CPHI Milan

Extra leads.
Extra business.
Extra awesome.

Easy-to-follow instructional guide for exhibitors to scan badges, qualify prospects and capture contact details with ease.

8-10 October 2024 | Milan, Italy

What are the benefits of lead scanning?

1

Say goodbye to binders

Reduce admin time as everything is digitalised. No paperwork means you can focus on the conversation with your potential new partners and clients.

2

Don’t miss a connection again

Your entire show team onsite can download the app and scan attendee badges during the event.

3

Personalise your lead qualification

Create qualifying questions that work for your company. Once your team members scan a badge, they can use these to categorise their leads.

4

Get business done faster

Download your leads in spreadsheets, and share them with your wider team before you’ve even left the venue.

5

Be more sustainable

Ditch paper and start using the event app to generate less waste & accelerate your business sustainably.

What are lead qualifying questions?

A lead is an individual serving as a potential sales prospect for your company. As an exhibitor, you have the option to incorporate specific questions for your leads to respond to, allowing you to categorise them into different groups and take prompt action accordingly.

These questions are customised based on the unique goals, products, or services of your company. By using custom lead qualifying questions, your business can gain deeper insights into a lead's needs, interests, and purchasing intent.

This feature can also be used to add questions for your team to answer after their conversations.

- Is the lead hot, warm or cold?
- Assign a follow-up action (send brochure, send email, set up meeting)

Examples of lead qualifying questions

- **What products are you interested in?**
- **What is your purchasing authority?**
- **When are you looking to place an order?**
- **What is your total budget?**
- **What is your preferred method of contact?**

Set up your qualifying questions

Bring consistency to your lead qualification by creating personalised questions for your company. After scanning an attendee badge or connecting with someone online, your team can answer these questions to help identify the quality of the lead.

To set up your personalised questions:

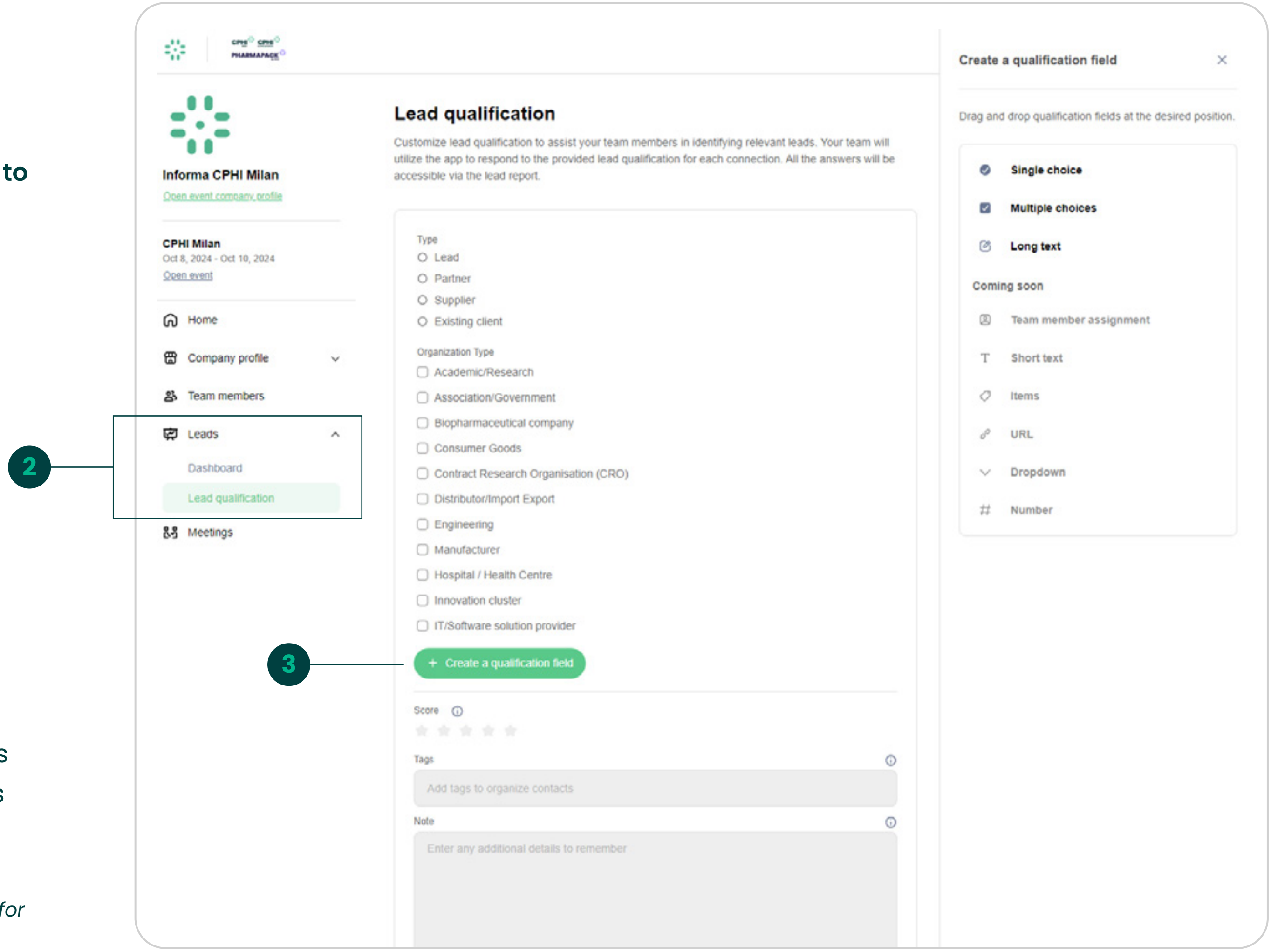
Step 1: Log in to the Event Planner and go to your **Exhibitor Centre***.
To get to the exhibitor centre from the event homepage, click your profile picture in the top right-hand corner and select "Exhibitor Centre" from the dropdown menu.

