



Present

Improving AOA Tradeshow Lead Management for Higher Sales Conversion

Webinar Discussion Points

1. Key insights on lead management.
2. Defining what is and isn't a lead.
3. Calculate the real cost of poor lead management
4. Setting realistic lead goals and building staff accountability.
5. Identifying the best information to capture to qualify leads.
6. Using state-of-the-art lead capture technology.
7. Overview Optometry's Meeting lead retrieval products.
8. How to create and use a tool to track lead goals.
9. Creating an easy to apply lead grading system.
10. How to route leads and track lead progress and sales conversion.
11. Best practices for following-up.

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.

Calculate the Real Cost of Poor Lead Management

1. Cost Per Lead:
 - Total Show Investment/# Leads
 - $\$25,000 / 100 \text{ Leads} = \250 per lead
2. Revenue Opportunity:
 - Average Sale Amount x (# Leads x Lead Conversion %)
 - $\$5,000 \times (100 \text{ leads} \times .25\% = 25) = \$125,000$
3. Impact on Brand:
 - *How does not following up impact your company's brand perception in the market?*



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:

	<u>Example</u>	<u>Participant</u>
● # of exhibiting hours	15	15
● # of booth staff	<u>x 2</u>	x _____
● Total staff hours	30	_____
● Interactions/hr/staffer	<u>x 4</u>	x _____
● Total target interactions	120	_____
● % of visitors to lead	<u>x.25</u>	x _____
● Lead goal	30	_____

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 Influence
- 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!

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

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

COMPANY OPPORTUNITY CARD Show: 07/12/13 Show Day: 07/12/13
Name: _____
Title: _____
Company: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____
Fax: _____
E-mail: _____
Web: _____
Product/Service: _____
Quantity: _____
Budget: _____
When do you need it? _____
How do you plan to pay for it? _____
Notes: _____
Printed: A B C Taken by: _____



How to Develop an Opportunity Card

Company	Show: IFT 2013
OPPORTUNITY CARD	Show Day: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4
<small>(Scan badge and attach)</small>	
Name: _____	
Company: _____	← Contact information
Direct Phone: () - _____	
E-mail: _____	
<input type="checkbox"/> Customer <input type="checkbox"/> Prospect <input type="checkbox"/> Suspect <input type="checkbox"/> Other?	
← Relationship with company	
1. How did you LEARN ABOUT EXHIBIT? <input type="checkbox"/> Walk-by <input type="checkbox"/> Mail <input type="checkbox"/> E-mail <input type="checkbox"/> Print ad <input type="checkbox"/> Web ad <input type="checkbox"/> Referral Other _____	
← Marketing recon	
2. Type of COMPANY? <input type="checkbox"/> Wholesale <input type="checkbox"/> Retail <input type="checkbox"/> Direct	
3. Job FUNCTION? <input type="checkbox"/> Logistics <input type="checkbox"/> Operations <input type="checkbox"/> IT <input type="checkbox"/> Executive	
4. Using PRODUCT/SERVICE? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Some What?	
← Situational questions	
5. GOALS/PROBLEMS? <input type="checkbox"/> Problem <input type="checkbox"/> Problem <input type="checkbox"/> Problem <input type="checkbox"/> Other? _____	
← Area of interest	
OPPORTUNITY <input type="checkbox"/> Product <input type="checkbox"/> Product <input type="checkbox"/> Service <input type="checkbox"/> Service	
← Qualification questions	
6. ROLE in Evaluation/Decision? <input type="checkbox"/> Engineer <input type="checkbox"/> Technical <input type="checkbox"/> Operations <input type="checkbox"/> Executive <input type="checkbox"/> Recommender <input type="checkbox"/> Influencer <input type="checkbox"/> Decision Maker	
← Next action	
7. EVALUATION Stage? <input type="checkbox"/> Assessing Needs <input type="checkbox"/> Evaluating Options <input type="checkbox"/> Supplier Evaluation <input type="checkbox"/> Pended <input type="checkbox"/> RFP RFQ	
← Space for free hand notes	
8. TIMEFRAME? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes? _____	
9. What is our Next ACTION? Information: <input type="checkbox"/> Give <input type="checkbox"/> Mail <input type="checkbox"/> E-Mail <input type="checkbox"/> Call <input type="checkbox"/> Yes <input type="checkbox"/> No Appointment: <input type="checkbox"/> Call for <input type="checkbox"/> Set When? _____ Action: <input type="checkbox"/> Site Visit <input type="checkbox"/> Quotation Proposal <input type="checkbox"/> Add to mail list When? <input type="checkbox"/> Immediate <input type="checkbox"/> 10 days <input type="checkbox"/> 30 days	
NOTES: _____	
Priority: A - B - C Taken by: _____	

Official Show Lead Retrieval Vendor



Telephone: (866)600-5253

Fax: 708-344-4444

2651 Warrenville Rd #400, Downers Grove, IL 60515

<http://www.compusystems.com/order>

Order form located on Freeman website:

<http://www.freemanco.com/store/browse/category.jsp?showID=416869>

CompuSystems Lead Retrieval

The smart way to collect leads



App works with all iPhone, iPad and Android devices with this year's and the previous year's operating system.

