

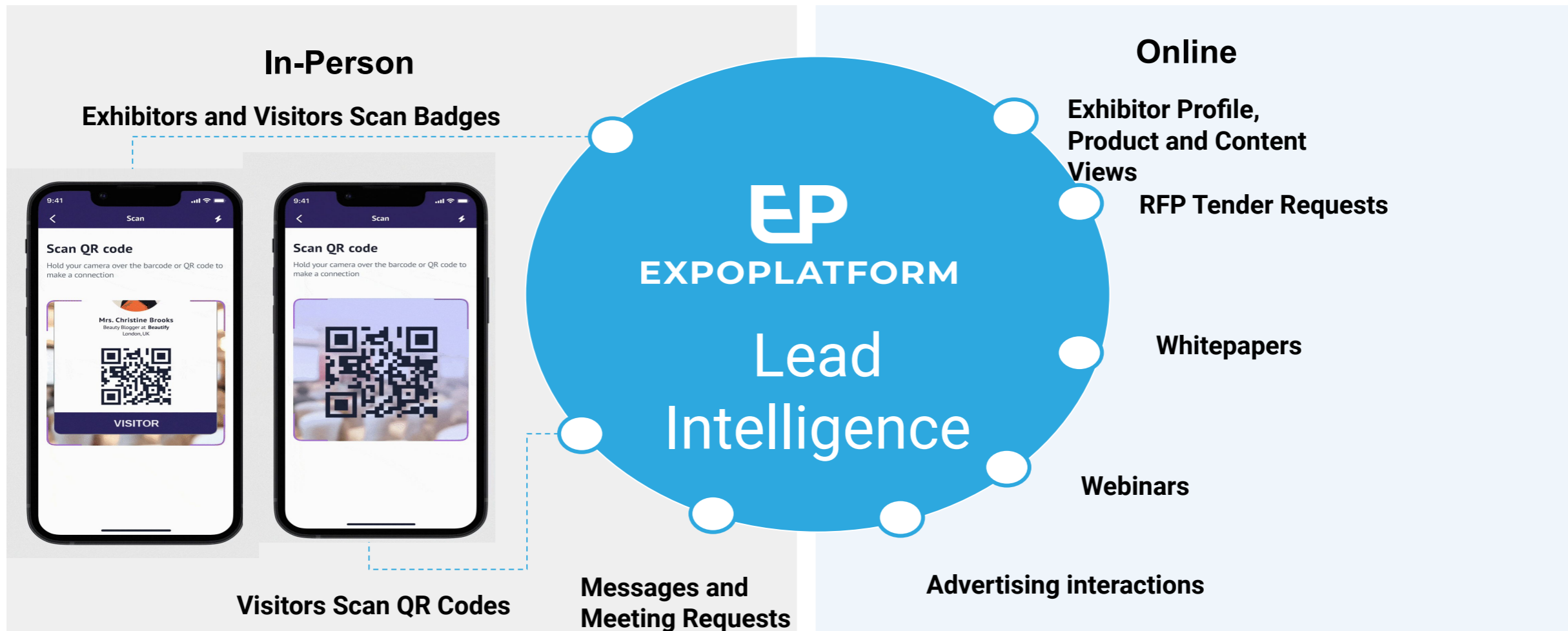
# MAKING THE MOST OF LEAD RETRIEVAL

A guide to maximizing lead capture and event ROI



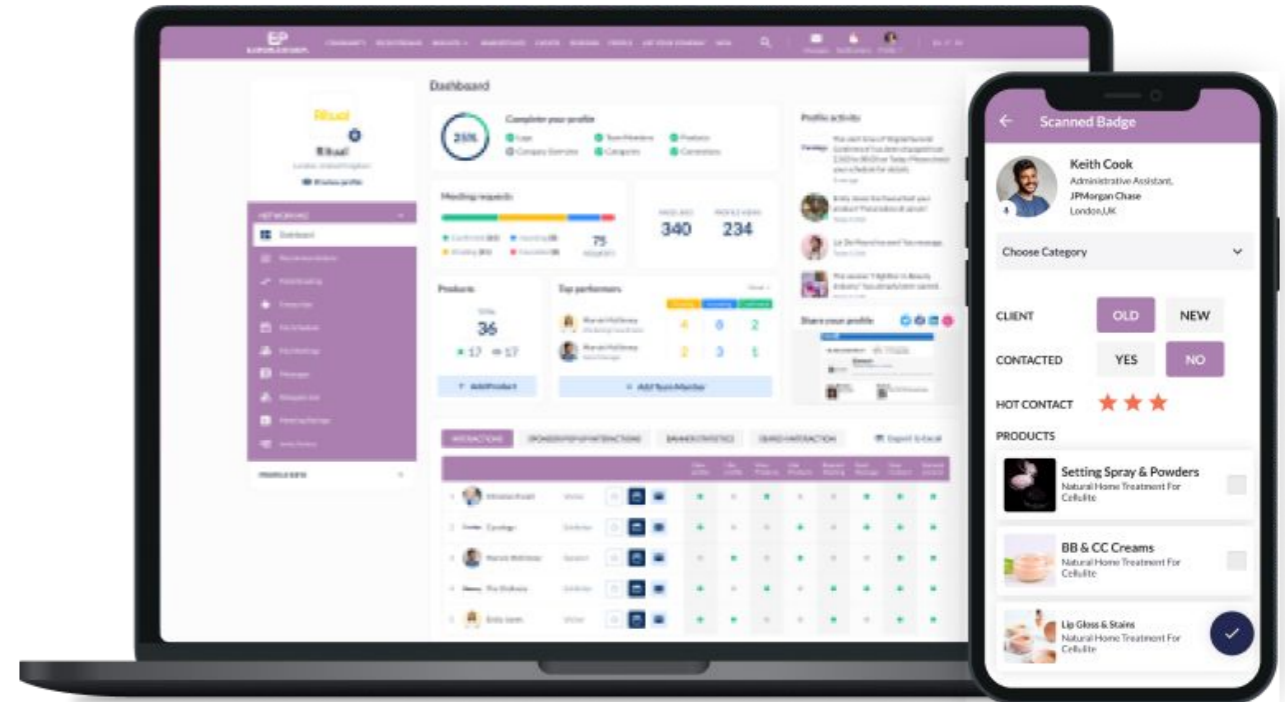
# OVERVIEW

With ExpoPlatform you can generate leads before, during and after the event, and follow up with them in real-time through our platform, including our event app, resulting, on average, in 3 times more leads per exhibitor than badge scanning alone.



