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.

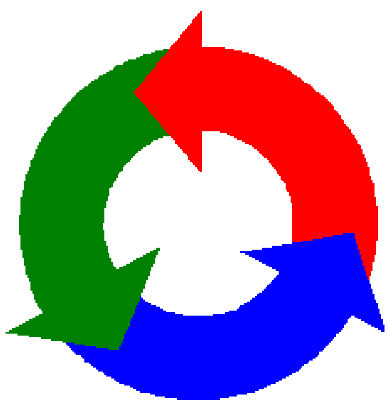
Why is This Happening?

- 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 Leads = $250 per lead
2. Revenue Opportunity:
   - Average Sale Amount x (# Leads x Lead Conversion %)
   - $5,000 x (100 leads x .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:

	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**	________

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:**

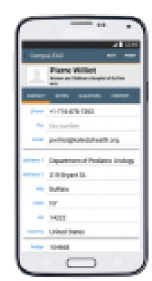
- Email Address
- Product Interest & Level of Interest
- Buying Role and/or Influence
- Evaluation and/or Decision Team
- Competitors Buying From or Looking At
- Purchase Timeframe or Season
- Next Action Step
- Other?

* 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

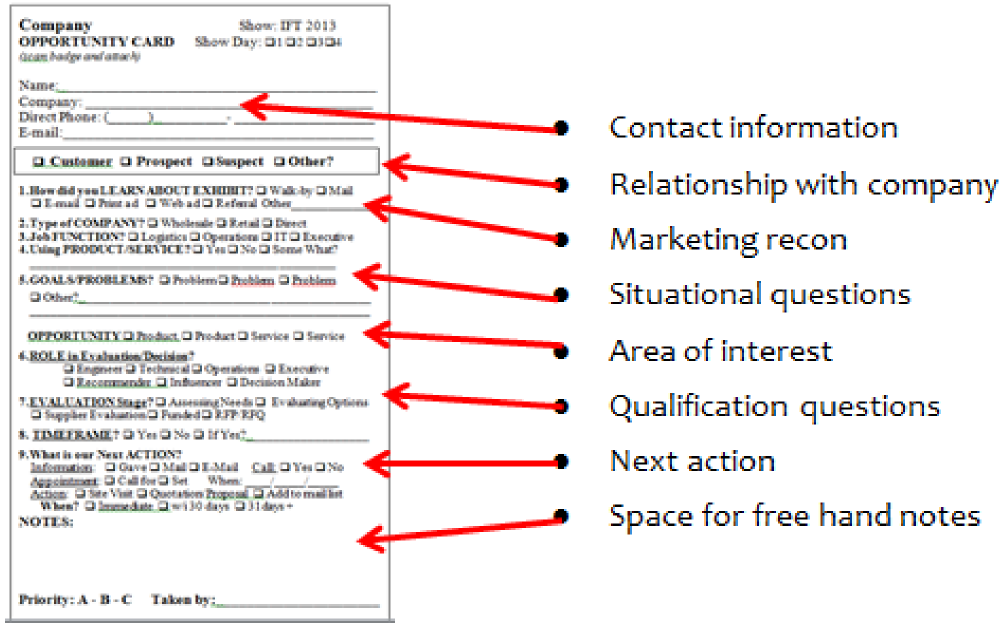
1. Communicate how you are ___________________________________
2. Calculate and share your Cost Per Lead
3. Set three firm lead reporting dates
4. Consider contests to build accountability
5. Consider charging for leads to dealers/distributors and independent reps who don't follow-up or report

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

How to Develop an Opportunity Card



Official Show Lead Retrieval Vendor

CompuSystems

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 celluar/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

Optometry's Meeting® 2016

June 30– July 2, 2016 • Boston Convention & Exhibition Center • Boston, MA

Packages	05/02/16 EARLY BIRD	05/17/16 ADVANCE	STANDARD	QTY	TOTAL
CompuLEAD Smart App *3 User Activation* (115) • Custom qualifiers and surveys • 15 pieces of literature (15 PDFs, 5 MB each) • 5 links to videos	$570	$610	$655	____	$______
CompuLEAD Smart *Badge Scanner* (114) • Custom qualifiers and surveys • Wireless printer • Delivery, setup and in-booth training • 15 pieces of literature (15 PDFs, 5 MB each) • 5 Links to videos	$595	$660	$745	____	$______
CompuLEAD Smart App *Unlimited User Activations* (116) Best Value • Custom qualifiers and surveys • 15 pieces of literature (15 PDFs, 5 MB each) • 5 links to videos	$905	$940	$990	____	$______
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	☐	$______
Delivery, Setup and In-Booth Training *For Mobile Plus* (08)	+$95	+$110	+$130	☐	$______

Payment

Contact Name/Title ______ Company Name ______ Booth # (Required) ______

Address ______

City ______ State ______ Zip Code ______ Country ______

Phone ______ Onsite Cell ______ Fax ______

Email ______ Alternate Email (to receive leads post-show) ______

Credit card deposit required for all rentals. Order will appear as LEAD RETRIEVAL on credit card statment.
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.

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No refunds on CompuLEAD Smart.

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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
   - 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. ____

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- Exhibitor Success & ROI Center:
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