Exhibitor Lead Management in EventsAir

> **<** Want to jump to a particular section? Use the contents tab to the right of this article

Introduction

[This article is designed for Exhibitors]
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.
- Lead management is the whole process (collection, processing and organizing that data to maximize follow up sales).

Introducing Lead Management in EventsAir

EventsAir offers a robust technology platform that allows exhibitors to manage leads effectively, from the very first encounter.

When a visitor arrives at a stand, you can scan their bar code or QR code (from an app or name badge) to instantly capture their name, company, contact details, and other information.

Exhibitor Lead Management in EventsAir 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.
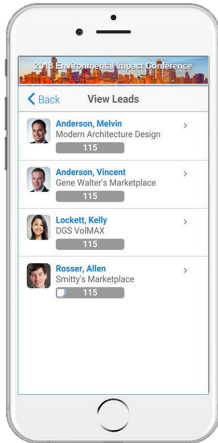
Integrated lead management

A traditional lead retrieval arrangement for a meeting or event involves the following steps:

- Locate and contract with a third-party lead retrieval company

- Go via the third-party company to rent scanners, printers and/or lead retrieval services using a manual process
- Meeting planners need to export registration details into a separate database to be used by the lead retrieval service (creating problems for late registrations and last-minute name changes and cancellations).

The EventsAir App Store and cloud environment offers an integrated approach:

– The Lead Management technology is included in the EventsAir App Store

– All data remains in the primary EventsAir database, eliminating challenges with data integrity and accuracy

– Lead retrieval scanning is done on any iPhone, iPad, or Android smart phone or tablet — no equipment rental is needed

– Advanced services such as profile questions, automated thank you emails, lead alert emails and data exporting are all managed quickly and easily from standard browsers and smart devices.

Self-Manage via the Exhibitor Portal

You can self-manage Lead Management directly in the Exhibitor Portal. Your team contact will open the Exhibitor Portal directly and set up Lead Management details (provided your stand includes Lead Management services — if not, please contact the event organizer to upgrade).

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, and to make this process even easier, some may have already been set up by the event organizer.

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

- **Question** – the actual text of the question, such as "Are you just doing research or ready to purchase?"
- **Response Type** – what type of responses you wish to display. 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 [this box may have already been checked by your event organizer]
- **Hide** — temporarily disable, or hide this question from the Lead Management function

Auto Thank You Email

If your event organizer has enabled **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 Management Setup

Questions   Auto Thank You Email   Lead Alert Email

Auto Thank You Email Setup

From Name *	ABC Company
From Address *	abcsales@abccompany.com
Cc	salesdirector@abccompany.com
Bcc	
Subject *	Thank You for Visiting Our Stand!
Attachment	📄 Special Show Offer.pdf ⊘ Remove

Body *

Thank you for taking the time today to stop by our stand and learn more about ABC Company and how we can help you create a 21st century technology for your business.

We're excited to move forward in 2017 and partner with businesses such as yours to become true industry pioneers in the exciting world of drone-based pizza delivery.

Please take a look at our special show offer, which is attached to this email.

Again, thank you for your interest in ABC Company.

Sincerely,
Joe Foster Jenkins, CEO
ABC Company

Insert First Name

Clear   Save

Lead Alert Email

If your event organizer has enabled **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 from the Attendee App
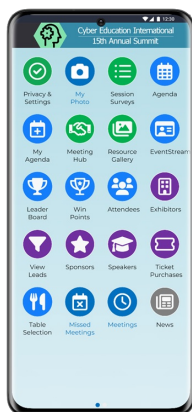
Your booth staff can use a standard Attendee App or a dedicated Attendee App created just for exhibitors to scan leads and enter answers to profile questions.

Either way, the Scan Leads and View Leads options are only visible if you're an exhibitor (or assigned team member) 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's important to flag.

Step 3 — Selecting 'Scan Leads'

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

Step 4 – Scanning the Attendee's QR code/bar code (or using the name search function)

Scan Lead uses your device's camera to scan the attendee's bar code or QR code when they visit your stand. The code may 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 even during it), 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 in the Exhibitor Portal

The Exhibitor portal lets you see (from any location) a list of leads collected at your stand.

Current Leads

Search Contact Details

Total Leads 4

Clear   ▼ Add Filter

	Contact	Date Scanned	Stand	
	Mr. Melvin Anderson Modern Architecture Design Concord CA	Mon Oct 24, 2016 4:14 pm	115	🗑
	Mr. Vincent Anderson Gene Walter's Marketplace Cincinnati OH	Mon Oct 24, 2016 4:13 pm	115	🗑
	Ms. Kelly Lockett DGS VolMAX Jackson TN	Mon Oct 24, 2016 4:07 pm	115	🗑
	Mr. Allen Rosser Smitty's Marketplace Longford KS	Mon Oct 24, 2016 4:07 pm	115	🗑

📄 Export   📍 Map

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 geographic indicators for every visitor to your stand.