Step 2: Select **"Leads"** from the left hand menu.
Then select **"Leads qualification"**.

Step 3: Click the button titled **"+ Create a qualification field"**.

Step 4: Create your questions. There is no limit on the number of questions you can add. Single choice, multiple choice and short text answers are supported.

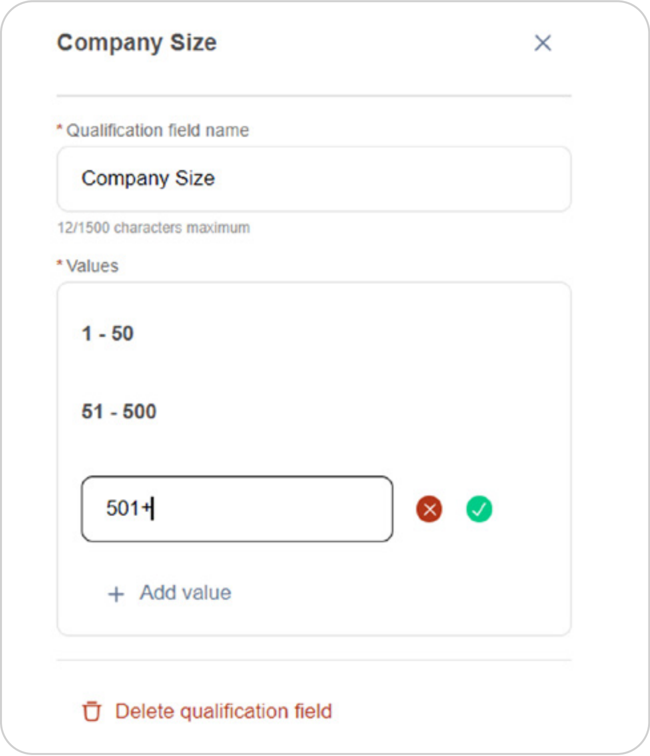
** It is possible for any member of your team to add questions, however once a question is added it will be seen by all your team members. We suggest one person take responsibility for adding questions and that they set these up as early as possible to get the most benefit.*



Set up your qualifying questions (continued)

Step 5: Click on the **pen icon** to edit the question

Step 6: Edit the field name and values.
To save a value, select the tick icon.



Once a qualifying field has been used by your team, it cannot be deleted or edited.

As a default, it is possible for any member of your team to add questions. Once a question is added it can be seen and used by all of your team members. We suggest one person take responsibility for adding questions and that these are set up as early as possible.

The visitor list will be available on 12th September

Start networking pre-event

The connections you make will be saved as a lead to your Leads Board.

To start making connections, [click here](#) and log in to your account.

