



Present

State-of-the-Art Tradeshow Lead Management

How to Improve Lead Quality & Sales Conversion

Webinar Discussion Points

1. Key insights on lead management.
2. What is and isn't a lead.
3. Four phases of closed-loop lead management.
4. Setting realistic lead goals.
5. Best information to capture to qualify leads and an easy to apply lead grading system.
6. How to route leads and track lead progress and sales conversion.
7. Building a culture of lead reporting.

1. How important are leads?
Critical Important Somewhat Important Not Important

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

Key Insights on Lead Management

1. For most exhibitors, the _____ product of a tradeshow is leads.
2. ____% of 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 the CAPTURE process.
6. Most exhibitors don't know what becomes of their 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.

Define What Is and What Isn't a Lead

What Is a Lead?

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

What Isn't a Lead?

- Badge swipe or scan
- Business card in a fish bowl or somebody's pocket

Calculate the Real Cost of Poor Lead Management

1. Cost Per Lead:

- Total Show Spend/# Leads
- $\$75,000 / 150 \text{ Leads} = \500 per lead

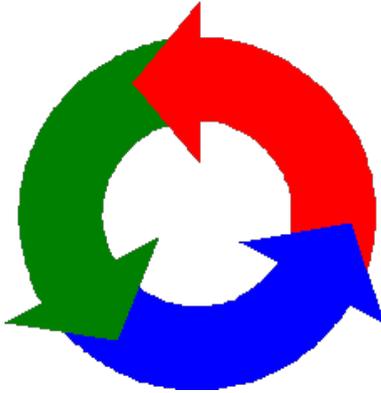
2. Revenue Opportunity:

- Average Sale Amount x (# Leads x Lead Conversion %)
- $\$25,000 \times (150 \text{ leads} \times .25\% = 38) = \$950,000$

3. Impact on Brand:

- How does not following up impact your company's brand perceptions in the market?

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

Set Realistic Lead Goals

1. **Exhibit Interaction Capacity** formula calculates the number of face-to-face interactions your staff can execute in your exhibit.
2. Use Exhibit Interaction Capacity formula to Set Lead Goals:

	<u>Example</u>	<u>Participant</u>
● # of exhibiting hours	16	_____
● # of booth staff	<u>x 3</u>	x_____
● total staff hours	48	_____
● interactions/hr/staffer	<u>x 4</u>	x_____
● total target interactions	192	_____
● % of visitors to lead	<u>x.25</u>	x_____
● Lead goal	48	_____

Determine the Best Information to Capture to Qualify Leads

Typical information areas might include:

- Email Address
- Specific Project/Application/Need
- Requirements or Specifications
- Product Interest & Level of Interest
- Buying Role and/or Influence
- Evaluation and/or Decision Team
- Competitors
- Budget
- Timeframe
- Specific Next Action Step
- Other?



Five Generations of Lead Capture Devices

1. Collect business cards
2. Use a paper lead form
3. Rent the show lead capture system
 - Rent and customize
4. Universal lead capture system
5. Smartphone/tablet technology

A scan of a paper lead form. The form has a header with the word 'Company' and 'OFFICIALS' in bold. Below the header, there are several sections with labels like 'Name', 'Title', 'Company', 'Phone', and 'Email'. There are also checkboxes and text boxes for additional information. The form is filled out with some handwritten text.

Scanning Options Available



Synergy Touch Our Best Option!

Handheld scanner with a color touch screen display. Quickly touch to add sales qualifiers, type notes with the on-screen keyboard. Includes **Live Access**, real-time leads for fast follow up. Battery lasts entire event. **Add Survey Questions, order in Step 2.**



Bluetooth Printer Option

Add lead printing with the Touch wireless printer.



Synergy PDA Mobile

Handheld PDA style scanner with a color display. Quickly add qualifiers with the stylus. Type notes using the keyboard. Leads are available for download shortly after show close. Battery lasts entire event.



Synergy All-In-One

Desktop style, scan with the tethered scanner, scan sales qualifiers. Prints and saves every lead. Download your leads shortly after the event. This unit requires electricity



Synergy Code Reader

Remote sized scanner with simple one button scanning and scan sales qualifiers. Includes **Live Access**, real-time leads for faster follow up. Battery lasts entire event.



Synergy Code Reader Plus

Remote sized scanner, one button scanning, displays your scanned lead. Scan sales qualifiers, tracks time & date of scan. Includes **Live Access** real-time leads for faster follow up. Battery lasts entire event.

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

Train Your Staff

1. _____ why you are developing the system and what is in it for them.
2. Create accountability by setting lead goals.
3. Provide hands-on role playing with the device before the show.
4. Kick-off your program with _____.

Assign a Lead Captain

Responsibilities of the Lead Captain:

1. Sets and _____ 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 reporting.

Only Route Qualified Leads

1. Sending _____ leads to the field is a key reason for poor lead follow-up.
2. Consider a post-show (re)qualification process.
3. Route leads _____!
4. Include All Relevant Data.
5. Assign or route leads through your CRM system, a web-based application or email a lead tracking spreadsheet.

Build a Culture of Lead Reporting

1. Create Culture of Reporting
 - Communicate Cost Per Lead.
 - Inform or cc the reps manager.
 - Use contests 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

Prepare Lead Follow-Up Plan BEFORE the Show

1. Sort leads by _____.
2. Determine media.
3. Determine messaging.

4. Determine timeframes.
5. Assign responsibility.
6. Use _____ wherever possible.

Tips for Using a CRM System to Track Lead Progress and Sales Conversion

1. Source _____ leads to the show.
2. Add contact history to existing records.
3. Schedule at least ___ pre-set reporting dates.
4. Pre-design email follow-up templates.
5. Pre-design follow-up letters.
6. Use automated processes to schedule follow-up by priority tracks.
7. Add user-definable fields.
8. Set-up custom lead tracking reports tied to the show.

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

1. _____
2. _____
3. _____

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