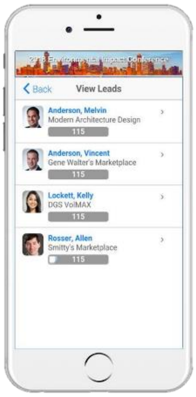
Introduction

Lead Management is a broad term that covers how leads (sales prospects) are collected at tradeshows and exhibitions, and how they're stored and used.

What's the difference between lead retrieval and lead management?

- Lead retrieval refers to the capture/collection of leads. This can be done using an iPhone, iPad, or Android smart phone or tablet.
- Lead management is the whole process (collection, processing and organising that data to maximize follow up sales).

Introducing Lead Management



When a visitor arrives at your stand, you can scan their QR code (displayed on their name badge or in the attendee app) to instantly capture their name, company, contact details, and other information.

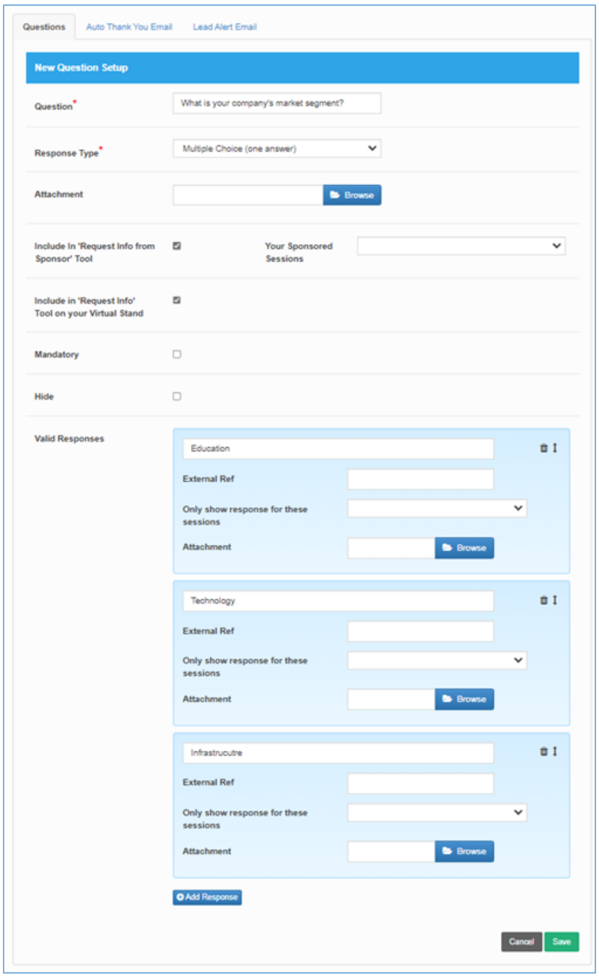
Exhibitor Lead Management also offers:

- **Custom profile or marketing questions** to ask during the lead collection process. You can write and use your own custom profile questions.
- **Automated thank you emails** that are sent to the attendee immediately after they visit your stand.
- **PDF or other document attachments** included in the thank you email – perfect for 'show special' offers or other marketing materials.
- **Alert emails** including attendee details sent automatically to others (e.g. your sales team).
- **Geographic lead-distribution displays** on a world map (Exhibitor Portal).
- **Lead details export** to a spreadsheet e.g. to import into your CRM or use as part of your follow-up process.

Self-Manage via the Exhibitor Portal

You can self-manage Lead Management directly in the [Show Exhibitor Portal](). Your team contact will open the Exhibitor Portal directly and set up Lead Management details.

Lead Setup - Questions



This is where you can create the profile questions for your staff to ask each visitor. Staff working on the booth/stand use their attendee app to ask the questions and submit the data for you to retrieve later. You can create your own list of profile questions.

