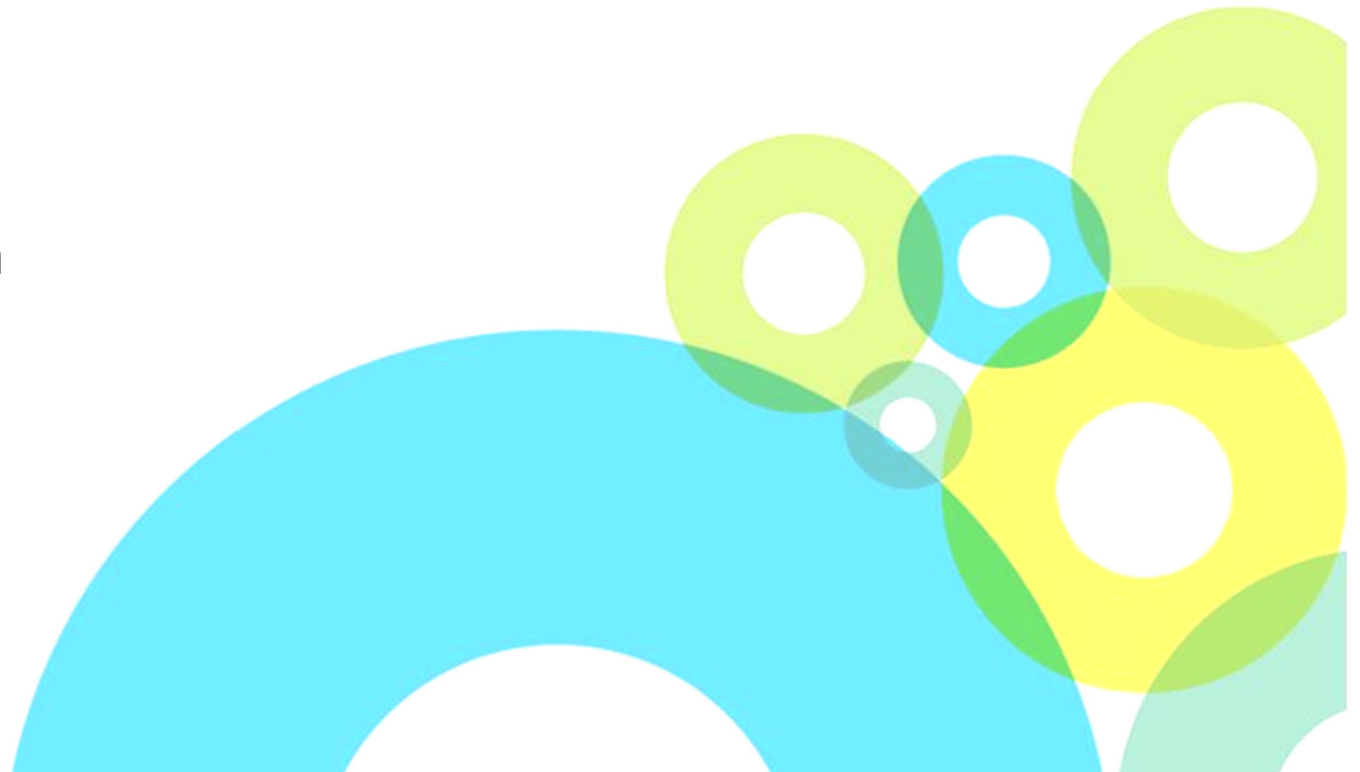


# Lead Retrieval and Lead Management

**Jamie Vaughan**  
**So VisIT**



***"80% of leads gathered at a show are not followed up."***

-Centre for Exhibition Industry Research ([ceir.org](http://ceir.org))

# Why ?

When you consider:-

- Over 80% of exhibition attendees have an influence on purchasing decisions at show and 55% have buying plans as a result of attending.
- Exhibitions are the second most effective means of generating sales leads after companies' own websites
- 91% of decision-makers find exhibitions an 'extremely useful source of purchasing information'.

