LEAD MANAGEMENT AT ARBS 2024

Setting up lead scanning

It is vital that you set up lead scanning – and test it – well before the show.

Lead scanning is set up through the portal.

We recommend you sit down with your team and discuss lead scanning, reviewing the following:

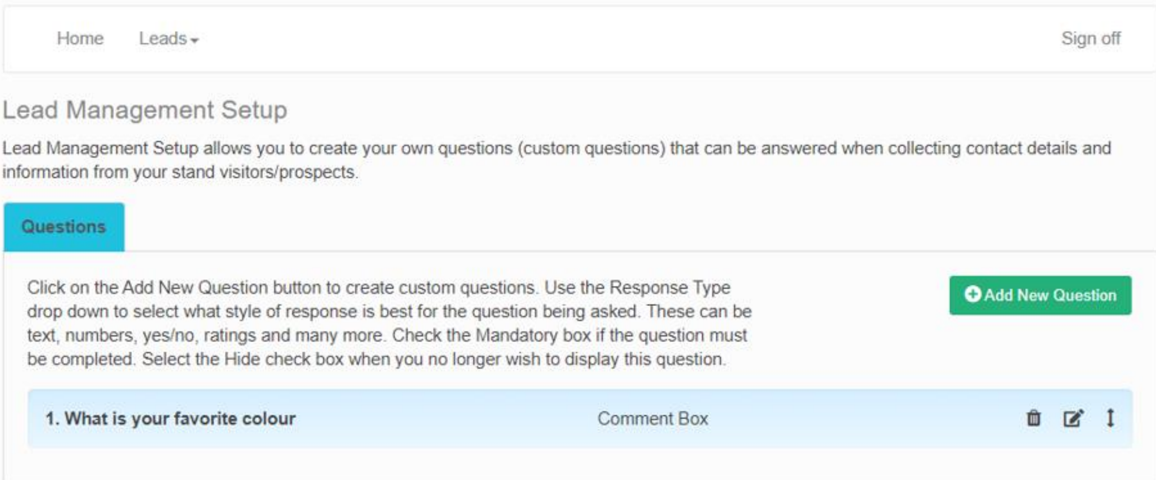
1. Do you want to set up customised questions. If so, what are they?
2. Are you going to send a thank you email. If so, what should it say?
3. Do you want to use the Lead Alert email function?
4. Using the Notes function. What information to capture here?

Ensure your team reads through the following lead scanning notes, so they understand how it works.

All the lead scanning data is collected in the portal. It is vital that everyone understands that only the PRIMARY CONTACT listed in the portal can access the complete set of lead data.

1. Customised questions

Once logged onto the Exhibitor Portal, you can create custom questions. Navigate to Exhibitor Portal > Lead Management setup > create custom questions as seen below.

