

Updated - Lead Management System Instruction Manual

Why are we doing this?

We have been striving to improve the event experience for all our stakeholders, including institutions, agents and students. Those of you that have been working with us over the past three years will have seen a number of enhancements, including a new event registration system, a meeting diary system and now lead management.

Each of these enhancements allows us to work smarter in the events arena. To date, capturing leads at fairs has involved either form-filling, or writing whilst trying to ensure that you have captured the details correctly, so you can reconnect with your student leads after the fair. Students who may visit 20 institutions at any event to date have had to fill in forms, spell their names over-and-over and try to make their handwriting readable. In a nutshell, it's hard work for all involved.

What does the lead management system do?

The lead management system is integrated into our existing events system and will allow you to scan a visiting student's QR code that they receive upon registration. The QR code is unique to each student and contains essential information, including their name and email address. When you scan the students, you will also have the opportunity to ask them a set of questions that you have created yourself.

Some key features include being able to:

- Capture student leads by scanning their QR code with your mobile device.
- Collect answers for customised profile questions.
- Set up emails to be sent to students as soon as they leave your meeting.
- View a list of students that you have engaged with at any time.
- Download the captured lead information easily for future use.
- Share the captured data easily with your admissions team or agent, as required.

Video Tutorials:

We have created two video tutorials showing how to set up your lead management and how to scan students.

- Video one: [Desktop: Setting up your Exhibition Portal](#)
- Video two: [Mobile Device: Setting up your Lead Management App](#)

What do I need to do to set this up before I travel?

1. Log into the Viet Nam Event Exhibitor Portal. This portal is for use at both Ho Chi Minh City Fair and Hanoi Fair.
 - [Viet Nam Fairs Exhibitor Portal](#)
2. Follow the step-by-step instructions to set up your lead management preferences (these instructions can also be seen in the Exhibitor Portal section of this document).

How long will it take to set up?

Setting up is very simple and should take no more than half an hour of your time. Please ensure you have your questions set up before the event to avoid any confusion and delays at the fair. Time well spent pre-event, rather than hours of data transfer post-event.

What equipment do I need?

You can set up the exhibition portal on your desktop. Scanning the leads at the event can only be done through your smart phone or tablet.

Operating systems:

- Android Operating System 4.4 and up
- Apple iOS 8.0 or later

Exhibitor Portal

Here is a quick overview of the Exhibitor Portal. You will also find all this information within the portal itself.

- [Viet Nam Fairs Exhibitor Portal](#)

1. Landing Page

**VIET NAM
NEW ZEALAND FAIRS**

**HO CHI MINH CITY AND HANOI
7 APRIL - 8 APRIL 2018**

ThinkNew | NEW ZEALAND EDUCATION

Viet Nam Fairs Exhibition Portal

Welcome to Education New Zealand's Exhibitor Portal for the Viet Nam Fairs.

We have pre-booked your "Exhibition Stand/s" for you and, in a few simple steps, you will be able to set up your lead management preferences.

First thing's first, please sign in with your ENZ Events login. If you have forgotten your login you can reset your password [here](#).

Existing Booking

Email

Address The Email Address field is required.

Password

The Password field is required.

2. Introduction Page

Introduction Leads Sign off

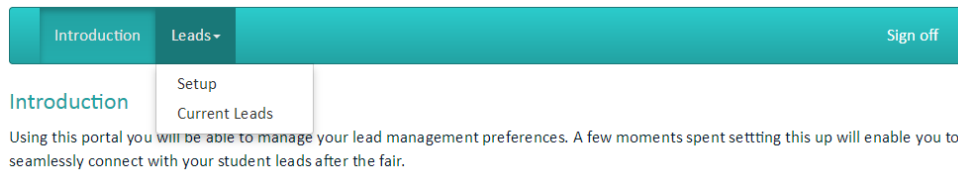
Introduction

Using this portal you will be able to manage your lead management preferences. A few moments spent setting this up will enable you to seamlessly connect with your student leads after the fair.

