The Conference Exchange™
www.CONFEX.com

For Exhibitors

Exhibitor Lead Retrieval & Appointments in the Confex Meeting App

2022

Lead Retrieval In a Virtual Environment

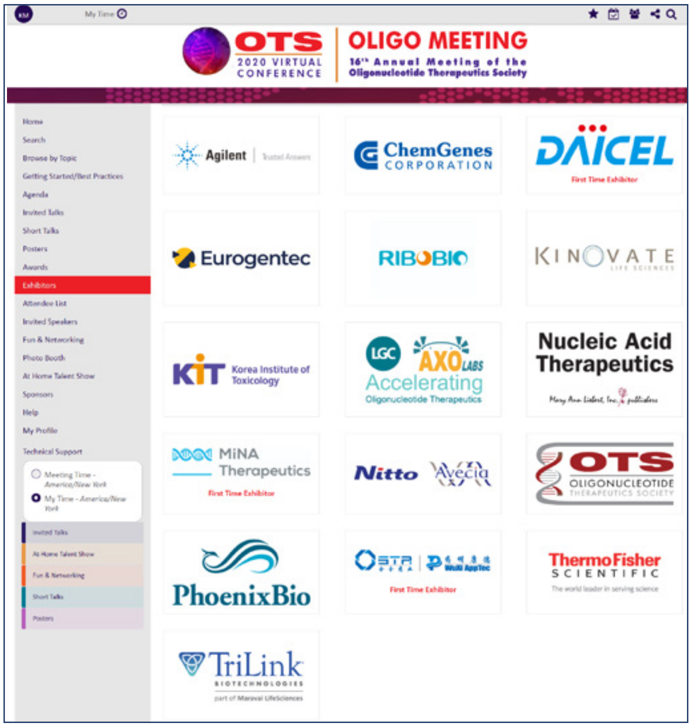
The following pages are broken down into two sections on how to use Lead Retrieval. Section one covers the **exhibitors' experience.** The second section is a breakdown of the **attendees' experience** as noted below.

Screenshot samples are representative pages. Your pages may vary slightly.

Lead Retrieval: The Exhibitors' Experience

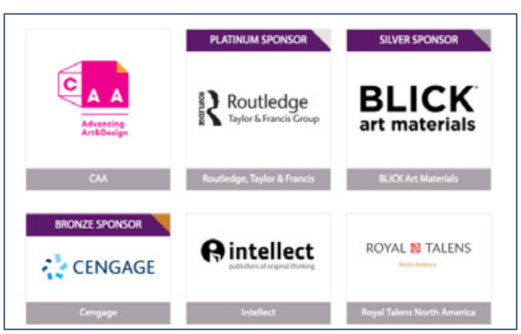
1 • Exhibitor Access to Exhibitor Pages

Exhibitors who log in to the Meeting site will be able to browse the site, including the Exhibitor Index.



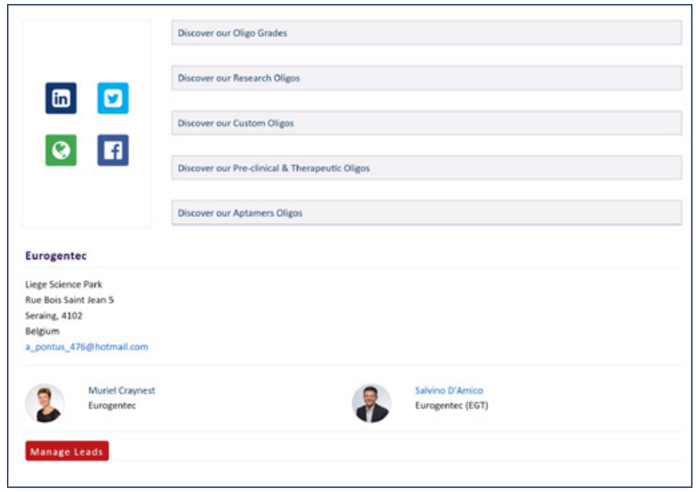
Exhibitors will have access to their exhibitor pages and lead management during the meeting and optionally well beyond the meeting. Meeting organizers will notify you well in advance of when access will be ending.

