Lead Collection: Tips and Best Practices

Holly Gosnell, Senior Exhibitor Services Account Manager at Convention Data Services
Discussion Points

• How will you collect leads at IMTS?
  • Choosing your device
  • Combining options

• Benefits of additional features

• Best Practices
  • Pre-show
  • Onsite best practices
  • Post-show
Where to start!

• What is lead retrieval and why you should use it.

• Which type or combination of devices are best for you?
  • Booth layout
  • Booth size
  • Number of staff
  • Number of products displayed
  • Experience of staff
  • Multiple booths?
Lead Retrieval Solutions at IMTS 2020
Connect App – Running on YOUR device

• Apple & Android compatible
• Real-time leads on portal
• Ability to customize
• Audio Notes
• Bluetooth Printer (Optional)

Benefits:
• Share leads within other installed apps
• Scan anywhere!
• Never miss a lead! Staff not sharing or waiting on device
Connect Plus Handheld – OUR device

- Wireless handheld
- Real-time leads on portal
- Ability to customize
- Audio Notes
- Internet/data included

Benefits:
- Everything included, use our device
- Nothing to install
Connect Elite PC – Software on YOUR Computer

- PC Software, we provide USB wired scanner
- Real-time leads on portal
- Ability to customize
- Lead Rating
- Bring your own printer
- Internet recommended

Benefits:
- Stationary device
- Full keyboard for note entry
Coming in 2020!

- Next Generation App

- New Features:
  - Complete redesign
  - Improved flow
  - Faster syncing and scanning
  - Share leads within apps
  - View attendee demographics on device
I chose my device, now what?

- Use the built-in tools
  - Qualifiers
    - 20 Standard
    - Custom Qualifiers (one screen)
    - Custom Survey (questions and answers)
  - Add Literature fulfillment
Custom Sales Qualifiers

• Benefits of Customization
  • Faster qualification at the time of the scan
  • All devices have same options
  • More efficient than typing notes
  • Filters easily in Excel
  • Faster follow up
  • Mandatory option
Literature Fulfillment

• Benefits of Literature Fulfillment
  • Send up to 20 PDF’s or videos
  • Customizable email
  • Follow up DURING the event
  • Literature sent captured in lead file

Dear Holly Gosnell,

Thank you for visiting our booth. Below are links to the product information you requested:

- Product A
- Product B

Sincerely,
ABC Company
www.abcompany.com
Portal Benefits

- Education Center
- How to Videos
- Task List
- Pre-show Set Up
- Manage licenses
- Manage devices
- Download leads – LIVE
Best Practices – Pre-show planning

• Set goals & develop plan
  • Who is responsible for lead management
  • Finalize customization and review with staff
  • Salesforce API available

• Develop a follow-up strategy

• Socialize your presence

• Leverage IMTS Passport to invite your customers and attendees

• Train and communicate your goals to staff

• Set up and install apps
Best Practices – Onsite

• Set up and train staff, don’t wait until opening morning
  • Review expectations
  • Practice scanning, qualification and note taking
  • Add additional apps if needed
• Monitor lead progress on your portal
• Use follow up options
  • Real time leads on portal
  • Literature fulfillment
  • Integration to IMTS Passport
• Review leads nightly & have staff enter missing data
Best Practices – Post-Show

• Download final lead file
• Review demographics
• Distribute leads to sales staff
• Timely follow-up is KEY
Contact Us!

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