## Key platform features include:

- Our dashboard showing who is interacting with your company profile, products and team members
- Our event app which includes the ability to scan badges, categorize leads, rate leads and make notes, including offline scanning of badges
- Ability to download leads
- Ability to equip all of your stand personnel with lead retrieval
- Ability for visitors to request onsite meetings and send messages
- Ability for visitors to scan badges and scan company and product QR codes
- Ability for visitors to favourite companies and products



# SCANNING BADGES & MANAGING LEADS

# SCANNING BADGES

**Step 1: Download the event mobile app and log in using your exhibitor or team member credentials.**

These are the same credentials that you use to log into the web platform.

**Step 2: To scan a badge, choose Scan Badges from the menu or tap the scan icon on the bottom right.**

This will open your camera so you can scan the badge. When the camera is pointed at the badge, it will automatically scan. (Note- depending on your permission settings you may be asked to give the app permission to use the camera or may need to tap within the scan window to grant permission)

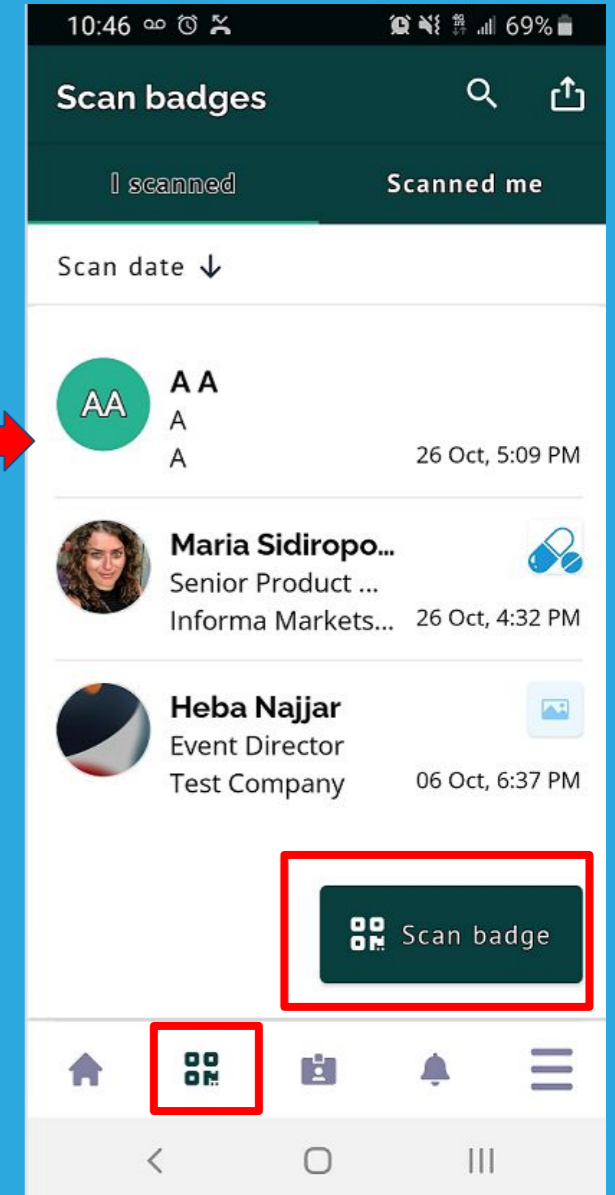
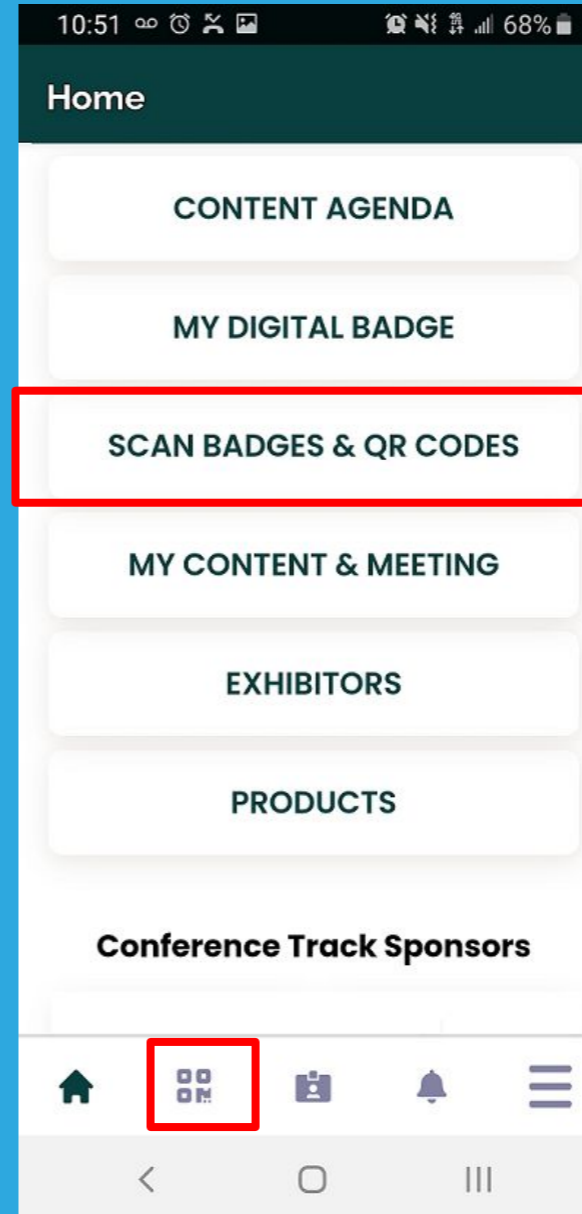
**Step 3: After scanning add details and notes on the next screen.**

On this screen you can add:

