



Exhibitor Lead Retrieval

Questions?

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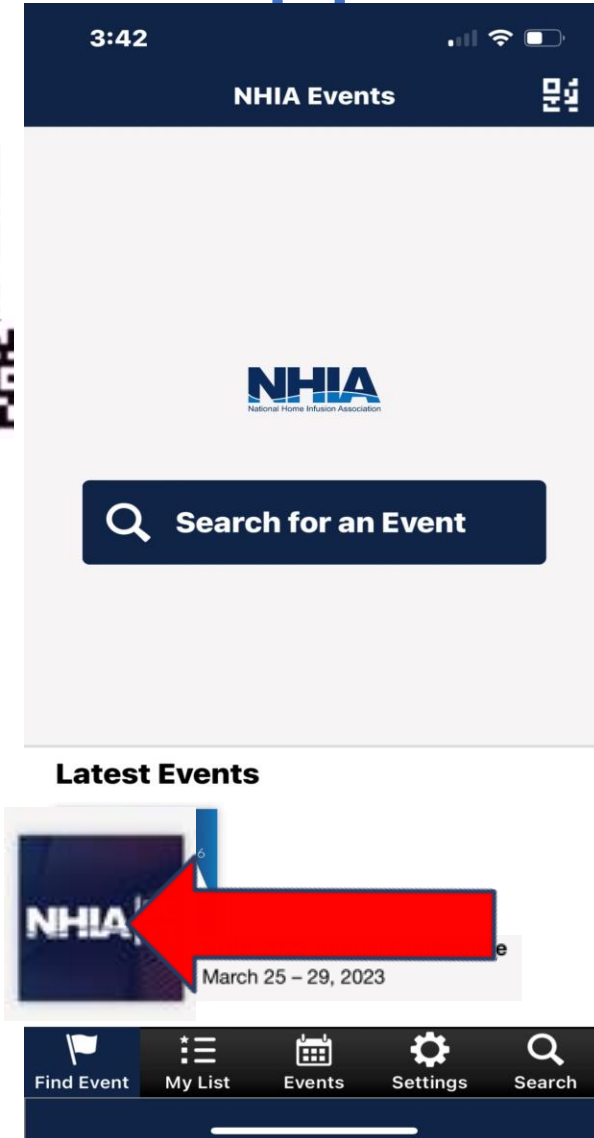
Using lead retrieval – DOWNLOAD the Event app

Booth Staff....**Do this before arriving in Austin!**

Download the NHIA event app

- App Store: Search for “NHIA Events”
- Choose the **NHIA 2024 Annual Conference App**
- Login credentials – Email and Access Key
 - Email with login credentials was sent to all *registered* attendees

App is available soon for iOS and Android!



Using lead retrieval onsite

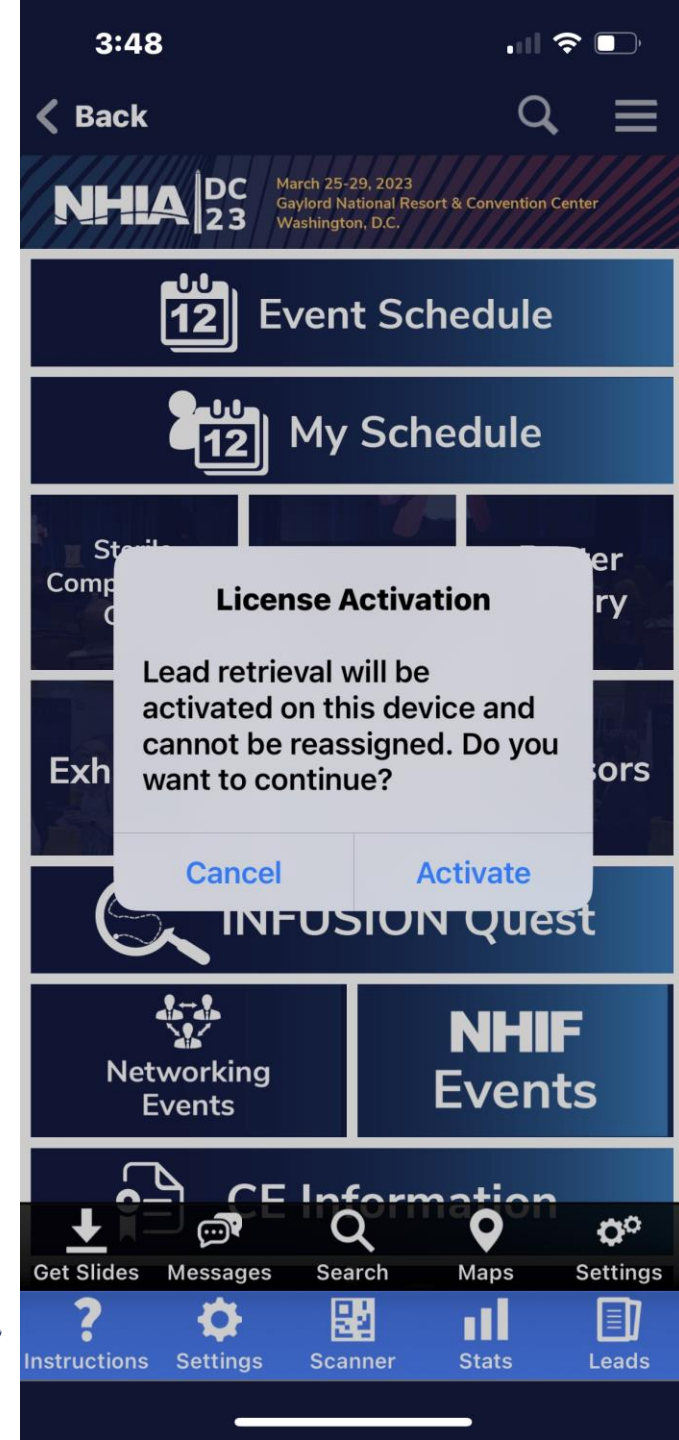
If you've been assigned a Lead Retrieval license through the Exhibitor Service Center

YOU WILL SEE

a **BLUE** bar at the bottom of your screen.