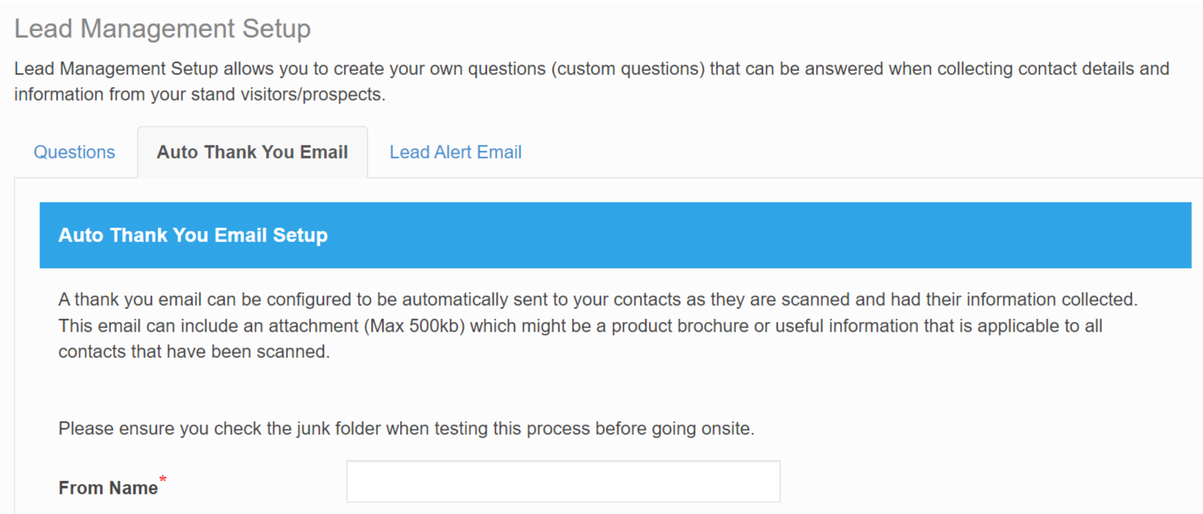


You don't have to set up customised questions. It is entirely up to you how you use this section. It is recommended **not** to make them mandatory as this can slow down lead captures if you are busy on your stand scanning.

HOWEVER – if you want to know who scanned a lead, you will have to set up a customised question called for example, SALES REP. This allows multiple choice answers – and will let you enter the names of your sales reps. When they scan a lead, they can click on their name in the customised question field, and this will sit in the data as the rep who scanned this lead.

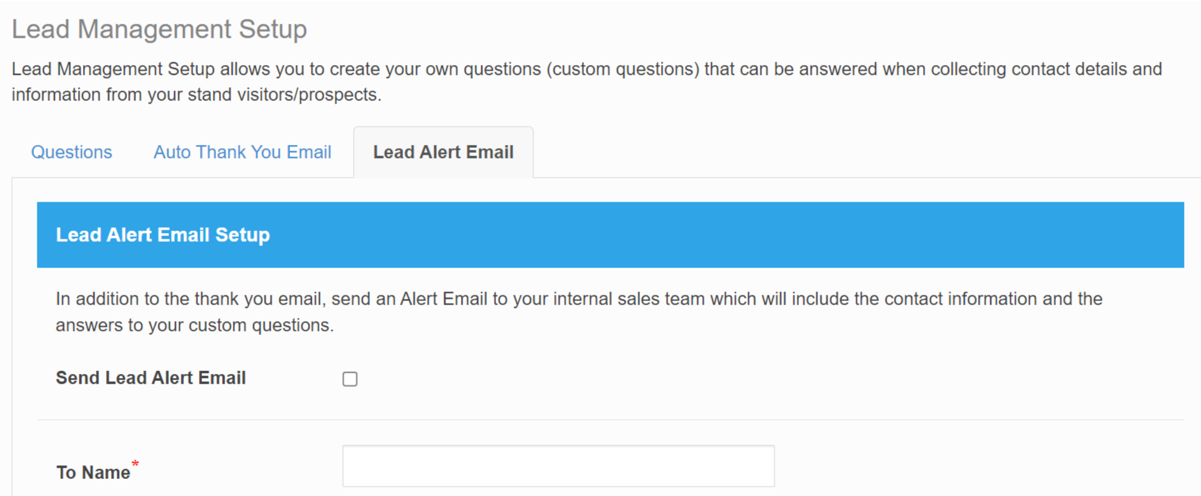
2. Thank you emails

There is also the option to add auto send thank you emails with an attachment if you wish to do so to your scanned contacts.



3. Lead alert email set up

If you have scanned a great contact and want your sales team to follow up quickly, we recommend you set up lead alert emails.



4. The notes function

Once you have scanned a lead, use the notes function to add in any follow up notes or comments from your conversation with the visitor. Notes are available both in the View Leads button on the app and saved in the Exhibitor Portal.

How do I scan a lead?

