Present

If Exhibiting ROI is the Name of the Game… Lead Management is the Playbook

Webinar Discussion Points

1. Key insights on lead management.
2. Defining what is and isn't a lead.
3. Setting realistic lead goals and building staff accountability.
4. Identifying the best information to capture to qualify leads.
5. Overview ATS 2017 lead retrieval systems.
6. How to customize your lead capture device or develop an opportunity card.
7. How to create and use a tool to track lead goals.
8. Creating an easy to apply lead grading system.
9. How to route leads and track lead progress and sales conversion.
10. Best practices for following-up.
11. How to get your sales team and/or distributors to support your lead management process.

1. How important are leads to the success of your exhibit program?
   ❑Critical ❑Important ❑Somewhat Important ❑ Not Important

2. Do you…
   a. Capture leads? ❑Yes ❑No ❑Unsure
      If yes, how? ____________________
   b. Know what becomes of your leads? ❑Yes ❑No ❑Unsure
   c. Set specific lead goals? ❑Yes ❑No ❑Unsure

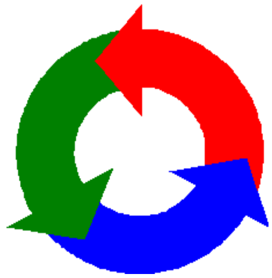
Key Insights on Lead Management

1. If you're not writing orders at the show, the REAL product is leads.
2. _____% of show leads are never followed-up.
3. _____% of sales people view show leads as cold calls.
4. _____% of buyers receive information after they have made a buying decision.
5. The problem starts with perception of lead value and the CAPTURE process.
6. Most exhibitors don't know what becomes of show leads.

Why is This Happening?

- Perceived ___________ of tradeshow leads.
- Marketing and Sales "disconnect".
- Lack of exhibit staff _____________.
  - _____% of booth staff have never received one single hour of professional training on how to work an exhibit.
- Lack of "clarity" on what a lead really is.
- Lack of a "Closed-Loop" lead management system.

Focus on the Four Phases of Closed-Loop Lead Management



1. **Capture** high quality leads.
2. Efficiently **Route** leads to the right people for fast follow-up.
3. Effectively **Follow-Up** to convert leads to purchasing action.
4. Provide an easy method for lead recipients to **Report** progress and sales conversion.

Define What Is and What Isn't a Lead

What Is a Lead?

1. Personal Interaction
2. Qualifying Questions Asked
3. Answers ______________________
4. Next Step ___________________ and Agreed To by Visitor

What Isn't a Lead?

- Business card in a fish bowl or somebody's pocket
- Badge swipe or scan with no engagement or additional information

How to Set Realistic Lead Goals

Exhibit Interaction Capacity formula calculates the number of face-to-face interactions you can execute in your exhibit.

Use Exhibit Interaction Capacity formula to set Lead Goals:

	Example	Participant
# of exhibiting hours	15	15
# of booth staff*	x 2	x_______
Total staff hours	30	________
Interactions/hr/staffer**	x 4	x_______
Total target interactions	120	________
% of visitors to lead	x.25	x_______
Lead goal	**30**	________

* 50 sq. feet/ staffer
** 3/conservative 4/moderate 5/aggressive

It's About What's Next!

Clarity of and commitment to ____________________ are critical leverage points to improve lead quality…

- ➢ *Ask and ye shall receive!*

Determine the Best Information to Capture to Qualify Leads

* **Typical information areas might include:**

- Email Address
- Product Interest & Level of Interest
- Buying Role and/or ______________
- Evaluation and/or Decision Team
- Competitors Buying From or Looking At
- Purchase Timeframe or Season
- Next Action Step
- Other?

* Customize your lead capture device to make sure you get this information!

Four Generations of Lead Capture Devices

1. Collect business cards
2. Use a paper lead form
3. Rent show lead capture system
   - ➢ Rent and customize with qualifiers
4. Buy a universal lead capture system
   - ➢ Be sure to discuss with show's lead capture company to determine how to capture encrypted data

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Why Use Lead Retrieval?

- Quickly collect valuable sales lead information
- Qualify and notate your leads
- Prioritize your leads for follow-up which saves your sales people time AND allows them to better convert leads to sales
- Acquire valuable demographic information which you don't get with a business card
- With your leads in electronic format, easily create mailing lists, email blasts, etc.