Selecting **Add New Question** will let you create questions with the following options:

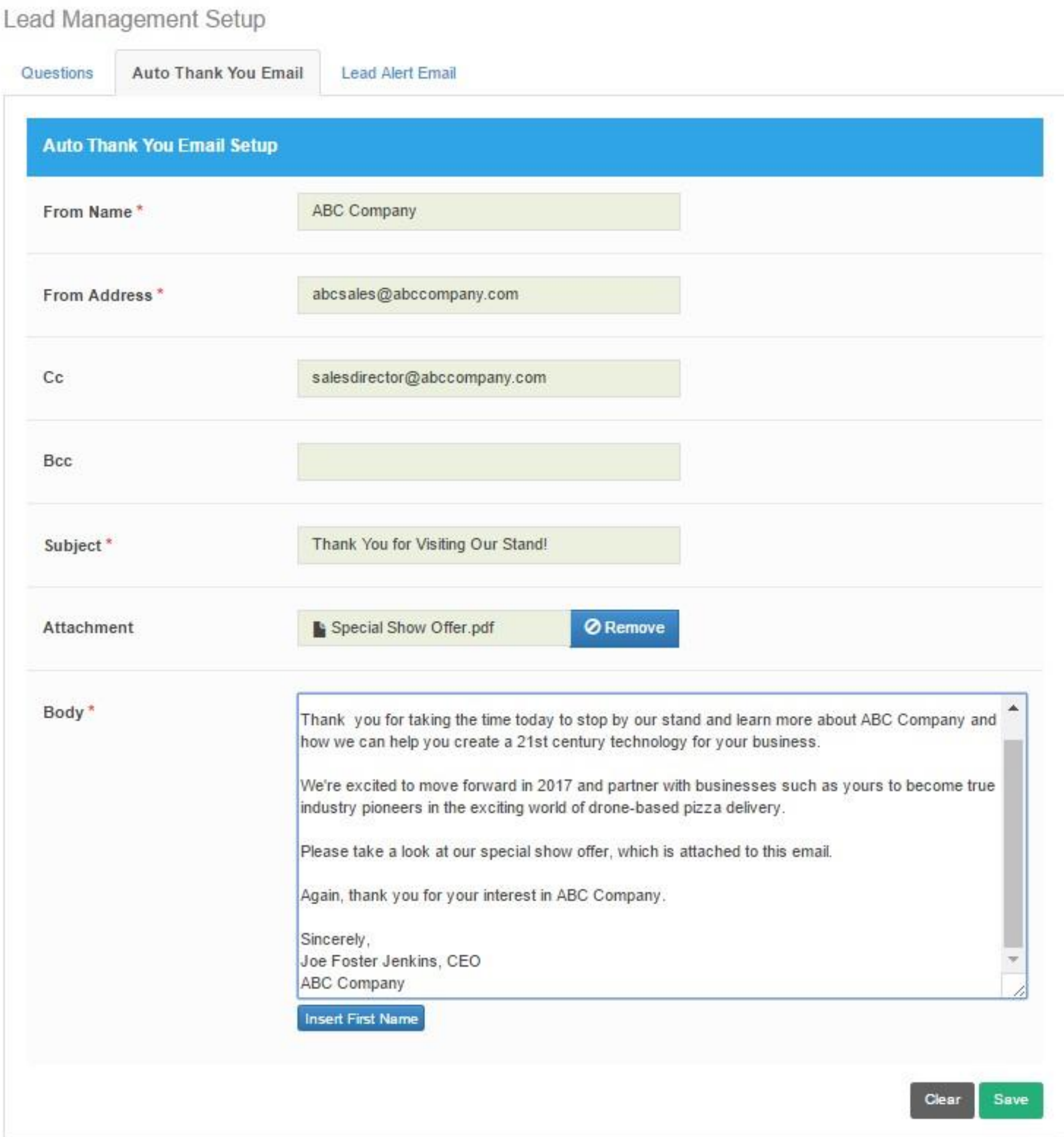
- **Question** - the actual text of the question, such as "Are you researching or ready to purchase?"
- **Response Type** -Available response types are:
    - Multiple Choice (one answer)
    - Multiple Choice (one or more answers)
    - Single Textbox
    - Comment Box
    - Rating 1-5
    - Yes / No
    - True / False
    - Number
    - Date
- **Mandatory** – this question should be answered by all leads
- **Hide**– temporarily disable, or hide this question from the Lead Management function

Auto Thank You Email

You can set up an email to automatically go to each registered visitor to your stand immediately after their details and answers to questions have been submitted.

