



This information is taken from an article written by Doug for Exhibitor Magazine.

Designing a Great Lead Form

At the conclusion of each show you attend, you're in charge of two important piles. The first is the hefty pile of invoices for show-related goods and services. The second is a large pile of leads gathered at the show. And sometime soon, a higher-up in your company is bound to ask you this key question: "Will the second pile pay for the first pile?"

Now take a look at pile #2 from a recent show. Is it a collection of business cards with cryptic notes on the backs? Is it scraps of paper spewed from an electronic badge reader (with no more info than from business cards?) Or is it a collection of forms with completed information that is valuable – and may even encourage your sales people to follow up?

As you design the form, keep these 6 questions in mind:

1. Is it easy to use? Not just a good size (more later on size), but will staffers be able to use it during a conversation?
2. Does it provide you with accurate information? Will it allow your staffers either to record the correct info about their visitors, or at least correct any mistakes that might crop up with electronic reader info?
3. Does it capture info you really need? Most electronic reader systems are so generic as to be meaningless to most exhibitors. Ask your sales management both of these questions: What do you have to have to make this a lead worth following – beyond the basic demographic data? (Consider current status, buying interest, influence, competitive info, etc.) And second, what additional info would be helpful during the follow up process? (Consider budgets, purchasing timeframe, other internal factors, other decision makers, timeframe, etc.) And as you develop the key 5-10 questions – no more – ask the sales management to prioritize them, thus making sure the top questions make it to the form, with others added as space allows.
4. Is the form a reminder for your salespeople? A good form helps sales people ask the right questions of the right visitors. How many times have you seen a form from a good prospect that had incomplete info? With a form that reminds the staffers to ask the right questions, you've helped your staffers do a better job.
5. Can it be completed quickly? Use check boxes and open-ended format questions in equal measure. Practice using the form with some role-play conversations, and see if it is easy and quick (and if the questions are close to being in the right order).
6. Can you easily evaluate and rate the leads? Face it – many companies generate so many leads they can only follow up on the best leads. Have a completely understood and agreed upon system for rating the leads. For example, on a 1 to 10 scale, with 10 being the best, it may be an "8" only if all of the demographic info is complete, and the staffer has asked and

7. recorded complete answers to the questions on competitive influences, budget approval, product awareness and time agreed upon for follow up.

Design the form well

My preference is a lead form that fits in my hand. Take an 8 1/2 by 11 standard piece of paper, and fold as you would a letter. Hold it vertically. It's an excellent size for a lead form. Notice how a business card fits perfectly across the top (stapled or clipped). While the form should also have space for the business card info, if your people can use a card, you've built in a short cut. Have the form printed on sturdy card stock, and your staffers can hold it and write on it without additional support.

Below the demographic / business card info, start with the best questions. What are you interested in? What demo did you see today? Why were you interested in that product? What are you using now? What reaction did you have to the info? What would you like to have happen next as a result of seeing and hearing this info? Who are you using now for this service? Who else is on your team that will select a new vendor? Get your questions together, prioritize them and print it up.

Leave some spaces for free-form comments (and don't forget there is a back of the form for that purpose as well). You can capture technical requirements, specific follow up information, budget ideas, additional people who should be involved, and much more.

And absolutely do not omit the place for the staffer to sign and date the form. People take more pride and care in work they sign – encourage them to look at these leads as if they are gold (they really are!)

As the show manager, you and your team should be reviewing all leads from the show every day during the show to verify completion. A lot of work, but catching the illegible handwriting and omissions early may allow you and your staffing team to correct, add and improve.

What can you measure as a result of having this great form? Much more than just visitors who came to the booth. If you count and record specific product demos, you now know that number. If you record reactions, you can measure them. With each staffer signing his or her form, you can measure and assess personnel performance. If you time stamp the forms, you may be able to even develop better staffing schedules based on probable traffic flow.