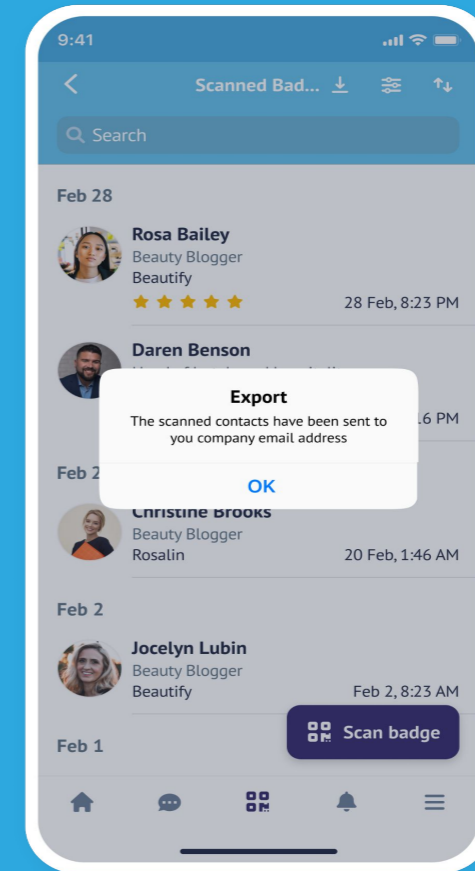
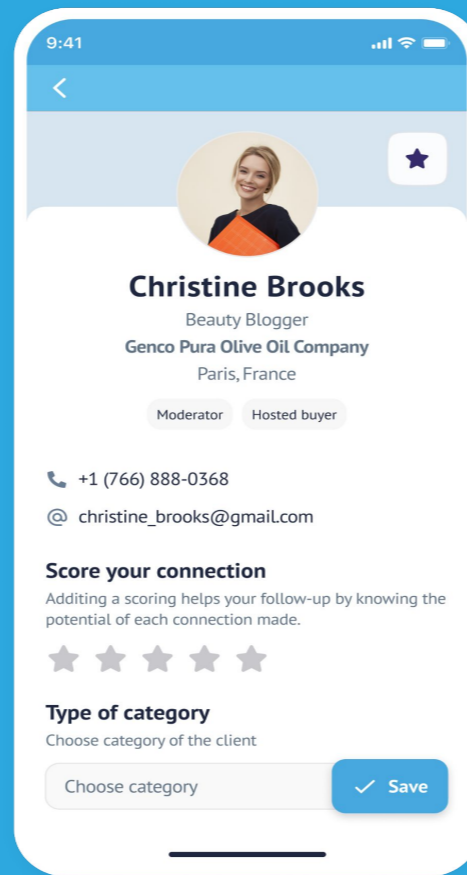
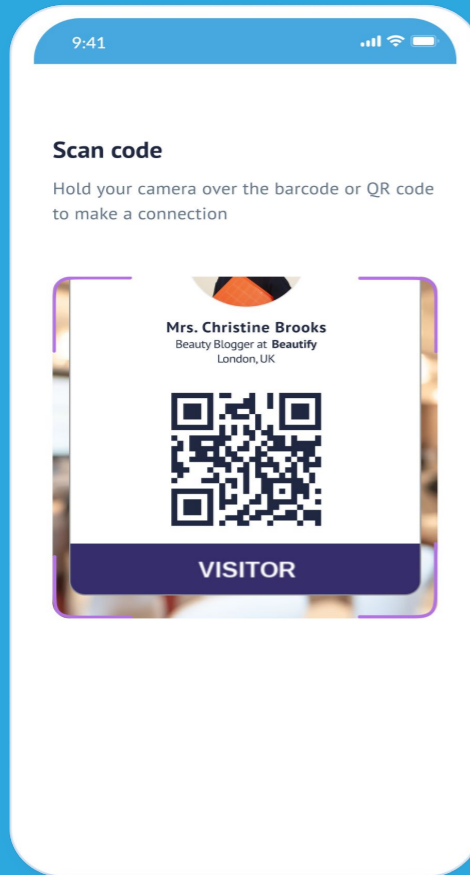
- What type of lead they are (Potential Partner, Potential Client, Supplier, Other)
- What type of client they are (New/Old)
- If they've been contacted (Yes/No)
- Lead Rating (1-5 stars)
- Any notes about the lead

Depending on how the organizer has configured visitor registration and configured the event app, you may also be able to see the lead's interest categories, purchasing power and other details

**Step 4: Click Save**



# SCANNING, RATING AND EXPORTING SCREENS



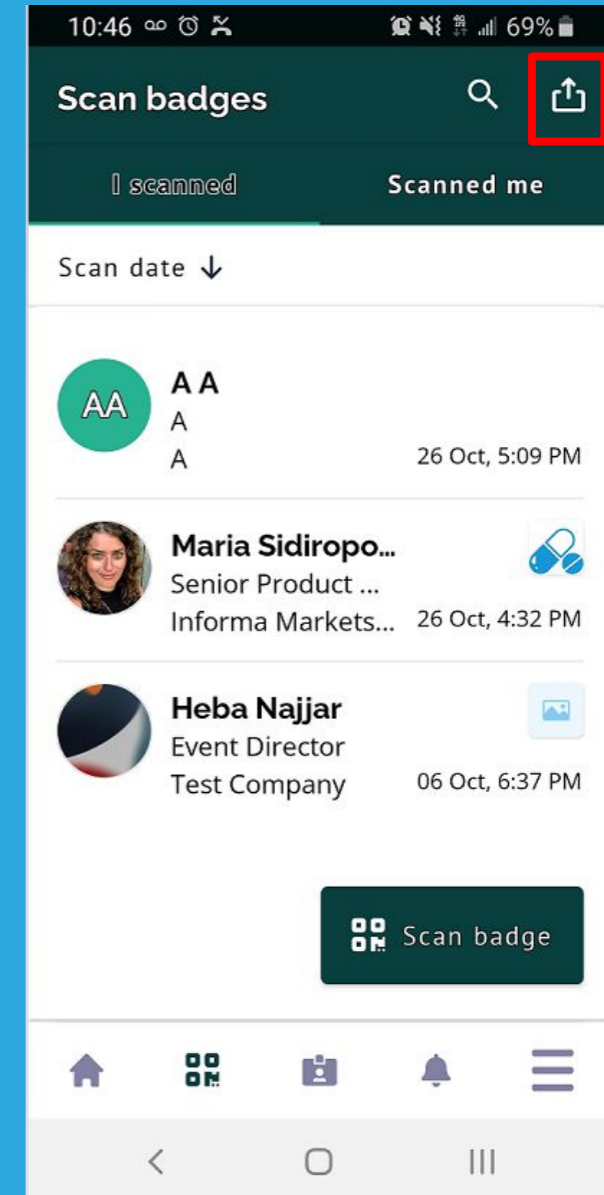
# EXPORTING LEADS FROM THE MOBILE APP

**Each person can view the badges that they've scanned by navigating to Scan Badges in the app.**

On this screen, there is an Export link in the upper right that can be used to export the leads.

