



Exhibitor Lead Retrieval

All attendees at the Turbo Expo 2023 in Boston, Massachusetts, USA will be issued a name badge with a QR code. With a smartphone or tablet, you can easily capture the information about visitors to your exhibition stand by scanning the QR code on their badges.

Exhibitors will get free access to a mobile app, which you can download directly onto your smartphone or tablet to scan leads. Complimentary Wi-Fi will be provided.

You will receive a detailed orientation on how to download the app and log in to scan and view your leads prior to the conference.

Lead Retrieval Order

If you would like complimentary access to the lead retrieval app, please provide an email address, which will be used for the user account set up (**must be the onsite contact**). Please note, all users from your organization will log in to the application with this email address.

Exhibiting Organization: _____ Booth Number: _____

User email address: _____

Contact First and Last Name: _____

Please returned the completed form to igtexpo@asme.org by **May 26, 2022**.

Lead Retrieval Capabilities

Review the following pages to learn more about lead retrieval and its capabilities.

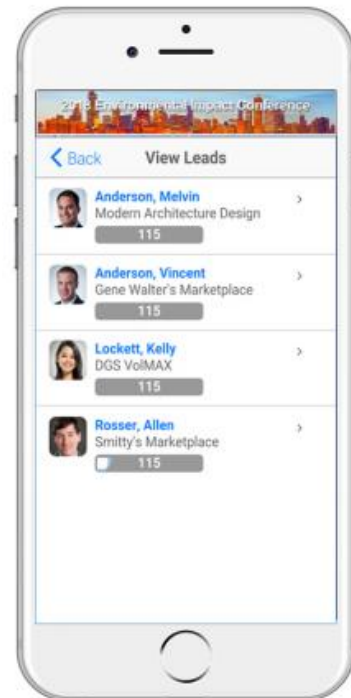
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Introducing Lead Management

Use TURBO's Lead Management Service (LMS) to better capture sale leads information enabling you to take immediate action on leads.

Below is a brief outline of the LMS features:

- **Capture the attendee's contact details** by scanning the QR code on an attendee's name badge when they visit your stand
- **Ask custom profile or marketing questions** during the lead collection process using your own custom questions.
- **Send out automated thank you emails** to the attendee immediately after they visit your stand.
- **Attach PDF or other documents** to the thank you email – perfect for show special offers or other marketing materials.
- **Send alert emails** containing attendee details that were just collected to one or more assigned personnel within your organization immediately.
- **View geographic lead distribution** in a graphical world map (Exhibitor Portal).
- **Export lead details** to a spreadsheet for use in a CRM or other sales follow up process (Exhibitor Portal).



Configuring Your Exhibitor Lead Management Details

The main contact will be sent a link for your dedicated Exhibitor Portal, which can be used to manage your leads, and upload documents and other required items to the event team. You are also able to configure and manage your Lead Management details and view collected leads as they are processed at your stand.

Lead Setup - Questions

This option lets you create profile questions that you can ask each of your stand visitors during the lead collection process through your mobile attendee app.

Selecting **Add New Question** lets you create questions with these settings:

- **Question** - "What is your company's market segment?"
- **Response Type** - similar to survey questions, you can choose what type of responses you wish to display. Available response types are:
 - Multiple Choice (one answer)
 - Multiple Choice (one or more answers)
 - Single Textbox
 - Comment Box
 - Rating 1-5
 - Yes / No
 - True / False
 - Number
 - Date

- **Mandatory** - check this box if you require this question to be answered for all leads
- **Hide** - check this box if you wish to temporarily disable, or hide this question from the Lead Management function

The screenshot shows the 'Lead Management Setup' interface. It has three tabs: 'Questions', 'Auto Thank You Email', and 'Lead Alert Email'. The 'Questions' tab is active, showing a 'New Question Setup' form. The question text is 'What is your company's market segment?'. The response type is 'Multiple Choice (one answer)'. Under 'Valid Responses', there are five entries: 'Education', 'Technology', 'Infrastructure', 'Government', and 'Manufacturing', each with a delete icon. Below the list is an 'Add Response' button. At the bottom, there are checkboxes for 'Mandatory' (checked) and 'Hide' (unchecked). 'Cancel' and 'Save' buttons are located at the bottom right.

TIP If you simply want a text box to collect notes about your lead, set up a question called “Notes” and select the Comment Box as the response type.

Auto Thank You Email

If enabled, **Auto Thank You Emails** are emails that are automatically sent to each attendee immediately after the transaction is processed (i.e. visitor badge scanned and questions are answered).

