informa markets

Exhibitor Lead Retrieval Guide

Florida International Medical Expo (FIME)

For FIME 2021, we are using **Visit Connect** as our Lead Retrieval tool, to help exhibitors and visitors make the most of their event participation. This includes a digital profile, digital content, marketing tools and a sophisticated lead capture system which enables exhibitors to collect, detail and respond to leads immediately.

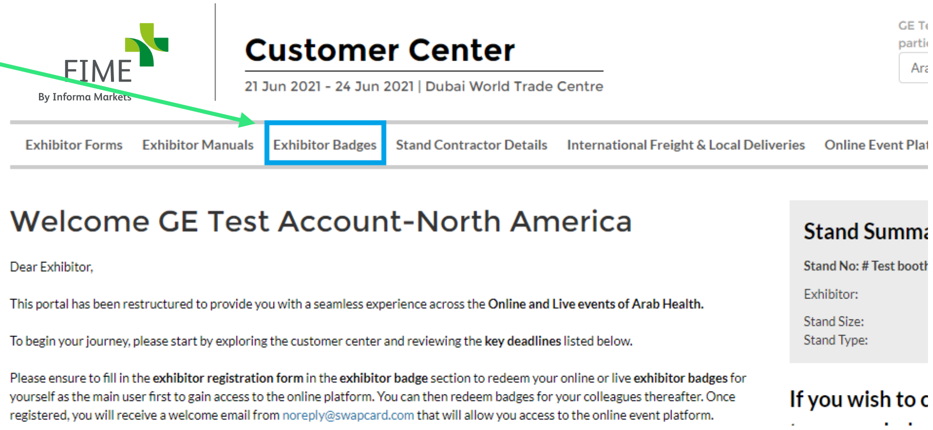
This document gives you an overview of how to get your lead capture system setup, how to use the system during show days and how to access you leads post-show.

Note that this information is correct as of July 25, 2021 but due to a few technical developments currently underway there may be a few slight changes to the process by Lead Retrieval launch date (August 22, 2021). Updated material will be provided accordingly.

Accessing Visit Connect

Getting to the Lead Retrieval Setup Page

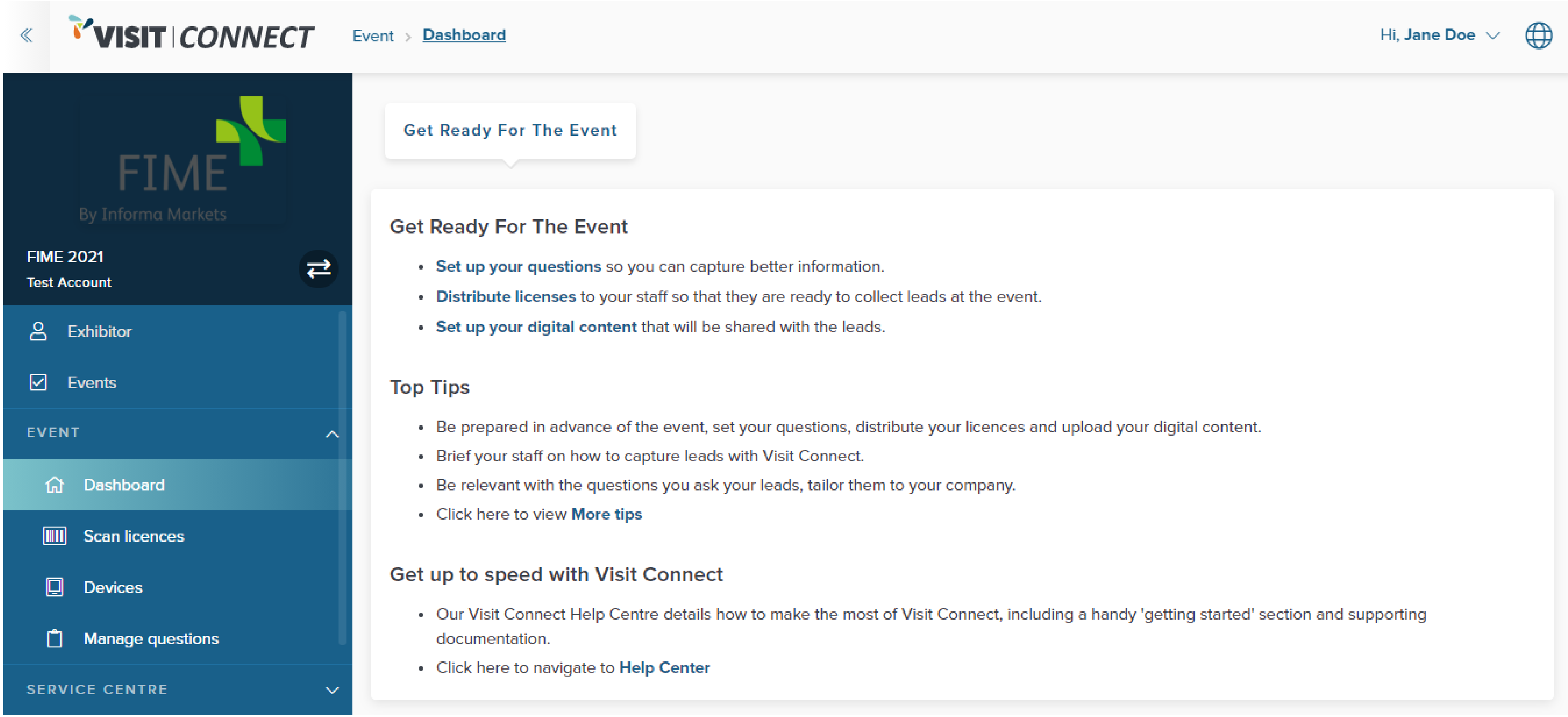
- Each company's main exhibitor contact will need to log into Customer Centre, and from there select the 'Exhibitor Badge' menu option.



