Present

Power Factor #3. Measuring Leads and Measuring Exhibiting Results

How to Improve Lead Quality, Sales Conversion and Measure Performance and ROI

Webinar Discussion Points

1. Best practices for lead management
2. Lead management metrics
3. Four generations of lead capture devices
4. Overview of ProMat's lead retrieval system
5. How to customize your lead capture devise or use a Lead Card
6. Tradeshow performance and financial metrics
7. How to create an Exhibiting Performance & ROI report

About the Expert Presenter

Jefferson Davis, President, Competitive Edge

The Tradeshow Turnaround Artist™

Jefferson is President of Competitive Edge, a highly-specialized consulting and training firm on a mission to ***inspire***, ***lead*** and ***direct*** businesses on how to more effectively use exhibiting to visibly support core business objectives and generate measurable financial value, far beyond cost.

His mission is achieved by challenging companies to re-evaluate limiting perspectives about exhibiting and by getting them focused on precision execution of five critical exhibiting success factors.

Jefferson is a results-focused, process-based, passionate visionary and creator of game changing exposition industry programs including: the acclaimed Tradeshow Turnaround Program, E3 Exhibiting Effectiveness Evaluation program, Exhibitor Success & ROI Center program.

His Tradeshow Turnaround philosophy and practices are the exposition industry's definitive guide to quickly turning tradeshows from *"expensive appearances"* to *"productive, profitable investments."*

Over the course of 30 years of on the floor exhibiting experience, he's identified a clear set of empowering results-focused perspectives, and backed them up with specific, process-based strategic practices, his training and consulting services have helped clients generate over $750,000,000 in combined results.

No other tradeshow consulting or training firm can speak to results like this.

Jefferson's client list read like a "who's, who" list in the exposition industry. Since 1991, he's been selected as the tradeshow expert of choice by over 270 Association and for-profit show organizers. He's a faculty member of EXHIBITOR Show. He's delivered over 500 live seminars and workshops, over 700 webinars reaching over 250,000 exhibitors, and his E3 team has evaluated over 18,500 exhibits in action.

Jefferson's corporate clients span almost every industry and have included industry leaders like Alcoa, AMX, Aramco Services Company, Assurant Property Services, BOC Gases, Brivo Systems, Corporate Express, Covidien, Doosan Portable Power, Egemin Automation, Enshu USA, Essilor, Heidelberg, Honeywell, Huber Technologies, Jungheinrich Lift Trucks/MCFA, McLanahan, McQuay International, Merial, Merz Asthetics, Nestle-Purina, Ocean Mist Farms, Panasonic, Parker-Hannifin, PCCA, Reichert Ophthalmic, Scholle, SteelKing, Tennant Company, Tesco, Trelleborg Life Sciences and Wheel Systems, US Surgical, Yale/Hyster and many, many more.

Jefferson is available on a very limited basis to personally help companies implement the Tradeshow Turnaround philosophy and practices. Call 800-700-6174 in the US or 704-814-7355

1. How important are leads to the success of your exhibit program?

   ❑Critical ❑Important ❑Somewhat Important ❑ Not Important

2. Do you…

a.	Set specific lead goals?	❑Yes	❑No	❑Unsure
b.	Have a clear qualification/grading process?	❑Yes	❑No	❑Unsure
c.	Capture leads?	❑Yes	❑No	❑Unsure
	If yes, how?	________________________		
d.	Track lead follow-up and sales conversion?	❑Yes	❑No	❑Unsure

CEIR Exhibitor ROI & Performance Metrics Practices (2015) Lead Management

- Leads #1 reason for exhibiting (68%)
- Support Top 3 Exhibiting ROI Metrics
  - Sales Revenue/Exhibiting Cost
  - Potential Sales Revenue/Exhibiting Cost
  - Cost Per Lead

Return on Investment
Metric #1. Sales Revenue/Exhibiting Cost

	Example	Participant
• Traceable Sales Revenue to Show Leads	$45,000	$____________
• (/) Exhibiting Investment	$15,000	$____________
• Return-on-Investment*	$3 to $1 ROI	$____________