This will trigger an email to the user with an attached spreadsheet of leads which includes (depending on organizer configuration):

- Name
- Email
- Company
- Position
- Address
- Phone
- Star Rating
- Notes added
- Products the lead was interested in
- Type of client (new/old)
- Time of scan

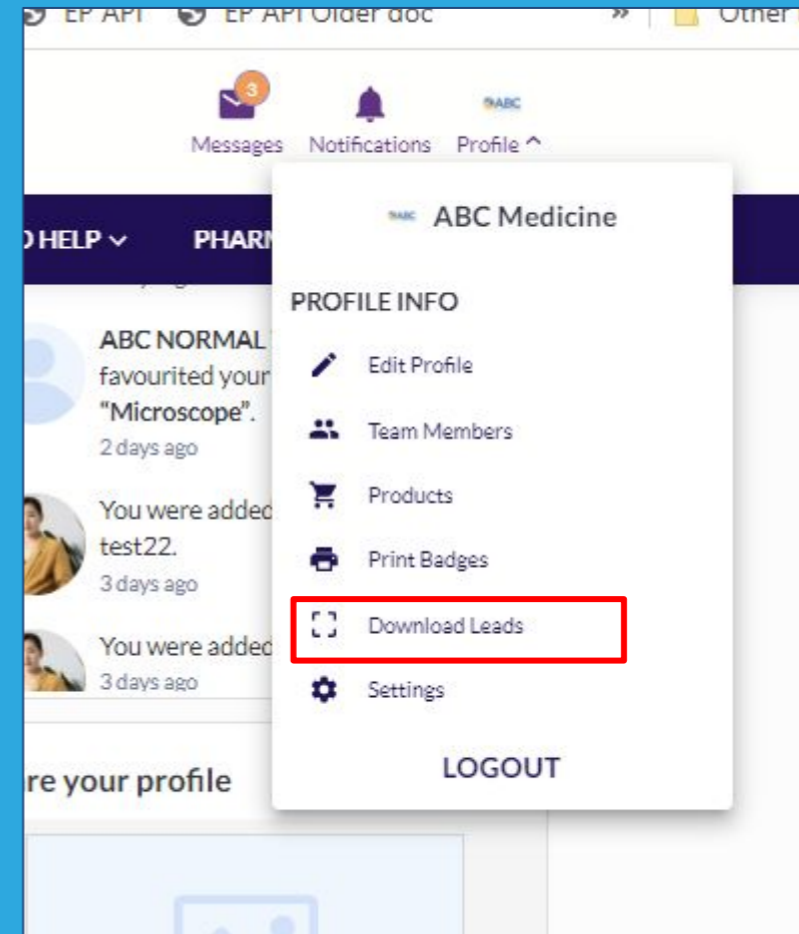




# EXPORTING LEADS FROM THE WEBSITE

Leads can also be downloaded from the website.

- **When accessed using the exhibitor profile this download will include all web and all scanned leads for all team members.** Because this file contains all leads, the downloaded spreadsheet will have an additional column for Lead Owner.
- **When accessed using a personal profile this download will include all web and all scanned leads for just that person.**





# PRE-EVENT NETWORKING TO GENERATE MORE LEADS

# COMPANY INTERACTIONS DASHBOARD

**When logged in with an exhibitor profile or as an admin team member accessing the company profile, this version of the Dashboard page is displayed.**

To navigate to this page click on Settings in the left navigation, then click Dashboard at the top of the new navigation that appears.

**At the bottom of the Dashboard page you will see a list of who has interacted with your profile and who your team has scanned onsite.**

Interactions displayed are:

- Company profile page viewed
- Page favourited
- Meeting requested
- Product viewed
- Product favourited
- Scanned at stand

On this page you can:

- Click into a person's profile to see additional details about them
- View all leads from both the website and mobile
- Add a person to your favourites
- Send a message
- Send a meeting request

Interactions				Page views	Page favourites	Request Meeting	Product views	Product favourites	Scanned at stand
1	Mark Weits	Visitor							
2	Mikaela Cano	Visitor							
3	Alina Faro (Media)	Visitor							
4	Lilly Clemmons	Visitor							
5	Devansh Prasad	Moderator							
6	Yordis Tribell	Visitor							
7	Lora Palmer	Speaker							
8	Inez Hale	Speaker							
9	Barilla	Exhibitor							
10	Andrea	Exhibitor							
11	Luke Bilton	Exhibitor							
12	Ivan Druhak	Visitor							
13	Pavel Lukianchenko	Visitor							
14	Tanya Pinchuk	Visitor							
15	Tetiana Druhak	Visitor							
16	Tanya Kovtun	Visitor							

Product favourites  
Contact time: 04/10/2021 • 10:45 am

# DISCOVERING POTENTIAL CONTACTS

To get started, visit the **Attendee List**.