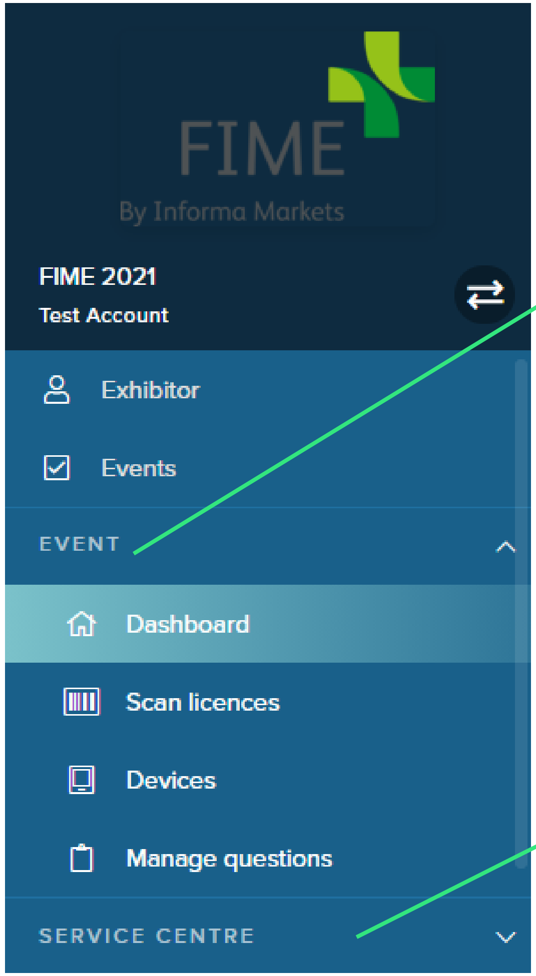
- Through this page, exhibitors can get access to the **Visit Connect portal** where staff badges can be registered and where Lead Retrieval can be set up.

- While some technical developments are being finalized, the Lead Retrieval section is currently unavailable. We expect to launch access for lead retrieval by Sunday August 22, 2021.

Visit Connect Dashboard View



Using the Visit Connect web portal menu



- Under EVENT, you will find the following options:
  - Dashboard – View a list of your events and see lead collection statistics
  - Scan licenses – View, export, and assign your scan licenses
  - Devices - View linked devices to your account
  - Manage questions – View and configure your (custom) questions
- Under SERVICE CENTRE you have:
  - Stand personnel – View, register, import, export, delete, and send scan licenses to your stand personnel
  - Registrants – View and export your registrants
  - Leads – View, filter and export leads collected

Manage Your Lead Retrieval Questions

Setup Questions

Exhibitors can add questions for their leads to answer, which they can set up under **Manage Questions.**

Example questions:

- What is your buying cycle?
- What is your preferred method of contact?
- When are you looking to place an order?
- What is your purchasing authority?
- Who is your current supplier for ... ?
- Are you looking for a particular type of product?
- What products are you interested in?
- What is your total budget?
- Are there any colleagues we should also contact?
- What quantity of product X are you looking to order?

Note: you could also add questions for stand personnel (Stand personnel means: the people who represent your company inside your stand or booth at the event) to answer after they have interviewed a lead (A lead is a person who represents a sales opportunity for your company), such as:

- Is this lead hot, warm or cold?
- Please assign a follow-up action (e.g., send a brochure, send an email, set up a meeting, none of the above, other).

Remember: the better you tailor your questions to your customers and business needs, the more effective your post-event follow-up. Limit the number of questions uploaded (pre-event) to 10 and rank by importance for ease of access to the potential lead