***This example calculation is not a promise of a specific ROI, but simply an illustration of a method for calculating exhibiting ROI.**

Return on Investment
Metric #2. Potential Sales Revenue/Exhibiting Cost

	Example	Participant
• Qualified Leads	20	____________
• (x) Average Sale Amount	$5,000	$____________
• Potential Lead Revenue Value	$100,000	$____________
• (/) Exhibiting Investment	$15,000	$____________
• Potential ROI from Leads	$8 to $1	$____________

Return on Investment
Metric #3. Cost Per Lead

	Example	Participant
• Total Exhibiting Investment	$15,000	$____________
• (/) # Leads in General	50	_____________
• Cost Per Lead	$300	$____________

➢ Average cost of a B2B tradeshow lead: $283
(Source: Exhibit Surveys, 2013)

Leads Support Top Exhibiting Performance Metrics

- # of Leads in General
- # of Qualified Leads
- Quality of Leads
- # of Leads Advanced along Purchase Process

Best Practice 1: Define What Is and What Isn't a Lead

What Is a Lead?

1. Personal Interaction
2. Qualifying Questions Asked
3. Answers ______________________
4. Next Step ___________________ and Agreed To by Visitor

What Isn't a Lead?

- Business card in a fish bowl or somebody's pocket
- Badge swipe or scan with no engagement or additional information

Best Practice 2: Set Realistic Lead Goals

Exhibit Interaction Capacity formula calculates the number of face-to-face interactions you can execute in your exhibit.

Use Exhibit Interaction Capacity formula to Set Lead Goals:

	Example	Participant
• # of exhibiting hours	26	26
• # of booth staff	x 3*	x_______
• Total staff hours	78	________
• Interactions/hr/staffer	x 4**	x_______
• Total target interactions	312	________
• % of visitors to lead	x.25	x_______
• **Lead goal**	**78**	________

* 50 sq. feet/staffer ** 3/conservative, 4/moderate, 5/aggressive

Performance Metric:
Track Lead Goal/Actual and Quality

- Lead Goal 52
- Total Leads Captured 50
- Achievement 96% of goal
  - A Leads 45% or 23
  - B Leads 40% or 20
  - C Leads 15% or 7

Best Practice 3: Track Lead Goal/Actual Daily or End of Shifts

Daily Lead Goal versus Actual Scorecard

			AM Shift		PM Shift		Total		
Day	Total Hours	% of Total Hours	Goal	Actual*	Goal	Actual*	Goal	Actual	Variance From Goal
1	8	22%	36		36		72	0	-72
2	8	22%	36		36		72	0	-72
3	8	22%	36		36		72	0	-72
4	8	22%	36		36		72	0	-72
5	5	14%	23		23		45	0	-45
Total	37	100%	167	0	167	0	333	0	-333

* Lead Captain must complete at end of each shift/day.

Best Practice 4: Develop & Use a Lead Grading Matrix

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

1. Determine what information would help assign value to a lead
2. Determine the number of codes required
3. Define what each code means
4. Make sure data and lead grading codes are integrated into the capture device

CEIR Exhibitor ROI & Performance Metrics Practices (2015) Lead Management

- 82% of exhibitors qualify leads
  - ____% at-show
  - ____% post-show
  - On average, 2 of 5 leads match qualification criteria
- 60% track lead management and conversion
  - 49% CRM
  - 21% Sales/Lead Tracking systems
  - 17% Spreadsheets
  - On average, ______ of 5 leads convert to sales

Best Practice 5: Determine the Best Information to Capture to Qualify Leads

* **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?

* Customize your lead capture device to make sure you capture this information!