You'll find all the instructions on the 'Leads' tab of this portal. We have also created a handy document, [here](#), that you can download, print and refer to at any time.

Should you have any questions please don't hesitate to email the events team on events@enz.govt.nz

3. Leads Tab – for setup of questions and auto email. Also for finding current leads.



Introduction Leads Sign off

Introduction

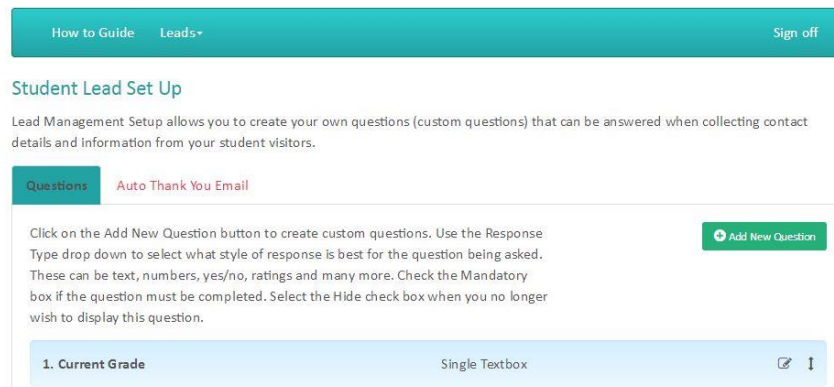
Setup
Current Leads

Using this portal you will be able to manage your lead management preferences. A few moments spent setting this up will enable you to seamlessly connect with your student leads after the fair.

4. Setting Up Lead Management

These are prompter questions for you to ask your student visitors. You ask the questions and you write the notes. It's not designed for you to hand over your phone for them to fill in a form. More detailed instructions can be found on the setup page of the portal.

You are welcome to add/remove any questions at your discretion. You can add a 'free comment' box to enable you to write any important meeting notes about the student you have just talked to. ***We already ask the students for their full names and email addresses, so you do not need to ask them for this information. They will be exported alongside the answers to your questions.***



How to Guide Leads Sign off



Student Lead Set Up

Lead Management Setup allows you to create your own questions (custom questions) that can be answered when collecting contact details and information from your student visitors.

Questions Auto Thank You Email

Click on the Add New Question button to create custom questions. Use the Response Type drop down to select what style of response is best for the question being asked. These can be text, numbers, yes/no, ratings and many more. Check the Mandatory box if the question must be completed. Select the Hide check box when you no longer wish to display this question.

Add New Question

1. Current Grade	Single Textbox	 
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5. Setting Up Auto Email

You can set up an auto email to go out to students you have met and scanned. You can tailor the wording of this email, sample below, which is generic to cover both fairs in Viet Nam. You can also add a PDF brochure as an attachment.

Questions **Auto Thank You Email**

Auto Thank You Email Setup

A thank you email can be configured to be automatically sent to all contacts that are scanned and had their information collected. This email can include an attachment such as an e-prospectus or useful information that is applicable to all student contacts that have been scanned (the attachment size must not exceed 5000KB).

Please ensure you have generic, rather than event-specific, wording in your email.

Follow the steps below to set up.

From Name * Rachel Brandon (TEST INSTITUTION)

From Address * rachel.brandon@enz.govt.nz

Cc rachel.brandon@enz.govt.nz

Bcc

Subject * Thank you for Visiting INSTITUTION NAME

Attachment Test Document.pdf Remove

Body *

Kia ora «FirstName»

Many thanks for visiting the INSTITUTION NAME booth at the New Zealand Fair today. One of our team will be in touch to follow up on your inquiry.

In the meantime, please find attached a copy of our current prospectus.

We look forward to welcoming you to New Zealand.

Insert First Name

Clear Save

6. Find Current Leads

Introduction **Leads** Sign off

Setup
Current Leads

Introduction

Using this portal you will be able to manage your lead management preferences. A few moments spent setting this up will enable you to seamlessly connect with your student leads after the fair.