Setup Questions

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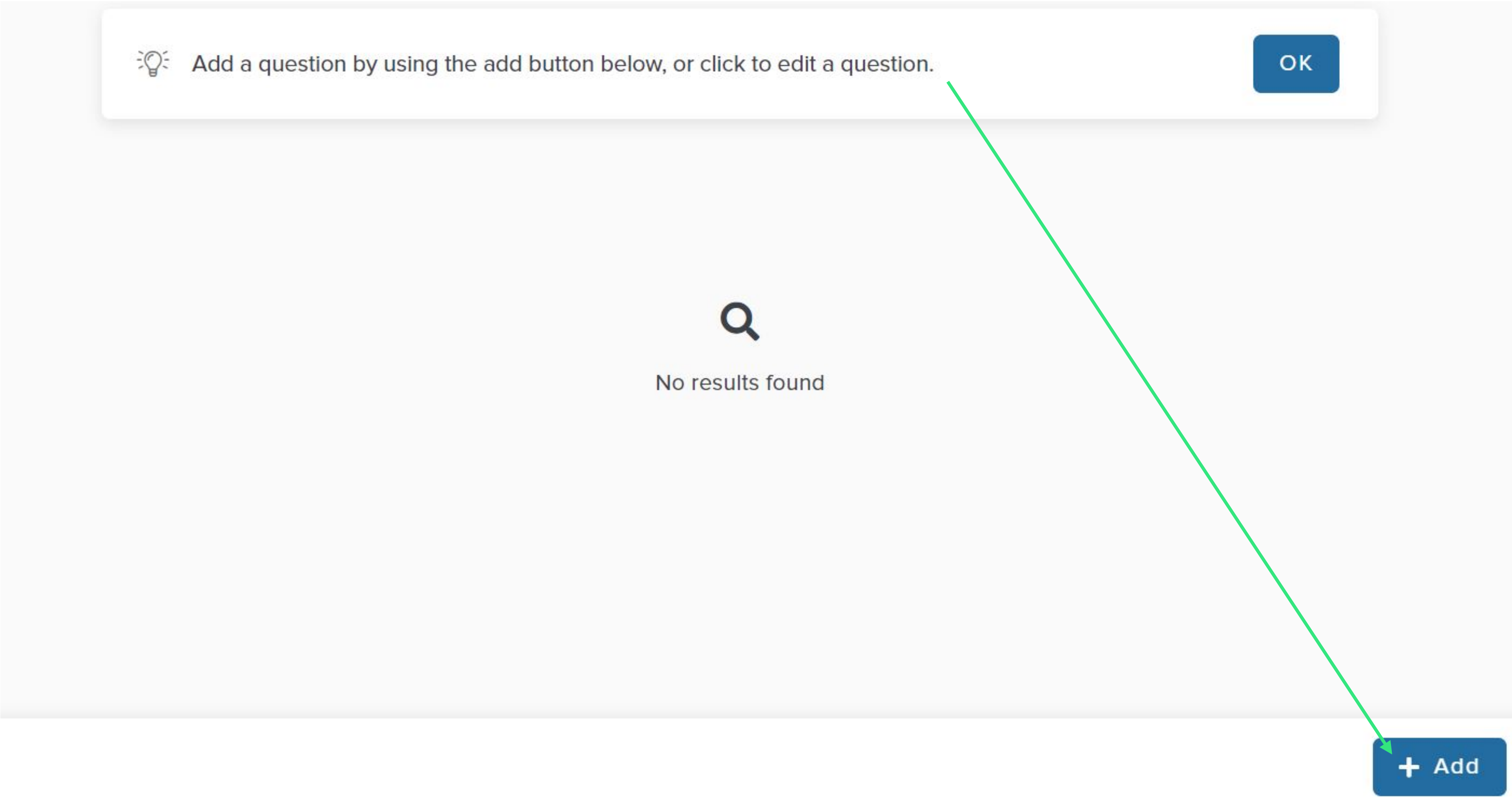
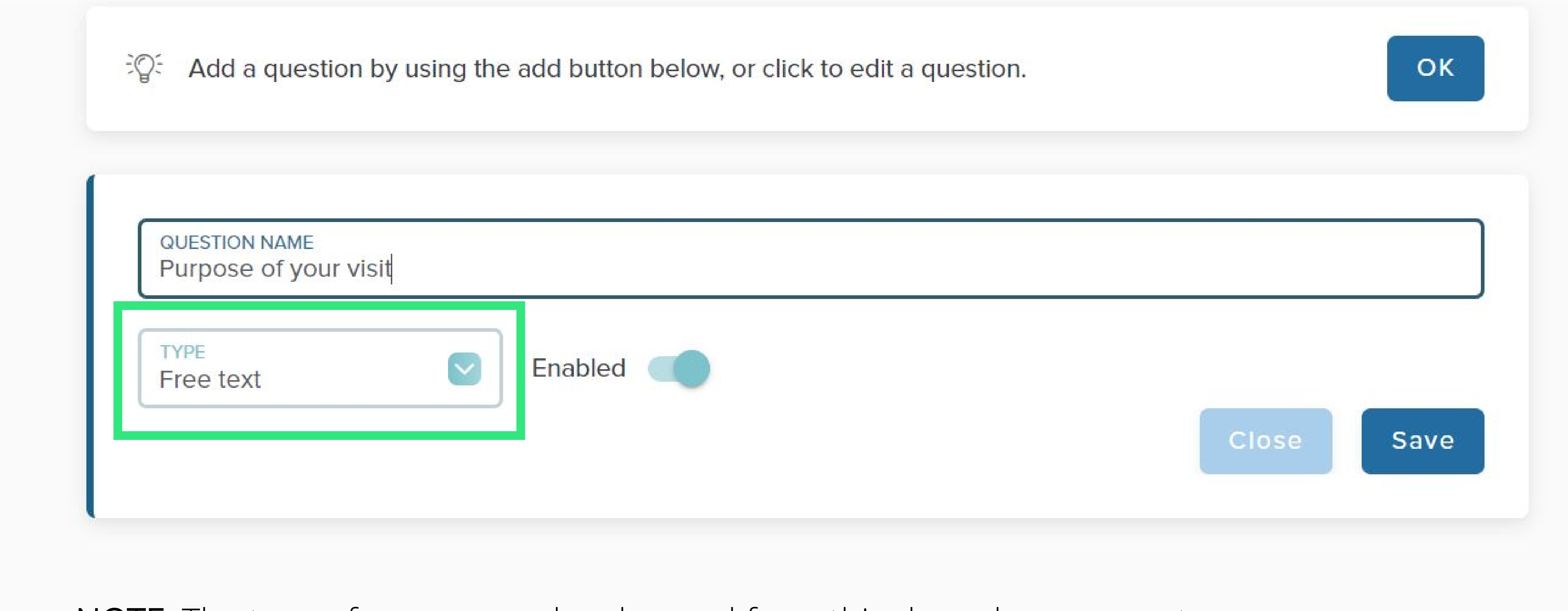
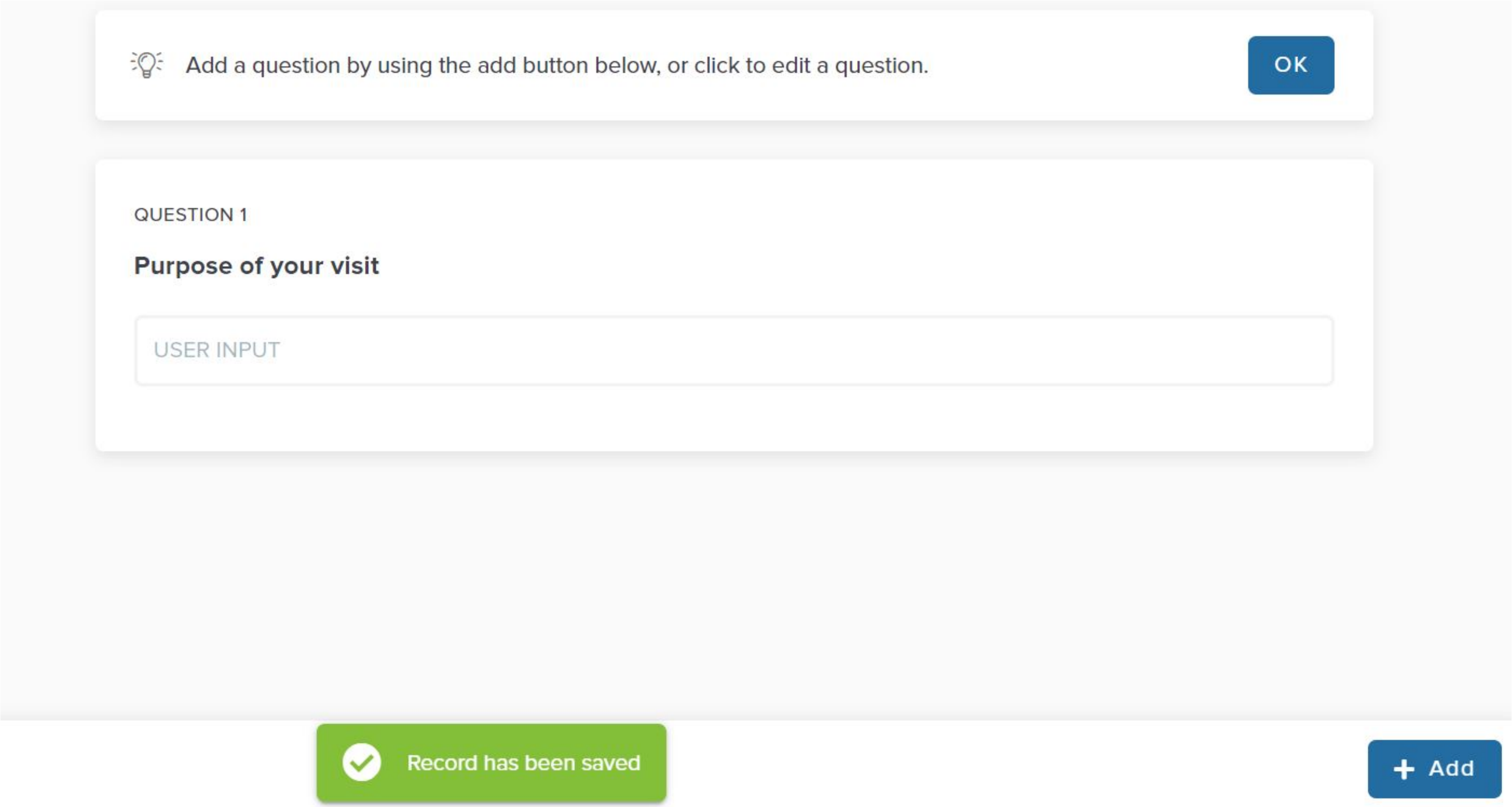