Options include:

- **From Name and Address**
- **CC and BCC**
- **Subject**
- **Attachment** - attach a PDF document with special offers or other marketing messages
- **Body** - merge in the first name of the attendee visiting their stand for added personalization.

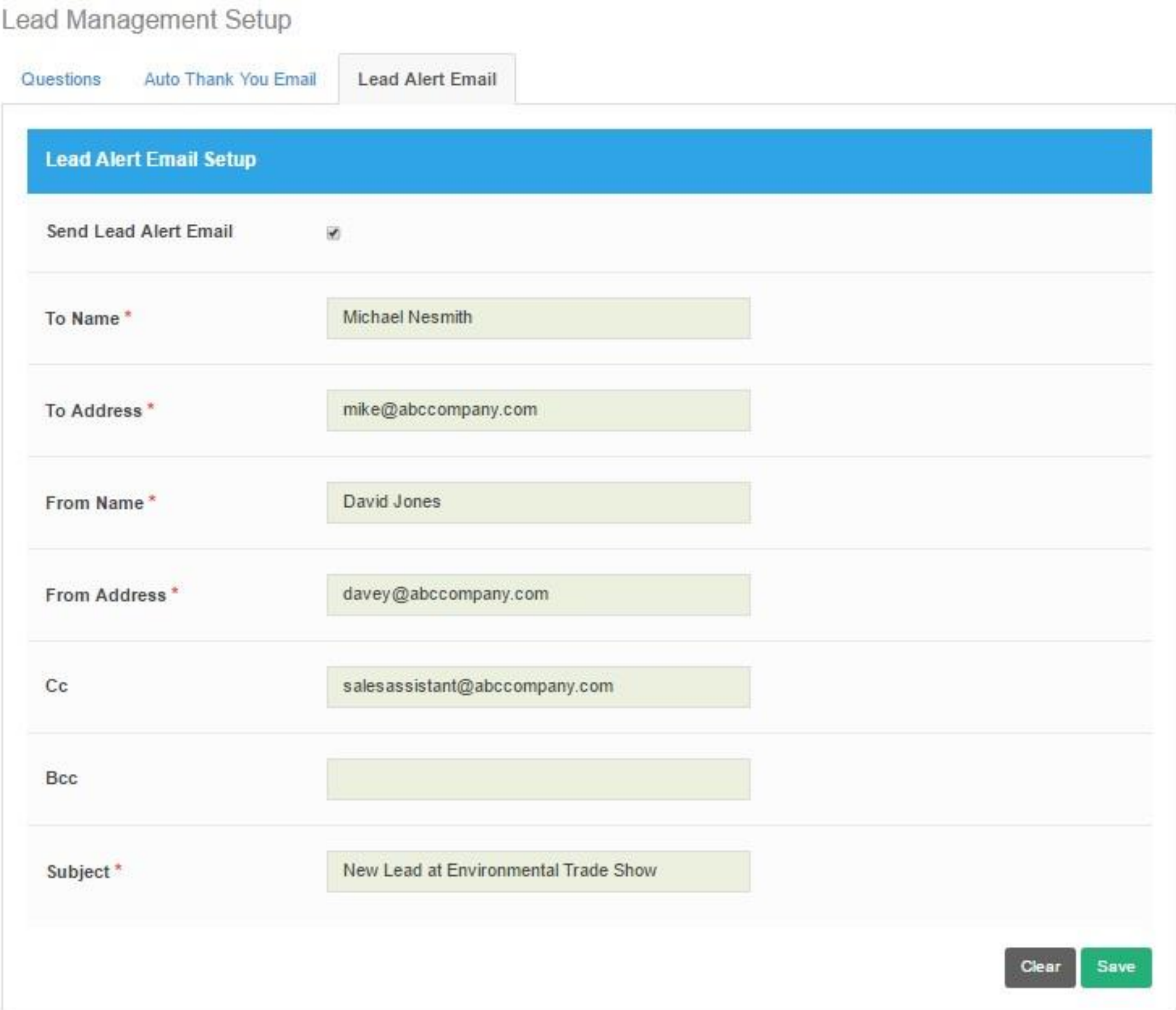


Lead Alert Email

You can send an email to any of your staff (for example, the sales manager at the home office or a team member at the exhibition).