Options include:

- **From Name**
- **From Address**
- **CC**
- **BCC**
- **Subject**
- **Attachment** – you can attach a PDF document or flyer with special offers or other marketing messages
- **Body** – this is the text of your message to your stand visitors. You can also merge the first name of the attendee visiting your stand for added personalization.

Lead Management Setup

Questions Auto Thank You Email Lead Alert Email

Auto Thank You Email Setup

From Name * ABC Company

From Address * abcsales@abccompany.com

Cc salesdirector@abccompany.com

Bcc

Subject * Thank You for Visiting Our Stand!

Attachment Special Show Offer.pdf Remove

Body *

Thank you for taking the time today to stop by our stand and learn more about ABC Company and how we can help you create a 21st century technology for your business.

We're excited to move forward in 2017 and partner with businesses such as yours to become true industry pioneers in the exciting world of drone-based pizza delivery.

Please take a look at our special show offer, which is attached to this email.

Again, thank you for your interest in ABC Company.

Sincerely,
 Joe Foster Jenkins, CEO
 ABC Company

Insert First Name

Clear Save

Lead Alert Email

If enabled, you can configure an email that is sent to any specified contact person in your organization. This could be a coordinator or sales manager at the home office or a team member at the exhibition or show.

Options include:

- **Send Lead Alert Email** - check this box enable the sending of the Lead Alert Email
- **To Name and Address**
- **From Name and Address**
- **CC**
- **BCC**
- **Subject**

Lead Management Setup

Questions Auto Thank You Email **Lead Alert Email**

Lead Alert Email Setup

Send Lead Alert Email

To Name * Michael Nesmith

To Address * mike@abccompany.com

From Name * David Jones

From Address * davey@abccompany.com

Cc salesassistant@abccompany.com

Bcc

Subject * New Lead at Environmental Trade Show

Clear Save

Using Lead Management

Once configured in the Exhibitor Portal, you are ready to start using Lead Management at your stand. Lead Management options display on your mobile app.

Your Lead Management options are:

- **Scan Leads**
- **View Leads**

Scan Lead option appears only for Exhibitors with Lead Management Services enabled for their stand

View Leads option appears only for Exhibitors with Lead Management Services enabled for their stand



Steps for Using Lead Management Services

Step One - Login to the Attendee App

All stand personnel on your team will use the same login name and password for the primary contact person (the person who originally booked the stand). There is no limit to the number of personnel who are able to log into the app.

Step Two - Select Scan Leads

This puts the attendee app into scan mode and is ready to either scan a bar code/QR code.

Step Three - Scan the Attendee Badge

Select Scan Lead to use your device's camera to scan the attendee's bar code or QR code.

Step Four - Answer Profile Questions

When the contact's details are displayed, if you created profile questions, you and your team will be able to directly enter answers to the profile questions. Once you press the submit button, the lead details are collected and if enabled, a thank you email is immediately sent to the visiting attendee.

Step Five - Reviewing Collected Leads

During the exhibition or afterwards, you are able to review collected leads by selecting "View Leads from the Mobile Attendee App" or "View Leads from the Exhibitor Portal". When viewing from the Exhibitor Portal, you are also able to export your leads to an Excel Spreadsheet for further sales follow up and even view a graphical display of lead sources from world map.

Optional Lead Alert Emails

In addition, if you enabled and configured Lead Alert Emails, designated personnel are sent an email with the attendee details and profile question responses.

Viewing Current Leads in the Exhibitor Portal

The Exhibitor portal lets you (from any location) view a list of leads collected at their stand.

Contact	Date Scanned	Stand
 Mr. Melvin Anderson Modern Architecture Design Concord CA	Mon Oct 24, 2016 4:14 pm	115
 Mr. Vincent Anderson Gene Walter's Marketplace Cincinnati OH	Mon Oct 24, 2016 4:13 pm	115
 Ms. Kelly Lockett DGS VolMAX Jackson TN	Mon Oct 24, 2016 4:07 pm	115
 Mr. Allen Rosser Smitty's Marketplace Longford KS	Mon Oct 24, 2016 4:07 pm	115

Options include:

- **Attendee Detail** - clicking on the name of each attendee will display a detailed view that includes responses to profile questions and date/time the attendee visited your stand.
- **Export** - selecting Export will generate a spreadsheet with all information collected on attendees visiting your stand.
- **Map** - selecting Map will display a world-wide map with geographic indicators for every visitor to your stand.

Data Processing

All data will be stored on the Event Management System as well as ASME systems in compliance with [ASME's Privacy and Security Statement](#) and the [event data processing policy](#).