Setup Questions



NOTE: The type of answer can be changed from this drop-down menu to include free text, multiple choice or single choice.

Setup Questions



Sharing Scan Licenses

Sharing Licenses with your Stand Staff

- You can use one scan license on an unlimited number of devices (mobiles or tablets).
- If you are accessing your e-mail from your mobile, you must click the Open Scan Web App button in your confirmation e-mail to access the Visit Connect progressive web app and start collecting leads by scanning visitor badges
- Or, if you are accessing your confirmation e-mail from a PC or another device, you can scan the QR code in the same e-mail using the camera on your mobile device to access the scan web app and start collecting leads by scanning visitor badges.

What Next?

- The app is now open with the licence activated. You're ready to collect leads (A lead is a person who represents a sales opportunity for your company)!

Visit Connect Progressive Web App

Lead retrieval with scan app

Information of a visitor who is a potential lead is shared with an exhibitor when the exhibitor scans their (digital) badge. The scanning is done through Visit Connect which can be accessed directly through the FIME show app (when logged in) or through the Visit Connect scan app.

Alternatively, you don't need to install an app. Progressive web apps (PWAs) work through the web browser of your device. And once you're up and running, it will keep working even if you lose internet connection. When you reconnect, all the data collected with be synced to the Visit Connect server

<u>You can use the scan app to:</u>

- Collect leads by scanning the QR codes on visitors' badges
- Record visitors' answers to questions
- Attach text notes, images and voice memos to leads
- Copy a lead's contact details to your device contacts

Collecting Leads

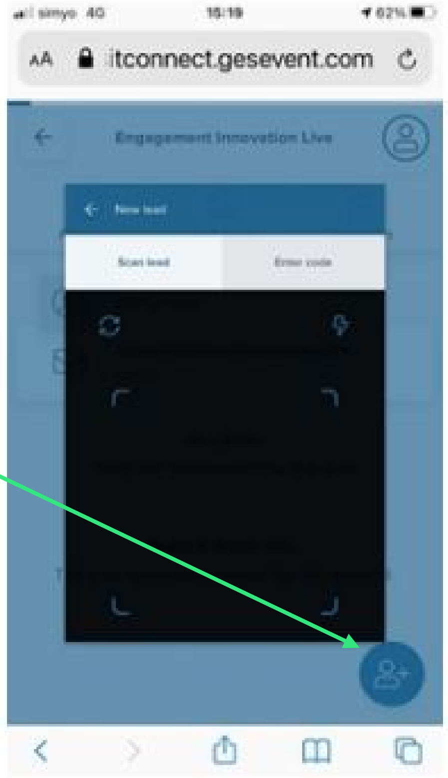
Collect Leads

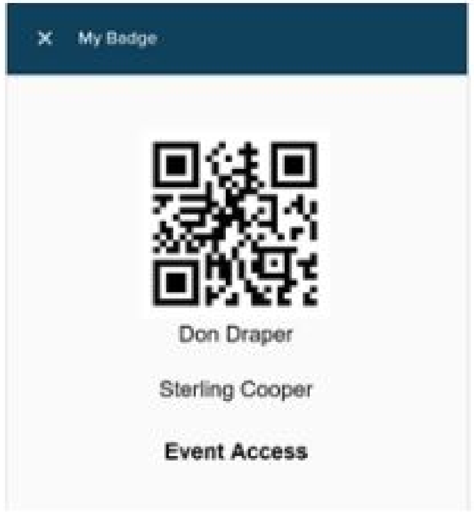
1. Tap the Add leads button in the bottom-right corner of your screen

