NEWLEADS
Trade Show Lead Solutions

Aligning Trade Show Leads With Your CRM

By John Hasbrouck, President
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If you've ever been excited about the hundreds of leads your team captured at a trade show and then wondered why it took so long to get the leads to the sales reps, the mystery is likely attributed to the lack of alignment with your CRM: the data has to match or it creates a log jam requiring days of manual input. The detailed database tool known as your CRM (Customer Relationship Management) might be better known to you by its brand name, such as "SAP", "Siebel", "SalesForce" or any number of other names. It's a big database that holds information on your prospects and customers. It may contain marketing campaign information; each system is unique to each company. Most important to trade show professionals, it contains both customers and prospects. In most CRM's, they are kept in separate areas. A new lead "inquiry" is a prospect who is not yet your customer. An existing customer who makes an inquiry is treated as a new "opportunity". When a new lead becomes a customer, the data is typically "moved" from the lead area to the customer area. This is often referred to as "converting" a lead.

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Sales leads collected at trade shows rarely reflect the CRM design or contain information that matches your CRM. Both new leads and existing customers are gathered in one big batch and thrown at the CRM administrator who is expected to make miracles happen overnight. But it's an impossible task since trade show lead gathering is a catch-all approach. Imagine if you had unexpected house guests and went shopping for groceries. What if you bought one of everything so that you could try to give everyone something they would like to eat? When you get home, you discover a series of problems that your grocery spree had created: Where do you store all of these groceries? How will you prepare each meal and when? How will you serve everyone their dinner at the same time? So it is with unprepared trade show lead gathering: lots of data with no easy path to the CRM and sales team.

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Trade Show Sales Lead Collection—A Dysfunctional Process

Gathering sales leads at trade shows is one of the most disconnected business processes imaginable. Where else can you collect thousands of "leads" by giving away a free iPad, then hand the pile of names to your sales team and tell them they are "leads"? Your sales team regards these as "names", "cold calls" and "suspects"—but not leads worthy of their time. Imagine if you did this process with a business reply card campaign, sending out a thousand cards asking people if they wanted to win a free iPad and only asking for their contact information. You'd get a lot of responses but you'd only know that these people were interested in iPads. If you're Apple, that's great. But if you're not selling iPads or iPad apps, that program causes a negative impact on your sales team, wasting their time on cold calling.

Contrast that with your web site information request form or an email campaign; it includes key questions about product interest, timeframe and so forth. But at trade shows, this methodology is typically overlooked in favor of just scanning badges, grabbing as many names as possible, and then hoping that sales will be thrilled with the names and start calling everyone—even though they are just names, not leads. Yet even if you do collect answers to qualifying questions, if they are not aligned with your CRM structure, your efforts are squandered and the leads turn to dust.