The most important thing to remember is that it's not through your phone camera. To be able to scan a lead you must have completed the following steps:

- Ensure each team member who needs to be able to scan is registered through MANAGE YOUR BOOKING in the portal. See example below:

Manage Your Booking

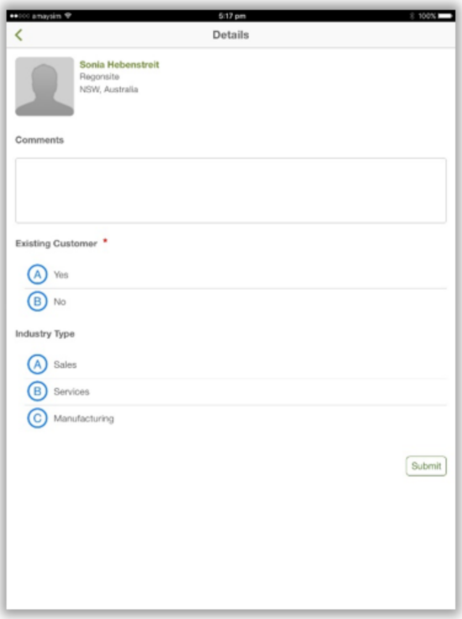
Listed below are the details for your booked exhibition stand. Each booked stand will also have a checklist of items that are required from the organiser. The Checklist section below will allow you to review and manage these requirements. Please note: if you are the primary contact for your booking, and you will be attending on site, your name must be included in the list below.

Stand	Checklist		
727 ARBS Organiser Office 0m x 0m (m²)	☐ Company Profile		Edit
	☐ Brochures (PDF, Websites, Video Links) (0)		Add/Remove
	☐ Logo		Upload
	Printed Exhibitor Directory Listing (50 words max)		Book
Registration	☑ Add Exhibitor Staff Badges Brenda Mcdonald	1	Open
	☑ Add Exhibitor Staff Badges Monique Morris	2	Open
	☑ Add Exhibitor Staff Badges Taylor Swift	3	Open
	☑ Add Exhibitor Staff Badges Karen Tancred	4	Open
	☐ Add Exhibitor Staff Badges		Add

- Each team member needs to download and install the attendee app, called the **Event App by Events Air**. (Please note, you can download the app now, however you won't be able to enter the ARBS 2024 event in the app until early April once the ARBS 2024 app content is live.)
- Once the attendee app is downloaded, each team member needs to ensure they have enabled Bluetooth and the camera for the app.
- Once the app is downloaded your team members need to log in to the app. (Log in details will be sent 6 weeks prior to the show.)
- The lead scanning app will now be ready to use, showing 2 buttons that visitors can't see. These are 1) Scan Leads and 2) View Leads

- To scan a lead, team members need to open the app and click on the **Scan Lead** button. This will open the camera on their phone. The screen below to scan the QR code will appear. Hold this over the QR code on the visitor's badge.

- When the scan is successful, the details of the person scanned will appear on the screen and the custom questions will be available to complete. Example below:



- **Press submit to save. All scans made by staff MUST BE SAVED.**
- From this point, all the data their data will then be visible in your Exhibitor portal. If you would like to see which staff member collected the scan, remember to include your staff's names as custom questions, so you can mark each scan with the person's name that you have pre-loaded.

What data is accessed when visitor badges are scanned?

If you want to see data immediately, click on the **View Leads** button in the app. Please note, only limited data (only their name and company) is displayed here.

However, <u>all their data</u> that is entered when they register (name/company/title/phone number/email address etc) is available to download from the portal.

Only the PRIMARY CONTACT listed in the portal can access the data.

