.

Use keywords like "finance" and "consulting" or anything that you are interested in being matched on

Once users get through the login steps, they land to the **interests specification page**, where they get to list things that they are passionate about, that they want to be matched on with others.

As users enter interests, they see gauges that measure how well those interests fit with the group, and how much those interests contribute to the group overall.

Also, depending on your configuration of the power tools, they get to see a Tag Cloud (like the one below), or even have some interests prepopulated, to automatically get matches in the group.

Step 1. List Your Interests on which you want to matched on



Record or update your interests that will be used in matching:

.. or load interests from your permanent profile

startup x finance x market x healthcare x add interest



To help you identify matches, see the Tag Cloud for this group's aggregated user interests:



Instantaneously, our matching algorithm identifies matching users based on shared interests. There are filters that can be used to drill down to specific combinations of shared interests only.

When the user selects a desired matching user, the connection button appears, enabling the sending of a connection request. *For quality reasons, we limit three connection requests per day.*

Step 2. Get Match Results - who is a fit to your interests



Filter by Interests: finance startup

Matching Users:

- financecareer
- entrepreneurcareer

Initiate Connection Request

Search for Matches

Contact request successfully sent to Matched Person

Finally the user receives a **connection request email** of the form below. Note that the sender's email appears in clear, so that the connection receiver can email directly if they feel like this would be a good connection to initiate.

This mechanism protects the party receiving the invitation, effectively becoming a double-vetted connection discovery.



Serendipify.Me

Identify the people that are most valuable to you

Dear entrepreneurcareer,

You are receiving a connection request from user 'tibi' because you have similar interests:

- startup

Feel free to contact user 'tibi' at: tiberiu.stefpraun@gmail.com

Cheers, and good luck serendipifying yourself. :) !

Final Notes

How much does it cost ?

We try to keep the service **free for small and growing groups and organizations**. We will start charging as your usage increases above certain thresholds, and we want to be paid by everyone who gets a solid value from using this service and who can afford it (big organizations, big conferences, etc). The Pricing page (<http://serendipify.me/pricing>) details this further.

How do I get new features ?

Shoot us an email at feedback@serendipify.me, we always love to hear from our users.