



The AI Matchmaking Playbook

How to turn a guest list into meetings both sides want.



Before you start

People come to events to meet the right three people. Most go home having met whoever stood next to the coffee.

This playbook changes that in five steps, with one rule on top. Nobody is researched or introduced unless they asked to be, and no introduction happens until both people say yes.

It is the playbook we are building Bony to run. You can run every step by hand today with a spreadsheet, an AI assistant and Google Calendar, and the prompts in this guide are written for that.

What you need

- Your registration form, with room for one checkbox and two questions
- A spreadsheet. Google Sheets works.
- An AI assistant with web search. The prompts here were written for Claude.
- Google Calendar, and the email address your guests already know
- A floor plan with named spots: Table 4, the coffee bar, the blue sofa

How long it takes

The first run is the slow one, because you write the form wording and the emails. After that you reuse them.

Hours for a first run with 100 guests:

[needs number]

Share of guests who tick the box:

[needs number]

First, the opt-in

What to do

Add one checkbox to your registration form. Leave it unticked. Then add two short questions for the people who tick it: "What do you want from this event?" and "Who would you like to meet?"

Exact wording

Checkbox text

Yes, match me with people I should meet. [Organiser name] may look up my public professional profile (role, company, LinkedIn) and suggest introductions at [event]. I approve each introduction before my contact details are shared. I can change my mind at any time.

Link the words "public professional profile" to a privacy notice. It says what you look up, where, why, how long you keep it and which address to write to if a guest wants out.

What good looks like

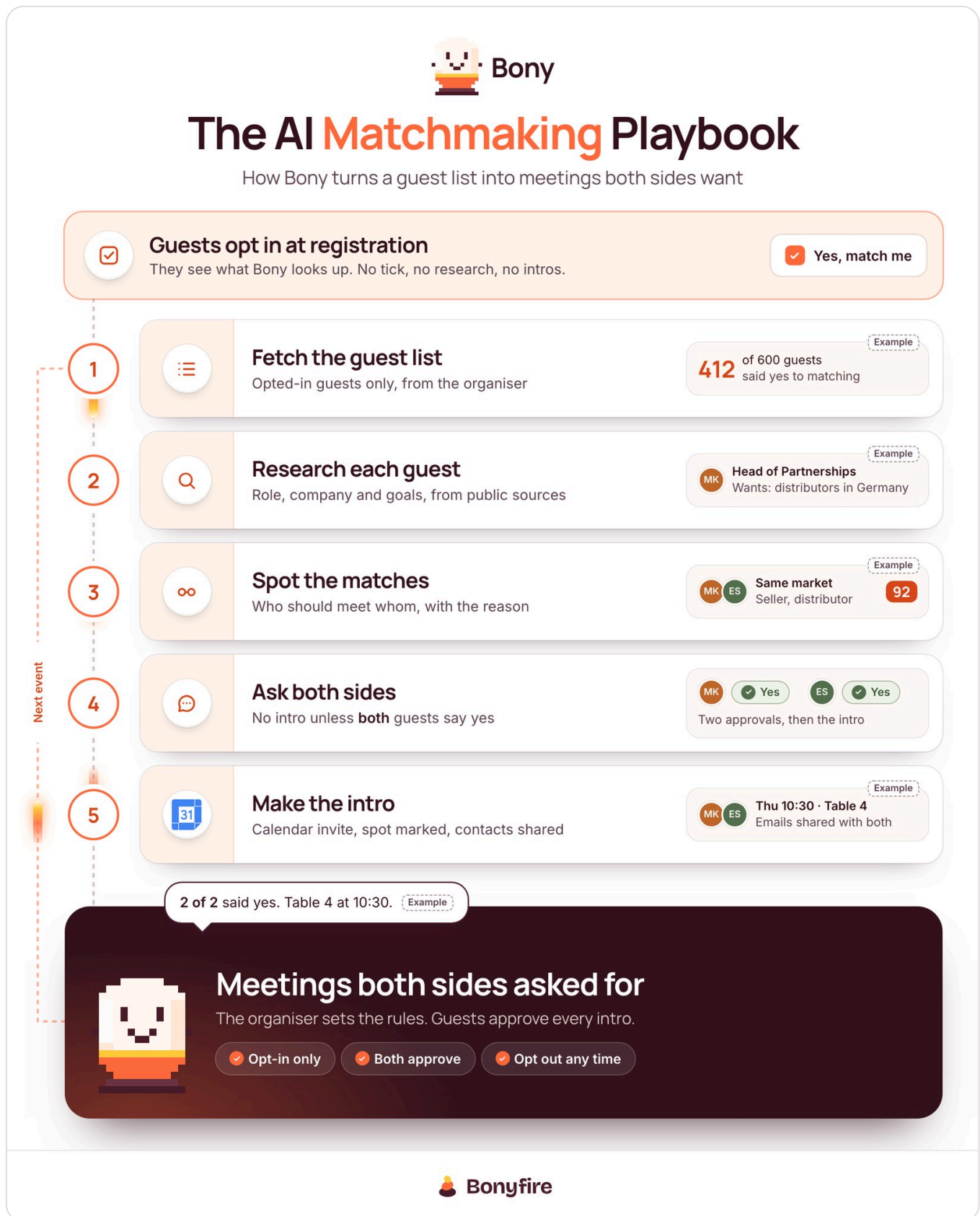
The box is unticked by default. The ticket costs the same either way. Every matchmaking email carries a one-word way out.