"Scanner" button opens the QR code reader

"Leads" button shows scans for **all** company sales reps

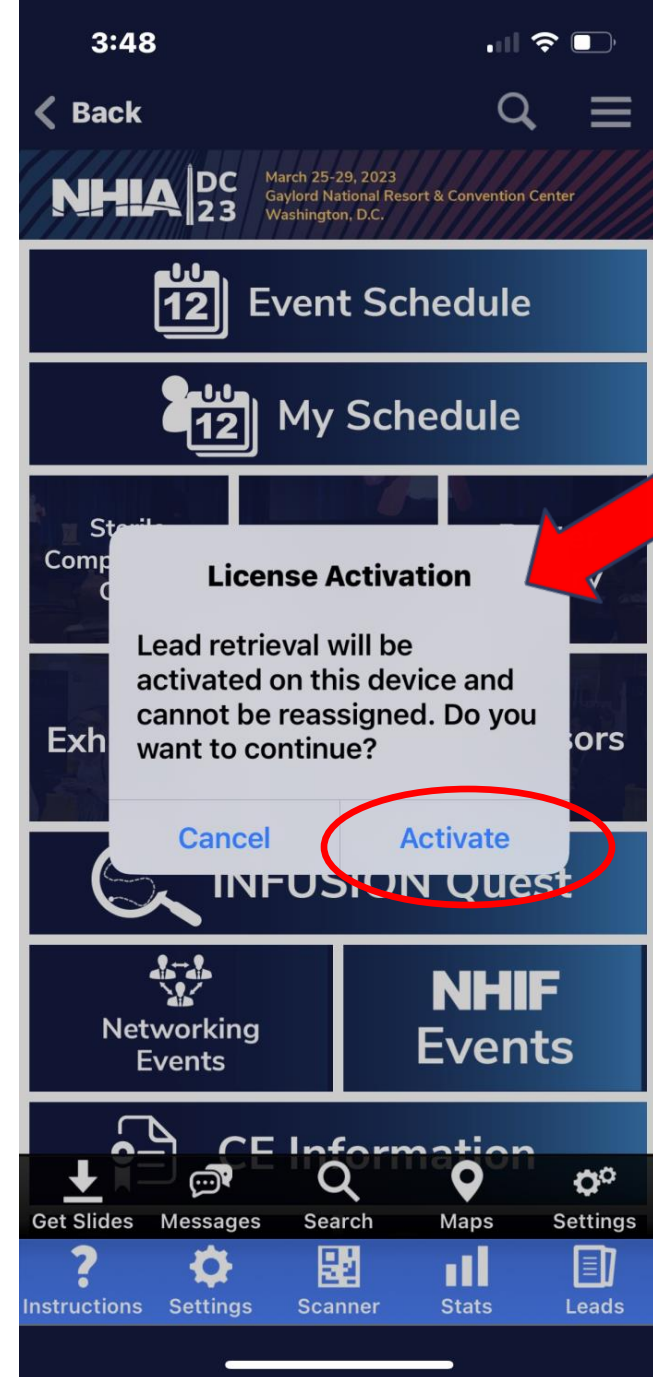


Using lead retrieval onsite

When you FIRST select the “Scanner” button,
You will see this License Activation popup.

Click “Activate” and then the license will be assigned to YOUR device.

Booth staff will ONLY see this message the first time.

