

TrueContext Whitepaper: Automating Lead Capture at Events

New Technologies, New Opportunities.

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Executive Summary

Event and intercept marketing are important direct marketing strategies for more and more companies looking to break through the clutter and engage with new prospects. Yet the nature of off-site events can make the logistics for managing these strategies expensive and challenging. Reliance on manual paper processes for tracking prospects only adds to the headaches and cost. Whereas technology has had the potential to speed up lead capture and management, it's also often cumbersome and expensive. Now however, a range of new developments in technology are enabling faster lead capture with higher accuracy without many of the traditional costs and challenges.

The Marketing Challenge

The lights are on but nobody's home

With the advent of Do Not Call lists and people constantly on the go, marketers find it hard to reach and engage their audience to generate leads. As a result, event and intercept marketing have become increasingly important marketing alternatives to reach customers, inform them, and in a perfect world, inspire them to make a purchase. At events, paper forms, lists, and business cards are the traditional methods for acquiring and managing leads. These paper-based processes however, come with many challenges.

So many clipboards, so few leads

High staffing costs and low productivity often prove the norm at offsite marketing events. Although you have an audience, you can almost guarantee yourself that they will run in the opposite direction from anyone carrying a clipboard. Filling out paper forms takes time and requires more staff per event – especially challenging for events with short periods of heavy traffic. Even when there's a compelling offer – free test ride or valuable prize drawing – prospects can be turned off by long waits.

Business card bingo

The fishbowl full of business cards is common at many events. In many cases, you'd be better off with fish in the bowl. The fishbowl often goes from event desk to office desk clutter, not into CRM. Even if entered into CRM, little is known about their interests or purchase intent.

Too little, too late

The early bird really does get the worm. A recent UK study revealed that car purchasers spend less than a week in the decision making process. Organizers of events that generate hot leads of prospective car buyers, for example, need ways of getting those leads into the hands of the right sales people immediately for quick follow-up. The simple truth is that hot sales leads that arrive a day late are worthless. Any delay due to processing paper-based information can have a devastating effect on sell-through and effectiveness of marketing events.

To Dream the Possible Dream

Event lead capture automation

Imagine if you will, the automation of event lead capture: automatic identification and verification of leads; contact information instantly and easily captured into CRM; prospects quickly qualified with the right questions for each event and offer. What would this mean to you? It means you would have a lot better chance to make a sale – either on the spot or by immediately sending hot prospects to sales. New developments in technology are making these dreams an easy and accessible reality.

For example, one global financial services company has used a handheld-based solution that scans a prospect's driver license to both verify ID and pre-populate new card application forms at events. A swipe, a few questions, and a digital signature capture later – and the application is in the system. This has resulted in a 30 percent increase in applications at events. (See side bar).

Case Study summary: A leading global financial services company found great success in acquiring new card customers at prestigious events. During breaks, card representatives would speak with attendees with targeted offers, such as air miles promotions. While these offers and events had long been effective, processing the large number of attendees proved slow and cumbersome. They had to staff up significantly to process attendees during the peak traffic times. Sending paperwork to headquarters for credit approval and new cards also added to the processing time. The speed the process and better use resources, the company decided to explore automation with handheld devices.

Traditional methods of building custom software for handhelds were expensive and inflexible. Hard-coded applications were especially difficult to update with the constantly changing promotional offers, terms, and conditions. They wanted a new card application process at events that would be flexible, mobile, and adaptable. Leveraging such new technologies as Software-as-a-Service and smart mobile clients, they were able to automate 13 credit card application forms in just three weeks. These forms included features such as digital signature capture (using a Symbol MC50 touch screen) and an integrated magnetic stripe reader that pre-populated data directly from a customer's driver's license.

Since deploying the new solution, the company has seen a 30 percent increase in customer acquisitions at events. All new card applications are loaded into the card issuer's system by the end of the event, with no delay or extra error-prone data entry required. The new cards are in the hands of the customer and active as much as five days sooner than before. As the promotions and events evolve, changes to all of the information, offers, and forms are "pushed" out to the handheld devices – wirelessly and automatically. The card issuer is able to automate this process without installing any software on their network, dramatically reducing the usual financial and time investment.

PC Automation, but at what cost?

Early automation at events often involved PCs. Prospects could line up, hand over a business card to be typed in, and answer some qualifying questions. People don't like to wait in lines – leading to satisfaction issues or people turning away. Many of those same PC systems also are dependent on network connectivity, creating multiple points of potential failure. Network, PC or system problems are a familiar nightmare at events with limited time windows. Network solutions are at the mercy of connectivity and the back-end system being up and running.

Since PCs are usually tethered – they don't support intercept marketing. Tablets have show promise – but in most cases they are simply too heavy for extended use. Un-tethered handheld solutions have been

perfect for intercept marketing, but they have typically come with high cost and complexity –especially for managing rapidly changing forms.

