Present

Improving Tradeshow Lead Management for Higher Sales Conversion

Webinar Discussion Points

1. Key insights on tradeshow 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. Overview NCBA lead retrieval products.
7. How to create and use a tool to track lead goals.
8. Creating an easy to apply lead grading system.
9. Best practices for following-up.
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
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:

<table>
<thead>
<tr>
<th></th>
<th>Example</th>
<th>Participant</th>
</tr>
</thead>
<tbody>
<tr>
<td># of exhibiting hours</td>
<td>17</td>
<td>17</td>
</tr>
<tr>
<td># of booth staff*</td>
<td>x 2</td>
<td>x _________</td>
</tr>
<tr>
<td>Total staff hours</td>
<td>34</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>136</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>34</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 __________to the next action are critical leverage points to improve lead quality…

➢ Ask and ye shall receive!

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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 _________ post-show 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
Official Show Lead Retrieval Vendor

For Assistance Contact:
(301) 576-3093 or expoleads@cstrategy.com

Order form:

EXPODemand Lead Retrieval Ensures Exhibiting Success
EXPODemand Lead Retrieval scanners capture complete contact and demographic information ideal for identifying your top prospects. Make your exhibiting efforts pay off with a small investment that will yield huge returns.

EXPOLeads
Reduce your carbon footprint STOP collecting business cards

EXPO LRS Mobile
- Quickly scan attendee badges
- Compact and ergonomic
- Reads up to 8,000 scans
- Includes standard lead qualifiers (custom are extra)
- Leads contain full contact and demographic information

EXPO LRS Premier
Includes all the features of the EXPO LRS Mobile plus:
- Full color display
- Ability to type in textform notes
- Store leads on personal USB drive

EXPO LRS Sidekick
- View & sort leads anytime
- Plugs into your laptop
- Works with LRS Mobile
- Add custom notes easily

EXPO LRS Mobile Connect
- Scan or type in attendee ID
- Review, add notes, qualifier
- Fill out extended surveys
- Real-time leads list

Leads are also available 1 business day post-event at www.expodemand.com at no additional charge.
All scanner orders include onsite & post show customer support.

EXPO LRS Rental Options

Custom Qualifiers
- Quality ideal sales prospects for your organization.
- Customize qualifying questions
- Identify customer interests
- Simplify your follow-up

Live Leads!
- Access lead files online in real-time as they are scanned by booth staff
- Monitor booth staff performance
- Follow up and quality leads immediately

Delivery/Support
- Save time onsite with Delivery, Support, Training and Pickup
- Saves time
- Staff training
- Ability to message onsite tech staff with scanner

Mailing Labels
- Quickly follow up with your sales leads. All sales leads are printed on labels and mailed to your office.
- Saves time & money
- Simplifies follow up process
- Receive native print file for future mailings

Save time and money by using lead retrieval services
Ordering Help: (301) 576-3093 or expoleads@cstrategy.com
TO ORDER: www.ExpoDemand.com or FAX (301) 560-8841
1. Not everyone will have a business card, but everyone will have a name badge to scan!

**Individual Equipment Rental:**

<table>
<thead>
<tr>
<th>Item</th>
<th>Early</th>
<th>Advance</th>
<th>On Site</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXPO LRS Mobile - Handheld &amp; Ergonomic</td>
<td>$225</td>
<td>$220</td>
<td>$220</td>
<td>$220</td>
</tr>
<tr>
<td>Bluetooth Thermal Printer - Add a robust printer to each unit</td>
<td>$75</td>
<td>$80</td>
<td>$95</td>
<td>$90</td>
</tr>
<tr>
<td>EXPO LRS Reader - Touchscreen with Keypad Full-color touchscreen scanner with a full on-the-fly recall allowing thrilled trade show attendees to select any scanning location. Leads are available online during and after the show.</td>
<td>$55</td>
<td>$60</td>
<td>$65</td>
<td>$60</td>
</tr>
<tr>
<td>Bluetooth Thermal Printer - Add a robust printer to each unit</td>
<td>$75</td>
<td>$80</td>
<td>$95</td>
<td>$90</td>
</tr>
<tr>
<td>EXPO LRS Sidestick - PC Solutions Use your laptop to capture leads using a USB scan session within the EXPO LRS software program and EXPO Mobile scanners. Leads can be saved instantly.</td>
<td>$25</td>
<td>$50</td>
<td>$75</td>
<td>$55</td>
</tr>
</tbody>
</table>

New! **EXPO LRS Connect for your iPhone or Android phone!**

| EXPO LRS Connect - Lead Retrieval on Your Mobile Devices Scan or type in attribute badge info for real-time lead information. LRS Connect features include custom qualifiers and surveys and the ability to work offline to avoid any scanning locations. Leads are available online during and after the show. | $25     | $50     | $75     | $55     |

Additional Features: Get a license for each smartphone in your booth.

