

BEFORE THE EXPO, PAPERWORK: DATA CAPTURE #16 OF 36

EXHIBITOR TRAINING VIDEO



As we noted in our previous article, we need to give serious consideration to the information we plan to collect at the event. So, what data should we collect and how do we capture it?

'Contact details are vital. As a minimum, you should record a full name, company name, position, email and telephone number. A business card will provide most of this information. Make sure they have agreed for you to make contact.'

WHAT INFORMATION TO COLLECT

Obtaining contact details is essential. Use standard forms or software to make sure you collect everything you need to be able to follow up effectively. What other information you collect will depend on the product or service you are selling. To help you, here are some suggestions:

DECISION MAKER

Are they the key decision maker? Have a yes / no box.

AREA OF INTEREST

Jot some notes about which specific product / service interests them.

KEY NEEDS / CHALLENGES

Again, make some notes to record how you can help them.

PURCHASE TIME FRAME

In most industries, you could have a check box selection of Immediate / 1-3 months / 4-9 months / 10 months plus. Some prospects may genuinely want to do business with you, but they might already be in contract or their service is not up for renewal. Recording these details will help you schedule a follow-up in advance of their contract end-date.



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NEXT STEPS AND LEAD GRADING

Use check boxes to record how you will develop the relationship. For example: email, phone call, arranging a meeting, online demo. Lead grading is about estimating the likely value of the contact, and recording this could be as simple as having three options: Interested / Warm / Hot.

COMMENTS AND NAME OF TEAM

Leave space for adding other comments and make a note of who had the conversation with the visitor.

HOW TO COLLECT DATA?

As well as using data capture forms, you can scan business cards using smart-phone and tablet apps. Or even hire barcode scanners. The important thing is to make sure the correct data is captured.



SUMMARY

Collecting accurate data is essential. Apps and scanners can make the job a lot easier and quicker. Be clear about what data you need to understand the prospect properly, and how best to follow up.

NEXT: WHAT TO DO DURING THE EXPO

We have now completed the 6P's of preparation. In our next tutorial, we will go through another framework called **SELFLESS**, which covers what to do during the expo.

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