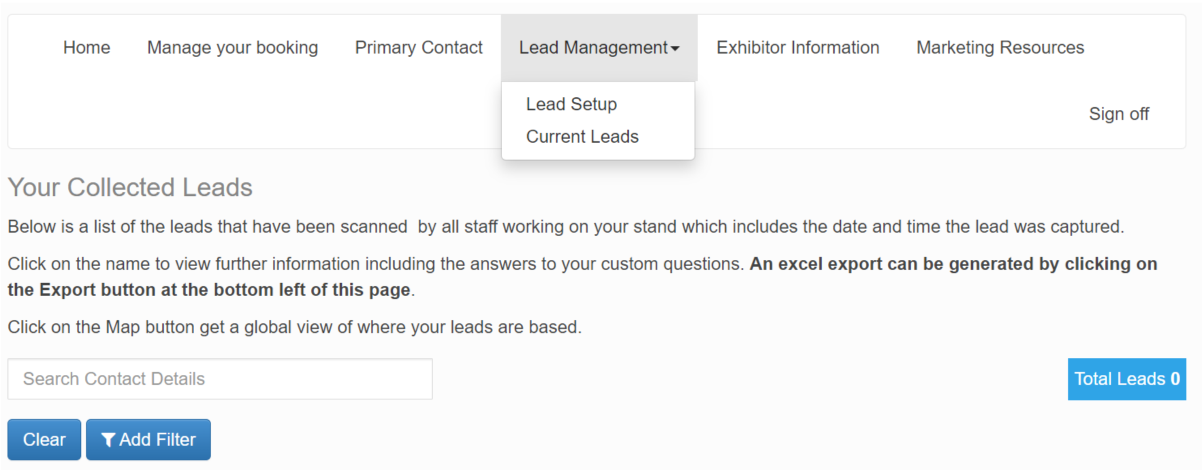
What data is accessed when exhibitor badges are scanned?

Please note, you won't get the same level of data with exhibitors as you do with visitors. This is because exhibitors don't register the same way as visitors. They are registered through the portal. All you will get with exhibitors is their name/company and email address.

How do I access the full data?

Remember, only the PRIMARY CONTACT listed in the portal can access the data.

They need to go to LEAD MANAGEMENT in the portal, click down on CURRENT LEADS.



This is where the whole lead database is stored, including customised questions. This can be downloaded and shared with the team. Here is a sample list:

Title	First Name	Last Name	Position	Organization	Address 1	Address 2	Address 3	City	State	Country	Postcode	Phone	Mobile	Email	Scanned Date	Scanned Time	Stand	Existing Customer	Comments
		Group Contact		Test Exh Scanning	Rtrth			Htrh	NSW	Australia	6666		5675675	sonia@regonsite.com	Wed Jul 14	12:24 PM	TEST	Yes	
	Mick	Sheehy		PWC											Wed Jul 14	12:23 PM	TEST	Yes	
	Dave	Stirling	Founding Executive, Chairman and CEO	DoTerra										natalia@regonsite.com	Wed Jul 14	12:22 PM	TEST	No	
	Sonia	Test Table For 10												sonia@regonsite.com	Wed Jul 14	12:24 PM	TEST	No	this is an important customer
	Emily	Wright	Sales and Marketing	DoTerra										natalia@regonsite.com	Wed Jul 14	12:22 PM	TEST	No	did it do this customer

Can we create our own lead generation form?

You need to use the ARBS Lead Scanning because QR codes on visitor badges are encrypted URLS, and scanning these using your phone camera will not provide any information at all.

How you do test Lead Scanning prior to the show?

You won't be able to test lead scanning until the app is live in early April.

Below are two QR codes we have set up for you to practise scanning once the app is live.

JANE DOE	**JOHN DOE**
ARBS TESTING CO.	**ARBS TESTING CO.**
VISITOR	**VISITOR**

WiFi Suggestions

General WiFi is free at ICC Sydney. However, with exhibitors and attendees all accessing the general WiFi it can be quite congested and slow. If you would like to ensure a faster and more reliable WiFi connection, you can either purchase additional WiFi through the ICC by completing this Internet Services Order Form.

Alternatively, you can use your own 4G/5G connection.

Any further questions?

If you have any further questions, please reach out to helpdesk@regonsite.com. They are there to ensure your lead scanning experience is as seamless as possible.

Lead Scanning Timings and Checklist:

To complete	Timings
Through the portal, register everyone in your team who needs to be able to use lead scanning	You can do this now
If you want customised questions, are these set up?	Can be set up now. Ensure they are done prior to ARBS.
If you want a thank you email, is this set up?	Can be set up now. Ensure this is done prior to ARBS.
Download the event app	App can be downloaded now, but ARBS 2024 content won't be live until early April
Have your team allowed Bluetooth and the camera for the app	From early April, once the app is live
Testing Lead Scanning	From early April, once the app is live
Is your team clear on who can access the data?	Explain this to them now
Is your team aware of who to access the data?	As above