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Contact Information from registration

First Name
Last Name
Title
Company
Address
City, State and Zip
Country
Phone
Fax
E-Mail

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Demographic Answers Provided with Lead Retrieval Scan

- Degree
- Job Title
- Work Setting
- Major Areas of Professional Work

Why is this important?

- You won't get this information from a business card!
- Each demographic question is in a separate field in your electronic lead file. Sort by your interests and follow-up immediately after the event with tailored information specific to their interests.

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Product Offering Review

X•Press Connect App

X•Press Connect Plus

X•Press Connect Elite

Portable Bluetooth Printer works with all solutions

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XPress Connect App

- Use your Android or Apple phone or tablet
- Survey Capability
- All staff can collect leads and not share a device
- Collect leads anywhere
- Real-time leads in Excel
- Forward lead feature
- Email Follow-Up

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XPress Connect Handheld

- Our device
- Electronic Notes
- Not tethered, no more cords
- Does not need electricity, charge at night
- Survey Capability
- Real-time leads in Excel

Convention Data Services

XPress Connect Elite

- Uses your MAC or Windows Computer, we supply the scanner
- Electronic Notes
- Survey Capability
- Real-time leads in Excel
- Forward lead feature
- Email Follow-Up
- Internet connection is recommended

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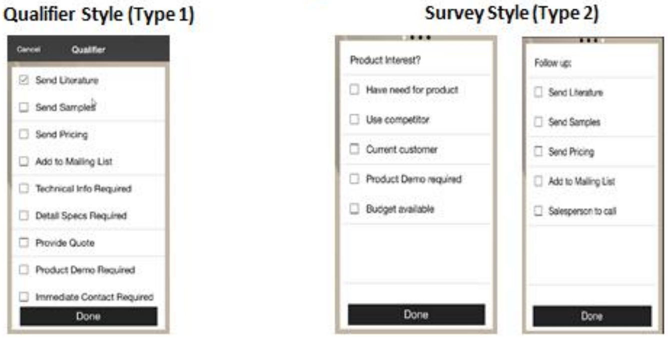
Qualifier vs Survey

Qualifier Style (Type 1) **Survey Style (Type 2)**



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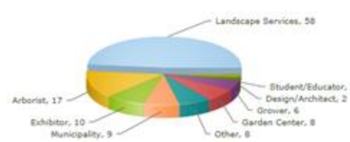
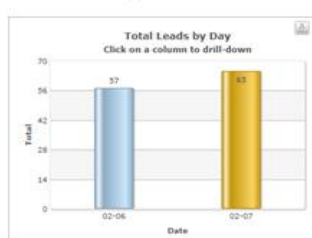
Post-show Reporting

- Real-time access to leads
  - Search, Sort and filer leads
  - Download to CSV
  - Cloud back-up
- Graphical reporting
  - Classification summary
  - Leads by day
  - Leads by hour
  - Geographic

DOWNLOAD





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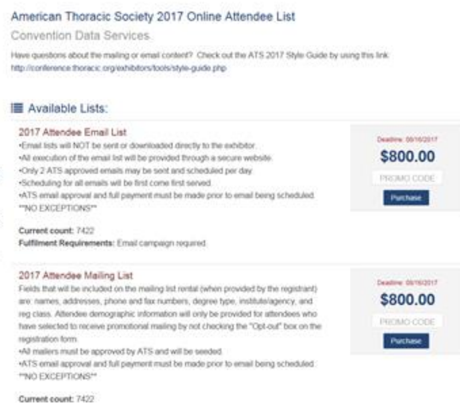
Online Attendee List

Important Exhibit Marketing Tool

- Attendee Pre-Show & Post-Show Lists Available
- Real time list numbers
- Mailing and Email lists available
- Exhibitors can select preferred demographics to target specific audience
- CDS will send eblasts on behalf of the exhibitors



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3rd Party Lead Retrieval

- Conversion File
  - Retrieve complete badge information on your third party device with a post-show file.
- Event API
  - Gain access to complete information in real-time using the CDS Event API

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Thank you!

