TRADE SHOW LEAD FOLLOW UP

Don't Market by the Numbers

Chart Your Own Course

Charter marketing

Before the Show

Create the Automation / workflows & Create the Emails before the show

Review the emails that you'll be sending and prepare the different emails and workflow requirements before the show. This will allow you to develop all the leadsources, groupings and tags, as well as to test the processes and automation workflows.

After the Show

Sorting the Leads

- Gather all leads, get notes
- Remove Competitors
- Separate leads as hot, warm, cold
    - Hot Leads: existing customers, leads from existing schools or districts
    - Warm Leads:
        - met with at the show directly in booth
        - Attended Session
    - Cold Leads: other attendees
    - Other: Business / Partner Leads
- Create leadsource code
- Add to your CRM with notes where available
- Add to your email program (if different than your CRM) with appropriate leadsource tags, labels

Follwing Up

- All Leads – Email 1
  Immediately following show (or same day/next day if possible)
    - Thank you for stopping by
    - SHARED benefit Note about the event - great info, great learnings, etc.
    - Here's a relevant link that covered X Topic at the show.
- Hot Leads - within 3 days of return from show
  THESE SHOULD BE PERSONAL CALLS FOLLOWED BY SUMMARY EMAILS DIRECTLY FROM AMs, TAILORED AND PERSONALIZED TO EACH LEAD
    - Hot leads, existing customers should be followed up directly by the reps
    - Hot leads who are leads from existing customers or customer schools, districts: Contact main contact with the school/district and inform of contact, interest, engage new lead with assistance of existing contact.

- Warm Leads – Session Attendees
    - Email 2 - within 1 day of Session
        - Thank you for attending SESSION NAME at SHOW INFO
        - Photo os session or slide of session
        - Include a summary of the main messages of the session
        - Link to downloads of session notes, presentation, summary, and related articles
        - Introduce their account person
        - SET TASK IN INFOR FOR REPS TO CALL THEM WITHIN 2 DAYS of EMAIL SEND
    - Email 3 - 4 days after Email 2 (SAME FOR ALL)
        - Include intro to the product set by their needs
            - ARC Core mention
            - Include additional products
            - Links to case studies
        - Include a short brag about EdReports
        - Set up a meeting invitation, consult to address specific needs
        - Include contact info of AM
    - Email 4 – 5 days after Email 3 (SAME FOR ALL)
        - Include articles, research links calling out a specific one or few that align with the conferences key points that align with your offerings.
- Warm Leads – Booth Visitors
    - Email 2 - within 2 days of return from show
        - Thank you for attending (include show name, dates, location)
        - Include a summary of the main messages of the meeting, some anecdote that is appropriate to the lead (lead group) -- include a photo of your crowded booth, or location shot of the event
        - Make it personalized - do we know what they were interested in?
        - Non-marketing/sales focused
        - Link to downloads of some sort (link to video, download article, etc.) that ties to the topic (2-3 to further qualify their interest level)
        - Introduce their account person
        - SET TASK IN INFOR FOR REPS TO CALL THEM WITHIN 2 DAYS of EMAIL SEND
    - Email 3 - 4 days after Email 2 (SAME FOR ALL)
        - Include intro to the product set by their needs
            - ARC Core mention
            - Include additional products
            - Links to case studies
        - Include a short brag about EdReports
        - Set up a meeting invitation, consult to address specific needs
        - Include contact info of AM
    - Email 4 – 5 days after Email 3 (SAME FOR ALL)
        - Include articles, research links calling out a specific one or few that align with the conferences key points that align with your offerings.

- Cold Leads
    - Email 2 – within 3 days of show end
        - Keep personalized
        - Remove mention of visiting the booth (include sorry we missed you, or acknowledging it was busy and they didn't have time to stop by)
        - Otherwise can be similar to warm lead.
    - Email 3 - 4 days after Email 2 (SAME FOR ALL)
        - Include intro to the product set by their needs
            - ARC Core mention
            - Include additional products
            - Links to case studies
        - Include a short brag about EdReports
        - Set up a meeting invitation, consult to address specific needs
        - Include contact info of AM
    - Email 4 – 5 days after Email 3 (SAME FOR ALL)
        - Include articles, research links calling out a specific one or few that align with the conferences key points that align with your offerings.
- Other: Business / Partner Leads
  Business/Partner leads -- these should be handled individually by the appropriate department/person -- within 1 week of return from show