

Lead Cards: Organized Leads Increase Sales

- 1 – A Lead Card is a low tech way to gather and collect potential client information for follow up. It doesn't matter whether your lead-collection system is electronic or on paper. The important thing is to design a system to capture leads that works for your company. Just be sure your staffers fill out these forms completely, accurately and clearly with every potential client. The quality of your post-show follow-up depends on the quality of your completed leads. Create a custom system that works for your team.
- 2 – Leads are valuable; they are like uncashed checks from future jobs. All leads should be taken home by the last staffer of the day. Alternatively, create a hidden location for stashing leads each night in your exhibit. Salespeople can also photograph their leads.
- 3 - A lead card should be no larger than 4x7 and be easily recognizable as a "note". You do not want the attendee to believe you are actually taking an order or creating a contract. Yet, you need enough room to take all pertinent information your company needs to follow up with the client.
- 4 – Train your staff to qualify attendees for your product or service. Inquire about budgets and talk about pricing ranges: high to low end without promises. There will be tens of thousands of attendees at a show, and pre-qualifying can save you time and money.
- 5 - Make sure you leave some room for personal information or details. For example, did the attendee mention that they need more light, grandma was moving home, or they love cut hydrangeas? These details give you a natural connection when you follow up on the leads post show. Make a note if they are sporting a Beavs or Duck logo – it's a fun conversation starter down the road.
- 6 – Don't forget to call each qualified lead within two weeks of the show. The most successful exhibitors call the day after meeting a prospect. Thank them for stopping into your exhibit. Even if your company is booked out for three months, professionals still call and notify potential clients of their timelines.

Below is a sample lead card. It is recommended that you actually have cards printed to pads. Remember to keep a copy of your company's lead card in your show supplies for reprinting should you run out during an event.

Sample Lead Card (always include the show name & date)

Name of Show: _____ Circle Show Day: TH FRI SAT SUN

Name: _____

Other Trades Involved in Project:

Address: _____

Other Information & Notes:

Phone(s): _____

Email(s): _____

Preferred Method of Contact: _____

Type of Project: _____

Products: _____

Budget Notes: \$ _____

Rate Interest Level:

Timeline: __ now __ 1 month __ 2 months Other _____

__Excellent __ Good __Fair __ Poor __ Unsure

Appointment for Estimate/Site Visit: _____

Sales Staff Name: _____