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.

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

1. Log into the Viet Nam Event Exhibitor Portals. There is one per fair and they are hyperlinked below. You need to set one up for **EACH fair** you are attending:
    a. Ho Chi Minh City portal
    b. Hanoi 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:

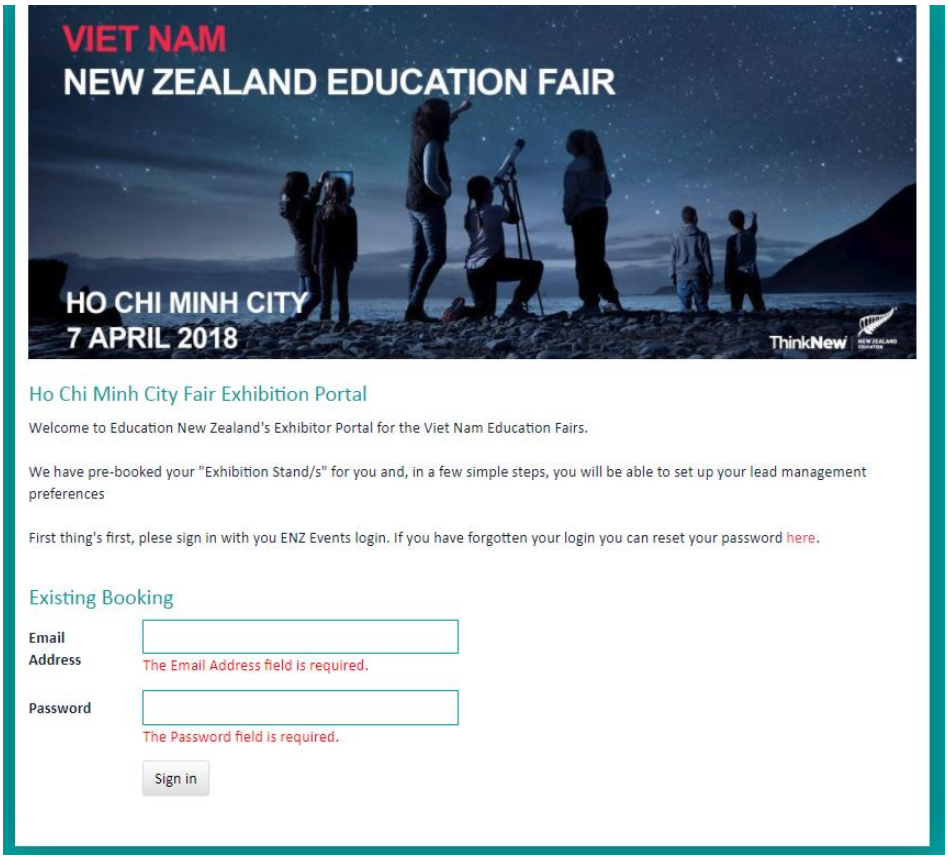
- Android Operating System 4.4 and up
- Apple iOS 8.0 or later

Exhibitor Portal

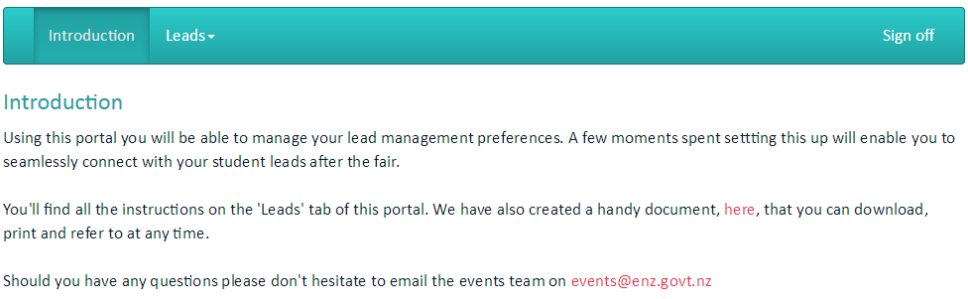
Here is a quick overview of the Exhibitor Portal. You will also find all this information within the portal itself.

- Ho Chi Minh City portal
- Hanoi portal

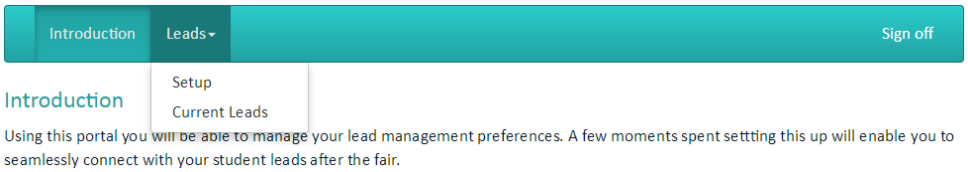
1. Landing Page (example from Ho Chi Minh City)