***"80% of leads gathered at a show are not followed up."***

-Centre for Exhibition Industry Research ([ceir.org](http://ceir.org))

# Lead collection *(What are the options)*



Goldfish bowl full of business cards



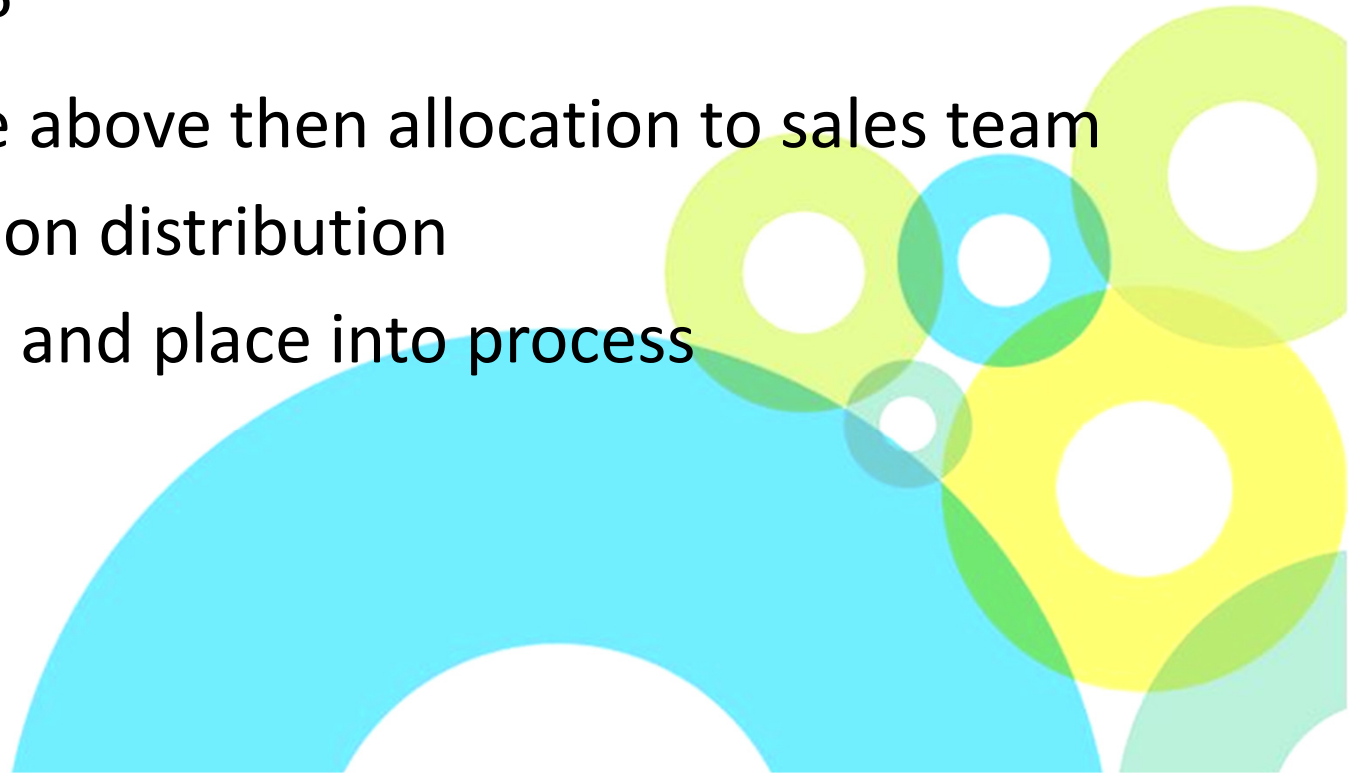
Back of a fag packet



All manually collected information needs inputting

# Lead Management (the problems)

- Return to the office, play catch up
- Dig out shows leads and try to organise
- Leads need to be separated into style, product, region, type?
- Based on the above then allocation to sales team
- After allocation distribution
- Sales receive and place into process



# Ideal Solution

In the ideal world every exhibitor should be able to collect leads at the event electronically, without keying in names and address's, be able to add individual notes or at least add the next action or product of interest. These leads should be available in a system that gives you the ability to distribute to your sales teams, the same day as well as provide full visibility of the lead journey through to sale or not with financial reporting (ROI).

# visit connect

intelligent lead management



# What is Visit Connect?

- Revolutionary new lead collection, distribution and management platform
- Written for exhibitors
- Integrated with SO VisIT pre-registration data base
- Software as a Service



# Collecting Leads

- Collect leads with Datapens



- Collect leads in real time within the application



# Collect leads with Datapens

- Datapens scan the barcode on a visitors badge to generate a lead.