2. Lead Retrieval Rental Packages - See product descriptions above

<table>
<thead>
<tr>
<th>Package Description</th>
<th>Early</th>
<th>Advance</th>
<th>On Site</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXPO LRS Mobile Package - LRS Scanner, Delivery/Pickup, Leads on Internet, Custom Qualifiers (without)</td>
<td>$592</td>
<td>$490</td>
<td>$580</td>
<td>$580</td>
</tr>
<tr>
<td>EXPO LRS Premier Package - LRS Scanner, Delivery/Pickup, Leads on Internet, Custom Qualifiers (optional)</td>
<td>$992</td>
<td>$992</td>
<td>$992</td>
<td>$992</td>
</tr>
<tr>
<td>EXPO LRS Sidestick Package - LRS Scanner, Delivery/Pickup, Leads on Internet, Custom Qualifiers (optional)</td>
<td>$1140</td>
<td>$1140</td>
<td>$1140</td>
<td>$1140</td>
</tr>
</tbody>
</table>

Company: ___________________________ Booth: __________

Questions? Contact Sara Capparelli
931-797-5003
sara.capparelli@cstrategi.com

ORDER ONLINE: www.expodemand.com

3. EXPO LRS Rental Options

<table>
<thead>
<tr>
<th>Delivery/Pickup/Onsite Support</th>
<th>Early</th>
<th>Advance</th>
<th>On Site</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eliminates the need for the receptionist to answer the phone while the booth is unoccupied.</td>
<td>$75</td>
<td>$85</td>
<td>$95</td>
<td>$95</td>
</tr>
<tr>
<td>Lead Access to Leads in Real-Time The system provides for the access to the leads being scanned in the booth. You will be provided with a username/password granting access to a secure Internet portal to view the lead file.</td>
<td>$45</td>
<td>$55</td>
<td>$65</td>
<td>$65</td>
</tr>
<tr>
<td>1GB Flashdrive Takes home your sales leads immediately by entering a 1GB flashdrive.</td>
<td>$45</td>
<td>$55</td>
<td>$65</td>
<td>$65</td>
</tr>
</tbody>
</table>

1GB Flashdrive takes home your sales leads immediately by entering a 1GB flashdrive.

EXPO Mailin Labels In addition to your important leads, simplify with EXPO Mailin Labels. Your lead file is merged and printed on to post & stick labels and sent to your office.

<table>
<thead>
<tr>
<th>Mailin Labels</th>
<th>Early</th>
<th>Advance</th>
<th>On Site</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$125</td>
<td>$125</td>
<td>$125</td>
<td>$125</td>
<td>$125</td>
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How to Customize Your Capture Device and/or

Develop an Opportunity Card

Create & Use a Tool to Track Lead Goals
Develop an Easy-to-Apply Lead Grading System

<table>
<thead>
<tr>
<th>Lead Grade</th>
<th>Time Frame for Purchase</th>
<th>Budget Identified</th>
<th>Buying Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>A+</td>
<td>0 to 3 Months</td>
<td>Yes</td>
<td>Final Say/Specify</td>
</tr>
<tr>
<td>A</td>
<td>4 to 6 Months</td>
<td>Yes</td>
<td>Final Say/Specify</td>
</tr>
<tr>
<td>B+</td>
<td>7 to 9 Months</td>
<td>Yes</td>
<td>Recommend</td>
</tr>
<tr>
<td>B</td>
<td>10 to 12 Months</td>
<td>Yes</td>
<td>Recommend</td>
</tr>
<tr>
<td>C</td>
<td>More than 1 Year</td>
<td>No</td>
<td>No Role</td>
</tr>
</tbody>
</table>

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. Sets 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: Wednesday 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
What were the three most important ideas you learned in this webinar?

1. _____________________________________________________________
2. _____________________________________________________________
3. _____________________________________________________________

**NCBA Commitment to Exhibitor Education and Success**

- Exhibitor Success & ROI Center:
  - Live and re-playable webinars
  - “How-to” exhibiting article series
  - “Ask the Tradeshow Expert” email Q&A program

- Bookmark, Share and Access at: