Captello

15

WAYS TO DRIVE ADOPTION OF UNIVERSAL LEAD CAPTURE WITHIN YOUR ORGANIZATION

By working with over 10,000 users of Captello's Universal Lead Capture system we've had the pleasure of interfacing with 100's of organizations of all different sizes. We've found many similarities and differences across a variety of teams and even experienced some serious lessons with our own team. After all, we love exhibiting ourselves and certainly practice drinking our own champagne (using our own universal lead capture software to maximize event success).

One thing we've discovered is that successful event teams follow a number of best practices to ensure their company and staff members attending exhibitions adopt their universal lead capture solution. The following helpful tips will ensure that you make the most out of your investment. In this ebook we outline 15 things that you can do within your organization to drive adoption of lead capture. To make it easier on you, we broke the article down into six (6) sections.

To get the wheels turning, ask yourself and your organization the following three questions:

1 Why do we exhibit?

Ask your Vice President of Marketing and your Vice President of Sales what the value of exhibiting is to the company. Ask them what success looks like. This helps you understand how your team will measure your success as an event marketer.

2 Ask your event team this:

If your goal was to improve ROI by 50% to 100%, what challenges with your current lead capture process are in your way of achieving this goal? Then, break down your process and identify gaps in your funnel, the challenges your team has onsite, and what manual post show processes could be automated.

3 Your own custom lead capture app

If you could design your own custom lead capture app that everyone would agree to use, how would it work? What data would it collect to identify Marketing Qualified Leads (MQLs) and Sales Qualified Leads (SQLs)? What next steps would be automated so we can shorten the sales cycle?

Once you have a unified response on the above, follow the 15 tips below to begin driving adoption within your organization.

Explain The Business Reasons

Help your event team understand the business reasons for why you made the investment in universal lead capture.

This 45 minute course called Best Practices for Lead Capture, can help you prepare before updating your team.

There are key benefits that your team may not understand, such as how the system helps you establish a process, simplify handoff to other team members, collect more data into your CRM or marketing automation system, and much more. If they understand why the solution is meaningful to you, your role, your executive team, and your company, then they are more likely to understand.

Nobody likes to just be told what to do without reason. If you want to simplify things, point to how this solution helps your company drive revenue. In our research with clients we've found universal lead capture helps companies:

Collect 74% more leads
- Shorten sales cycles by 40%
- Close 20% larger deals

If your booth staff consists primarily of sales people, then they will understand.

Motivate Your Team

Most of the time your booth will be filled with salespeople. Sales people are innately competitive. There are several things you can do to tap into their competitive nature. For example, set some goals.

With Captello's universal lead capture solution you can set team goals and individual goals. Give sales people a higher individual goal than others. Wrap an incentive around the team goal, such as a nice dinner, social outing, etc. Think about your elementary days in school when the teacher would reward everybody with a pizza party if the class did something great! Trade show teams should not be any different.

Reward individuals for hitting their goal with prizes such as an extra day off work, movie tickets, gift cards, company swag, and more.
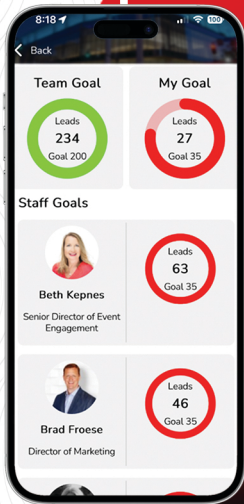
Captello offers a reward platform of over 250 different gift card brands. Whether it's a universal gift card or a specialized "token", you could use this system along with a leaderboard to put together an annual competition with a bigger reward at the end of the year. As reps participate in events they get points for whoever uses the system more. Who wouldn't want that nice vacation for their family!

With Captello's Universal Lead Capture platform, you could also structure competition around data completion. In other words, staff members that fill more of your lead collection form will do better in the competition. There are mechanisms built in to measure completion rates. Whether your competition is on data completion or number of leads collected, make it competitive!

Align your Team

Systems like Captello have built-in features to help your team communicate and align with each other at events, making a universal lead capture system more than just a way to capture leads.

Using the next three capabilities will help you drive usage of the mobile app by all your team members:

1- Availability

Imagine a larger trade show where you need to be aware of who is available within your booth. For example, if someone needs to speak with a member of your team given their role or specialty, team members could mark their availability as in or out. This is helpful at large events so you know which team members are present in your booth to help.


2- Encourage Communication

Chats can be created with different groups of people, filtering who is available, unavailable, or all team members. Using the system for chat encourages communication across all team members. This is helpful since many people on your team might not have another person's mobile phone number and sending 100s of emails isn't that attractive. We also know the difficulties of creating large chat groups between iOS and Android devices. It just doesn't work that well. Use built in chat for better communication.