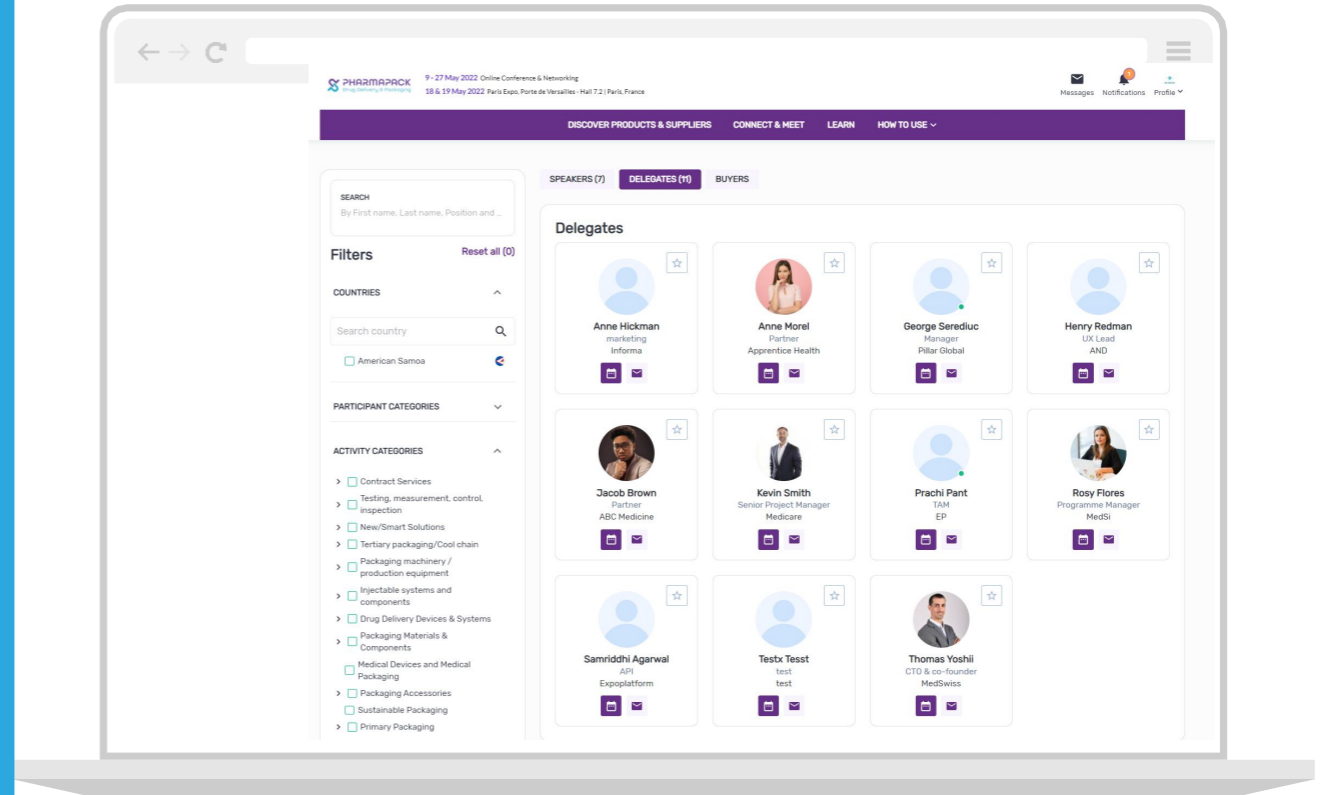
To navigate to the Attendee List from the Profile section, click on Settings then click on Attendee List in the new left navigation that appears.

This is where you can start building your pipeline of future valuable contacts, conversations and customers. Make sure to brief your teams on how to browse attendees with the easy-to-use **filters**.

Available filters vary depending on organizer configuration but can include:

- Countries
- Participant categories
- Organization
- Primary activity
- Markets active in
- Activity categories
- Interest categories

Each person's profile card can be clicked into for additional details about that person. There are also icons that allow you to add the person to your list of favourites, send them a message, or send them a meeting request.



# SEARCHING FOR SPECIFIC CONTACTS

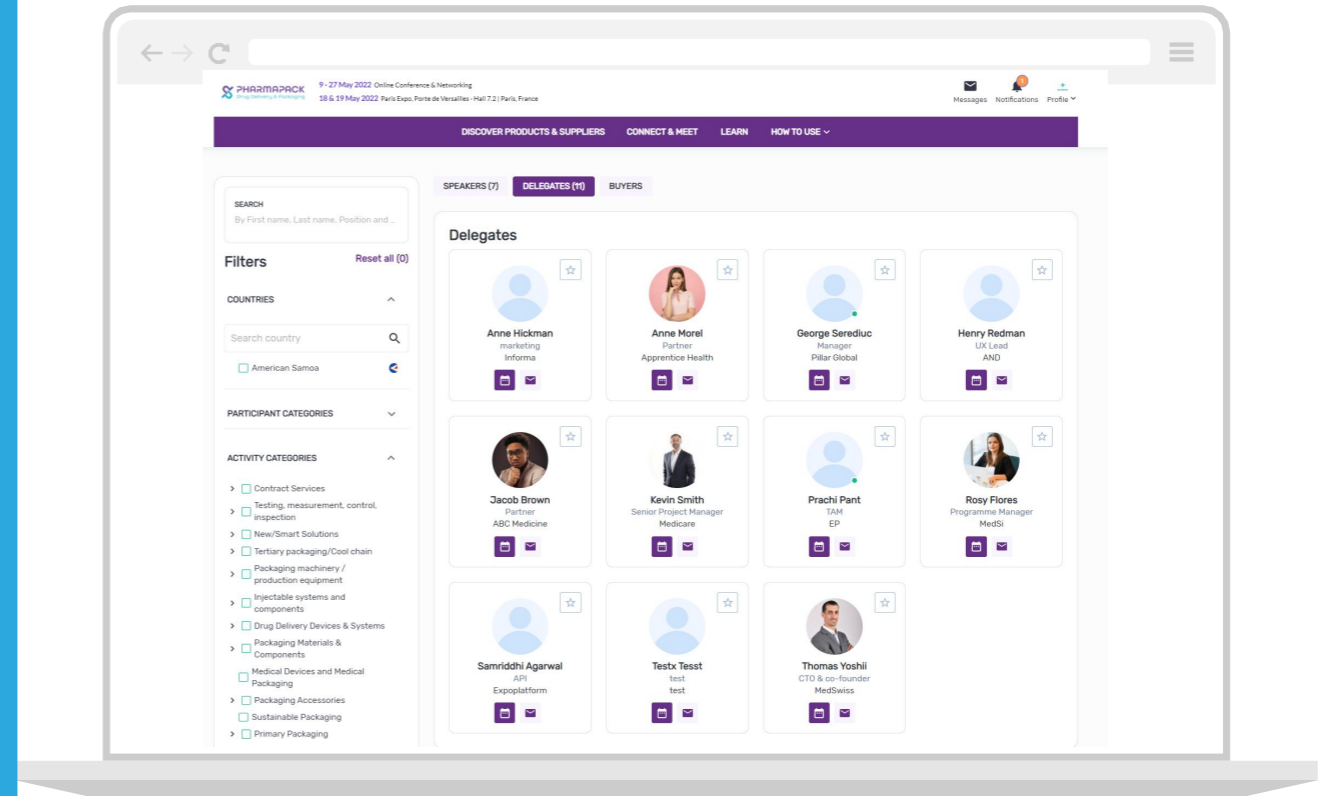
To get started, visit the **Attendee List**.