Common mistake

Ticking the box for people, or hiding the wording in the terms. Looking people up without telling them is the part that gets organisers into trouble. GDPR Article 14 says a person must be told when you collect data about them from somewhere else.

The playbook on one page

Five steps, one opt-in and two approvals. The pages after this one take each step in turn.



1 Fetch the guest list

Your ticketing tool

Google Sheets

What to do

Export the guests who ticked the box. Only those guests. You want name, email, company, job title, ticket type and their two answers.

Tool and setup

1. Export registrations from your ticketing tool as a CSV file.
2. Open it in a new Google Sheet called "Matchmaking".
3. Filter the opt-in column to "yes". Delete every other row from this sheet.
4. Add six columns: Profile, Offers, Wants, Match, Reason, Status.
5. Export again two days before the event to pick up late registrations.

What good looks like

One row per person and no duplicates. Every row has an email and a "yes" in the opt-in column.

Common mistake

Exporting the whole guest list "to filter later". The full list then sits in your matching sheet, and sooner or later somebody researches a guest who never agreed.

2 Research and enrich each profile

 Claude

What to do

Give every guest a short profile: what they do, what their company does, what they can offer another guest and what they are looking for. Start from their own answers on the form. Add public professional information only.

Tool and setup

Open Claude with web search switched on. Paste 20 rows at a time, because small batches get each person checked properly. Copy each field into its column in the sheet.

Prompt

You are helping an event organiser prepare introductions between guests who asked to be matched. For each person below, write five fields: Role. Company, in one line. Offers: what they could give another guest. Wants: what they are looking for. Sources: the links you used. Use their registration answers first. Add only public professional information, such as the company website, a LinkedIn headline or a published talk. Nothing about private life. No guesses about age, health, politics, religion or family. If you cannot find something, write "not found". Do not invent anything. People: [paste rows]

What good looks like

You can trace every line to the form or to a link. "Not found" shows up now and then, which tells you the assistant is not making things up.

Common mistake

Letting the profile grow. Role, offers and wants are enough to make a match. Anything more is personal data you now have to look after.

3

Identify the matches



What to do

Look for pairs where one guest offers what the other wants, or where both are working on the same problem. Keep it to three introductions per person. More than that and nobody turns up to any of them.

Tool and setup

Paste all profiles into one Claude conversation. Put the pairs it returns into the Match and Reason columns, then read the list yourself and remove any pair you would not introduce at your own dinner table.

Prompt

Here are guest profiles for [event]. Propose introductions. Pair two people only when one person's Offers meets the other's Wants, or when both face the same problem. Never pair direct competitors unless both asked to meet peers. Three introductions per person at most. For each pair give both names, a score from 0 to 100, and the reason in one sentence that both people would agree with. Strongest pairs first. Profiles: [paste profiles]

What good looks like

A reason you could say out loud to both people. "Maria sells packaging to food brands and Elias runs purchasing at one." **Example** If the reason is "both work in tech", drop the pair.