- Visit Connect also supports “tags” to allow exhibitors to assign actions or groupings to leads as they are collected with Datapens.







# Collecting Leads with Datapens

- Exhibitors can create a barcode sheet within the application to print out and use at the show.

Edit tags		
Tag	Barcode	Delete
Hot Lead (Call within 5 days)	P01	<input type="checkbox"/>
Good Lead (Call within 10 days)	P02	<input type="checkbox"/>
Lead (Call within 15 days)	P03	<input type="checkbox"/>
Information Request Product A (by email)	P04	<input type="checkbox"/>
Information Request Product A (by post)	P05	<input type="checkbox"/>
Information Request Product B (by email)	P06	<input type="checkbox"/>
Information Request Product B (by post)	P07	<input type="checkbox"/>
Pass to Partner A	P08	<input type="checkbox"/>
Pass to Partner B	P09	<input type="checkbox"/>
Existing Customer Upgrade	P11	<input type="checkbox"/>
Existing Customer Support	P12	<input type="checkbox"/>
Complaint	P13	<input type="checkbox"/>
Potential New partner	P14	<input type="checkbox"/>
Potential New Supplier	P15	<input type="checkbox"/>

visitconnect  
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## Action Tags for Kings Trust Ltd

	Hot Lead (Call within 5 days)(P01)	
	Good Lead (Call within 10 days)(P02)	
	Lead (Call within 15 days)(P03)	
	Information Request Product A (by email)(P04)	
	Information Request Product A (by post)(P05)	
	Information Request Product B (by email)(P06)	




# Collecting Leads with Datapens

- Tags are assigned to visitors by scanning the visitor badge and then scanning a number of barcodes from the sheet.



visitconnect  
intelligent lead management

## Action Tags for Kings Trust Ltd

	Hot Lead (Call within 5 days)(P01)	
	Good Lead (Call within 10 days)(P02)	
	Lead (Call within 15 days)(P03)	
	Information Request Product A (by email)(P04)	
	Information Request Product A (by post)(P05)	
	Information Request Product B (by email)(P06)	

# Collecting Leads with Visit Connect Live

- Visit Connect live allows exhibitors to collect leads in real-time from within the application.



# Collecting Leads with Visit Connect Live

- Exhibitors enter a visitors badge number and pin

 **Add a Real Time Lead**

Event Bob: Enter a Badge Number and Pin

Badge Number:

Pin:



- The system verifies the combination and retrieves the visitor's information from our systems, real-time. It is then added to the exhibitor's leads.