3- Event Instructions

One of our favorite features is event instructions. This is a sure fire way to get users to download the lead capture app and use it. We've seen customers put specific instructions that team members need to rely on, such as uniforms (what to wear on each day of the event), key happenings or team meetings, exhibitor hours, packing lists, how to videos, and much more. Instructions can be filled with text, images, videos, links with users being forced to see instructions when they open the app. This is an ancillary way to create dependency on the app outside of the core focus, which is lead capture.
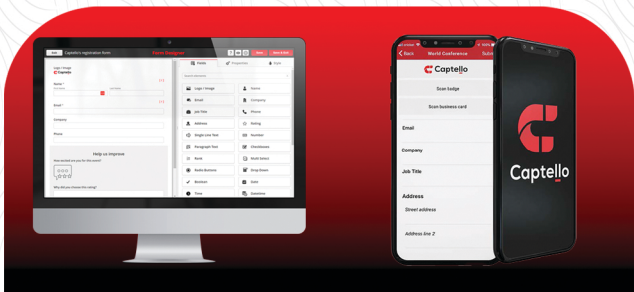
Make it Easy

Drawing from our experiences, keep your lead capture forms simple. Why? Making the process simple for end users will help drive adoption. People will shun your lead capture process if the capture form feels overwhelming or too complex. This doesn't necessarily mean you only need to have a form with name and email address. Forms can be intelligent with responsive questions.

Let's look at some of the ways you can simplify your lead capture form:

1- Create Responsive Questions

Add logic into your form to have further drill downs on questions without putting the additional questions into the form by default, which extends the length of the form.

For example, if someone selects a radio box which indicates an attendees interest then ask another set of questions that are relevant to their interests. This helps shorten the form so it's easier on the eyes.

2- Build in Business Card & Badge Scanning

Adding these methods of lead capture helps reduce manual input and increase adoption. When using badge scanning make sure to purchase the developer kit from the show.

3- Limit Required Fields

Make sure not to have every field required. I understand it's great from a marketing perspective to have more data; however, forcing the user to fill out every single detail is brutal and will cause users to give up on the process. Prioritize data collection and only make high priority fields required, such as area of interest. Things such as industry and other firmographics can be collected via other means. Same thing as sociographics. Captello provides mechanisms for data enrichment to collect more information on a person and their company which might help you shorten your form even further.

CAPTURE RESPOND AUTOMATE

STORE NURTURE ANALYZE

Explain How it Helps Them

There has to be benefit to the end user for them to use your lead capture system. Assuming your trade show team is mainly salespeople, explain that this solution helps them and show them how.

Here are a few ways sales representatives directly benefit from a universal lead capture system:

1- Better Follow Up

Reps can respond quickly by sending a thank you email that comes from their work email address, not some generic message, and deliver digital brochures as part of the email. This should be the first step in the process, thanking them for visiting and letting them know they'll be following up. This quick and personal touch point helps beat their competitors who are likely also exhibiting on the show floor.

2- Lead Prioritization

Subjective and objective qualification methods exist in most lead capture systems. These are ways to take better notes and select a lead rating. When reps realize that the information we help them collect will help them prioritize their follow up, or follow up by others, they will see the benefit. Not all leads look alike and if you don't spend your time following up on urgent leads with a very personal touch point (non-generic) they will increase conversions to demos and sales.
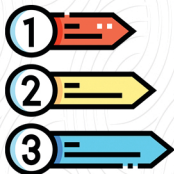
3- Lead Qualification

Being able to follow up the prioritization with qualified to identify which leads truly are sales qualified will again help reps prioritize their follow up.

4- Improved Handoff

The result of better prioritization and qualification is improved handoff if leads are assigned to someone else after they are initially collected. It's important information is transferred carefully without dropping key bits that could make the difference in booking a follow up appointment, for whoever has this task.

5- Book Meetings

Add features into your lead capture app that help reps book meetings on the spot with urgent leads. Half the battle in following up on trade show leads is chasing people down. Attendees might tell you they are interested and ask you to send them more information, then you can never reach them or it takes forever to do so. Adding a meeting booking feature into your form helps you secure the meeting on the spot.

6- Catalog of Content

Add your datasheets, brochures, flyers, etc. into your lead capture app so users can open the catalog at any time and use documents to supplement their discussion.

There are some steps you can take to increase adoption of your lead capture system that are in your full control.

First, start by monitoring usage. You can do this by reviewing key analytics such as top users and getting notifications for users you've invited who have yet to download the lead capture app and login. Use this information to review with your team. Conduct a pre-event and post-event meeting and highlight the stats.
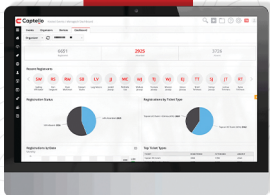
Train the team when they are onsite. Have a dedicated meeting that covers lead capture.

Go through a sample lead capture exercise, perhaps by having each person scan their own badge.

Walk them through your form and explain all of the features and capabilities, while helping them understand why this is beneficial to them, you, and your company. You can always reset your lead data when

Monitor, Review, & Train

Summary

1. Explain the business reasons for using ULC
2. Set team and individual goals
3. Hold a competition on leads collected or on data completion, run per event or annually
4. Provide incentives such as gift cards or tokens
5. Encourage communication within the app
6. Provide event instructions within the app
7. Simplify data collection via responsive forms
8. Simplify data collection with minimal required fields
9. Incorporate badge scanning
10. Incorporate business card scanning
11. Explain how the solutions helps them
12. Clearly outline benefits of more leads, shortening sales cycles, closing bigger deals
13. Monitor usage and get notifications for users who don't use the system
14. Review results in team meetings
15. Conduct training on-site