Four Generations of Lead Capture Devices

1. Collect business cards
2. Use a paper lead form
3. Use show lead capture system
   - ➢ Customize with qualifiers
4. Buy a universal lead capture system
   - ➢ *Be sure to discuss with show's lead capture company to determine how to capture encrypted data*

Official Show Lead Retrieval Vendor

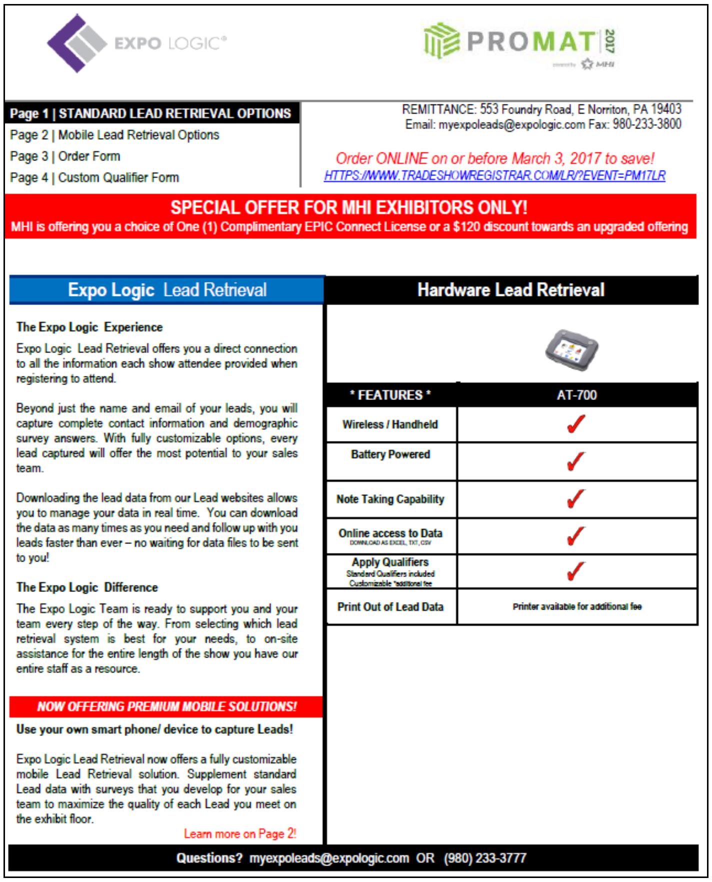
Expo Logic

For Assistance Contact:

myexpoleads@expologic.com OR (980) 233-3777

Order ONLINE on or before March 3, 2017 to save!

[HTTPS://WWW.TRADESHOWREGISTRAR.COM/LR/?EVENT=PM17LR](https://www.tradeshowregistrar.com/lr/?event=PM17LR)



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Page 1 | STANDARD LEAD RETRIEVAL OPTIONS
Page 2 | Mobile Lead Retrieval Options
Page 3 | Order Form
Page 4 | Custom Qualifier Form

REMITTANCE: 553 Foundry Road, E Norriton, PA 19403
Email: myexpoleads@expologic.com Fax: 980-233-3800

Order ONLINE on or before March 3, 2017 to save!
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SPECIAL OFFER FOR MHI EXHIBITORS ONLY!
MHI is offering you a choice of One (1) Complimentary EPIC Connect License or a $120 discount towards an upgraded offering

Expo Logic Lead Retrieval

The Expo Logic Experience

Expo Logic Lead Retrieval offers you a direct connection to all the information each show attendee provided when registering to attend.

Beyond just the name and email of your leads, you will capture complete contact information and demographic survey answers. With fully customizable options, every lead captured will offer the most potential to your sales team.

Downloading the lead data from our Lead websites allows you to manage your data in real time. You can download the data as many times as you need and follow up with you leads faster than ever – no waiting for data files to be sent to you!

The Expo Logic Difference

The Expo Logic Team is ready to support you and your team every step of the way. From selecting which lead retrieval system is best for your needs, to on-site assistance for the entire length of the show you have our entire staff as a resource.

NOW OFFERING PREMIUM MOBILE SOLUTIONS!

Use your own smart phone/ device to capture Leads!