Visitor details

**Title:** Mr

**FirstName:** Rere

**Surname:** Rere

**Company:** Expo1234

**Address1:** 10 Woodshots Meadow

**Town:** Watford

**Postcode:** WD18 8YX

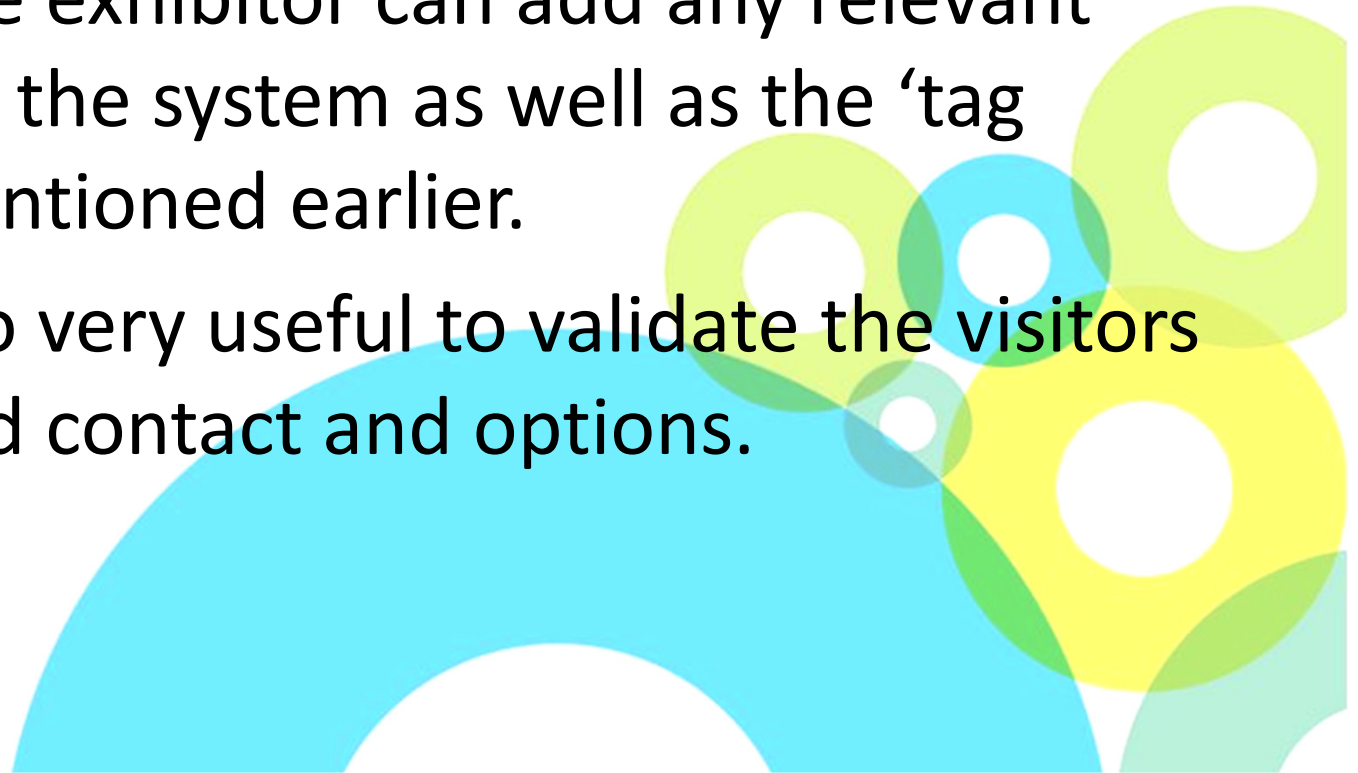
**Country:** United Kingdom

**Job:** Rerer



# Collecting Leads with Visit Connect Live

- The Exhibitor can then edit the retrieved record or collect another.
- In edit, the exhibitor can add any relevant notes into the system as well as the 'tag codes' mentioned earlier.
- This is also very useful to validate the visitors details and contact and options.



# Distributing Leads

- Assign leads to users

The screenshot displays a CRM interface with a table of leads and an open dialog box for assigning multiple leads. The table has columns for 'surname', 'company', 'Company', 'User', and 'Stage'. The dialog box, titled 'Assign Multiple Leads', has tabs for 'Existing User' and 'New User'. It shows 'Assign 8 leads to existing user:' with a 'Company' dropdown set to 'Sales Team A' and a 'User' dropdown set to 'Gorden Freeman'. 'Assign' and 'Cancel' buttons are at the bottom.

checkbox	star	surname	company	Company	User	Stage
<input checked="" type="checkbox"/>	★	Griffiths	The Reef	Sales T		
<input checked="" type="checkbox"/>	★	Mortgage	Bushwood Country Club	Sales T		
<input checked="" type="checkbox"/>	★	Anderson	Consumer Recreation Services	Sales T		
<input checked="" type="checkbox"/>	★	Davies	IPS	Sales T		
<input checked="" type="checkbox"/>	★	Bowman	Lacuna Inc.	Sales T		
<input checked="" type="checkbox"/>	★	Jones	H.A.L. Labs	Sales T		
<input checked="" type="checkbox"/>	★	Robinson	Rekall, Inc.	Sales T		
<input checked="" type="checkbox"/>	★	Davies	The Dharma Initiative	Sales T		
<input type="checkbox"/>	★	Jones	WKRP	Sales T		
<input type="checkbox"/>	★	Mathews	Lomax Industries	Sales T		
<input type="checkbox"/>	★	Lead	Beacon	Sales T		
<input type="checkbox"/>	★	Woods	Longflash	Sales T		
<input type="checkbox"/>	★	Patel	Dikee	Sales Team A	Gorden Freeman	1
<input type="checkbox"/>	★	Bradford	Tacky Data	Sales Team A	Alex Vance	1