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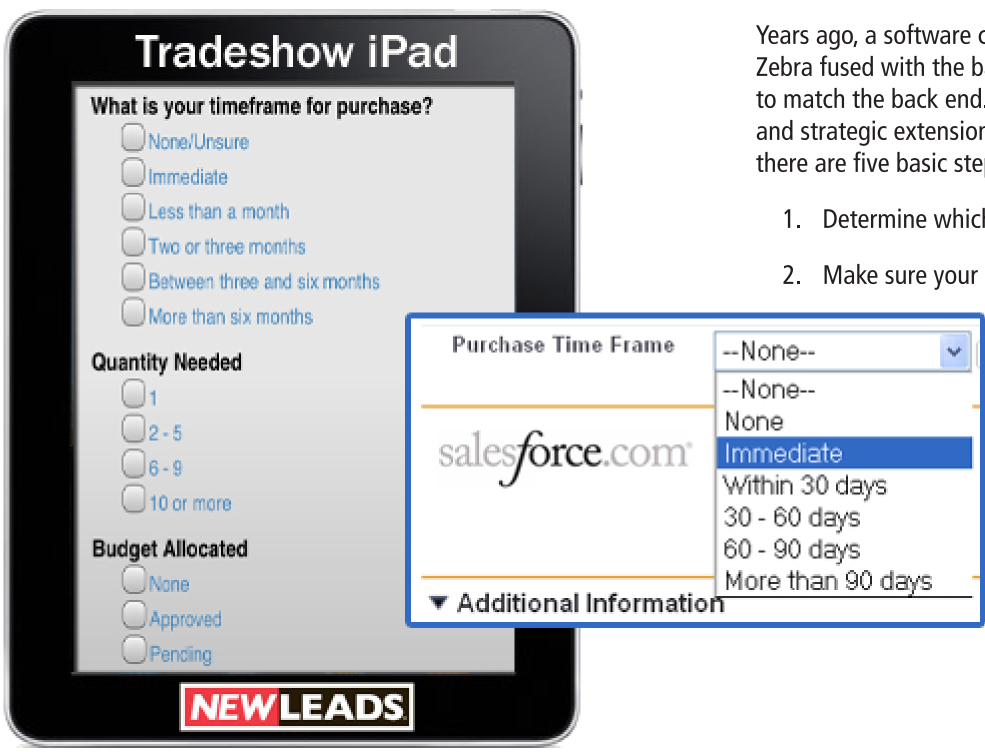
Designing the Front End to Match the Back End: Five Basic Steps



Example of time frame question on trade show iPad vs. "same" question in SalesForce: same intent but not a match

Years ago, a software company ran ads showing the front end of a Zebra fused with the back end of a cow. Their point? The front end has to match the back end. Think of your trade show lead form as a small and strategic extension of your CRM. When aligning with your CRM, there are five basic steps to success:

1. Determine which CRM questions must be asked.
2. Make sure your questions and answers are technically matched.
3. Design a customer match-up process to separate new leads from your existing customers.
4. Create the new CRM-matched export (this is not a csv file).
5. Verify the CRM-ready data with test leads prior to your first show.

1. Determining Which CRM Questions to Ask at Shows

Your CRM already contains sales qualifying fields. There are typically at least four basic fields used for questions that sales reps use to qualify any lead. They are similar to these: "Product Interest", "Timeframe for Purchase", "Size of Opportunity" and "Customer Status". (Each of these is likely phrased differently in your CRM which was created by your IT staff.) If you look in your CRM, you will find questions like these in various areas. In salesforce.com, for example, these should be located under the "Leads" tab and also under the "Opportunities" tab. You will find many more questions in your CRM, but limit the number of questions you choose so that your sales survey is short and "trade show friendly". Discuss with your sales director which questions comprise the minimum set to include on the lead form.

2. Creating a Technical Match-Up

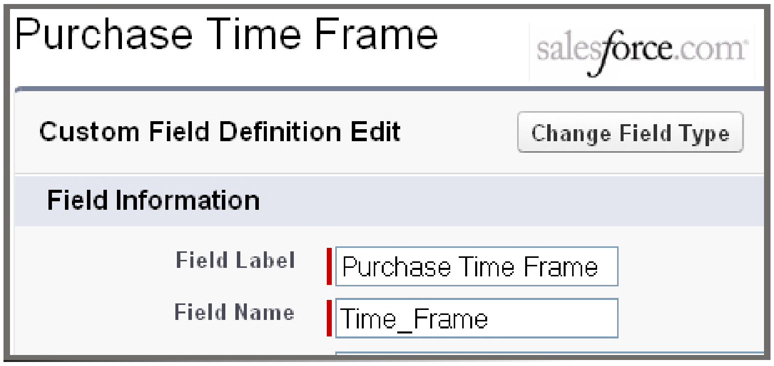
Asking the questions that match your CRM requires a technical match; each question's field name must match exactly to the wording of the CRM, and each answer must match the drop-down answers found in your CRM. If you import leads into your CRM and there are records that don't match technically, they will be rejected and not imported, causing hours of delays as the admin must go through the import record by record.