2. Allow the app to use the camera on your device

3. Scan the QR code on the visitor's badge

4. If the scan succeeds, your device may vibrate or make a sound, depending on the device settings





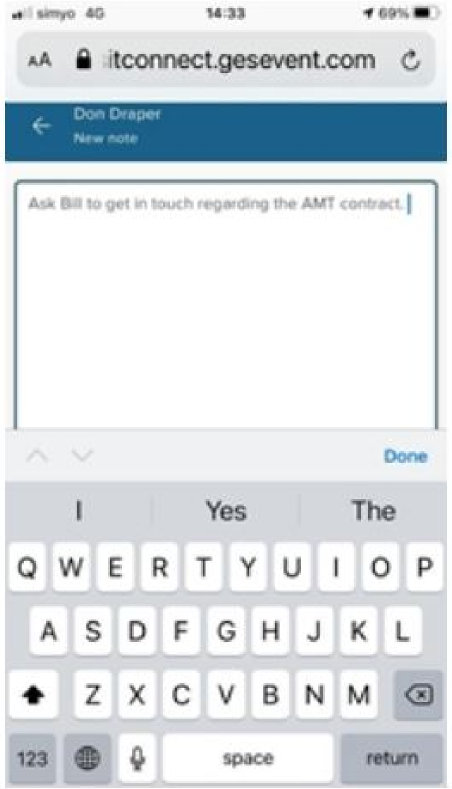
Collect Leads

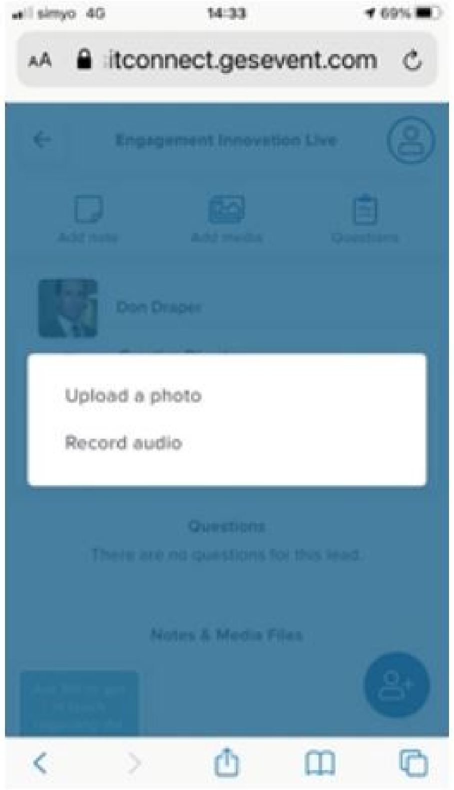
If the scan fails, you can manually enter the visitor's 15-character code on the **Enter code** tab.

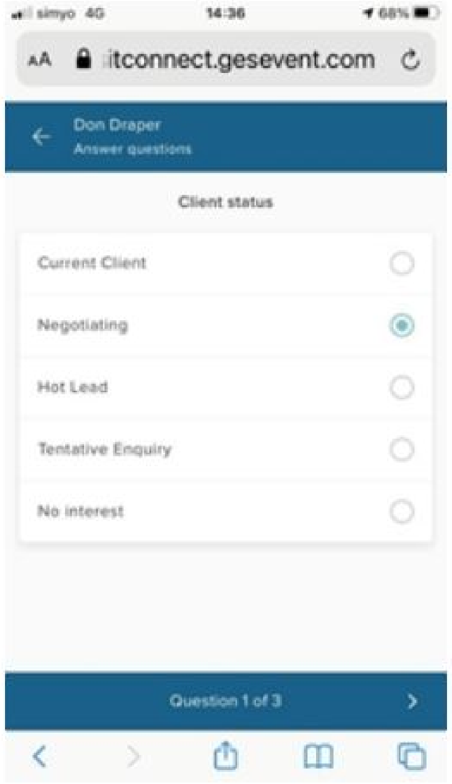
This code is three groups of five letters printed on the badge.

Collect Leads

After adding the lead, you can enter answers to questions which were setup pre-event and attach memos, images or notes.

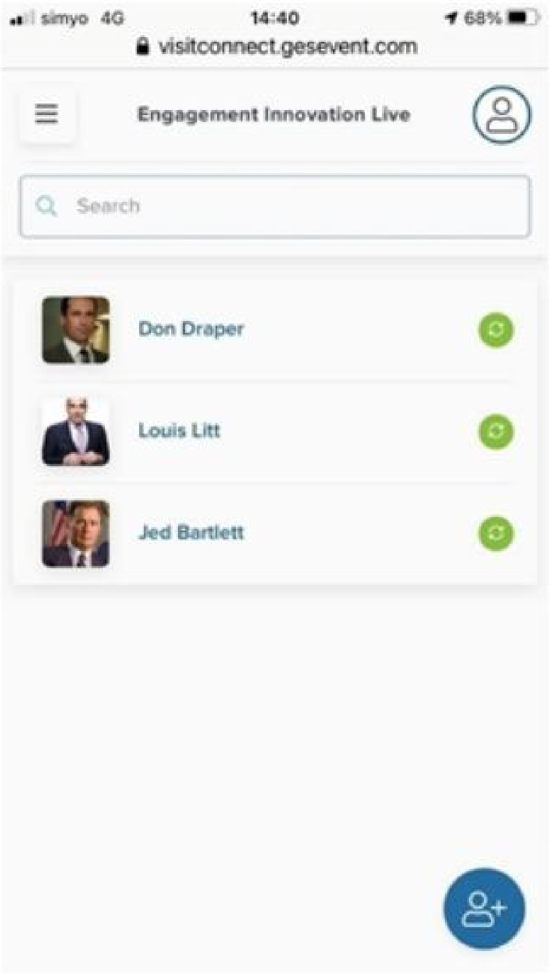


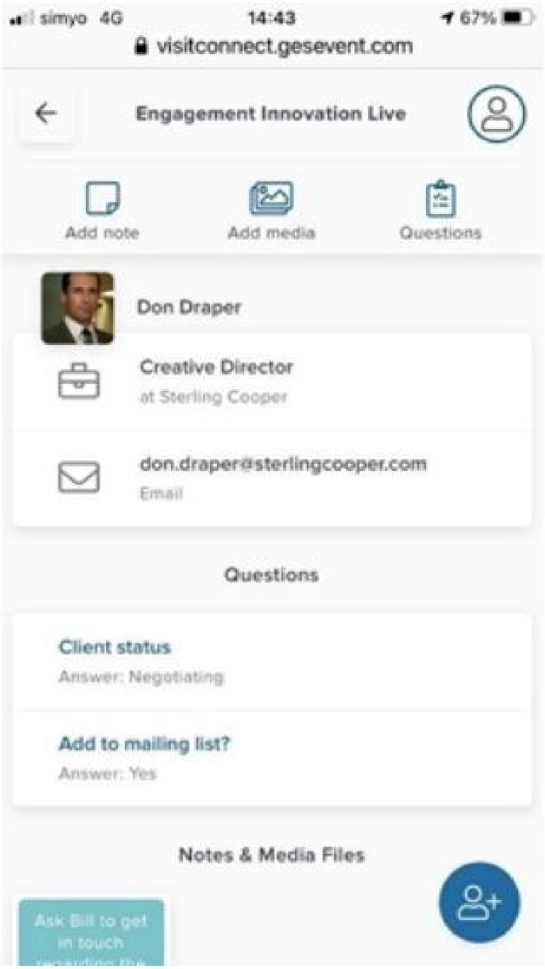




Review Leads in App

In the main screen of Visit Connect, you can see a list of all the leads collected. Tap on one to see the details, and you can continue to annotate after the visitor has left.