To navigate to the Attendee List from the Profile section, click on Settings then click on Attendee List in the new left navigation that appears.

The Search box is in the upper left of the page and the list can be searched by:

- First Name
- Last Name
- Company
- Position

Each person's profile card can be clicked into for additional details about that person. There are also icons that allow you to add the person to your list of favourites, send them a message, or send them a meeting request.

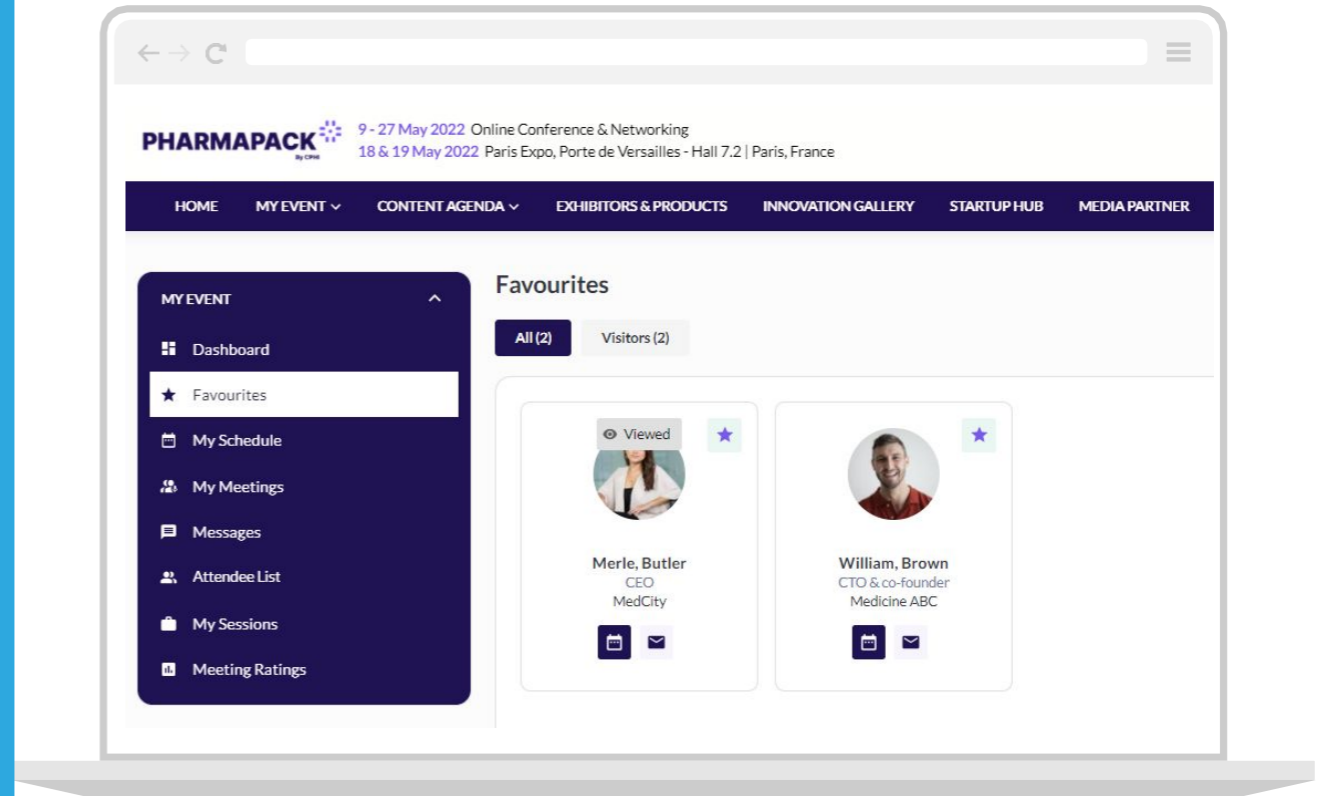


# SAVING AND VIEWING FAVOURITES

You can save a person, company or product to your list of favourites by clicking the star icon on the profile card.

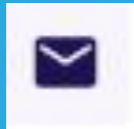
An item that you have already favourited will have a solid star while a not yet favourited item will have a hollow star.

To navigate to your list of favourited items from Edit Profile, click Settings and then click on Favourites in the new left navigation that appears.



# SENDING & VIEWING MESSAGES

Throughout the platform you will see a this Message icon on all company, product and people cards.