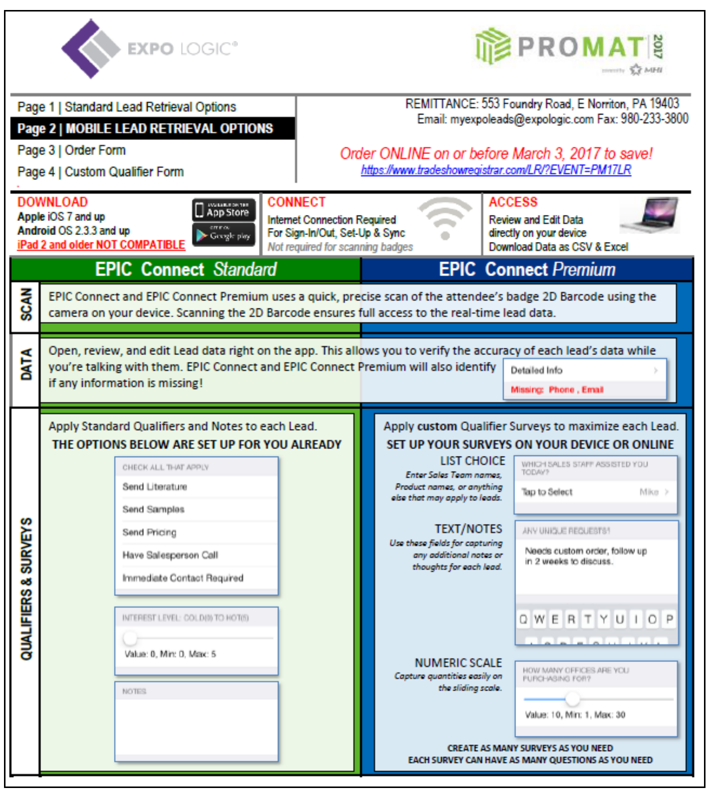
Expo Logic Lead Retrieval now offers a fully customizable mobile Lead Retrieval solution. Supplement standard Lead data with surveys that you develop for your sales team to maximize the quality of each Lead you meet on the exhibit floor.

Learn more on Page 2!

Hardware Lead Retrieval

* FEATURES *	AT-700
Wireless / Handheld	✓
Battery Powered	✓
Note Taking Capability	✓
Online access to Data (DOWNLOAD AS EXCEL, TXT, CSV)	✓
Apply Qualifiers (Standard Qualifiers included; Customizable *additional fee)	✓
Print Out of Lead Data	Printer available for additional fee

Questions? myexpoleads@expologic.com OR (980) 233-3777



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Page 1 | Standard Lead Retrieval Options
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https://www.tradeshowregistrar.com/LR/?EVENT=PM17LR

DOWNLOAD
Apple iOS 7 and up
Android OS 2.3.3 and up
iPad 2 and older NOT COMPATIBLE

CONNECT
Internet Connection Required
For Sign-In/Out, Set-Up & Sync
Not required for scanning badges

ACCESS
Review and Edit Data
directly on your device
Download Data as CSV & Excel

EPIC Connect *Standard* | **EPIC Connect *Premium***

SCAN
EPIC Connect and EPIC Connect Premium uses a quick, precise scan of the attendee's badge 2D Barcode using the camera on your device. Scanning the 2D Barcode ensures full access to the real-time lead data.

DATA
Open, review, and edit Lead data right on the app. This allows you to verify the accuracy of each lead's data while you're talking with them. EPIC Connect and EPIC Connect Premium will also identify if any information is missing!