Common mistake

Matching on job title. Two heads of marketing are colleagues at different companies. A match needs one person with a need and another with the answer.

4

Ask both sides for approval

Your event email

What to do

Write to each person on their own. Say who you think they should meet and why, then ask for a yes or a no. Share no contact details yet. Neither side hears the other's answer until both have said yes.

Tool and setup

Send from the address your guests already get event updates from. Mark each answer in the Status column: Asked, Yes or No.

Email

Subject: Someone you should meet at [event]
Hi [first name], you asked us to match you at [event]. We think you should meet [name], [role] at [company]. The reason: [one-sentence reason]. Would you like the introduction? Reply yes or no. If you both say yes, we book 20 minutes for you at the event and share your email addresses with each other. If you say no, they never hear about it. To stop all matching, reply stop.

What good looks like

Two yeses on record before anything else happens. A no stays private, and a "stop" removes the person from the sheet the same day.

Common mistake

Treating silence as a yes. Send one reminder after two days. If there is still no answer, drop the pair.

5

Make the introduction



Google Calendar

What to do

Once both have said yes, put the meeting in their calendars. The invite carries the reason, the exact spot at the venue and the contact details they agreed to share.

Tool and setup

1. In Google Calendar, create an event. Title: "Intro: Maria Kosta and Elias Stavrou at [event]".
2. Pick 20 minutes inside a break. Never during a keynote.
3. Add both people as guests and keep "See guest list" on, so each sees the other.
4. Location: the named spot plus the venue, for example "Table 4, networking lounge, [venue and address]".
5. Description: the reason for the introduction, each person's name, role and email, and the line "Can't make it? Reply to both and pick another slot."
6. Add a phone number only if that guest offered one for this purpose.

What good looks like

Both people accept the invite. The spot exists on your floor plan, and someone on your team knows Table 4 is taken at 10:30.

Common mistake

Sending every pair to the same table in the same break. Number your tables, stagger the slots and print the list for whoever runs the room.

After the event

Ask each matched guest one question: "Was this meeting worth your time?" Their answers make next year's matching better. Then delete the profiles on the date your privacy notice promised.

Share of introductions both sides approved at our events: [needs number]. Share of booked meetings that took place: [needs number].

Privacy notes, in plain words

- **Consent is your basis.** Keep a record of who ticked the box and when. No tick means no research.
- **Tell people what you look up.** Your privacy notice names the sources, the purpose and how long you keep the data. That covers the Article 14 duty to inform people when data about them comes from elsewhere.
- **Changing their mind is easy.** When a guest writes "stop", delete their profile and cancel any introduction still waiting.
- **Both approve before details move.** No email address or phone number is shared on one yes.
- **Professional information only.** If it would not belong on a conference badge or a company website, leave it out.
- **Set a deletion date** and keep it.

This is a working guide, not legal advice. Show the checkbox wording and the privacy notice to whoever advises you on data protection before your first run.

The checklist

Print this page. Tick as you go.

- ☐ The registration form has an unticked “Yes, match me” checkbox and the two questions.

- ☐ The privacy notice says what you look up, where, why and for how long.

- ☐ The matching sheet holds opted-in guests only.

- ☐ Every profile line traces back to the form or to a public link.

- ☐ Each person has three introductions at most, and each pair has a one-sentence reason.

- ☐ You read the match list yourself before anyone was contacted.

- ☐ Each person was asked separately, with no contact details in the email.

- ☐ Both people said yes before the calendar invite went out.

- ☐ Each invite names the table, the time and the venue.

- ☐ The person running the room has the printed list of tables and slots.

- ☐ Opt-outs were removed the same day.

- ☐ A deletion date is set for after the event.

Talk to Bony

Stuck on a step, or curious how Bony would run this for your event? Send her a message. Tell her the event, the date and the step you are on.

Message Bony on LinkedIn

[linkedin.com/in/bonny-bonfire-b50977441/](https://www.linkedin.com/in/bonny-bonfire-b50977441/)

Bony is Bonyfire's assistant for event organisers. This guide is practical advice, not legal advice. Check the rules that apply to your event and your country before you contact anyone.