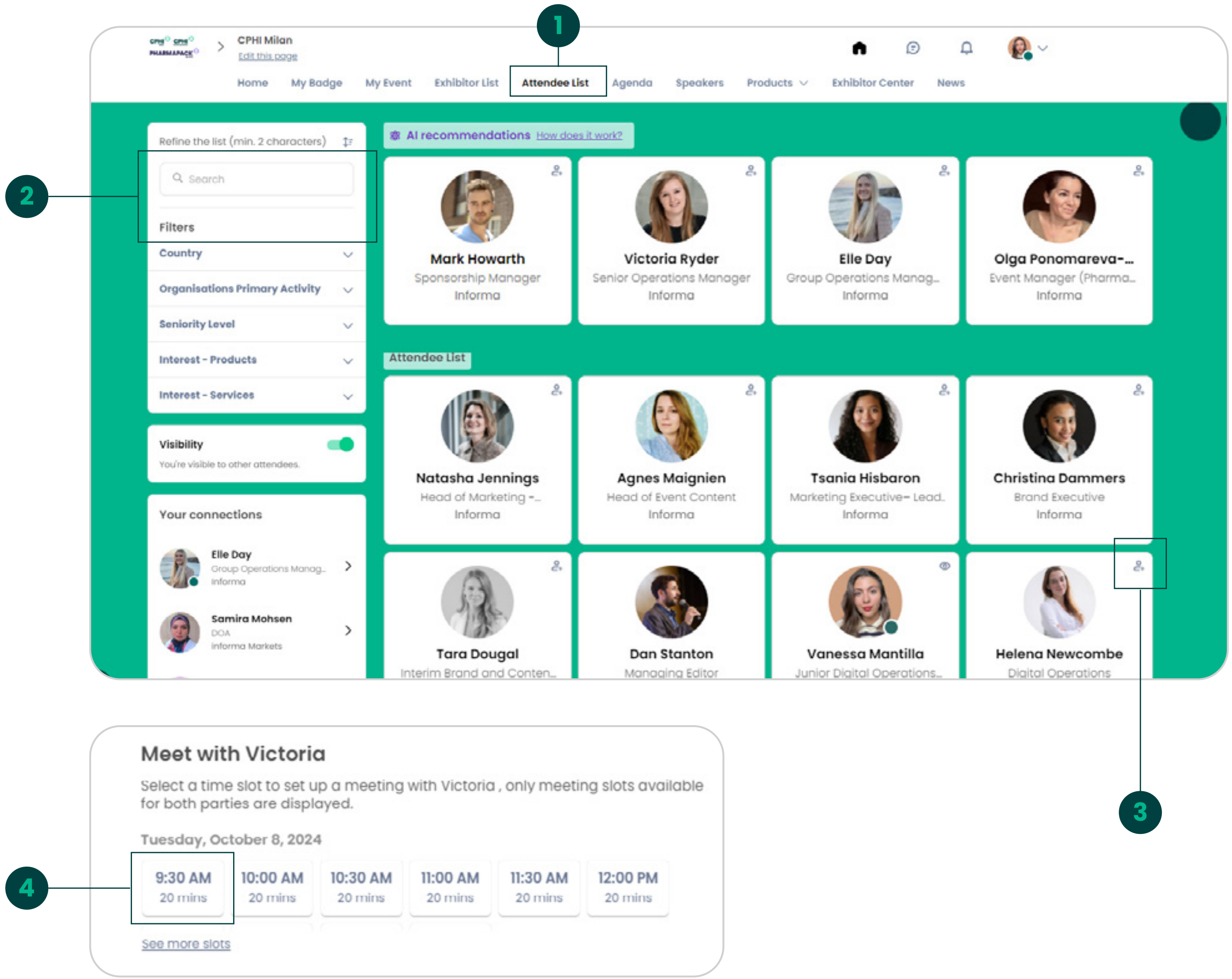
Step 1: Select **Attendee List** from the top menu.

Step 2: Use **filters** to search for potential leads or type **keywords** into the search bar.

Step 3: To **send a connection,** select the icon on the attendee card. Once your request has been accepted, you will be able to exchange messages.

Step 4: To **request a meeting,** click on the attendee profile and select a meeting slot, then follow the instructions to add a location, extra team members and a message.

At the top of the visitor list you will also find your AI recommendations. The more information you provide in your personal profile and the more you interact with the platform, the more accurate these will be.



Scan attendee badges onsite

Scanning a badge will capture their contact details for you to download later.