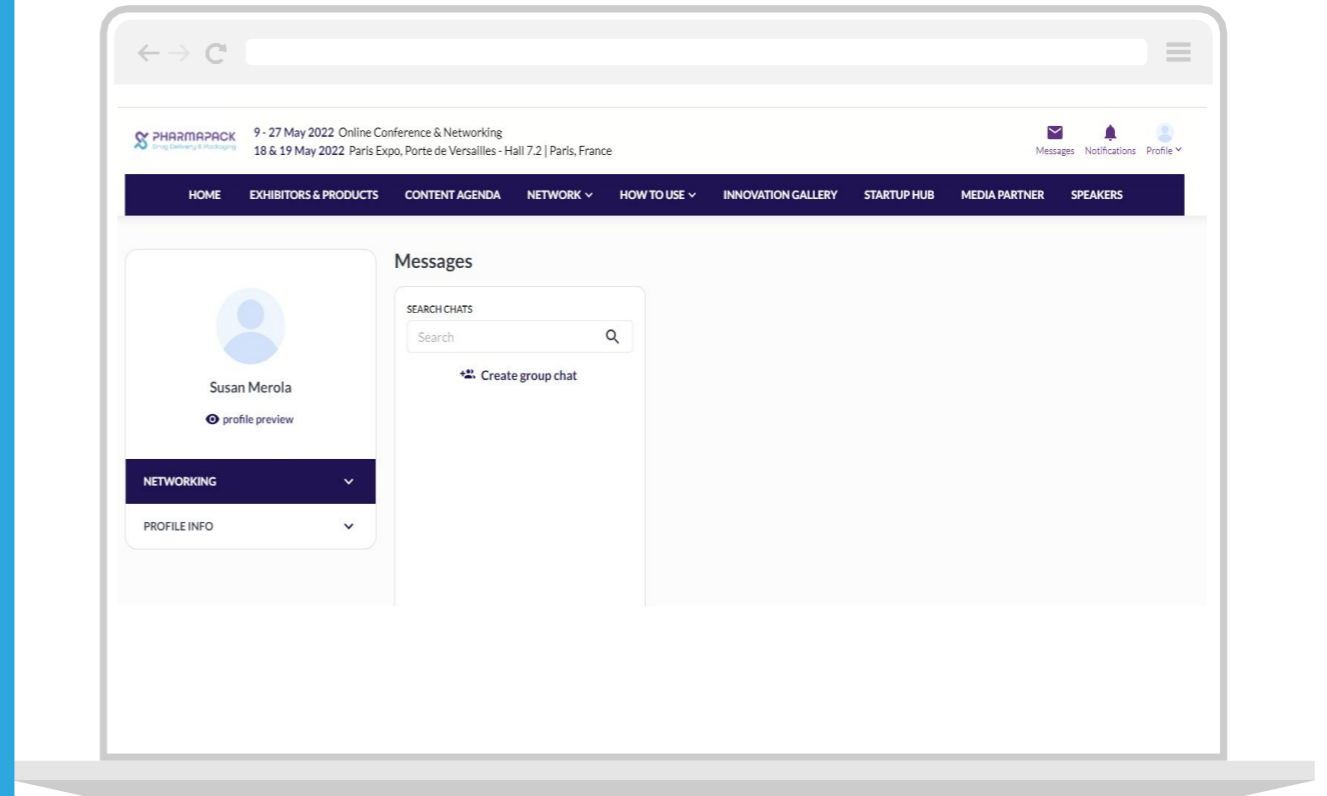


To send a message, click on the icon and begin typing your message.

At the top of the page, to the left of the profile picture, you'll see Messages and Notifications. When you receive a message, it will appear in Messages and you will also receive a notification under Notifications.

You can all see and search all of your messages by clicking on the profile picture in the upper right, then choosing Messages in the Networking section of the drop down menu.

From this page you can also create group chats.



# REQUESTING A MEETING

Throughout the platform you will see a this Meeting icon on all company, product and people cards.



To request a meeting, click on the icon and begin filling out the form.

In the first step you'll be asked for:

- Subject - what is the purpose of the meeting?
- Message - a short message about why you want to meet
- Others you wish to invite (optional) - Invite others to join your meeting using their email address
- Location to meet (online or at event)
- Duration of the meeting

In the second step, you'll be asked to select a date and time for the meeting and then your meeting request will be sent to the other party when you click the Request Meeting button.

The screenshot shows a web browser displaying the PHARMAPACK Meeting Request form. The page header includes the PHARMAPACK logo, event dates (9-27 May 2022 Online Conference & Networking, 18 & 19 May 2022 Paris Expo, Porte de Versailles - Hall 7.2 | Paris, France), and navigation links (HOME, EXHIBITORS & PRODUCTS, CONTENT AGENDA, NETWORK, HOW TO USE, INNOVATION GALLERY, STARTUP HUB, MEDIA PARTNER, SPEAKERS). The user profile for Susan Merola is visible on the left. The Meeting Request form is titled "Meeting Request" and includes a dropdown for "You are requesting a meeting with" (currently set to "AB"). The "Meeting data" section contains fields for "Who will go on meeting from your side\*" (Susan Merola), "Add more delegates" (Search by email), "Location\*" (Select location), "Duration of the meeting\*" (30 min), "Subject\*" (Type subject), and "Message\*" (Enter the message you would like to send to the other party). The form also has radio buttons for "Meeting data" and "Data & time".