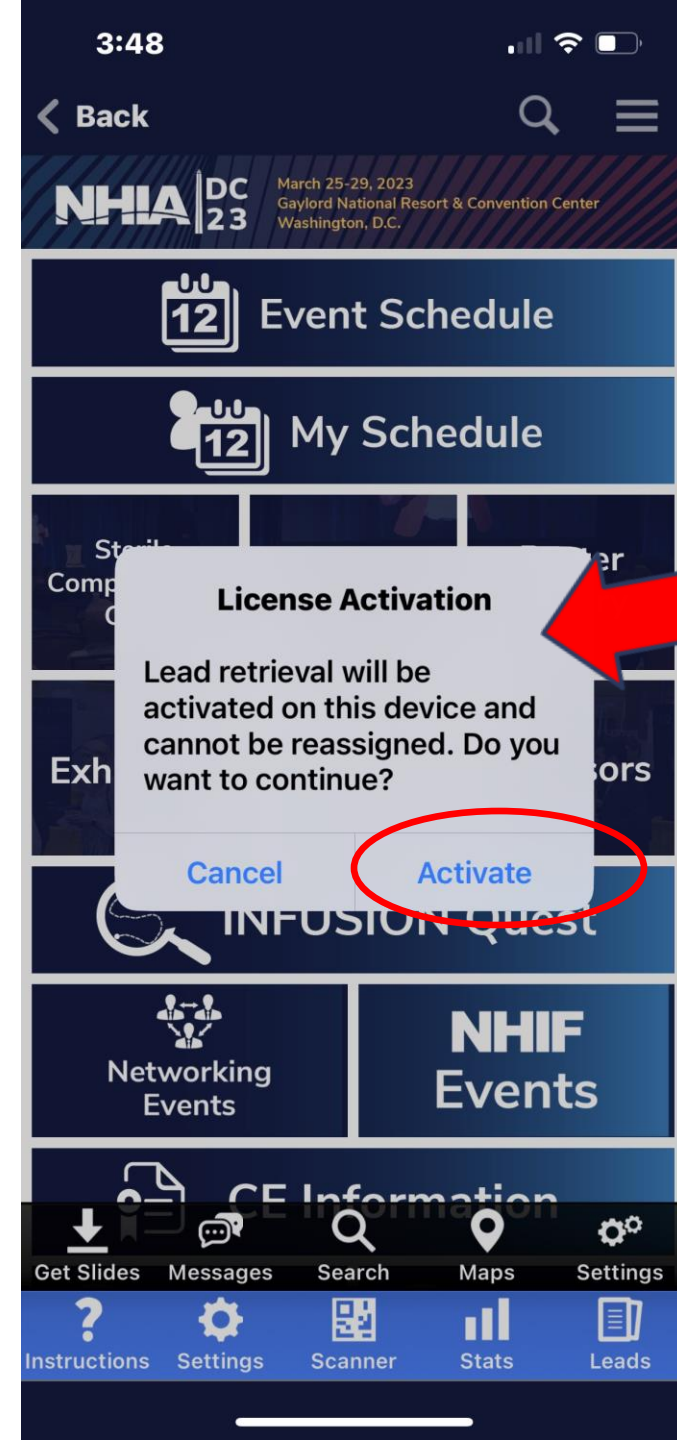


Using lead retrieval onsite

THIS LICENSE SHOULD ONLY BE ACTIVATED ON ONE DEVICE.

(i.e. your team member is using an iPhone for personal use and iPad for scanning with their same credentials)

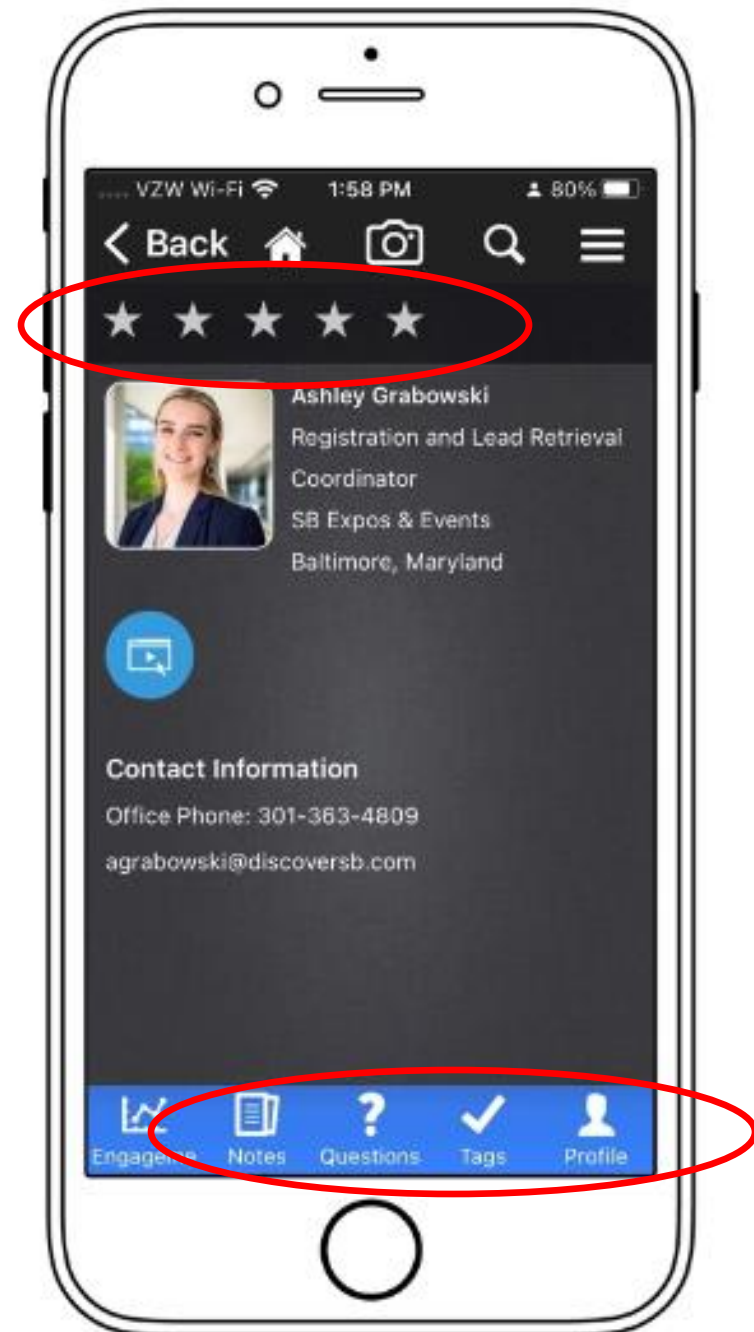
Leads WILL be LOST if you use the same login credentials to activate all the lead licenses.