Any leads and conversations generated through the lead retrieval system will also be available to download before access to the meeting site ends.



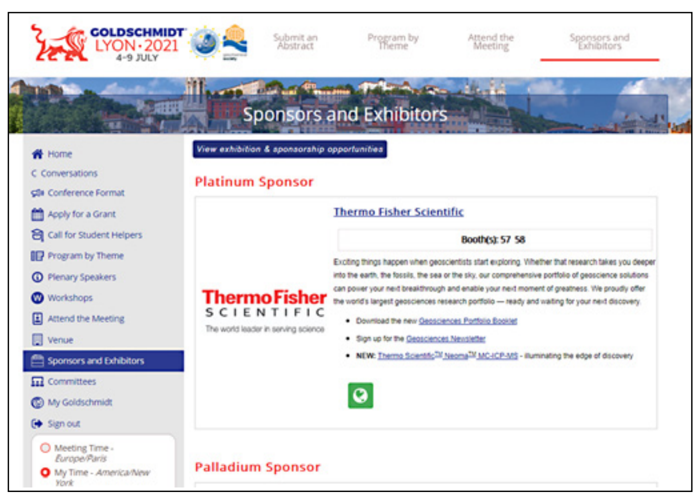
2 • Exhibitor's View of their own Exhibitor Page

No matter how many leads and conversations an exhibitor has going, the only thing they will see at the bottom of their page is a link to **Manage Leads**.



Exhibitors can manage their leads from clicking the **Manage Leads** button at the bottom of their Exhibitor page.

The lead management pages are unique for each exhibitor and can only be seen by exhibitor contacts who have logged in to the meeting site. Exhibitors cannot see other exhibitors contacts or lead management page information.



Screenshot samples are representative pages. Your pages may vary slightly.

Lead Retrieval: The Exhibitors' Experience
continued

3 • Managing Leads: Conversations

All Attendees who start a chat with an exhibitor, will be added to the exhibitor's **Inquiries** on the left side of the exhibitor's lead management page.

Once a Attendee starts a conversation, if they had previously chosen **YES!** when prompted, they will move from the **Contact List** to the **Inquiries**.

Expanding each Attendee's conversation will give access to the full conversation. All responses from any of a particular exhibitor's contacts will show in the same chat conversation.

- The Attendee comments are always on the left.
- The exhibitor comments are always on the right.
- All comments are marked with the person's name and a time stamp.