CompuLEAD Smart Lead Retrieval App

Download the app and activate it via a unique activation code

- Transfer activations between your staff's devices
- Custom qualifiers and survey questions
- Edit lead information and add notes
- Scan badges on and off the show floor even when cellular/Wi-Fi connection is lost
- Send your own marketing materials to your leads from the app
- Get personal in-booth training (additional charges apply)
- Wireless printer (additional charges apply)



Mobile Plus



Optional Wireless Printer

CompuLEAD Smart Badge Scanner

A rental device equipped with the Smart app

- Custom qualifiers and survey questions
- Edit lead information and add notes
- Scan badges on and off the show floor even when cellular/Wi-Fi connection is lost
- Get in-booth delivery, setup and training (additional charges apply)
- Wireless printer (additional charges apply)



Follow-up

Included FREE with your CompuLEAD order is myLeads, CompuSystems premier post show follow up service. myLeads allows you to view all of your leads and provides a powerful suite of post-show follow-up services.

- Download leads directly to your own CRM or database
- Print leads and mailing labels
- Send broadcast emails to your leads
- Run reports to help measure ROI

		05/02/16 EARLY BRD	05/17/16 ADVANCE	STANDARD	QTY	TOTAL
Packages						
CompuLEAD Smart App 3 User Activation (115)		\$570	\$610	\$655		\$
<ul style="list-style-type: none"> • Custom qualifiers and surveys • 15 pieces of literature (15 PDFs, 5 MB each) • 5 links to videos 						
CompuLEAD Smart Badge Scanner (114)		\$595	\$660	\$745		\$
<ul style="list-style-type: none"> • Custom qualifiers and surveys • 15 pieces of literature (15 PDFs, 5 MB each) • Wireless printer • Delivery, setup and in-booth training 						
CompuLEAD Smart App Unlimited User Activations (116)		\$905	\$940	\$990		\$
<ul style="list-style-type: none"> • Custom qualifiers and surveys • 15 pieces of literature (15 PDFs, 5 MB each) • 5 links to videos 						
Individual Items						
CompuLEAD Smart App 3 User Activation (173A)		\$450	\$490	\$540		\$
CompuLEAD Smart Badge Scanner (174A)		\$450	\$490	\$540		\$
CompuLEAD Smart App Unlimited User Activations (178A)		\$800	\$840	\$890		\$
Add-ons						
Wireless Printer (187A)		+\$80	+\$95	+\$115		\$
Setup and In-Booth Training For Smart (108)		+\$95	+\$110	+\$130	<input type="checkbox"/>	\$
Delivery, Setup and In-Booth Training For Mobile Plus (08)		+\$95	+\$110	+\$130	<input type="checkbox"/>	\$
Payment						
Contract Name/Title		Company Name		Booth # (if required)		
Address						
City		State		Zip Code		Country
Phone		Onsite Cell		Fax		
Email		Alternate Email (to receive leads post-show)				
Subtotal		\$				
Processing Fee		\$ 15.00				
TOTAL		\$				
All applicable taxes will be added.						
All orders subject to a \$100 cancellation fee.						
No refunds after 06/01/16.						
No refunds on CompuLEAD Smart.						
Order						
compuystems.com/order						
Fax: +1 708.344.4444						
For assistance						
Inside the U.S. (Toll-free): 866.600.LEAD (5323)						
Outside the U.S.: +1 708.786.5565						
Credit card deposit required for all rentals. Order will appear as LEAD RETRIEVAL on credit card statement.						
By signing this order form, I declare that I have fully read, understand and agree to abide by the Terms and Conditions listed on the product description page.						
<input type="checkbox"/> Visa <input type="checkbox"/> MC <input type="checkbox"/> Amex						
Card Number		Expiration Date				
Cardholder Name		Cardholder Signature				

Create & Use a Tool to Track Lead Goals

Daily Lead Goal versus Actual Scorecard									
Day	Total Hours	% of Total Hours	AM Shift		PM Shift		Total		Variance From Goal
			Goal	Actual*	Goal	Actual*	Goal	Actual	
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	<ol style="list-style-type: none"> 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
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	

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
 - * Mail
 - * 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

Best Practices for Following-Up

- Mail
 - Reference their request from the show
 - Clear call to action
 - Reward for responding
 - Do at least 3 post-show spaced mailers

Best Practices for Following-Up

- Email
 - Optometry's Meeting: information you requested
 - 75 character subject line, 120 word body copy
 - Only half of top of body copy should be HTML masthead
 - Only one _____
 - Avoid sending attachments early in the relationship
- Telephone
 - In the booth, ask for best time to call
 - Try to get cell phone number
 - Be brief, be interesting and be gone
 - Get them talking by asking questions
 - Know your _____ before calling
- Social Media
 - Connect, Follow or Friend them
 - Join groups they are members of
 - Add to or start conversations
 - Use Linked-In in mail
 - Focus on sharing _____, not hard selling
 - Provide links to blogs, articles and useful videos

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

1. _____
2. _____
3. _____

AOA Commitment to Exhibitor Education & Success

- Exhibitor Success & ROI Center:
 - Live and Re-playable Webinars
 - “How To” Exhibiting Article Series
 - “Ask the Tradeshow Expert” Email Q&A
- Bookmark, Share and Access at:
 - <http://exhibitsom.org/2016/Public/Content.aspx?ID=2158&sortMenu=103008>