Trade Show Lead Gathering Systems and Lead Form Design

Seriously Fun Training

If visitors to your booth simply come by and pick up literature without leaving a name, your ability to match the person's name and company to purchase order or warranty card to prove the sales return for the show is non-existent. And if the lead form does not ask for the appropriate qualifiers, all of the leads will be considered to be of the same quality and the follow-up will suffer.

To gather leads quickly and effectively, to qualify and sort the leads, and to follow-up on those leads expeditiously, you will need to:

1. Decide on a lead gathering system that includes equipment and software and one that integrates with your existing sales force automation or customer relationship manager system.
2. Design a lead form in collaboration with those people who will receive and follow-up on the leads.
3. Be able to upload the leads into your company's existing database.

Here are some lead gathering system options:

1. Purchase your own lead system or rent equipment from show management.
2. Desktop, tablet, handheld PDA, self-service, and/or web-based or other electronic systems that include badge scanning capability that automatically populate the fields for contract information, etc.
3. Use a lead system that allows customization of the qualifiers and fields and the addition of notes. If the system does not include the ability to make changes and notes electronically, then you should use one that prints out a paper record of the lead.
4. Paper output from the lead system or business card can be attached to your own paper lead form (staple the two pieces together).
5. Grabbing business cards are my least favorite choice because the trade show won't get credit for these and your efforts will probably never get recognized if those business cards don't hit your system.

To enable your sales people, distributors, or partners to turn qualified visitors into customers, they typically need the following pieces of information as a part of complete lead:

1. Contact information and preferred method of contact.
2. Specific product or service interest.
3. Time frame for further contact and purchase.
4. Budget or funding for a purchase.
5. Next step, agreed upon and committed to.
6. Hot leads typically have everything above and a very short follow-up time frame.

The need for these, or any other qualifiers, should be verified by your "customer" for this information; your salespeople, telemarketing people, etc. The design and content of the leads should be a collaborative effort. Marketing should not force their lead form on the trade show.

Lead form design guidelines:

1. To complete a lead in your booth, during-the-show with your visitors, should only take 30 - 60 seconds
2. If electronic, have it branch intelligently especially if you've got a lot of products that the visitor could be interested in.
3. If you can fit everything on one screen or page, without having to strain your eyes to read it, do that. One screen of information to complete visually communicates to the visitor that the process will not take very long. Multiple screens give them no clue and might lead to some impatience or resistance on their part.
4. Avoid fill in question (except for the notes area). Use tick boxes to make selections quick and restricted.
5. If you are using paper lead forms, use full 8.5 x 11 pieces of paper on clipboards with attached pens. Leave enough space at the top where you can affix a business card.