



By addressing the first three critical exhibiting success factors, you are well on your way to a successful exhibiting experience. Don't stop now, because there are two more factors to getting a financial return on your exhibiting investment.

### **CRITICAL SUCCESS FACTOR #4: MANAGE YOUR LEADS**

If you're not writing orders or signing contracts at the show, and you expect to achieve a return on your exhibiting investment, it's critically important to understand that leads are the REAL product of the show.

At the top level, a lead can be defined as *"anybody you interact with in the exhibit and around the event that requires follow-up on your part, and that follow-up delivers value for your company"*.

The key to generating QUALITY leads is to make sure that each lead includes four critical factors:

- ✓ Somebody from your company personally interacted with the person
- ✓ Key qualifying questions were asked
- ✓ Answers were captured or documented
- ✓ A next step was **identified** and **agreed** upon by the visitor

#### **1. Get together with your sales team and ask, "What information should we capture to help us better qualify and value the lead?"**

- Typical information areas might include: email address, product interest & level of interest, buying role and/or influence, evaluation and/or decision team, competitors buying from or looking at, purchase timeframe or season, next action step, other?

#### **2. Organize this information into the natural flow of conversation and create a lead qualification and capture device.** Whether you use a paper form, or you rent and customize the show lead retrieval system, this will make a big difference in the quality of information you capture.

- Sample paper lead form:

Company _____ Show: EPT 2013	
OPPORTUNITY CARD Show Day: Q1 Q2 Q3 Q4	
<small>Circle badge number only</small>	
Name: _____	
Company: _____	
Direct Floor: ( ) - _____	
E-mail: _____	
<input type="checkbox"/> Customer <input type="checkbox"/> Prospect <input type="checkbox"/> Suspect <input type="checkbox"/> Other?	• Contact information
1. How did you LEARN ABOUT EXHIBIT? <input type="checkbox"/> Walk-by <input type="checkbox"/> Mail <input type="checkbox"/> E-mail <input type="checkbox"/> Print ad <input type="checkbox"/> Web ad <input type="checkbox"/> Referral Other: _____	• Relationship with company
2. Type of COMPANY? <input type="checkbox"/> Wholesale <input type="checkbox"/> Retail <input type="checkbox"/> Direct	• Marketing recon
3. Job FUNCTION? <input type="checkbox"/> Logistics <input type="checkbox"/> Operations <input type="checkbox"/> IT <input type="checkbox"/> Executive	
4. Using PRODUCT/SERVICE? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Some What?	
5. GOALS/PROBLEMS? <input type="checkbox"/> Problem <input type="checkbox"/> Problem <input type="checkbox"/> Problem <input type="checkbox"/> Other: _____	• Situational questions
OPPORTUNITY: <input type="checkbox"/> Product <input type="checkbox"/> Product <input type="checkbox"/> Service <input type="checkbox"/> Service	• Area of interest
6. ROLE in Evaluation/Decision? <input type="checkbox"/> Engineer <input type="checkbox"/> Technical <input type="checkbox"/> Operations <input type="checkbox"/> Executive <input type="checkbox"/> Purchasing <input type="checkbox"/> Influencer <input type="checkbox"/> Decision Maker	• Qualification questions
7. EVALUATION Stage? <input type="checkbox"/> Assessing Needs <input type="checkbox"/> Evaluating Options <input type="checkbox"/> Supplier Evaluation <input type="checkbox"/> Ready <input type="checkbox"/> RFP RFI	
8. TIMEFRAME? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> If Yes: _____	• Next action
9. What is our Next ACTION? Information <input type="checkbox"/> Demo <input type="checkbox"/> Mail <input type="checkbox"/> E-Mail Call <input type="checkbox"/> Yes <input type="checkbox"/> No Agreement <input type="checkbox"/> Call for Cat. Show Action <input type="checkbox"/> Site Visit <input type="checkbox"/> Operation Request <input type="checkbox"/> Ask for email <input type="checkbox"/> Other: <input type="checkbox"/> Immediate <input type="checkbox"/> 1-15 days <input type="checkbox"/> 15 days+	• Space for free hand notes
NOTES: _____	
Priority: A - B - C Taken by: _____	

3. **Train your booth staff** on asking the questions in the proper sequence, and using the capture device, **before** you get to the booth.
4. To get visitors to commit to the next step, avoid assuming that they have interest. Be sure to ask the visitor *what their level of interest in your products is?, and what they think the your next step should be?*.
5. Be ready to physically give them, or email them, samples and follow-up information on the spot. Research has proven speed of response dramatically increases lead conversion rate.
6. Develop your lead follow-up plan **before** coming to the show, so you can follow-up quickly.
7. And finally, do not give up too quickly on leads. Your philosophy should be *“any lead worth taking is worth following up on”*, and that you’re going to stay in touch with each lead for as long as it takes. Be there when the buyer is ready to buy, not just when you’re ready to sell!

For a deeper dive on this critical exhibiting topic, please be sure to read these educational materials on the Exhibitor Success & ROI Center web page:

- **Read:**
  - CEIR Industry Insight Report: How Exhibitors Can Improve Lead Quality & Sales Conversion
  - Improving Lead Quality by Asking the Right Questions and Capturing More Information
  - Closed-Loop Lead Management

The Exhibitor Success & ROI Center is your one stop shop to access critical knowledge tools and resources. Please be sure to visit and share the link with everyone involved with your exhibit program.



**Got Questions About Completing this Exercise?**

Email your questions to SHRM’s Tradeshow Productivity Expert  
[Jefferson@tradeshowturnaround.com](mailto:Jefferson@tradeshowturnaround.com)