EXHIBITION LEAD MANAGEMENT

In the lead-up to the conference and onsite, you can use the conference's app to capture attendee details. Using our EventsAIR software, you can manage the entire lead management process, including collecting, processing, and organising that data to maximize follow-up sales.

Our software 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 QR code (from the app or name badge) to instantly capture their name, company, contact details, and other information.

Exhibitor lead management via the conference app offers:

- Custom profile or marketing questions to ask during the lead collection process. You can create 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).
- Lead details export to a spreadsheet e.g. to import into your CRM or use as part of your follow-up process.

SETUP

Self-manage via the Exhibitor Portal

You can self-manage lead management directly in the Exhibitor Portal via the **Lead management** tab. Under **Setup**, you can:

Lead questions

This is where you can create the profile questions for your staff to ask each visitor. Staff working on the stand use the conference 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 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

Tip: If you want to identify who scanned an attendee, include a multiple-choice question for all staff.

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 – Insert the first name of the attendee visiting their stand for added personalisation.

Lead alert email

You can send an email to any of your staff (for example, the sales manager at the Head 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 – 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 alert your sales teams when a lead is scanned and answers are submitted.

Step 2 – Stand staff log in to the conference app

One week before the conference, stand staff will receive an email with login details to access the conference app. Ensure they download and log in before arriving onsite at the conference. If they are unable to see 'Scan lead' or 'View leads,' please contact Tiffany Johnson.

IMPORTANT: DO NOT USE MEETING HUB TO SCAN LEADS AS WE WILL BE UNABLE TO SUPPLY YOU WITH A DETAILED REPORT.

Step 3 – Selecting 'Scan leads'

Open the conference app and select **'Scan lead'.** This puts it into scan mode, ready to scan the QR code on an attendee's name badge.

Step 4 - Submitting answers to profile questions

Once the attendee's details are displayed on screen, profile questions can be asked/completed. 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 5 - Reviewing collected leads

During the conference, stand staff can view basic attendee details (name and organisation) by selecting **'View leads'** from the conference app.

In the Exhibition Portal, you can access comprehensive details (all staff scans are pooled together), showing where your visitors are from, and you can also export your leads to an excel spreadsheet for further follow-up.

If stand staff need access to view an attendee's full details or wish to modify the setup of the questions onsite, the Conference Innovators team will direct them back to you.