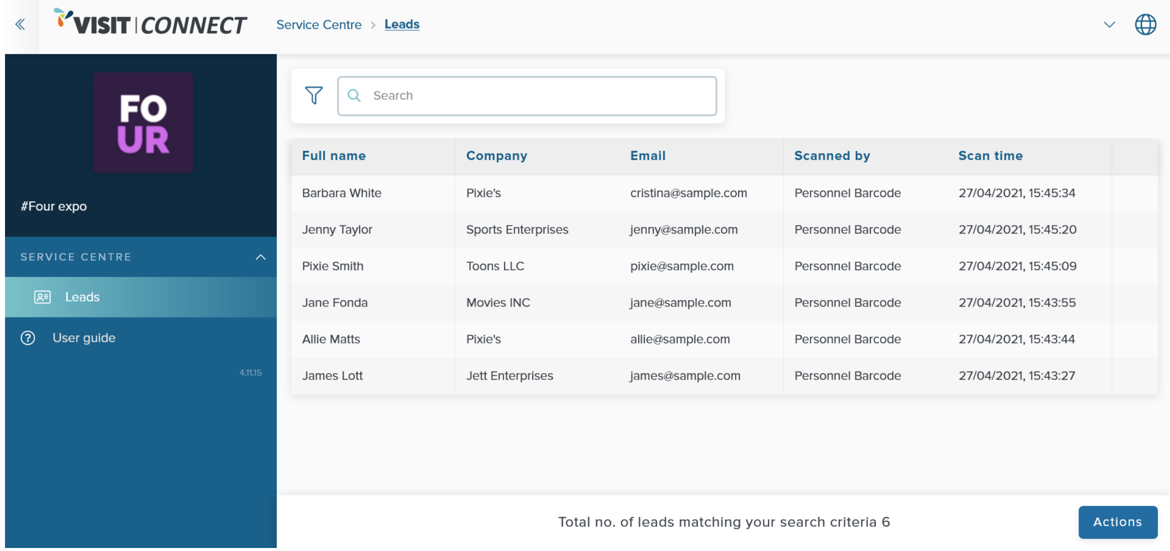
Accessing Your Leads

Retrieving your lead data from the app

- **Visit Connect app:** Perform a manual sync
  - Connect your device to the internet (be online) and open the Visit Connect app
  - Go to the **Leads** page and swipe down to start synchronising your leads
  - Wait until you see the message "All leads are synchronised", then close the app
  - Log in to your Visit Connect account in the web portal (https://visit.gesevent.com/) and verify that all the leads are visible and have been synchronised
  - You can synchronise your leads as often as you want, and we recommend that you ensure they are synchronised daily

Accessing your leads in the Visit Connect web portal

- Log in to your Visit Connect account in the web portal (https://visit.gesevent.com/)
- Click **Leads** in **Service Centre** in the side menu to see a list of all the leads that have been collected during the event
- The columns FULL NAME, COMPANY, and EMAIL show the leads' contact details as entered on their event registration form. The list also contains these columns:
  - Scanned by: This tells you the method the lead was collected
  - Scan time: The date and time at which the lead was collected and by which staff member.



Managing leads

You can manage leads in several ways in the Visit Connect portal:

- Search for leads by typing into the search field at the top and pressing Enter
- Filter leads by various criteria: stages of contact, company, person who scanned the lead, content scanned by the lead, scan dates
- Preview a lead's details by clicking the lead in the list. The preview appears in the bottom area of the screen and from this section you can;

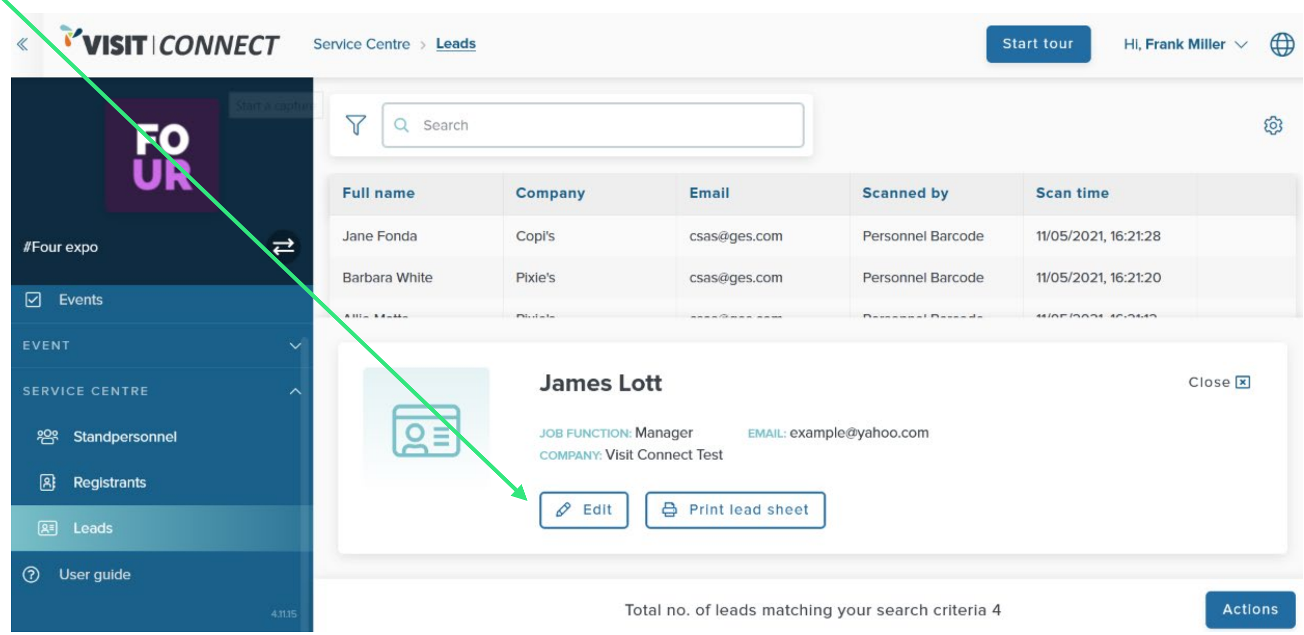
    - Click the edit button to view and edit a lead's details. (See Accessing a lead's details for more information)
    - Click PRINT LEAD SHEET to save or download the details (see Print lead sheet)

- Export the leads in any format (excel, csv) by clicking EXPORT (see **Export leads**)
- Update the list with the latest information by clicking REFRESH LEADS (if the event is still going on).