The New Enabling Technologies

Today, new technologies are making it easier than ever to dramatically increase lead capture productivity and speed response time – all without requiring IT help or expensive upfront investments. Some of these key technologies include:

On-demand software or “software-as-a-service” (SaaS): Instead of purchasing and installing software at your company, SaaS enables you to simply and securely connect through the Internet to service provider that operates and manages the software. Services such as Salesforce.com offer rich applications that can be delivered in an on-demand model, minimizing the impact on scarce or over-taxed in-house IT resources within your organization.

Mobile smart client applications: These applications give companies fully customized handheld solutions for a fraction of the cost and time of previous solutions. Mobile smart client applications are ideal for lead capture forms which need to be quickly customized for each event – often at the last minute or during events. These lighter applications enable customers to build and customize their own forms without any coding or outsourcing to software engineers.

A new generation of off-the-shelf handheld devices: There’s a greater range of more affordable devices now available including **BlackBerry** and **Windows Mobile**–based devices. With improved compatibility, it’s easier to find and develop applications that will work on multiple off-the-shelf devices. This gives organizations and users more flexibility in device choice and less risk in devices being discontinued or no longer supported. You can also get reasonably-priced card readers and scanners that turn devices into super fast lead capture tools.

In addition, recent breakthroughs in **wireless networking** provide better and more cost effective mobile data access options. With higher transmission speeds and more consistent coverage, customers can count on the network always being nearby. There will always be out-of-coverage spots, however, so any handheld solution still needs to have offline capabilities.

Best Practices - Putting Solutions in Place Today

All of the aforementioned new technologies are being put to use today to enable quick lead capture at events and flexibility without any expensive upfront costs or internal IT involvement. While automating lead capture at events can seem intimidating, it’s easy to get started. Here is a list of advice and best practices to consider as you start off.

Get started now

It’s hard to fully understand the potential benefits of automating lead capture until you try it. Even at the initial steps of reviewing the lead capture and hand-off process – you are apt to find that handheld access can deliver lots of efficiencies. You may also find that handheld devices help you speed up or combine other steps in the lead capture process – including surveys, better qualification, or even placing orders or assigning sales follow-ups on the spot.

Find a flexible solution

Change is a constant among events and event teams. Routine change includes new venues, products and services, new promotions, and staff. Selecting a mobile solution that is flexible to meet these changing needs is very important. Your flexibility checklist should include the following:

- Can my event lead capture form run on Windows Mobile and BlackBerry devices?
- Can I easily change forms and questions for events and at events?
- Can contract staff upload data into the system without having to jump through corporate IT hurdles?
- Can I send data over both cellular networks and wi-fi connections (depending on the event and coverage options)?
- Can I still enter data while devices are out of network coverage?
- Can I recover data remotely from lost or stolen devices and then disable those devices?

As your business and the market evolve, so will your processes for capturing leads at events. Your mobile solutions need to enable you to maintain efficiency.

Avoid common pitfalls

In addition to being flexible, it's also important to avoid common shortcomings of many traditional approaches to automating lead capture with handhelds:

- **Browser-only solutions** are difficult to use on handheld devices because of occasionally slow or inaccessible network connections. The pages for inputting data and the uploading of that data often take a long time. The forms are also usually not available without the network – which is common at many event venues.
- **Cradle-based synchronization** requires a handheld device be attached to a laptop to upload data over the internet or through a VPN. While this is important to have as an option, you do not want it as the only method for data access. You'll also need to be able to transfer data over the air. This is a faster process that doesn't require managing extra sync code on desktops.
- **Hard-coded, off-the-shelf-solutions** are easy to start using, but unless your events, questions, and data never changes, you're apt to run into customization needs down the road which might be expensive or impossible to accommodate.
- **Hard-coded, custom solutions** are expensive and time-consuming to create and difficult to change without ongoing expense.
- **Not getting up-front user feedback** is a challenge for many lead capture solutions on handhelds. It's important to get all stakeholders involved to understand need and get feedback, participation, and ultimately buy-in to the solution.
- **Not monitoring usage and iterating** becomes a challenge after implementation. Business processes evolve, so you need to ensure that the solution is getting the job done. Remember, if it helps your staff, it helps you. Track usage, get feedback, and improve.

Conclusion

With automated lead generation you get more leads per staff at events and faster response times. New technologies make this accessible with little upfront costs. And many solutions offer easy pilot programs with little risk – often on existing devices. It's that easy. You'll never know how automation can help increase leads per field worker until you try it. Pick an event and use off the shelf devices. Set some simple goals, benchmark existing processes, and assess the benefits around productivity and processing speed. Involve the right users, focus on tangible benefits, set clear and simple expectations, and design a flexible solution as a starting point. It's easier now than ever. Make this your competitive advantage today.