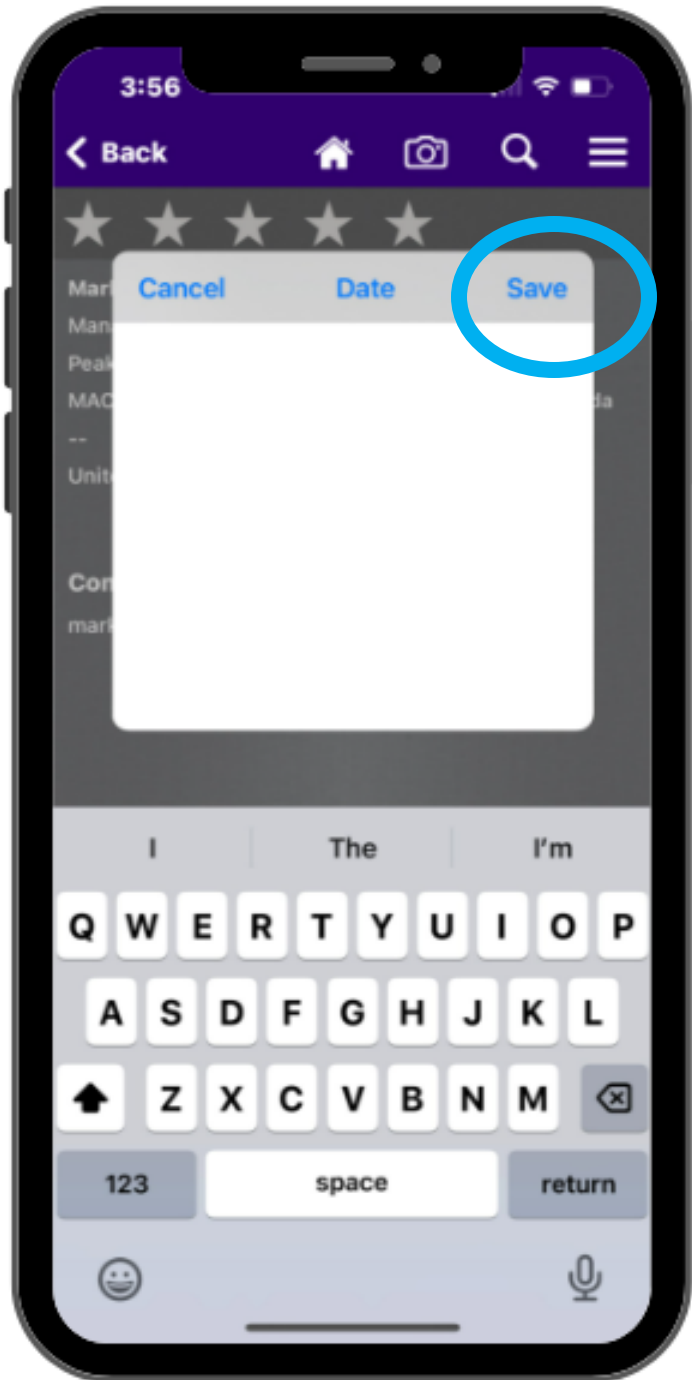


Using lead retrieval onsite

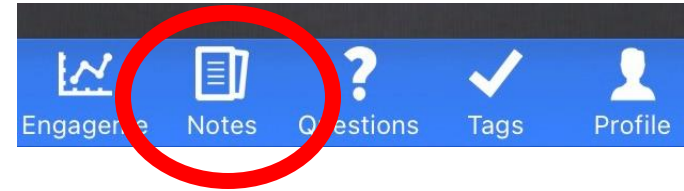
After attendee is scanned, several options available

- **Notes:** Free entry field
- **Questions:** Answer qualifying questions that admin set up in Tasks
- **Tags:** Select tags that admin set up in Tasks
- **Profile:** Make edits to the attendee's profile.
- 1-5 stars

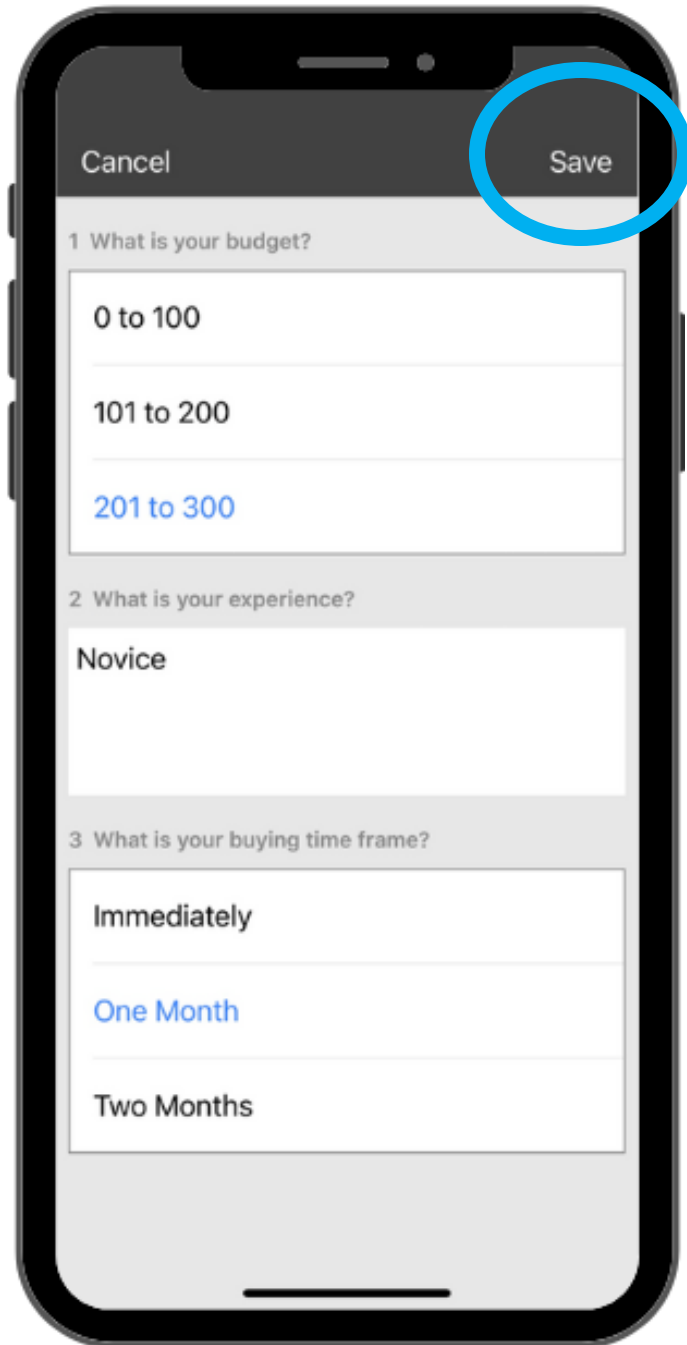




Using lead retrieval onsite - NOTES



- Include any notes about the customer
- HIT "SAVE" at the top right

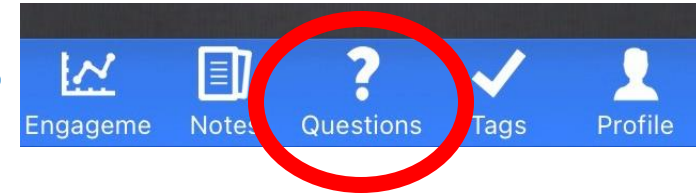


A mobile application interface for lead retrieval. At the top, there is a dark header bar with a 'Cancel' button on the left and a 'Save' button on the right. The 'Save' button is circled in blue. Below the header, the app displays three questions in a list format:

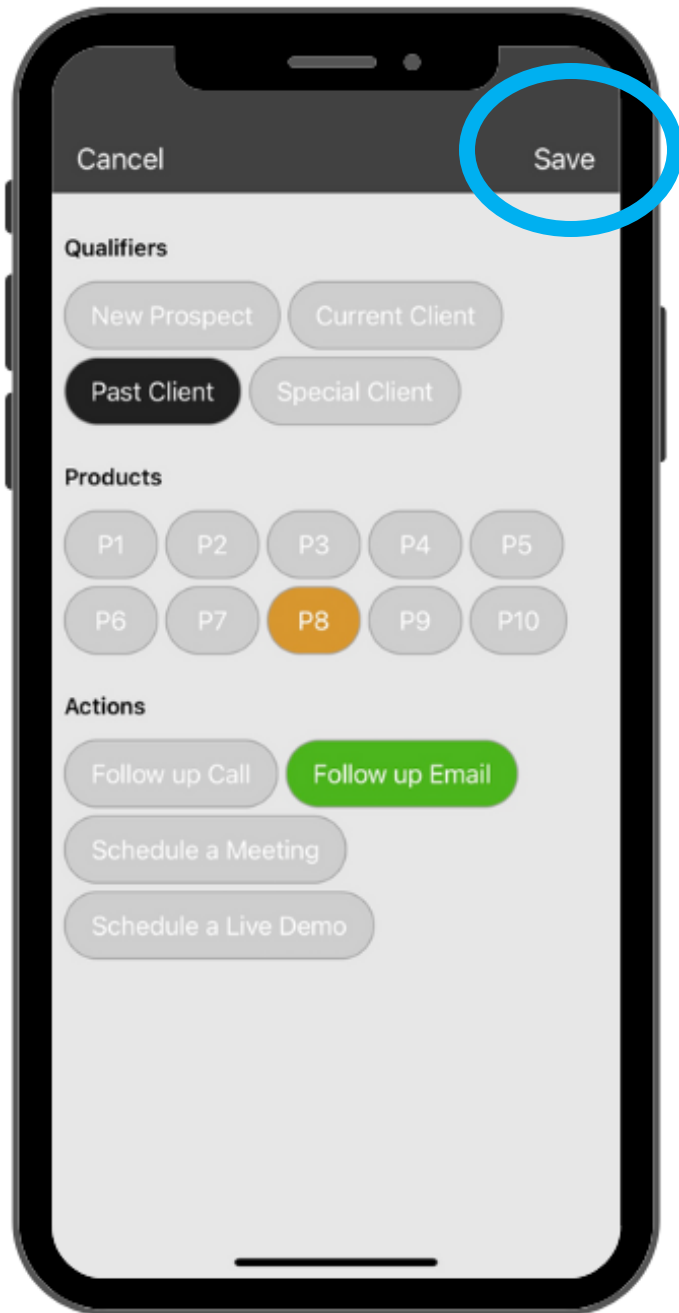
- 1 What is your budget?
 - 0 to 100
 - 101 to 200
 - 201 to 300
- 2 What is your experience?
 - Novice
- 3 What is your buying time frame?
 - Immediately
 - One Month
 - Two Months

The selected answers, '201 to 300' and 'One Month', are highlighted in blue.

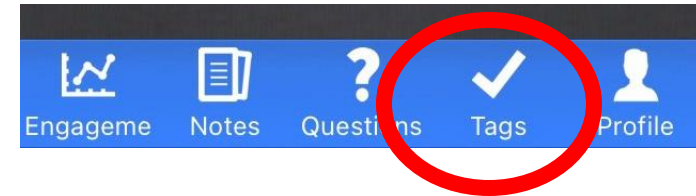
Using lead retrieval onsite - Questions



- These are the qualifying questions your admin has loaded into the portal
- Select answers and answer turns BLUE
- HIT "SAVE" at the top right

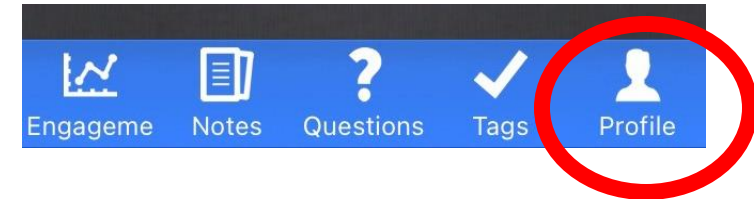


Using lead retrieval onsite - Tags



- These are the tags your admin has loaded into the portal
- Select answers and answer turns a color
- HIT "SAVE" at the top right