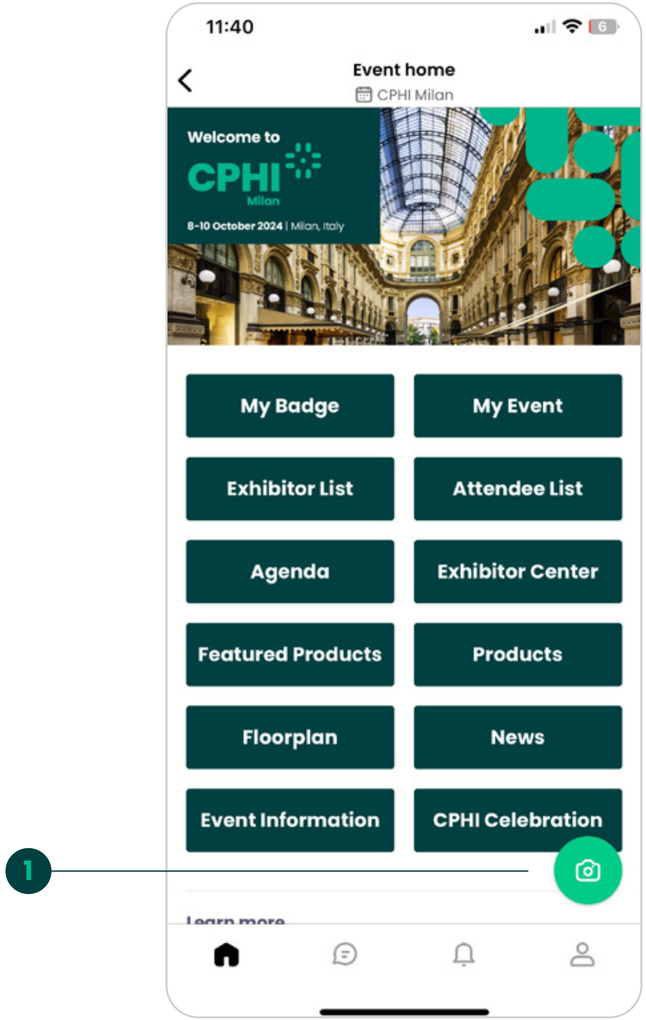
To start scanning badges onsite, you will need to download the app.

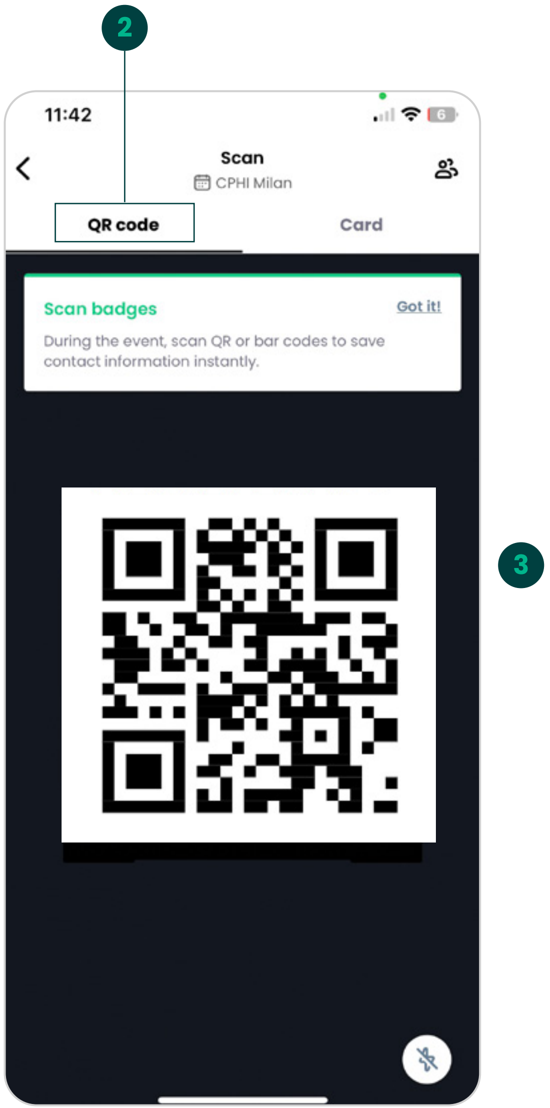
Step 1: Log in and select the camera icon in the bottom right-hand corner.