Options include:

- **Send Lead Alert Email -** check this box to confirm you want to send Lead Alert Emails
- **To Name and Address**
- **From Name and From Address**
- **CC and BCC**
- **Subject**



Lead management in the Attendee App

Your booth staff can use the Attendee App to scan leads and enter answers to profile questions.

Scan Leads and View Leads options are only visible if you're a registered exhibitor on a stand with Lead Management enabled.

View Leads is only visible if you're the main contact.

Lead Management – Step-by-step

Step 1 – Log in to the Exhibition Portal

Create your profile questions and set up your email(s) to thank visitors and/or alert your sales teams whenever a lead is scanned, and answers are submitted. (You can also decide to skip the question/answer step, and just submit the attendee's information once they've agreed to this.)

Step 2 – Booth staff log in to the Attendee App

Stand personnel can use the same login name and password for the primary contact who purchased the stand. There's no limit to how many staff can do this but be aware they can overwrite each other's information. This may be fine, such as if you want the email sender addressed changed to match booth personnel, but it is important to flag.

Step 3 – Selecting 'Scan Leads'

This puts the staff member's attendee app into scan mode, so it is ready to either scan a QR code or find the attendee's name using the search function.

Step 4 - Scanning the Attendee's QR code

Scan Lead uses your device's camera to scan the attendee's QR code when they visit your stand. The code will be on their name badge or on their app. You can also search for their name.

Step 5 - Submitting answers to profile questions

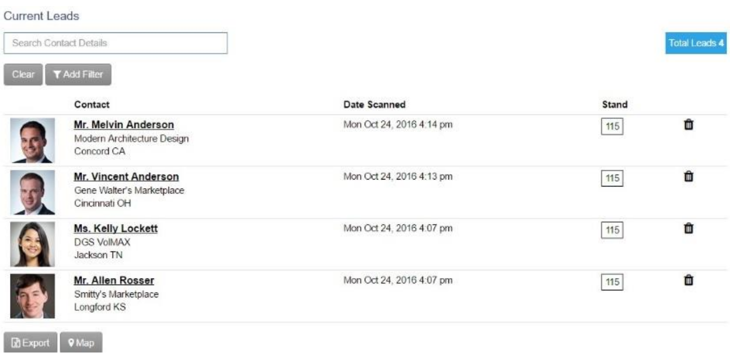
Once the attendee's details are displayed on screen, profile questions can be asked. When the submit button is pressed, the lead details are collected and if enabled, the thank-you email and/or lead alert email will be sent.

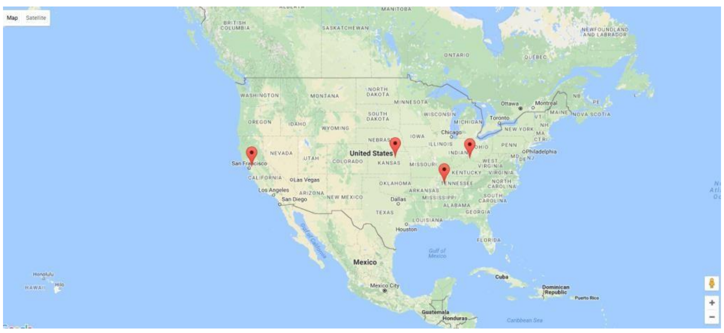
Step 6 - Reviewing collected leads

After the exhibition (or during), you can see your collected leads by selecting **View Leads from the Attendee App** or **Exhibitor Portal.** In the portal, you can see a map showing where your visitors are from, and you can also export your leads to an Excel Spreadsheet for further follow-up.

Viewing Current Leads - Exhibitor Portal

The Exhibitor portal lets you see a list of leads collected at your stand.





Options include:

- **Attendee Detail** – click the name of each attendee to see a detailed view including responses to profile questions and date/time of visit.
- **Export** – generate a spreadsheet with all information collected.
- **Map** – see a map with geographical indicators of your stand visitors.