4 • Managing Leads: Contact List

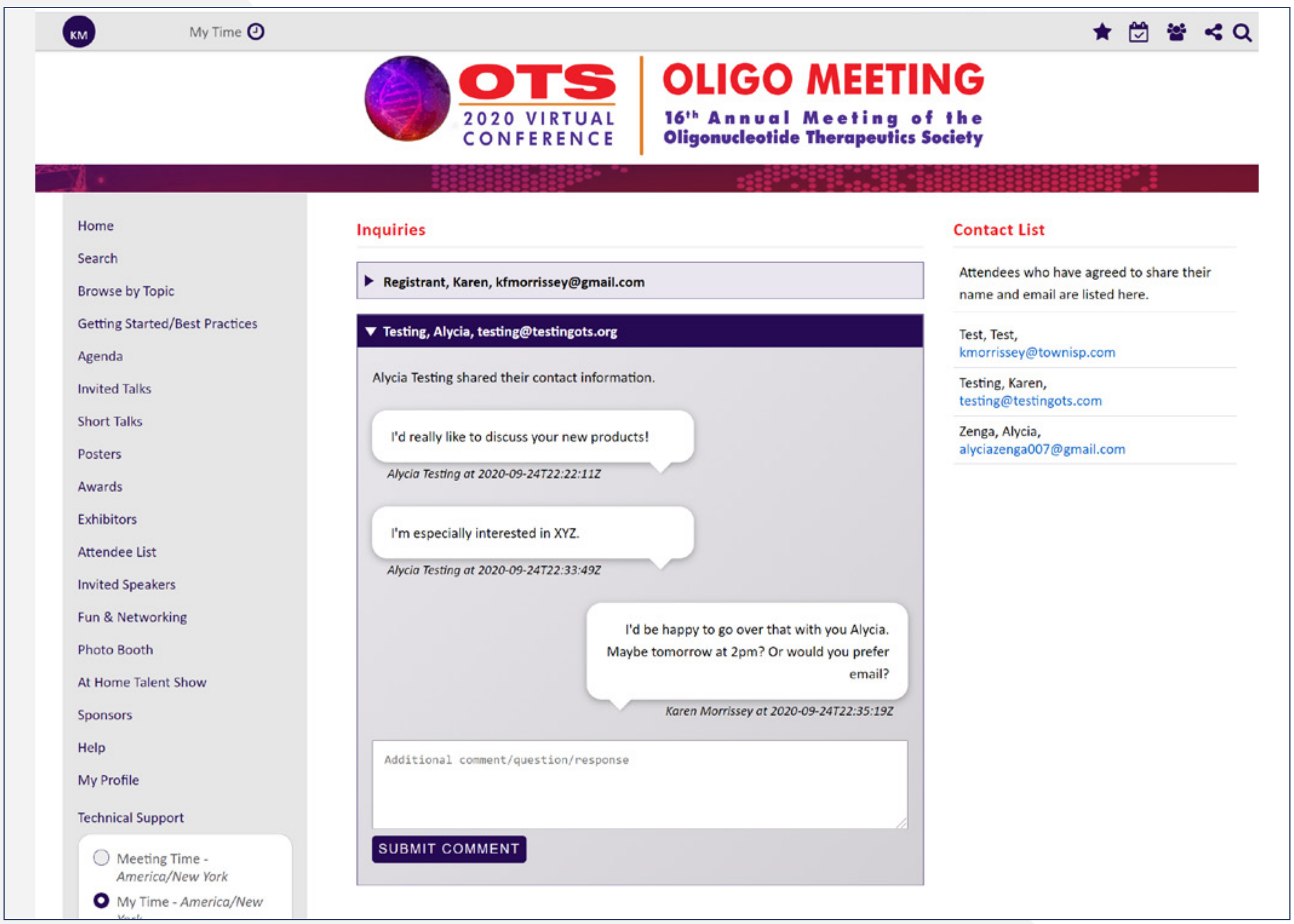
Once an Attendee clicks on an Exhibitor's page, they will be prompted to give permission to share their contact information (see the Attendee Initial Contact on pg 2).

All Attendees who choose **YES!** when prompted, will be added to the exhibitor's **Contact List** on the right side of the exhibitor's lead management page.

5 • Managing Leads: Email Notifications

Emails will be sent to exhibitors each time:

- an Attendee chooses YES!
- an Attendee starts or continues a conversation
- an exhibitor contact responds in a conversation.



