



Present

State-of-the-Art Lead Management

How to Quickly Improve Lead Quality and Sales Conversion

Participant Learning Objectives

By the end of this webcast, you will...

1. Analyze your current lead management practices.
2. Gain important insights on lead management
3. Learn about the four phases of a “closed-loop” lead management system.
4. Overview CompuSystems lead retrieval system options.
5. Learn a series of practices to improve your lead management process.

1. How important are leads to the success of your exhibit?
 Very Important Somewhat Not Important
2. Do you set specific lead goals Yes Sometimes Rarely
3. How do you capture leads?
4. Do you know what becomes of your leads? Yes Some No/Not all

Key Insights on Lead Management

- For most exhibitors, the _____ product of a tradeshow is leads.
- ____% of leads are never followed-up. CEIR Research
- ____% of leads are never followed-up.
- ____% of buyers receive information after they have made a buying decision.
- The problem starts with _____ process.
- Most exhibitors don't know what becomes of their show leads.

Why is Lead Management a Problem?

1. Perceived quality of tradeshow leads
2. Marketing and Sales _____
3. Lack of exhibit staff training
 - ____% of booth staff have never received one single hour of professional training on how to work an exhibit
4. Lack of _____ on what a lead really is
5. Lack of a “Closed-Loop” lead management system

Practices to Improve Lead Quality

1. _____ and train your staff on what is and isn't a lead:

2. Calculate the Real Cost of Poor Lead Management:

1. Cost Per Lead:

● Total Show Spend/# Leads

● \$ _____ / _____ Leads = \$ _____ Cost Per Lead

2. Lost Revenue Opportunity:

● Average Sale Amount x # Lead Conversion %

● \$ _____ x (_____ leads x _____ % = _____) = \$ _____

3. Impact on Brand:

● *How does not following up impact your company's brand perceptions in the market?*

3. Focus on the Four Phases of Closed-Loop Lead Management

1. Capture high _____ leads

2. Efficiently _____ leads to the right people for fast follow-up

3. Effectively _____ to convert leads to purchasing action

4. Provide an easy method for lead recipients to _____ progress and sales conversion

4. Set _____ lead goals

- # of exhibiting hours 25
- # of booth staff x _____
- total staff hours _____
- interactions/hr/staffer x _____
- Interaction capacity _____
- % of visitors to lead _____
- Lead goal _____

5. Ask _____ what information they need to capture to qualify leads.

- Email Address
- Project/Application/Need
- Requirements/Specifications
- Product Interest & Level
- Buying Role
- Evaluation and/or Decision Team
- Competitors
- Budget
- Timeframe
- Next Action Step
- Other?

6. Evaluate & Improve Your Lead Capture Device

- *How do you capture leads now?*
 - Collect business cards
 - Use a paper lead form
 - Rent the show system or Rent and customize the show system
 - Own a universal lead capture system
 - Smartphone technology
- Considerations in Creating Effective Capture Devices
 - Number of staff
 - Size of booth
 - Efficiency
 - Portability
 - Accuracy
 - Security
 - Cost

AAOS Official Show Lead Retrieval Vendor

COMPUSYSTEMS **The TOTAL Lead Management Solution**

Visit www.compusystems.com/order to learn more and to order CompuLEAD lead retrieval services. Exhibitor Services Representatives are available to answer questions at 708.786.5565.

Devices:

CompuLead Mobile

CompuLead Mobile Elite

CompuLead Desktop II

CompuLead Desktop Pro

CompuLead Smart

Post-show Buyer Connect

Early-bird Pricing Deadline is 9/2/2011

7. Develop an Easy-to-Apply Lead Grading Systems

Lead Grade	Time Frame for Purchase	Budget Identified	Buying Role
A+	0 to 3 Months	Yes	Final Say/Specify
A	4 to 6 Months	Yes	Final Say/Specify
B+	7 to 9 Months	Yes	Final Say/Specify Recommend
B	10 to 12 Months	Yes	Recommend
C+	More than 1 Year	Yes	Recommend
C	Unknown	No	No Role

8. Train Your Staff

- Reason for the system
- Accountability
- _____ role playing
- Kick off with _____

9. Assign a Lead Captain

- Sets and communicates lead goal
- Ensures availability and functionality of capture devices
- Monitor lead goals versus actual
- Acknowledges performances & corrects non performance
- Ensures data entry into CRM system and routing
- Possibly, the point of contact for reporting

10. Only Route Qualified Leads

- Sending junk leads to the field is a key reason for poor lead follow-up.
- Consider a post-show (re)qualification process
- Route leads FAST
- Include All Relevant Data
- Assign or route leads through your CRM system, a web-based application or email a lead tracking spreadsheet.

11. Build a Culture of Lead Reporting

1. Create Culture of Reporting
 - Communicate Cost Per Lead
 - Inform or cc the reps manager
 - Use contests to kick-off the program
2. Hold End of Shift or Day Lead Review Meeting
3. Close of Show Report
 - Number of leads captured versus goal
 - Cost Per Lead
 - Number of Leads and % by Priority Code

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12. Prepare lead follow-up plan BEFORE the show

- By Priority
- Media
- Messaging
- Timeframes
- Who is responsible?
- Automation

What specific actions will you take to improve your lead management process for AAOS?