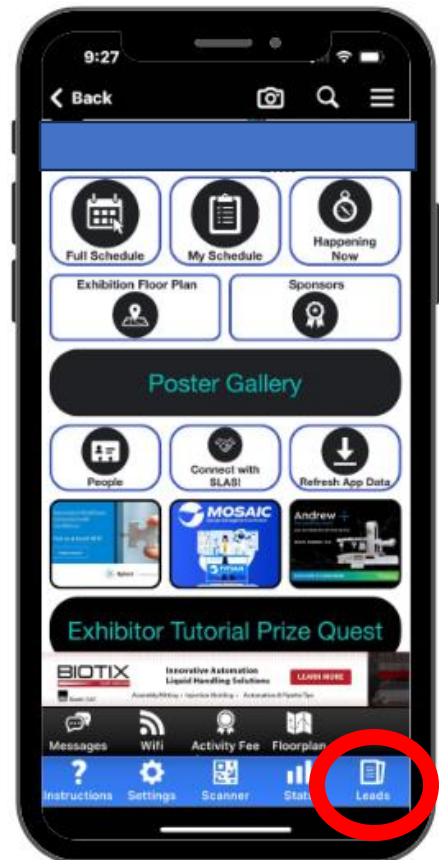
Using lead retrieval onsite - Profile

Two smartphone screens displaying a profile form. The left screen shows the form with pre-filled data: 'Personal Details' (Name: Colleen Campbell, Pronouns:), 'Organization Details' (Senior Manager, SB Expos & Events, Organization website URL:), 'Location Details' (White Marsh, Maryland, United States), and 'Contact Details' (Cell Phone Number:). The right screen shows the same form with a keyboard. A red circle highlights the 'Organization website URL' field, which contains the text 'www.discover_sb.com'. A blue circle highlights the 'Save' button at the top right of the form.

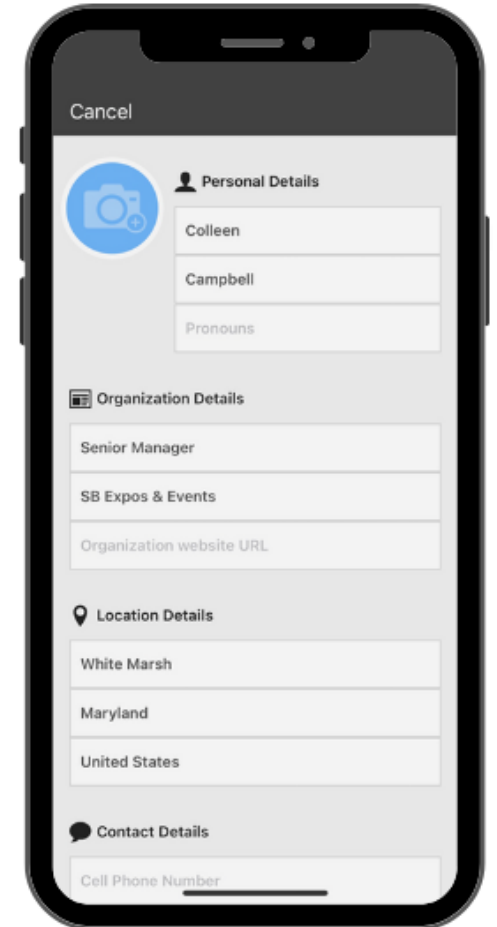
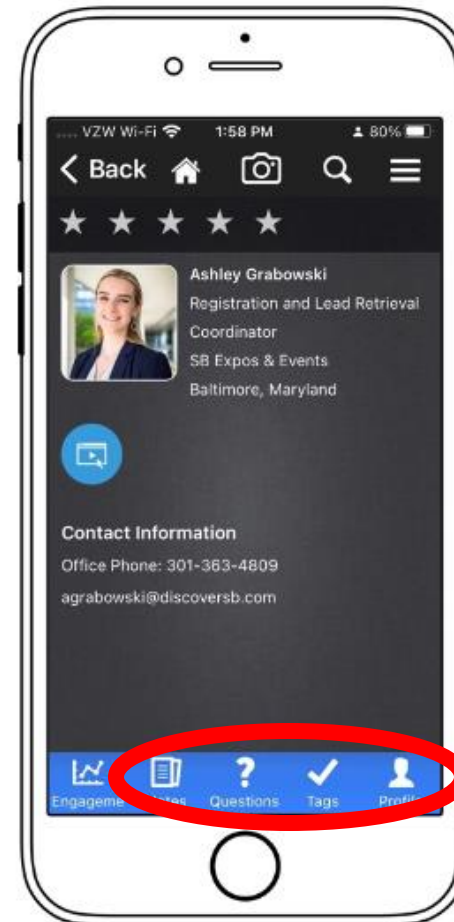
- These fields are pre-populated from what the attendee entered into registration
- You can ask them for any other information you want
- HIT "SAVE" at the top right

Use the Leads icon to update or edit scanned leads

Click on the Leads icon and then click on the name of the lead you want to edit



To take notes, add/ edit qualifiers and access the full attendee profile, choose from the icons at the bottom



