

By addressing the first three critical exhibiting success factors, you are well on your way to a successful exhibiting experience. Don't stop now, because there are two more factors to getting a financial return on your exhibiting investment.

CRITICAL SUCCESS FACTOR #4: LEAD MANAGEMENT

If you're not writing orders or signing contracts at the show, and you expect to achieve a return on your exhibiting investment, it's critically important to understand that leads are the real product of the show.

At the top level, a lead can be defined as *“anybody you interact with in the exhibit and around the event that requires follow-up on your part, and that follow-up delivers value for your company”*.

The key to generating QUALITY leads is to make sure that each lead includes four critical factors:

- ✓ Somebody from your company personally interacted with the person
- ✓ Key qualifying questions were asked
- ✓ Answers were captured or documented
- ✓ A next step was **identified** and **agreed** upon by the visitor

1. **Get together with your sales team and ask, “What information should we capture to help us better qualify and value the lead?”**
 - Typical information areas might include: email address, product interest & level of interest, buying role and/or influence, evaluation and/or decision team, competitors buying from or looking at, purchase timeframe or season, next action step, other?
2. Organize this information into the natural flow of conversation and create a lead qualification and capture device. Whether you use a paper form, or you rent and customize the show lead retrieval system, this will make a big difference in the quality of information you capture.
 - Sample paper lead form:

Company Show: IFT 2013
OPPORTUNITY CARD Show Day: Q1 Q2 Q3 Q4
 (Date, budget and priority)

Name: _____
 Company: _____
 Direct Phone: () _____
 E-mail: _____

☐ Consumer ☐ Prospect ☐ Suspect ☐ Other?

1. How did you LEARN ABOUT EXHIBIT? ☐ Website ☐ Mail
☐ E-mail ☐ Print Ad ☐ Web ☐ External Other _____
 2. Type of COMPANY? ☐ Wholesale ☐ Retail ☐ Direct
 3. Job FUNCTION? ☐ Logistics ☐ Operations ☐ IT ☐ Executive
 4. Using PRODUCT/SERVICE? ☐ Yes ☐ No ☐ Some What?

5. GOALS/PROBLEMS? ☐ Problem ☐ Problem ☐ Problem
☐ Other? _____

OPPORTUNITY ☐ Product ☐ Production ☐ Service ☐ Service

6. **ROLE** in Evaluation/Decision?
☐ Logistics ☐ Technical ☐ Executive ☐ Executive
☐ Recommender ☐ Influencer ☐ Decision Maker

7. **EVALUATION Stage?** ☐ Assessing Needs ☐ Evaluating Options
☐ Supplier ☐ Evaluation ☐ Purchase ☐ IFT EPO

8. **TIMEFRAME?** ☐ Yes ☐ No ☐ If Yes? _____

9. **What is our Next ACTION?**
 Information: ☐ None ☐ Mail ☐ E-Mail ☐ Call ☐ Yes ☐ No
 Appointment: ☐ Call for ☐ Set When _____
 Action: ☐ See Visit ☐ Question Response ☐ Mail ☐ Mail
 When: ☐ Immediate ☐ 1 to 10 days ☐ 11 days+

NOTES: _____

Priority: A - B - C Taken by: _____

Contact information

Relationship with company

Marketing recon

Situational questions

Area of interest

Qualification questions

Next action

Space for free hand notes

3. **Train your booth staff** on asking the questions in the proper sequence, and using the capture device, **before** you get to the booth.
4. To get visitors to commit to the next step, avoid assuming that they have interest. Be sure to ask the visitor *what their level of interest in your products is?, and what they think the your next step should be?*

5. Be ready to physically give them, or email them, follow-up information on the spot. Research has proven speed of response dramatically increases lead conversion rate.
6. Develop your lead follow-up plan **before** coming to the show, so you can follow-up quickly.
7. And finally, do not give up too quickly on leads. Your philosophy should be “any lead worth taking is worth following up on”, and that you’re going to stay in touch with each lead for as long as it takes. Be there when the buyer is ready to buy, not just when you’re ready to sell!

For a deeper dive on these critical exhibiting topics, be sure to visit the [Exhibitor Success and ROI Center](#) to access these exhibitor resources and educational materials:

View On-Demand Webinar:

- If Exhibiting ROI is the Name of the Game, Lead Management is the Playbook

Read:

- Lead Persistence – The Key to Tradeshow Lead Conversion
- CEIR Insight Report: How Exhibitors Can Improve Lead Quality & Sales Conversion
- Closed Loop Lead Management
- Managing Leads Through Sales Cycle Milestones

If you have any questions, please feel free to reach out to us.