2. Introduction Page



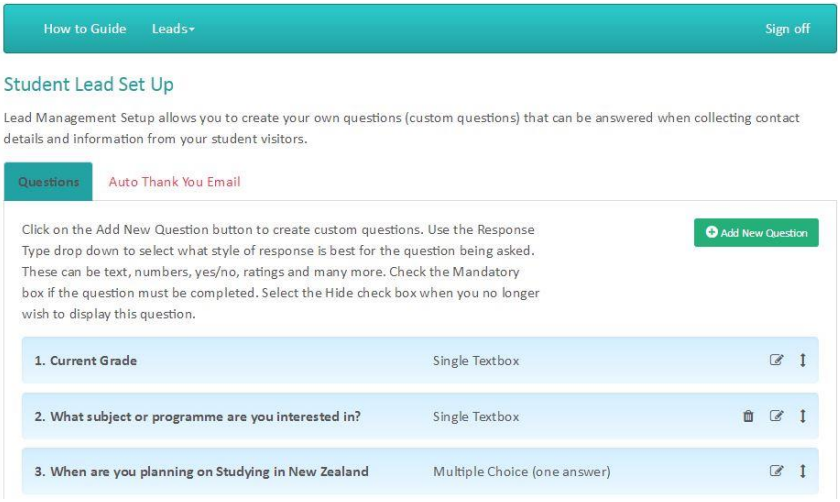
3. Leads Tab – for setup of questions and auto email. Also for finding current leads.



4. Setting Up Lead Management

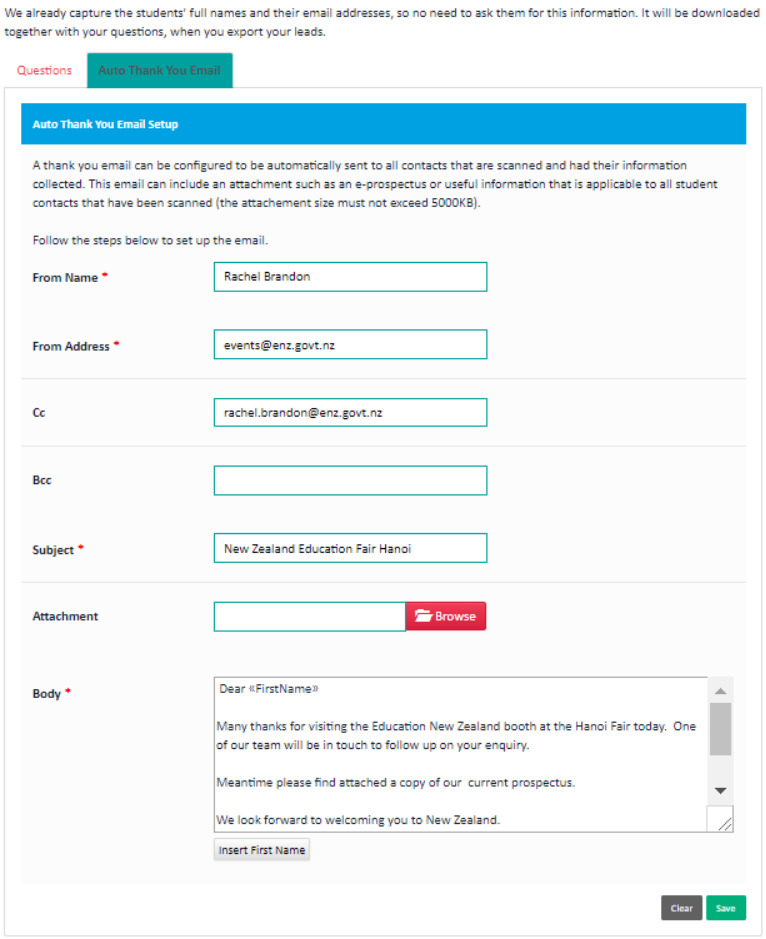
These are prompter questions for you to ask your student visitors. You ask the questions and you write the notes. It's not designed for you to hand over your phone for them to fill in a form. More detailed instructions can be found on the setup page of the portal.