Detailed Info
Missing: Phone , Email

QUALIFIERS & SURVEYS

Apply Standard Qualifiers and Notes to each Lead.
THE OPTIONS BELOW ARE SET UP FOR YOU ALREADY

CHECK ALL THAT APPLY
Send Literature
Send Samples
Send Pricing
Have Salesperson Call
Immediate Contact Required

INTEREST LEVEL: COLD(0) TO HOT(5)
Value: 0, Min: 0, Max: 5

NOTES

Apply **custom** Qualifier Surveys to maximize each Lead.
SET UP YOUR SURVEYS ON YOUR DEVICE OR ONLINE

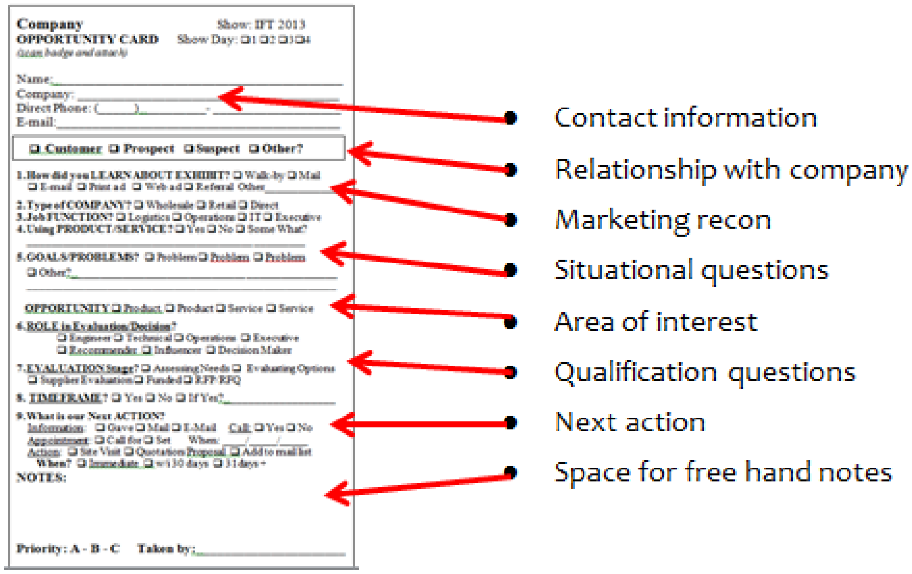
LIST CHOICE
Enter Sales Team names, Product names, or anything else that may apply to leads.
WHICH SALES STAFF ASSISTED YOU TODAY?
Tap to Select — Mike

TEXT/NOTES
Use these fields for capturing any additional notes or thoughts for each lead.
ANY UNIQUE REQUESTS?
Needs custom order, follow up in 2 weeks to discuss.

NUMERIC SCALE
Capture quantities easily on the sliding scale.
HOW MANY OFFICES ARE YOU PURCHASING FOR?
Value: 10, Min: 1, Max: 30

CREATE AS MANY SURVEYS AS YOU NEED
EACH SURVEY CAN HAVE AS MANY QUESTIONS AS YOU NEED

Best Practice 6: Customize Lead Capture Device or Use a Lead Card



Best Practice 7: Get Your Sales Team and/or Distributors to Support Your Lead Management Process

1. Communicate how you are improving lead _______________
2. Calculate and share your Cost Per Lead
3. Set three firm lead reporting dates
4. Consider contests to build accountability
5. Consider charging for leads to dealers/distributors who don't follow-up or report

Best Practices for Lead Response Management

1. Speed of response – fast information delivery equals higher conversion rate
2. Best days to make follow-up calls: _________________ and Thursday
3. Best times to make follow-up calls: Between _____ pm and ______ pm
4. Average follow-up stops after two attempts.
5. Persistence – by making a few more call attempts, you can increase contact and conversion rate by 70%

   Source: Harvard Business Review

Best Practices for Lead Follow-Up

1. Prepare lead follow-up plan by priority ______________ show.
2. Follow-up FAST or in line with visitor request.
3. Plan for 6 to 12 touches over the next 3 to 6 months.
4. Integrate multiple media:
   * Email
   * Mail
   * Telephone
   * Social media
   * In-person visits
5. Deliver real value… don't just sell!
   * Social media posts and groups
   * __________________
   * Checklists
   * Case Studies
   * Industry Intelligence Reports