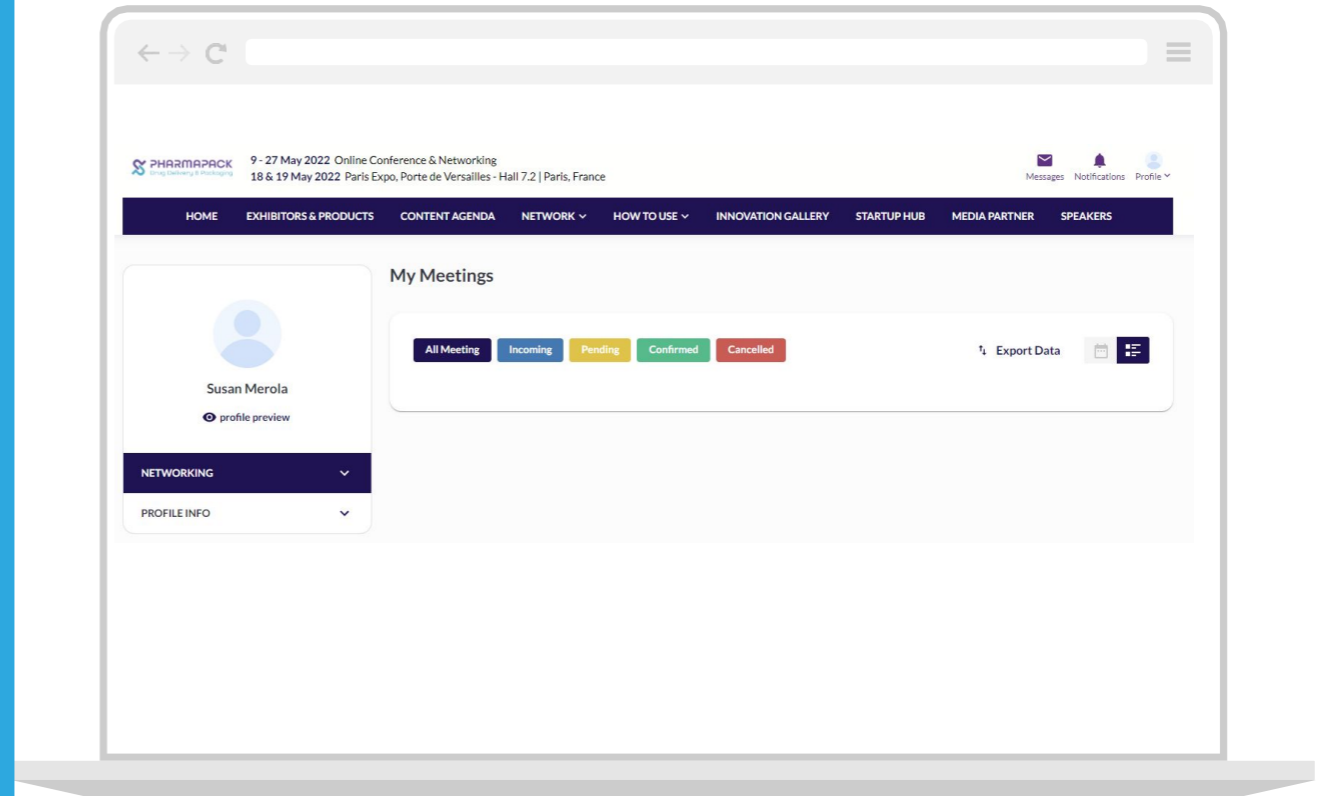
# VIEWING & MANAGING PERSONAL MEETINGS

**On the My Meetings page, you can see all of your meeting requests along with the status of each.**

To navigate to My Meetings, click on the profile picture in the upper right, then click on My Meetings in the drop down menu under Networking.

On this page you can accept or decline a meeting request, as well as reschedule or cancel a confirmed meeting.

There is both a list view and a calendar view.



# VIEWING & MANAGING YOUR TEAM'S MEETINGS

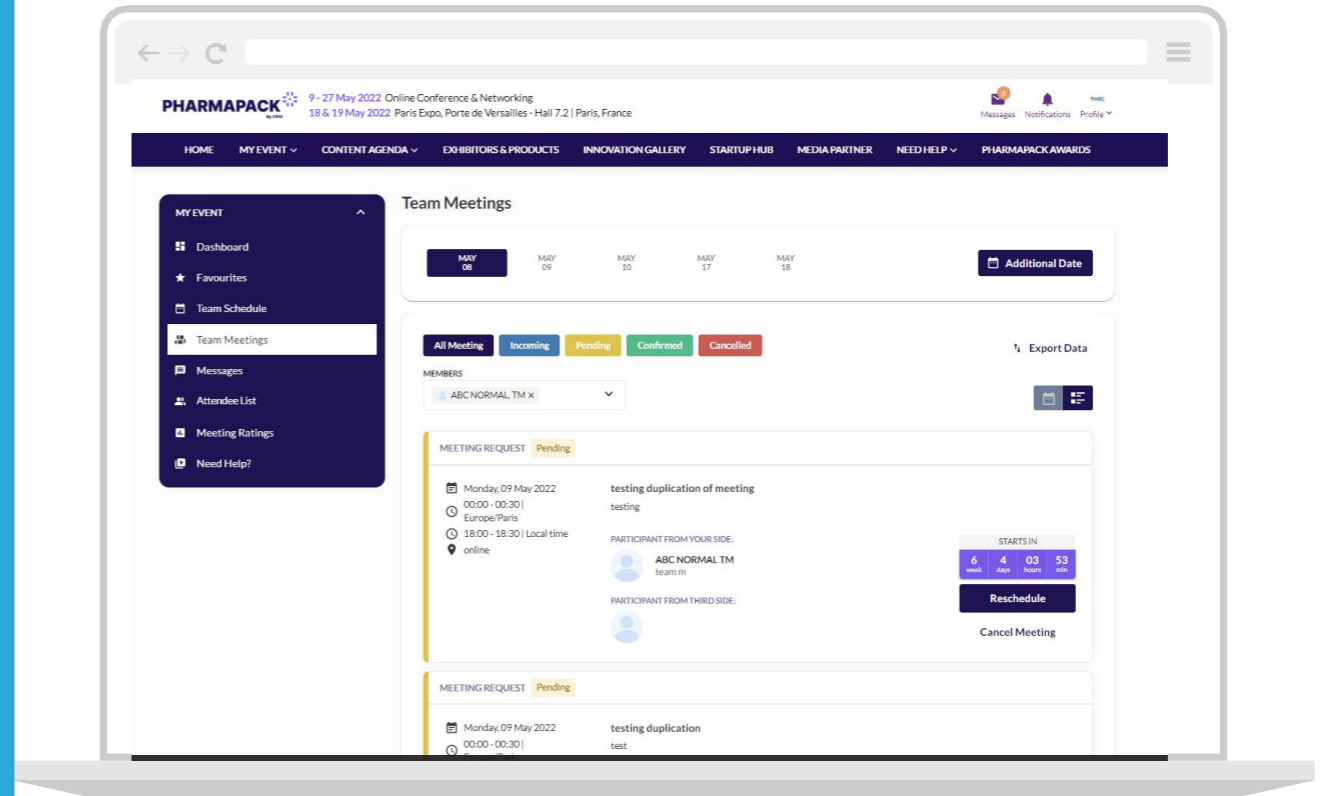
On the **Team Meetings** page, you can see meeting requests for all of your team members, along with the status of each meeting request.

On this page you can view meeting requests by:

- Status
- Team Member
- Date

There is both a list view and a calendar view.

As a reminder an overview of meeting requests count and top performing team members can be found on the company dashboard page.





**EXPOPLATFORM**