Step2: Select **QR Code.**

Step3: Align the square camera with the attendee badge.

The app will prompt you to allow access to your camera. Please agree in order to scan badges.





Add notes and tags

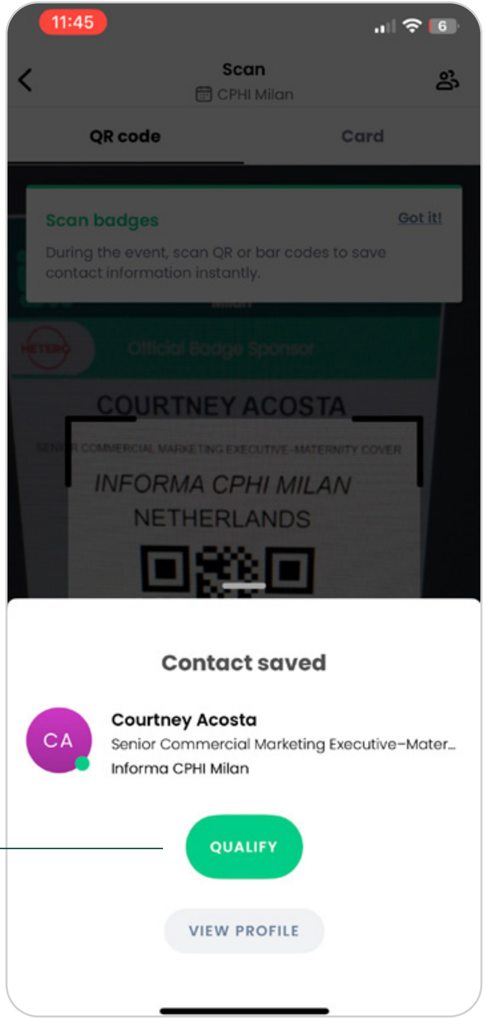
Once a badge has been scanned, you'll be able to see their contact details and annotate their profile with your own notes.

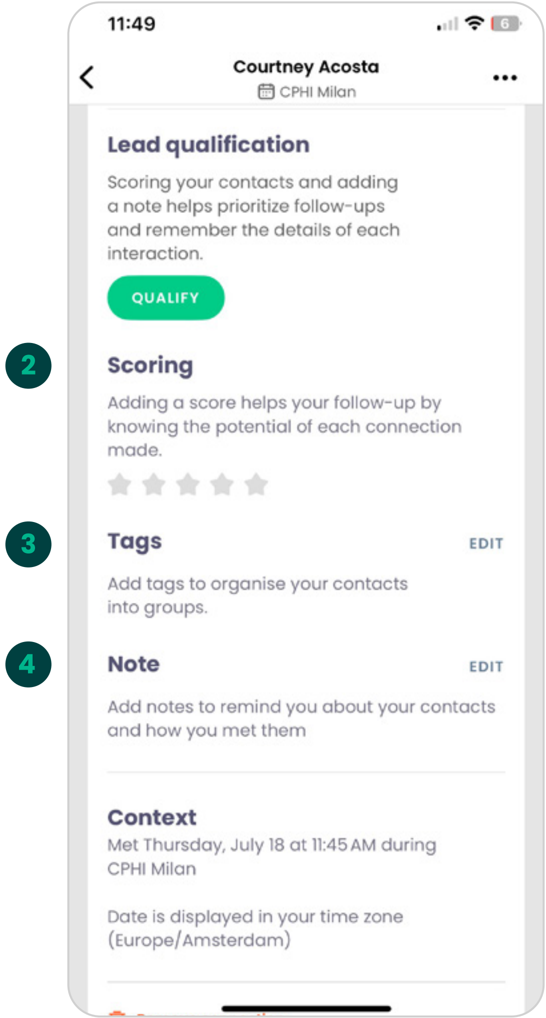
Step 1: Click **"Qualify"** to start adding your own annotations.

Step 2: Give your lead a score out of 5 based on their potential.

Step 3: Add tags to enable easy filtering of leads (pre-populate possible tags with your team before the event to ensure you are on the same page).

Step 4: Add your own additional notes about the lead.