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.***

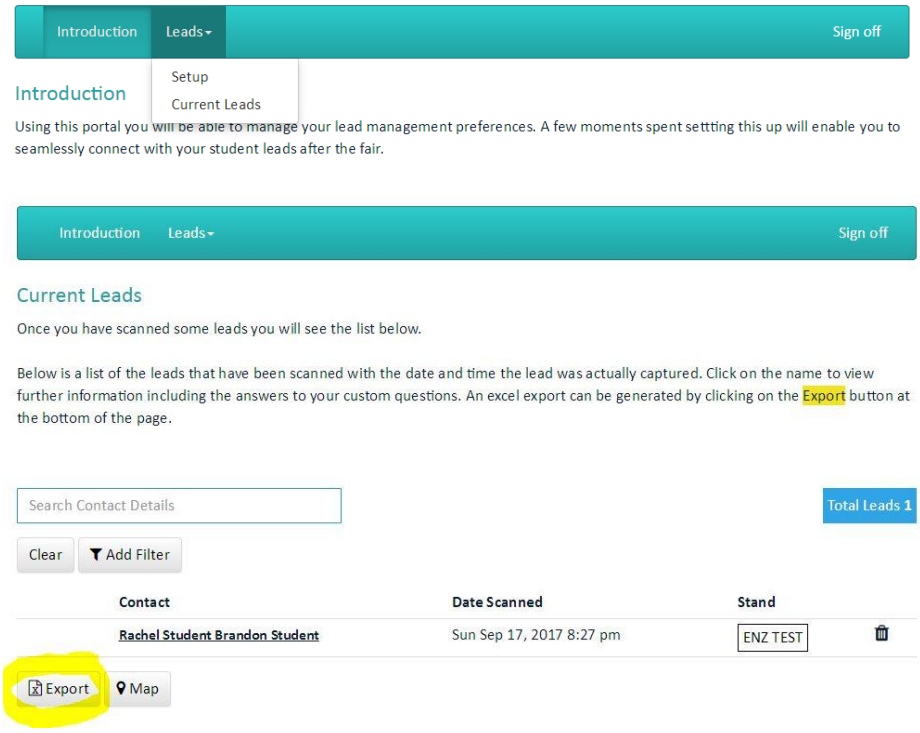


5. Setting Up Auto Email

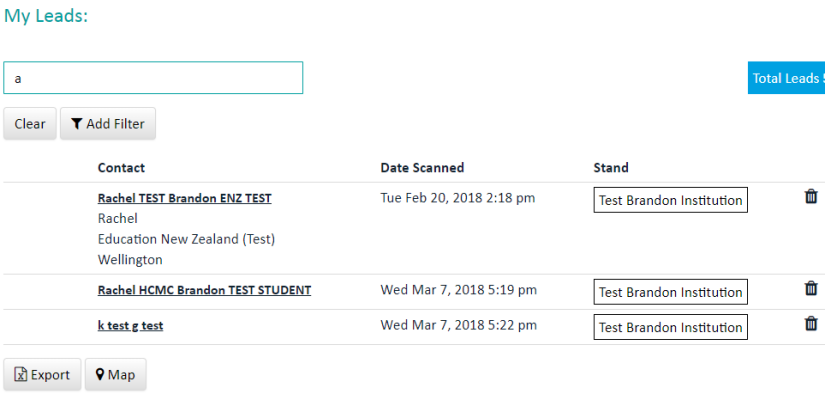
You can set up an auto email to go out to students you have met and scanned. You can tailor this to say whatever you like. You can even add a PDF brochure as an attachment.



6. Find Current Leads



If you experience an error where your leads aren't displaying, please type an 'a' or any other letter into the search box, hit enter, and it will display them alongside the 'Export' button.



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'

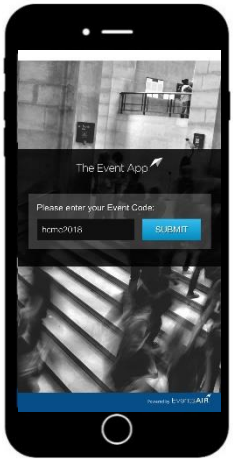
How do I scan student QR codes?

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

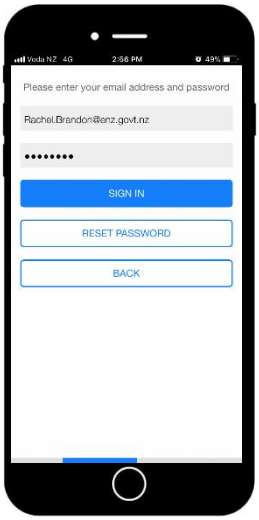
2. Once downloaded, open the app and enter event code for the event you are attending.
   If at the Ho Chi Minh City Fair: **hcmc2018**

If at the Hanoi Fair: **hanoi2018**

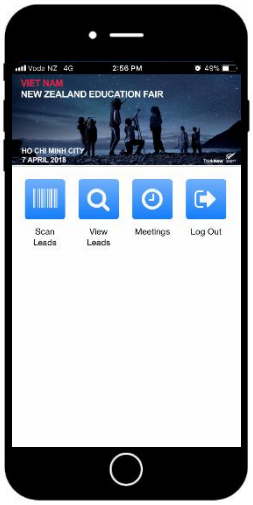


3. Tap on 'log in' icon – you cannot scan any leads until you have logged in.

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 (relating to whichever fair app you are testing) and then you can look at your lead 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