# Manage Leads

- Set event targets and monitor performance

Settings > Set Targets

**Targets**

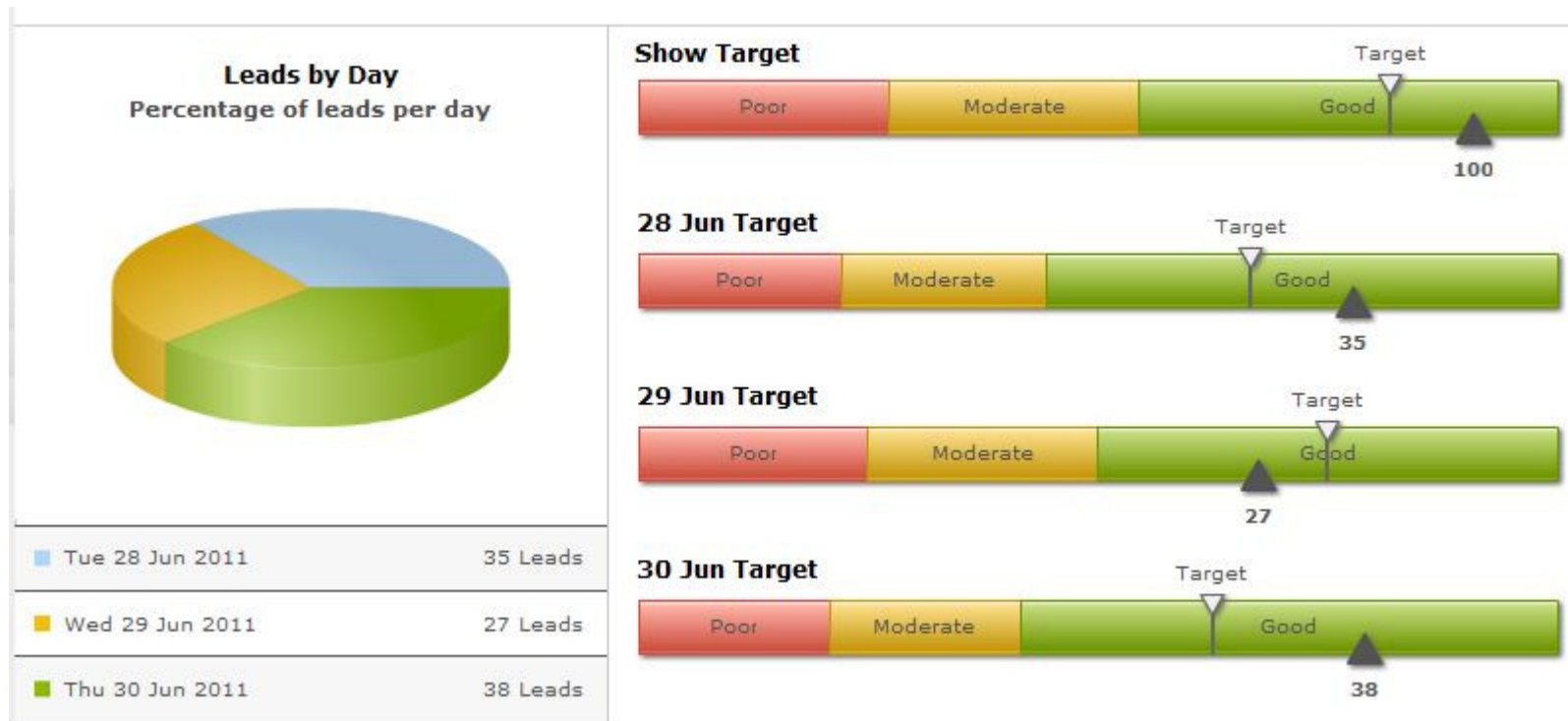
You can fill in the boxes below to set targets for then number of leads you are aiming to generate at the show. You can then use the analysis section to keep track of your performance.

Period	Target	Moderate Performance	Poor performance
Thu 30 Jun 2011	<input type="text" value="30"/>	<input type="text" value="20"/>	<input type="text" value="10"/>
Wed 29 Jun 2011	<input type="text" value="30"/>	<input type="text" value="20"/>	<input type="text" value="10"/>
Tue 28 Jun 2011	<input type="text" value="30"/>	<input type="text" value="20"/>	<input type="text" value="10"/>
All Show	<input type="text" value="90"/>	<input type="text" value="60"/>	<input type="text" value="30"/>