For all Lead Management Questions:

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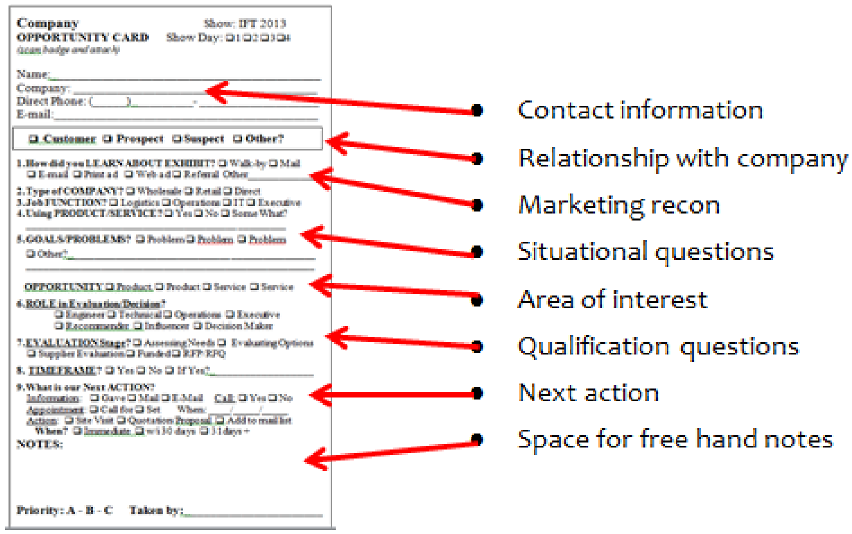
How to Customize Your Capture Device and/or Develop an Opportunity Card



Create & Use a Tool to Track Lead Goals

Daily Lead Goal versus Actual Scorecard

Day	Total Hours	% of Total Hours	AM Shift Goal	AM Shift Actual*	PM Shift Goal	PM Shift Actual*	Total Goal	Total Actual	Variance From Goal
1	8	22%	36		36		72	0	-72
2	8	22%	36		36		72	0	-72
3	8	22%	36		36		72	0	-72
4	8	22%	36		36		72	0	-72
5	5	14%	23		23		45	0	-45
Total	37	100%	167	0	167	0	333	0	-333

* Lead Captain must complete at end of each shift/day.

Develop an Easy-to-Apply Lead Grading System

Lead Grade	Time Frame for Purchase	Budget Identified	Buying Role
A+	0 to 3 Months	Yes	Final Say/Specify
A	4 to 6 Months	Yes	Final Say/Specify
B+	7 to 9 Months	Yes	Final Say/Specify Recommend
B	10 to 12 Months	Yes	Recommend
C+	More than 1 Year	Yes	Recommend
C	Unknown	No	No Role

1. Determine what information would help assign value to a lead
2. Determine the number of codes required
3. Define what each code means
4. Make sure data and lead grading codes are integrated into the capture device

Assign a Lead Captain

Responsibilities of the Lead Captain:

1. ____________ and communicates lead goal.
2. Ensures availability and functionality of capture devices.
3. __________________ lead goals versus actual.
4. Acknowledges performance & corrects non-performance.
5. Ensures data entry into CRM system and routing.
6. Possibly, the point of contact for post-show reporting.

Build a Culture of Lead Reporting

1. Create Culture of Reporting
   - Communicate Cost Per Lead.
   - Inform or cc lead recipient's manager.
   - Use________________ to kick-off the program.
2. Hold End of Shift or Day Lead Review Meeting
3. Close of Show Report
   - Number of leads captured versus goal.
   - Cost Per Lead.
   - Number of Leads and % by Priority Code.
   - Potential revenue value of leads.