Tradeshow Performance & Financial Metrics

1. Exhibit Interaction Capacity/Utilization
2. Exhibit Attraction Efficiency
3. Cost Per Interaction (CPI)
4. Cost Per Lead (CPL)
5. Lead Goal, Quantity and Quality
6. Potential Value of Leads Captured
7. Hard Dollar ROI
8. Soft Dollar ROI

Tradeshow Performance & Financial Metrics

	Example	Participant
1. Exhibit Interaction Capacity/Utilization		
Exhibiting Hours	26	______________
Times Full-Time Exhibit Staff	3	______________
Total Staff Hours	78	______________
Times Interactions per Hour per Staffer	3-5 *	______________
Exhibit Interaction Capacity	234-390	______________
** 3 conservative/4 moderate/5 aggressive*		
Actual # of Exhibit Interactions	206	
Divide by Exhibit Interaction Capacity	275	______________
Exhibit Capacity Utilization	75%	______________
Target: 80 to 100%		
2. Exhibit Attraction Efficiency		
Actual # of Exhibit Interactions	206	______________
Divide by Profile Matches in Show Audience	550	______________
• Company Type, Job function/Title, Geography		
Exhibit Attraction Efficiency	37%	______________
Benchmark: 45% (Source: Exhibit Surveys)		
3. Cost Per Interaction (CPI)		
Total Exhibiting Investment	$15,000	$_____________
Divide by # of Interactions	206	______________
Cost Per Interaction	$73	$_____________
Average cost of field sales call: $596		
(Source: CEIR, 2009)		

Setting Exhibiting ROI Targets

GOOD: 1-1 payback or 100% ROI
BETTER: 3-5 payback or 300-500% ROI
BEST: As high as you can go!

Two Types of ROI

Hard Dollar ROI: ________________ received that can be credited in full or in part to the show, typically in the form of at-show and/or post-show sales.

- Can be measured in top line revenue or gross margin.

Soft Dollar ROI: _________________ received that can be quantified/expressed in numeric terms, typically in the form of money saved.

Cost Per Interaction Soft Dollar ROI Contribution Formula & Example*

	Example	Participant
Total Exhibiting Investment	$ 15,000	$_____________
Divide by # of Exhibit Interactions	206	______________
Cost Per Interaction	$73	$_____________
Comparative (Field Sales Call)	$596	$_____________
Less Cost Per Interaction	-$ 73	$_____________
CPI Savings	$523	$_____________
Times # of Interactions	x 206	______________
Soft Dollar ROI Contribution	$107,738=718%SD/ROI	$_____________

***These sample calculations are not a promise of a specific ROI, but simply an illustration of a method for calculating exhibiting ROI.**

Sections to Include In Your Exhibiting Performance & ROI Report

1. General Show Information
2. Exhibiting Objectives Set and Progress Made Toward
3. Exhibit Interaction Capacity/Utilization - Cost Per Interaction
4. Leads: Goal/Actual, Cost Per Lead, Potential Value of Leads
5. Pre & At-Show Marketing: Media, Reach/Response and Effectiveness
6. Public Relations and Media Exposure
7. Exhibit Design and Effectiveness
8. Demonstrations/Presentations
9. Hospitality and Sponsored Events
10. Key Customers and VIPs Met
11. Competitive Summary
12. Show Budget vs Actual w/Benchmarks and R.O.I.
13. Lessons Learned & Recommendations for Next Show

What were the three most important ideas you learned in this webinar?

1. ____

2. ____

3. ____

<u>MHI's Commitment to Exhibitor Education & Success</u>

* ShowPro Pre-show Exhibitor Webinar Series
  - Fast Track to ProMat Exhibiting Success
    * Selective Attraction: January 4, 2017
    * Managing Your Visitor's Experience: January 24, 2017
    * Managing Leads & Measuring Results: February 16, 2017

* ShowPro Live Exhibitor Workshop
  - Held in Atlanta, December 7, 2016
    * To access presenters' PowerPoint slides, please visit the Show Pro website: http://www.promatshow.com/showpro/