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
   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 tradeshows 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:

- # of exhibiting hours
- # of booth staff*
- Total staff hours
- Interactions/hr/staffer**
- Total target interactions
- % of visitors to lead
- Lead goal

<table>
<thead>
<tr>
<th></th>
<th>Example</th>
<th>Participant</th>
</tr>
</thead>
<tbody>
<tr>
<td># of exhibiting hours</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td># of booth staff*</td>
<td>x 2</td>
<td>x__________</td>
</tr>
<tr>
<td>Total staff hours</td>
<td>30</td>
<td>________</td>
</tr>
<tr>
<td>Interactions/hr/staffer**</td>
<td>x 4</td>
<td>x__________</td>
</tr>
<tr>
<td>Total target interactions</td>
<td>120</td>
<td>________</td>
</tr>
<tr>
<td>% of visitors to lead</td>
<td>x.25</td>
<td>x__________</td>
</tr>
<tr>
<td>Lead goal</td>
<td>30</td>
<td>________</td>
</tr>
</tbody>
</table>

* 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
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.

Contact Information from registration

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

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.
Product Offering Review

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

XPress Connect Plus

XPress Connect Elite

Portable Bluetooth Printer works with all solutions

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
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

Qualifier vs Survey

<table>
<thead>
<tr>
<th>Qualifier Style (Type 1)</th>
<th>Survey Style (Type 2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Interest?</td>
<td>Product Interest?</td>
</tr>
<tr>
<td>Have you heard of product</td>
<td>Have you heard of product?</td>
</tr>
<tr>
<td>User comparison</td>
<td>User comparison</td>
</tr>
<tr>
<td>Current customer</td>
<td>Current customer</td>
</tr>
<tr>
<td>Send Finished List</td>
<td>Send Finished List</td>
</tr>
<tr>
<td>Technical Info Requested</td>
<td>Technical Info Requested</td>
</tr>
<tr>
<td>Email Submit Required</td>
<td>Email Submit Required</td>
</tr>
<tr>
<td>Provider/Quote</td>
<td>Provider/Quote</td>
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<tr>
<td>Product Lists Required</td>
<td>Product Lists Required</td>
</tr>
<tr>
<td>Immediate Callback Request</td>
<td>Immediate Callback Request</td>
</tr>
<tr>
<td>Done</td>
<td>Done</td>
</tr>
</tbody>
</table>

Post-show Reporting

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

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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 blasts on behalf of the exhibitors

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

Thank you!

For all Lead Management Questions:

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Exhibitor Services
800-746-9734
xpressleads@cdsreq.com
How to Customize Your Capture Device and/or Develop an Opportunity Card

- Contact Information
- Relationship with company
- Marketing recon
- Situational questions
- Area of interest
- Qualification questions
- Next action
- Space for free hand notes

Create & Use a Tool to Track Lead Goals

Develop an Easy-to-Apply Lead Grading System

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.
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:
About the Expert Presenter
Jefferson Davis, President, Competitive Edge
The Tradeshow Turnaround Artist™

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 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