Introduction **Leads** Sign off

Current Leads

Once you have scanned some leads you will see the list below.

Below is a list of the leads that have been scanned with the date and time the lead was actually captured. Click on the name to view further information including the answers to your custom questions. An excel export can be generated by clicking on the **Export** button at the bottom of the page.

Search Contact Details Total Leads 1

Clear Add Filter

Contact	Date Scanned	Stand
Rachel Student Brandon Student	Sun Sep 17, 2017 8:27 pm	ENZ TEST

Export Map



To view your leads please type an 'a' or any other letter into the search box, hit enter.



Once you can see your list of leads, you will also see the 'Export' button at the bottom of the page.

My Leads:

Total Leads

Clear
▼ Add Filter

Contact	Date Scanned	Stand	
Test Sam Student Hanoi Test Heeney Student	Thu Mar 15, 2018 3:09 pm	Test Brandon Institution	
Hcmc Sam Test Student Hcmc Heeney Test Student	Thu Mar 15, 2018 3:10 pm	Test Brandon Institution	

 Export
 Map

7. Export Leads

Click on **Export** and this will auto-download an Excel spreadsheet with the contact information (full name and email) and any data that you collected for each lead.

Using 'The Event App'

How do I scan student QR codes?

You can do this at the touch of a button from your smart phone or tablet. The scanning system uses your device's camera.

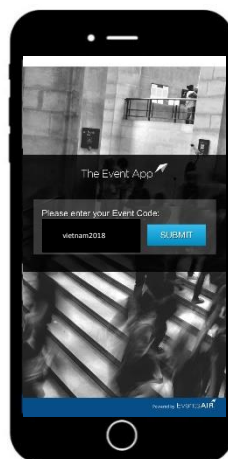
1. Download the application *'The Event App'* to the mobile device that you will use at the fair (compatible with both Android and iOS systems)

[Event APP – Google Play](#)

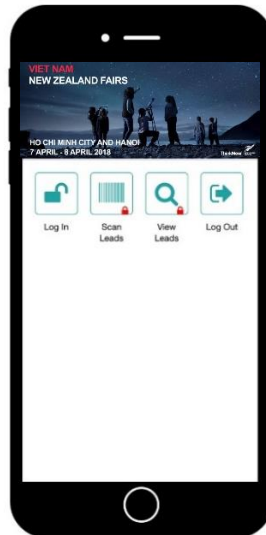
[Event App – Apple Store](#)

2. Once downloaded, open the app and enter the event code below.

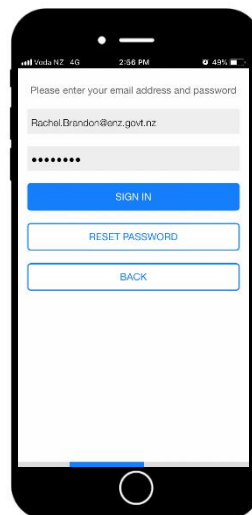
Event Code: **vietnam2018**



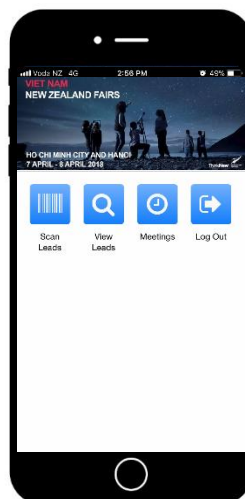
3. Tap on 'log in' icon – you cannot scan any leads until you have logged in.



4. Log in using your **existing Events email and password** (this is used throughout all the event platforms including registration, meeting diary and lead management).



5. You are now set up and ready to go! Have a go at scanning the different QR codes. Practice makes perfect!



6. Test your scanning ability. Scan the below QR Codes and then look at your lead under 'view leads' to ensure they have been captured. This is the part where your questions/open textbox for notes you have set pops up.

HCMC Test Code



Hanoi Test Code



Questions

If you have any questions, please don't hesitate to ask – events@enz.govt.nz