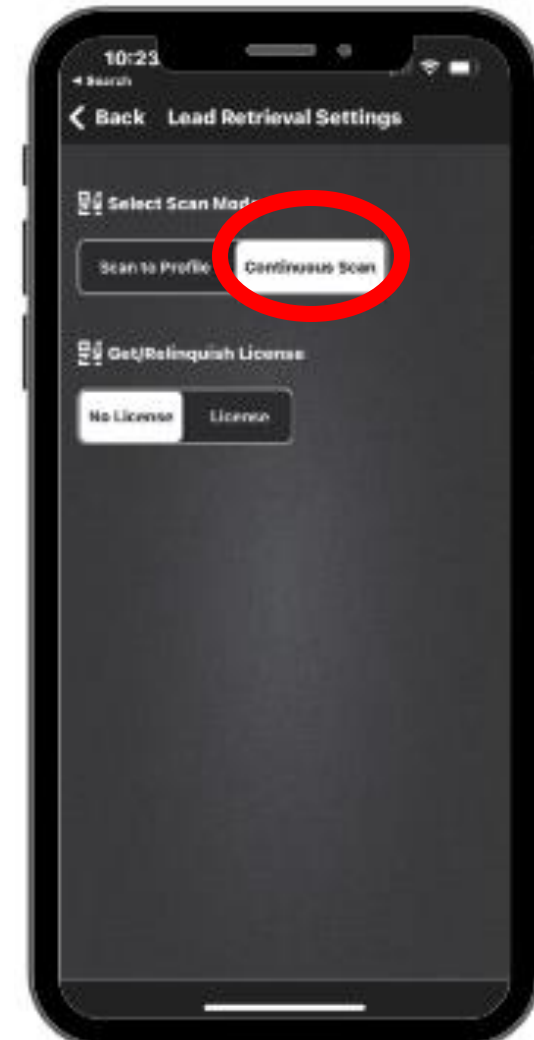
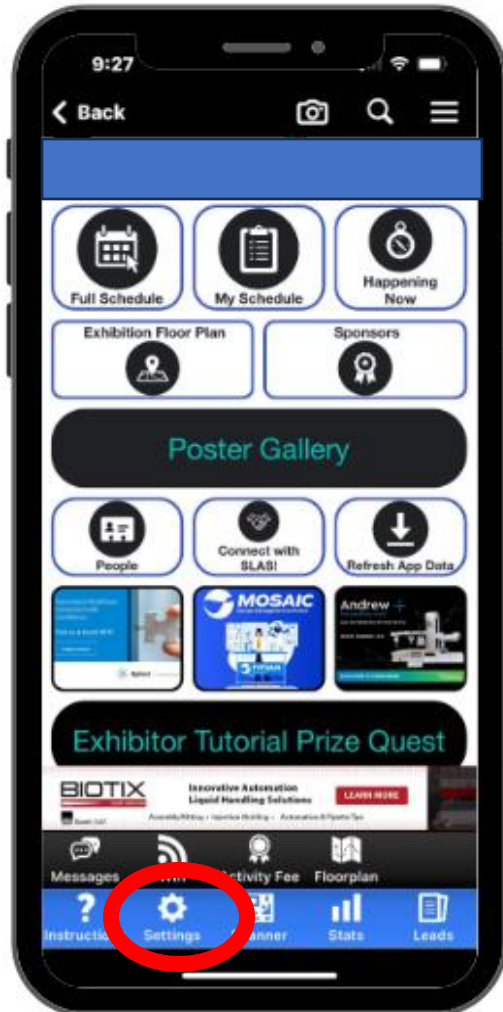
Checking Leads Onsite – Offline Warning



Using Continuous Scan

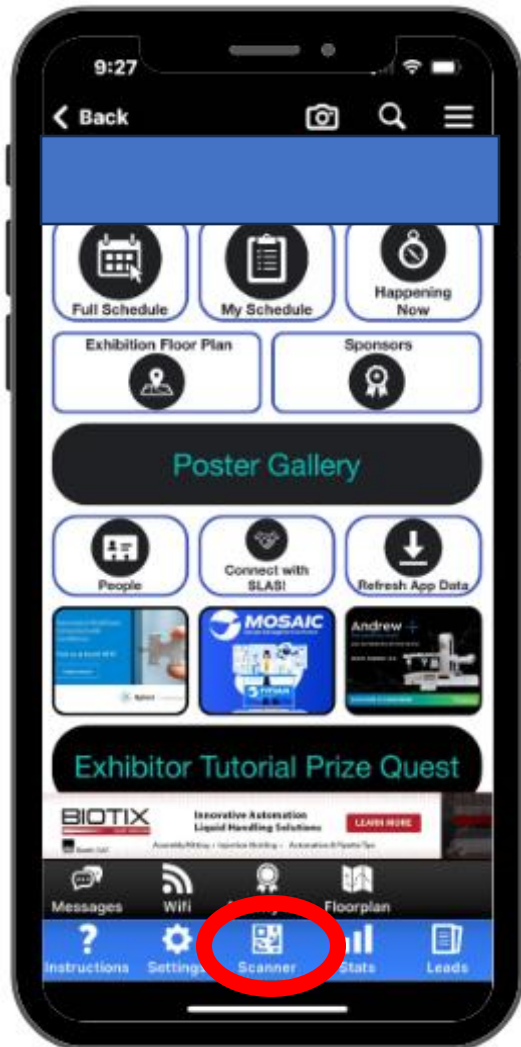
Access this setting after logging in and activating a license.

1. Click the LR “Settings” icon
2. Click on Continuous Scan to activate

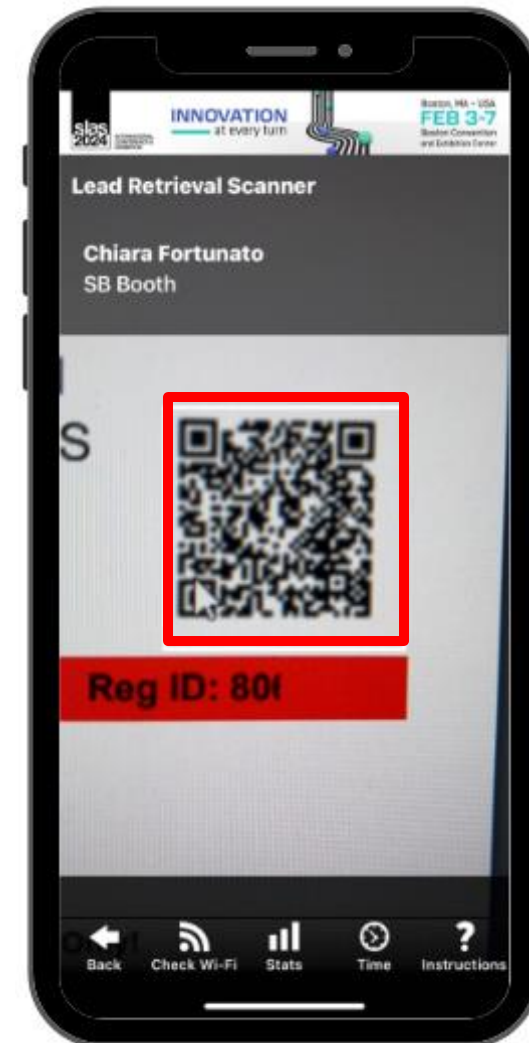


Using Continuous Scan

3. Click “Scanner” button



4. Align QR code in view



Using Continuous Scan

5. If the scan is successful, a pop-up will show the attendee's name and photo (if available)



Using lead retrieval onsite – Special Notes

Lead retrieval works on Wi-Fi or cellular signal.