Save Targets

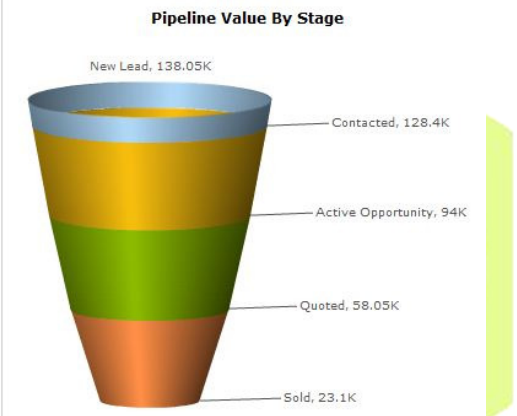
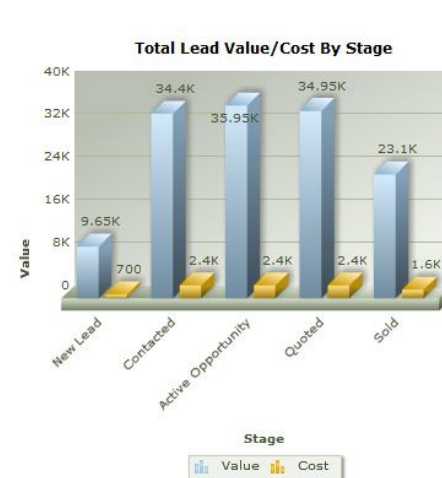
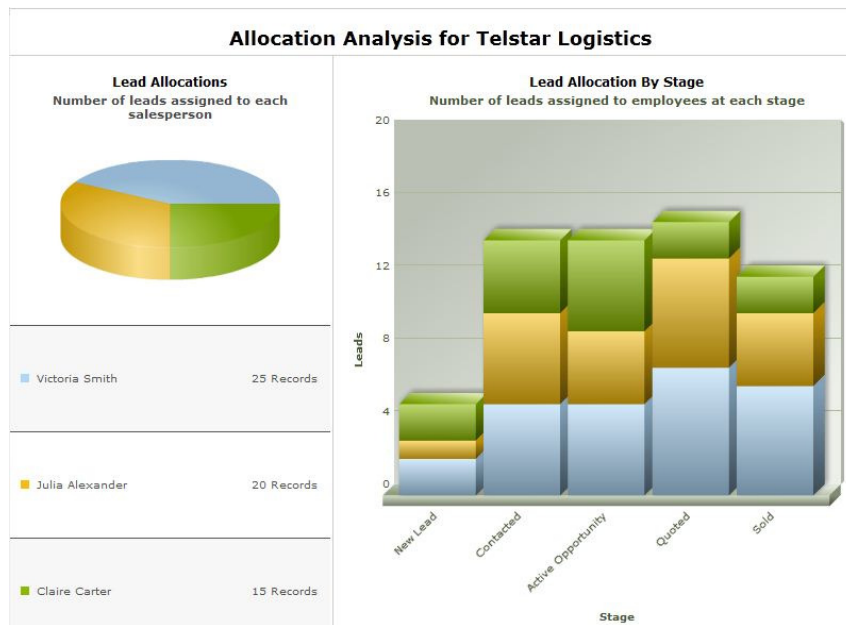
# Manage Leads

- Set event targets and monitor performance



# Manage Leads

- Monitor sales team performance



- Monitor lead allocation, pipeline and ROI

# Download Leads

- Leads can be filtered and then downloaded in spreadsheet format

The screenshot displays a CRM interface with a 'Filters' panel on the left and a 'Download Leads' dialog box in the center. The filters include Status (Active, Hold, Dead), Flag (Fresh, Warning, Overdue, All), Viewed (Viewed, Unviewed), Stages (1-5), Action Code (All), Upload Date Start/End, Leads to Display (25), Companies (Please select a company), Users (Please select a user(s)), and Tags (Assign a tag to this lead...). The dialog box contains the text: 'You download is now ready, click the button to download your export:' and a 'Download Now' button. Below the filters is a table of leads with columns for surname, company, Company, User, and Stage.

+	+	+	+	+		
☐	★	★	★	★		
☐	★	★	★	★		
☐	★	★	★	★		
☐	★	Woods	Longflash	Sales Team A	Gorden Freeman	1
☐	★	Patel	Dikey	Sales Team A	Gorden Freeman	1
☐	★	Harrison	Northern Group	Sales Team A	Gorden Freeman	2

Leads 1 to 3 of 3  
Select: All, None

Assign Selected Leads Save Assignments Move to Dead Leads Download Leads