Best Practices for Lead Response Management

1. _____________ of response – fast information delivery equals higher conversion rate
2. Best days to make follow-up calls: ________________ and Thursday
3. Best times to make follow-up calls: Between 4:00 pm and 5:00 pm
4. Average follow-up stops after two attempts.
5. Persistence – by making a few more call attempts, you can increase contact and conversion rate by 70%

Source: Harvard Business Review

Use Follow-Up Techniques to "Wow" and Be There When They're Ready to Buy

1. Prepare lead follow-up plan by priority BEFORE show.
2. Follow-up FAST or in line with visitor request.
3. Plan for _____ to _____ touches over the next 3 to 6 months.
4. Integrate multiple media:
   * Email
   * _______________
   * Telephone
   * In-person visits
   * Social media
5. Deliver real value… don't just sell!
   * Social media posts and groups
   * _________________
   * Product samples
   * Promotional products (refillable)
   * Testimonial letters and videos

How to Get Your Sales Team and/or Distributors to Support Your Lead Management Process

1. Communicate how you are __________________________________
2. Calculate and share your Cost Per Lead
3. Set three firm lead reporting dates
4. Consider contests to build accountability
5. Consider charging for leads to dealers/distributors and independent reps who don't follow-up or report

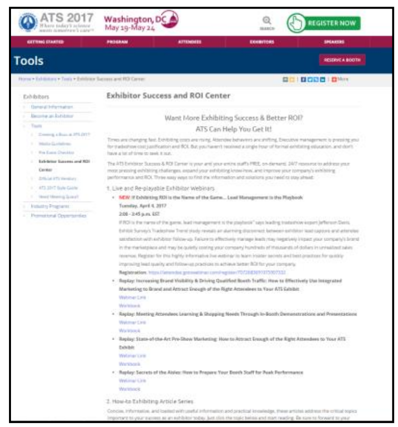
What were the three most important ideas you learned in this webinar?

1. ____

2. ____

3. ____

ATS Commitment to Exhibitor Education & Success



- Exhibitor Success & ROI Center on-line:
  - New and re-playable webinars
  - "How to" exhibiting article series
  - Downloadable tools
  - Ask the tradeshow expert email Q&A
- New Exhibitor On-Boarding
- Access at:
  - http://conference.thoracic.org/exhibitors/tools/exhibitor-success-roi.php

About the Expert Presenter

Jefferson Davis, President, Competitive Edge

The Tradeshow Turnaround Artist(tm)

Jefferson is President of Competitive Edge, a highly-specialized consulting and training firm on a mission to ***inspire***, ***lead*** and ***direct*** businesses on how to more effectively use exhibiting to visibly support core business objectives and generate measurable financial value, far beyond cost.

His mission is achieved by challenging companies to re-evaluate limiting perspectives about exhibiting and by getting them focused on precision execution of five critical exhibiting success factors.

Jefferson is a results-focused, process-based, passionate visionary and creator of game changing exposition industry programs including: the acclaimed Tradeshow Turnaround Program, E3 Exhibiting Effectiveness Evaluation program, Exhibitor Success & ROI Center program.

His Tradeshow Turnaround philosophy and practices are the exposition industry's definitive guide to quickly turning tradeshows from *"expensive appearances"* to *"productive, profitable investments."*

Over the course of 30 years of on the floor exhibiting experience, he's identified a clear set of empowering results-focused perspectives, and backed them up with specific, process-based strategic practices, his training and consulting services have helped clients generate over $750,000,000 in combined results.

No other tradeshow consulting or training firm can speak to results like this.

Jefferson's client list read like a "who's, who" list in the exposition industry. Since 1991, he's been selected as the tradeshow expert of choice by over 270 Association and for-profit show organizers. He's a faculty member of EXHIBITOR Show. He's delivered over 500 live seminars and workshops, over 700 webinars reaching over 250,000 exhibitors, and his E3 team has evaluated over 18,500 exhibits in action.

Jefferson's corporate clients span almost every industry and have included industry leaders like Alcoa, AMX, Aramco Services Company, Assurant Property Services, BOC Gases, Brivo Systems, Corporate Express, Covidien, Doosan Portable Power, Egemin Automation, Enshu USA, Essilor, Heidelberg, Honeywell, Huber Technologies, Jungheinrich Lift Trucks/MCFA, McLanahan, McQuay International, Merial, Merz Asthetics, Nestle-Purina, Ocean Mist Farms, Panasonic, Parker-Hannifin, PCCA, Reichert Ophthalmic, Scholle, SteelKing, Tennant Company, Tesco, Trelleborg Life Sciences and Wheel Systems, US Surgical, and many, many more.

Jefferson is available on a very limited basis to personally help companies implement the Tradeshow Turnaround philosophy and practices. Call 800-700-6174 in the US or 704-814-7355