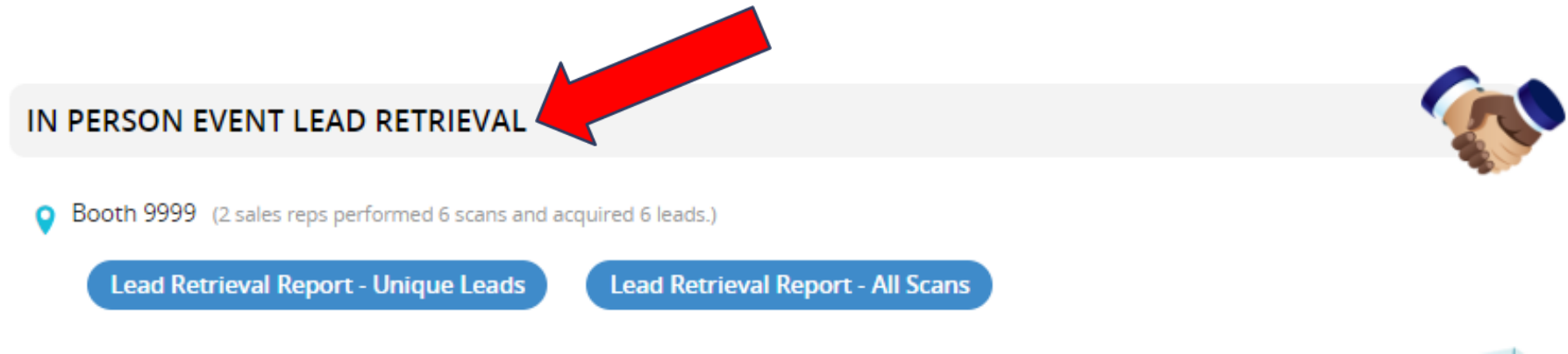
Offline scans are held locally on the device UNTIL it reaches Wi-Fi or cellular service.

Remember....

- Complimentary WiFi is provided
- Staff can scan offline, but **other staff members will not see those leads until back on Wi-Fi or cellular.**
- Offline leads will not show up in post-show reports until the device has internet service.
- DO NOT delete the app until your leads have been synced using WiFi

Accessing Post-Show Reports

- Login to the NHIA 2024 Exhibitor/Sponsor Portal
- Two reports:
 - Unique Leads
 - All Scans



- Downloads into Excel

Accessing Post-Show Reports

[illegible][illegible]




- **Install** the SLAS Events App
Make sure you have the most up to date build - Ask us how!
- **Connect to Wi-Fi or Cellular Data**
- **Ensure that you are connected to Wi-Fi.** In Boston, there will be WiFi available to all exhibitors so devices can be connected in real time to the cloud.
- **Activate** the license on the device in which you'll be using to scan. The license may only be used once.
- **Click "Forgot password"** if you don't know your login credentials.
- **Check** your leads daily in your Exhibitor Portal in the "Live Event Lead Retrieval" section.

A red circle with a diagonal slash through it, indicating a prohibition or 'no' symbol.

DON'T

- Activate your license on **more than one device**
- Use an old build of the app - make sure it is up to date!

A red circle with a diagonal slash through it, containing a blue Wi-Fi symbol, indicating a prohibition or 'no' symbol.

TROUBLESHOOTING

DO NOT DELETE, SIGN-OUT, UNINSTALL, OR CLEAR THE CACHE OF THE APP ONCE THE APP HAS BEEN ACTIVATED OR THE ACTIVATION AND **LEADS WILL BE LOST.**

Frequently Asked Questions

1. Is there onsite support?
 - Yes, on Sunday, March 24th and Monday, March 25th located near the Service Desks
2. Is there Wi-Fi in the Exhibit Hall?
 - Complimentary WiFi is provided
3. How can you view leads onsite?
 - In the NHIA 2024 Conference App by clicking the 'Leads'
 - By accessing the reports in the NHIA 2024 Exhibitor Portal
4. Can I activate the license on two devices?
 - **No, a Lead Retrieval license can only be activated on one device or leads will be lost**

Best practices

1. Remind sales staff to:

- Ask permission before scanning an attendee's badge.
- Review your scanned leads before leaving show floor to ensure you captured all the information.

2. Utilize all of the qualifying features that are available to get the best post-show data:

- Stars
- Notes
- Custom qualifier questions
- Tags

Deadline Reminders

- **LEAD RETRIEVAL TASKS DUE Friday, March 22, 2024**

- Qualifying Questions (Optional)
 - Create your custom lead qualifying questions to gather information quickly about your leads
- Custom Tags (Optional)
 - Create customized tags so your sales staff can quickly categorize their leads in real-time
- Assign Licenses (**Mandatory**)
 - Important note: all booth staff **MUST** be registered for the conference before you can assign a license to them

When You Arrive in Austin

YES - You CAN purchase licenses on-site

- \$420 for the first license
- \$235 for each additional license

When You Arrive in Austin

The Lead Retrieval desk will be staffed during the following hours:

Sunday, March 24th, 11 am – 7 pm

Monday, March 25th, 8 am – 3 pm

After Monday, March 25th at 3 pm, contact us at
nhialeads@discoversb.com