

## Lead Management Critical Success Factor 4

If you're not writing orders or signing contracts at the show, and you expect to achieve a return on your exhibiting investment, it's critically important to understand that leads are the real product of the show.

At the top level, a lead can be defined as *"anybody you interact with in the exhibit and around the event that requires follow-up on your part, and that follow-up delivers value for your company"*.

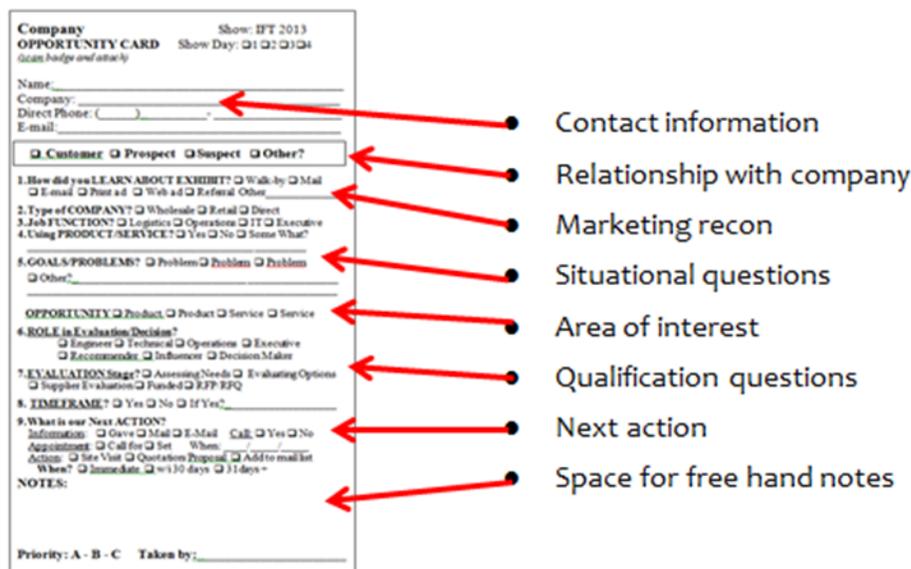
The key to generating QUALITY leads is to make sure that each lead includes four critical factors:

- ✓ Somebody from your company personally interacted with the person
- ✓ Key qualifying questions were asked
- ✓ Answers were captured or documented
- ✓ A next step was **identified** and **agreed** upon by the visitor

**Get together with your sales team and ask, "What information should we capture to help us better qualify and value the lead?"**

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?

**Organize this information into the natural flow** of conversation and create a lead qualification and capture device. Whether you use a paper form, or you rent and customize the show lead retrieval system, this will make a big difference in the quality of information you capture.



The image shows a sample paper lead form with several sections. Red arrows point from labels on the right to specific parts of the form:

- Contact information** points to the Name, Company, Direct Phone, and E-mail fields.
- Relationship with company** points to the "Customer, Prospect, Suspect, Other?" radio button options.
- Marketing recon** points to questions 1, 2, 3, and 4.
- Situational questions** points to question 5.
- Area of interest** points to question 6.
- Qualification questions** points to question 7.
- Next action** points to question 9.
- Space for free hand notes** points to the NOTES section.

The form itself contains the following text:

Company \_\_\_\_\_ Show: IFT 2013  
OPPORTUNITY CARD Show Day:  1  2  3  
*(Scan badge and attach)*  
Name: \_\_\_\_\_  
Company: \_\_\_\_\_  
Direct Phone: (\_\_\_\_) \_\_\_\_\_-\_\_\_\_\_  
E-mail: \_\_\_\_\_  
 Customer  Prospect  Suspect  Other?  
1. How did you LEARN ABOUT EXHIBIT?  Walk-by  Mail  E-mail  Print ad  Web ad  Referral Other \_\_\_\_\_  
2. Type of COMPANY?  Wholesale  Retail  Direct  
3. Job FUNCTION?  Logistics  Operations  IT  Executive  
4. Using PRODUCT/SERVICE?  Yes  No  Some What?  
5. GOALS/PROBLEMS?  Problem  Problem  Problem  
Other? \_\_\_\_\_  
6. OPPORTUNITY  Product  Product  Service  Service  
7. ROLE in Evaluation/Decision?  
 Engineer  Technical  Operations  Executive  
 Recommender  Influencer  Decision-Maker  
8. EVALUATION Stage?  Assessing Needs  Evaluating Options  
 Supplier Evaluation  Pended  RFP/RFQ  
9. TIMEFRAME?  Yes  No  If Yes? \_\_\_\_\_  
10. What is our Next ACTION?  
Information:  Give  Mail  E-Mail  Call  Yes  No  
Appointment:  Call for  Set When \_\_\_\_\_  
Action:  Site Visit  Quotation Request  Add to mail list  
When?  Immediate  <= 10 days  11 days +  
NOTES: \_\_\_\_\_  
Priority: A - B - C Taken by: \_\_\_\_\_

Sample paper lead form

**Train your booth staff** on asking the questions in the proper sequence, and using the capture device, before you get to the booth.

To get visitors to commit to the next step, **avoid assuming that they have interest**. Be sure to ask the visitor

- What their level of interest in your products is?
- What they think the your next step should be?

**Be ready to physically give them, or email them, follow-up information on the spot.**

Research has proven speed of response dramatically increases lead conversion rate.

**Develop your lead follow-up plan before coming to the show**, so you can follow-up quickly.

And finally, **do not give up too quickly on leads**. Your philosophy should be “any lead worth taking is worth following up on”, and that you’re going to stay in touch with each lead for as long as it takes. Be there when the buyer is ready to buy, not just when you’re ready to sell!

For more information on this topic, view the webinar replay: “**Power Factor 3: Managing Leads and Measuring Exhibiting Results: How to Improve Lead Quality, Sales Conversion and Measure Performance and ROI,**” available on the New Exhibitor Onboarding web page at [www.promatshow.com/exhibitors/onboarding.aspx](http://www.promatshow.com/exhibitors/onboarding.aspx).

Finally, please note we are providing new exhibitors with an E3 Exhibiting Effectiveness Evaluation. The purpose of this program is to 1) reinforce areas of effectiveness, and 2) identify potential areas that can be improved so your company gets more value and results. Between April 9th and 11th, a highly experienced tradeshow expert will visit your exhibit and observe your exhibit in action. They will not need to interrupt your booth activities during this process. However, the evaluator will be taking photos of your booth, which will only be used in a confidential report you’ll receive.

Shortly after the show, you will be emailed an Exhibiting Effectiveness Evaluation Report highlighting areas of effectiveness and identifying potential areas that can be improved so your company gets more value and results.

If you have questions, feel free to reach out to Greg Baer at [gbaer@mhi.org](mailto:gbaer@mhi.org).