

Business Matchmaking Operations Training Course

3 – 7 May 2027
Montreux

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Training Center

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Ref: 1742_230947 **Date:** 3 – 7 May 2027 **Location:** Montreux **Fees:** 7500 Euro

Overview

Business Matchmaking Operations Training Course is a one-week intermediate course for business development, partnership, event, platform, and ecosystem functions who leave with a Business Matchmaking Operations Playbook. Participants turn participant needs and offers into qualified introductions through business matchmaking operations, partner profile design, transparent criteria, human validation, facilitated meetings, and follow-up controls. The course connects match decisions with trust, data stewardship, outcome measurement, and partnership ecosystem governance. Agile Leaders Training Center develops practical business matchmaking capability.

Who Should Attend

- Business development functions responsible for sourcing and qualifying collaboration opportunities
- Partnership functions responsible for identifying complementary organizations and shaping mutual value
- Event functions responsible for participant profiling, meeting schedules, and facilitated introductions
- Platform functions responsible for matching rules, participant data, and opportunity workflows
- Ecosystem functions responsible for partner participation, governance, and outcome reporting

The course assumes participants connect organizations, opportunities, or resources at work, and it leaves out generic networking, customer relationship management, sales negotiation, and legal agreement drafting.

Departments and Industries

The course supports departments and industries that create structured connections among buyers, suppliers, innovators, investors, institutions, or delivery partners.

- Business development, partnerships, strategy, and corporate innovation
- Events, exhibitions, accelerators, associations, and professional networks
- Technology platforms, marketplaces, financial services, and professional services
- Manufacturing, healthcare, education, energy, and infrastructure
- Public services, nonprofit organizations, research institutions, and economic development

Learning Objectives

By the end of this course, participants will be able to:

- Analyze matchmaking purpose, participants, offers, needs, and constraints
- Build comparable partner profiles and opportunity taxonomies
- Apply eligibility, ethics, consent, and conflict-of-interest screens
- Use weighted criteria with documented human validation
- Facilitate introductions and structured discovery meetings
- Evaluate match quality, conversion, governance, and improvement priorities

Course Agenda

Day 1: Matchmaking Purpose and Participant Profiles

- Matchmaking Outcome and Scope Charter
- Partnership Ecosystem Stakeholder Map
- Participant Offer-and-Need Profile Canvas
- Partner Profile Design Quality Checklist
- Opportunity Taxonomy and Matching Vocabulary

Day 2: Qualification, Data, and Match Decisions

- Eligibility and Readiness Screening Gate
- Consent and Data-Minimization Checklist
- Conflict-of-Interest and Independence Screen
- Weighted Match Matrix and Scoring Guide
- Human Validation and Decision-Rationale Record

Day 3: Introductions and Match Meetings

- Curated Introduction Brief Template
- Mutual-Value Hypothesis Canvas
- Structured Discovery Meeting Agenda
- Meeting Facilitation and Balanced-Airtime Method
- Fit, Concern, and Next-Step Capture Sheet

Day 4: Pipeline, Measurement, and Ecosystem Governance

- Match Follow-Up Pipeline and Stage Definitions
- Match Quality Dashboard and Conversion Measures
- No-Match Feedback and Learning Loop
- Partnership Ecosystem Governance Charter
- ISO 44001 Relationship Lifecycle Alignment Map

Day 5: Business Matchmaking Operations Practice

- Exercise: Diagnose an Incomplete Participant Profile
- Exercise: Score and Validate a Cross-Sector Match
- Exercise: Facilitate a Qualified Introduction Meeting
- Exercise: Review Match Quality and Pipeline Evidence
- Capstone Exercise: Business Matchmaking Operations Playbook

Practical Exercises

The course uses suggested activities to connect matchmaking decisions with repeatable operating controls.

- Suggested activity: convert buyer, supplier, investor, and innovator cases into comparable offer-and-need profiles.
- Suggested activity: apply a weighted match matrix, record assumptions, and challenge a high score with human evidence.
- Suggested activity: facilitate an introduction, balance participation, and record mutual value, concerns, and next steps.
- Suggested activity: assemble a playbook linking qualification, matching, meetings, follow-up, metrics, and governance.

FAQs

Who suits business matchmaking operations training, and what does it assume?

Business development, partnership, event, platform, and ecosystem functions suit the training. It assumes responsibility for connecting organizations or opportunities and does not require data-science or software-development expertise.

How does business matchmaking operations differ from networking training?

Business matchmaking operations uses participant profiles, qualification rules, explicit criteria, facilitated introductions, and outcome tracking, while networking training emphasizes personal relationship building and informal contact development.

What makes a business matchmaking score defensible?

A defensible score uses relevant weighted criteria, reliable profile evidence, documented assumptions, conflict checks, and human validation rather than treating an automated result as a final decision.

How should business matchmaking outcomes be measured?

Business matchmaking outcomes should combine process measures, match-quality evidence, meeting completion, agreed next steps, progression through the follow-up pipeline, partner feedback, and learning from declined or unsuccessful matches.

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Conclusion

Participants take a Business Matchmaking Operations Playbook back to work. It connects partner qualification, ethical data use, match criteria, human validation, meeting facilitation, follow-up, measurement, and ecosystem governance. It changes ad hoc introductions into documented business matchmaking operations that teams can evaluate, govern, and improve.