You can delete a lead if needed. For example, if a person contacts you with a request to remove their information from your records due to privacy considerations. The deletion cannot be reversed and you must use the delete icon to delete one or more leads from the Leads screen.

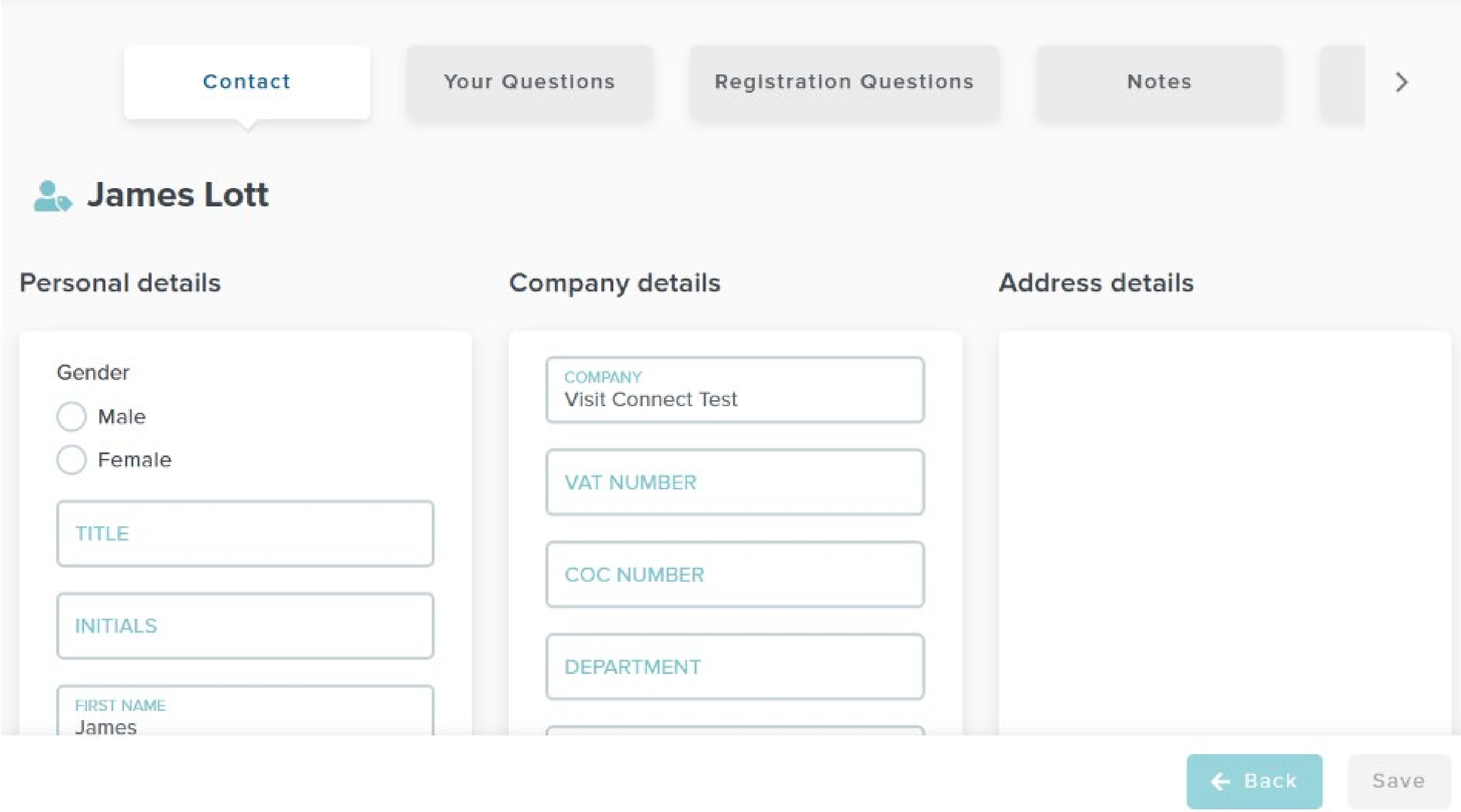
Accessing a lead’s details

From the leads list, you can drill down to a more detailed view of each lead when you click **Edit**:

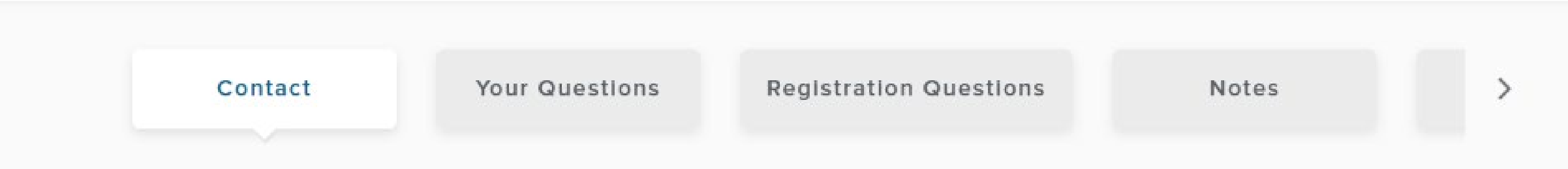


Accessing a lead's details

The six tabs at the top of the lead's details page let you see various things:



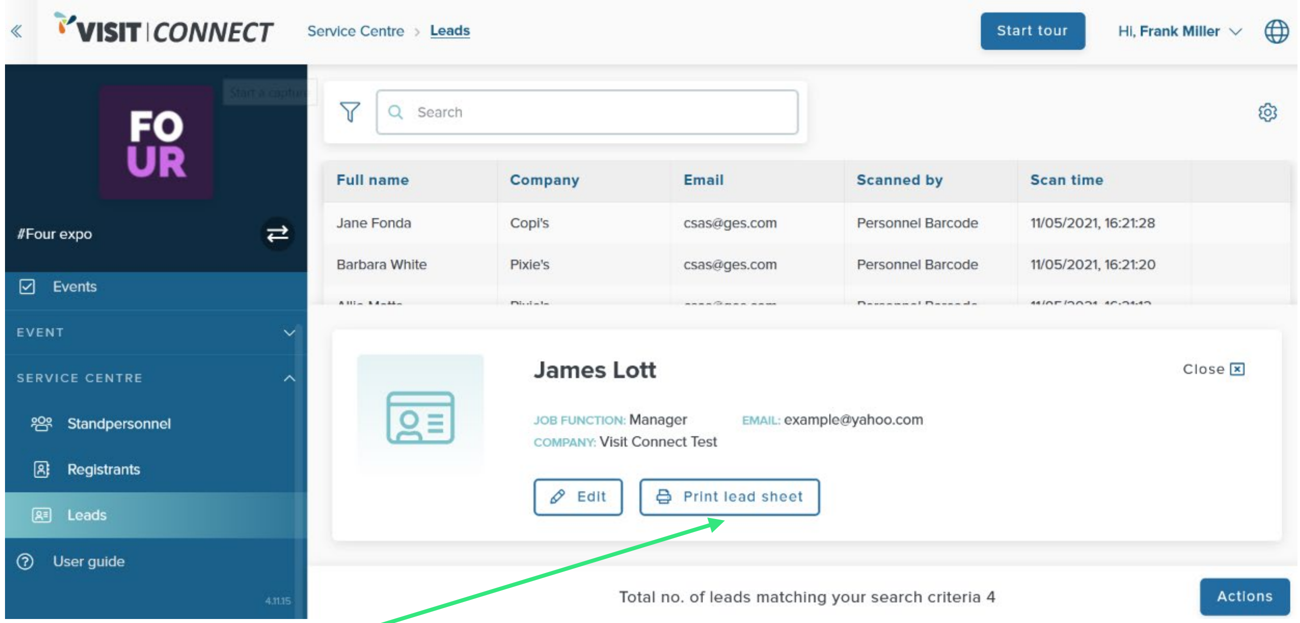
Accessing a lead's details



- CONTACT – View and edit the lead's contact details
- YOUR QUESTIONS – View and edit the answers that the lead gave to your (custom) questions
- REGISTRATION QUESTIONS – View and edit the answers the lead entered on their event registration form. (*Not all events share this information with exhibitors. The tab is empty in that case)*
- NOTES – View and edit the notes recorded for this lead or add new notes
- CONTENT - This lets you see the content collected by the lead
- STAGES – See or choose which stage the lead is in, such as Contacted, Active Opportunity or Long Term Opportunity. You can use this tab to build up a contact history for the lead

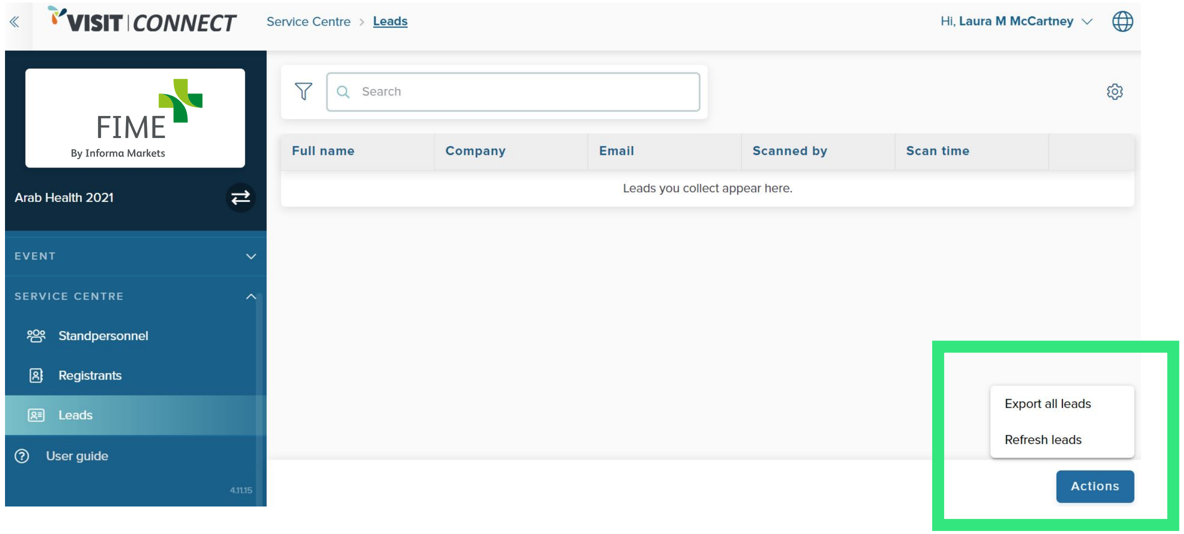
Print lead sheet

- You can print out the information collected about a specific lead (A lead is a person who represents a sales opportunity for your company) on a lead sheet. This way, you have the most important information on hand when you follow up on a lead.
- In the menu, click **Leads**
- Select from the list the lead whose details you want to print.
- Click **PRINT LEAD SHEET**. You now can open or save the lead sheet as a PDF, and then print it.



Exporting Leads

- You can use the Visit Connect web portal (The Visit Connect web portal is where you manage your accounts, licences and leads) to export leads to an Excel workbook or .csv file for follow-up or import into a CRM.
- In the menu, click **Leads**.
- In the bottom-right corner, click **Actions -> Export all leads.**
- Click **DOWNLOAD** and choose where to save the file to your computer and select Save.
- You can now open the export file in Microsoft Excel, or import it into any software that supports this file format (see Leads export file).



Digital (QR) Content

A second lead retrieval method

A second way to collect leads

- Scanning a visitor’s badge is one way to collect their information and secure them as a lead. A second way is to include QR codes on your stand.
- Informa have assigned QR codes to your company and all your products that had been uploaded in SwapCard (the online platform). We can print these QR codes for you to place on your stand and let visitors give you their contact information when they scan these QR codes onsite.

Visitor arrives at your booth

They scan your QR codes/you scan their badges

They collect content and you collect them as a lead

What do you get

- You can have multiple QR code stickers printed.
  - Tell us onsite which products you want to promote during the show, and we can print their assigned QR codes for you

- These QR codes can be placed directly onto your stand, or you can place them on a placard

- All exhibitors will be given <u>one free placard</u>. You can choose to have more placards if you wish – each additional placard will be charged at US$10

Collect your printed QR codes & placard

- You can go to the ‘Exhibitor QR Code Collection’ stand located at the entrance of the West Lobby
- Here you can collect your free placard, purchase more placards, and print & collect your QR code stickers
- From 8am onwards on Monday, 30th August 2021

Thank you

Please reach out to
FIMEcustomerservice@informa.com
if you require any support.