The first step is for your CRM administrator to supply a field layout document (or a sample set of records with a header record). This contains all of the fields in your CRM, and you use this to match the field names in your trade show leads database. When leads from a show are to be imported into the CRM, these field names must match. Additionally, there are technical specs to what each field may contain. For example, if the field is "Product Interest", it may allow single pick or multiple pick. In either case, the answer selected (called the "value" in a database) must match exactly. "Super Widget" might be identified in your CRM as "Super-Widget"; a small difference but it must be an exact match. If you have a notes field (in some CRM's this is the "Description" field), it may only allow a certain number of characters, such as 255. If this is the case, you must create a limit on your tradeshow leads software notes field. Details such as these are contained in a second document supplied by your CRM admin called the "field descriptions". This indicates how many characters are in each field, if the field contains numbers or letters or both, which sub-delimiter is required, which fields must be concatenated (combined) and placed in a notes or memo field, etc.

NewLeads data experts routinely work with CRM admins on this arduous but worthwhile process; once it's done, the template for all of your trade show leads is done and the import process becomes part of the standard business process.

3. Design a Customer Match-Up Process

This can be done either at the show at the point of a badge scan or after the show with various merge-purge routines in IT. The latter is time consuming and often gets down to a manual match, causing days of delays, at best. The former is the best way to do the match-up. This requires programming a comparison of badge scans with your existing CRM database and then selecting such a match when it is presented. If you are in an industry (such as Pharma) where attendee badges have home addresses instead of work addresses, you will need to determine which information you want to use to match. For example, if a doctor lives in NJ but works across the river in NY, you must program your leads system to search neighboring states. A less complicated search is simply first name, last name and state. Once a match is found, you can mark the lead as an existing customer.



CRM technical match-ups include much more than the field name. Other requirements include data type, single or multi-pick, field length, sub-delimiter, field values and so forth.

4. Create a CRM-Matched Export

The next step is creating the actual export to be used by your CRM team for import. Using the field names, values and definitions, either create a custom export from your trade show leads system or design an after show process to convert each field and value to make the data "CRM Ready." Using an Excel file, overlap your output from the trade show leads system with the field layout provided by your CRM administrator. Carefully review the restrictions of each field taking careful note of field length, which is often restricted, and the treatment of multiple pick answers. You may have to fill in CRM field requirements for those fields that are not output by your trade show leads system, such as "Campaign Name." Ask your CRM admin to verify that the fields are matched and ready to go. Make sure you do not create a .csv file but rather an Excel or .txt file; .csv files are often opened as Excel files which cause corruption of data in vital places such as phone numbers and zip codes.

5. Verify the CRM-Ready Export File

The last step is to verify your export file with test leads. To do this, you'll need to put about a dozen leads into the trade show leads system. Randomly select choices for each question so that all of the leads reflect all of the choices available. Then, export the leads in the custom CRM export format that you have designed. Send this file to your CRM administrator for a test import. If you have flagged known customers from new prospects, you might need unique export files for each. Don't be surprised if changes are required after the test; it's common to find errors at this stage and multiple passes back and forth will certainly be required to get it right. Once fully tested, you'll finally have a file that is truly "CRM Ready." Knowing the complexity of this process, resist the requests for last minute changes to your trade show lead form questions and answers: one mismatched answer value will reject a lead from being imported.

Summary

Aligning your trade show leads with your CRM is a process that starts with your CRM, not your trade shows. Designing your trade show system should be an extension of your CRM (in terms of data collection) yet built for trade shows. This requires questions and answers copied from your CRM to be used at your trade shows, as well as a custom export to match the importing requirements of your CRM system. Creating such a system ensures seamless integration of trade show leads with the CRM system resulting in immediate delivery of leads to the sales and marketing teams and provides increased value to your trade show program.

If you need assistance with trade show leads and CRM alignment, please call us at 805-604-4444 ext 106 or 102, 7 am – 4 pm PST (GMT-8) or email sales@newleads.com.