Download your leads post-event

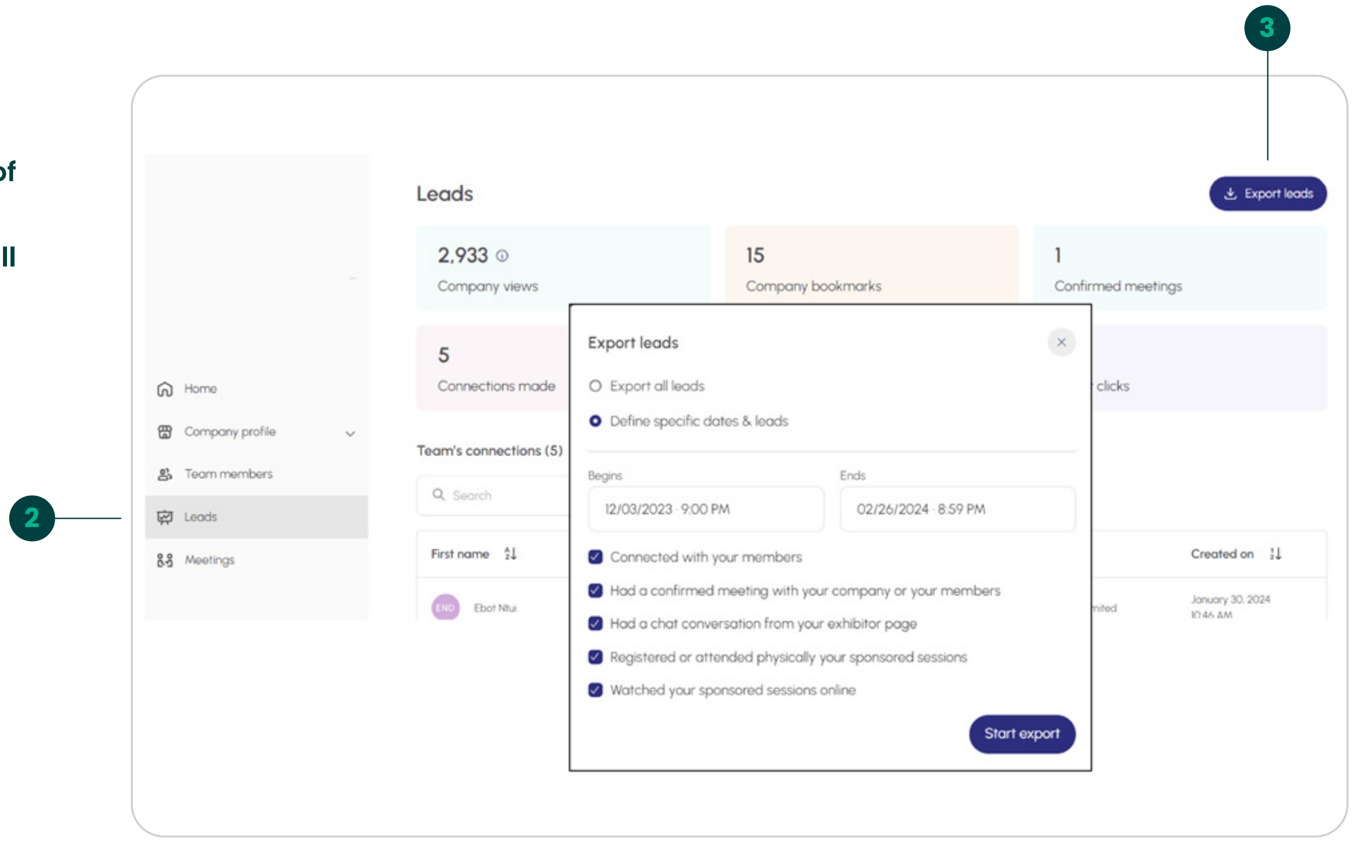
Post-event, you can download an excel file that includes the information of all your scanned badges, any connections made online and anyone who has interacted with your sponsored content. The file is formatted so that all the information can seamlessly be imported into most CRM systems.

Step 1: Log in to the Event Planner and go to your **Exhibitor Centre.**
To get to the exhibitor centre from the event homepage, click your profile picture in the top right-hand corner and select "Exhibitor Centre" from the dropdown menu.

Step 2: Select **"Leads"** from the left-hand menu.

Step 3: Click **"Export Leads"** from the top right corner.

Step 4: You can download all your leads at once or select specific dates and sources.



Download the CPHI app to begin scanning!

Need assistance?

Contact the CPHI customer service team on cphicustomerservice@informa.com