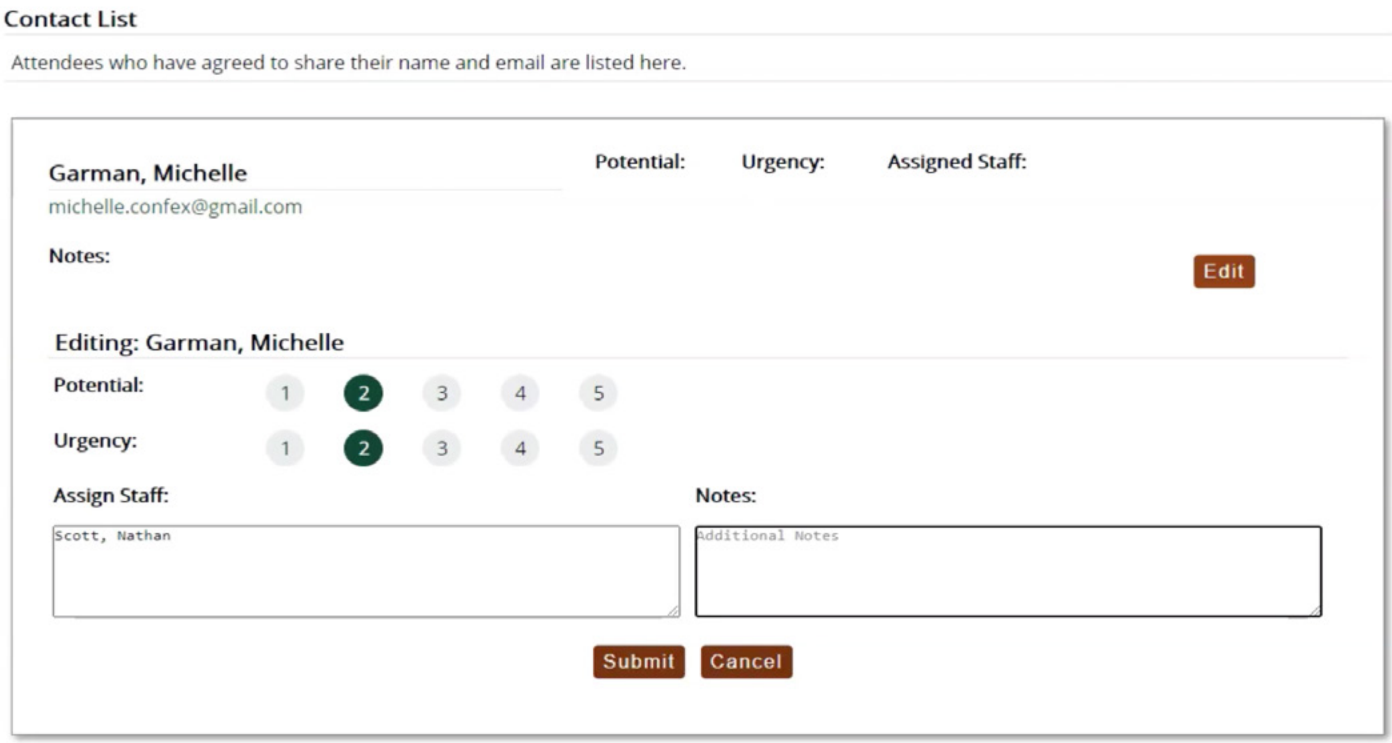
Screenshot samples are representative pages. Your pages may vary slightly.

Urgency, Priortity, Staff & Notes

1 • Ranking Leads

For each attendee who's badge is scanned, the exhibitor may rank the lead, using Value (1-5), and Urgency (1-5). Exhibitors may also assign Staff, and leave a Note for each lead.

This information is available on the Leads page and is only visible to the exhibitor.

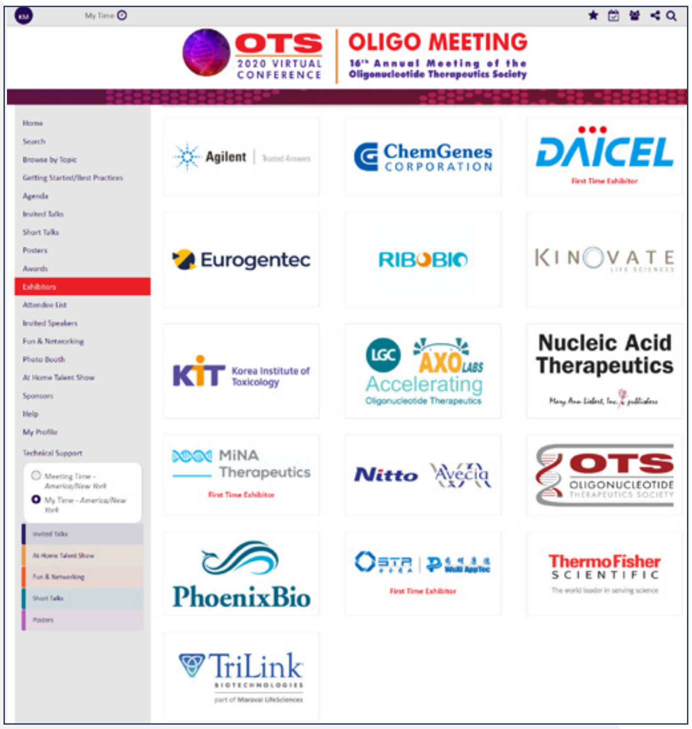


Screenshot samples are representative pages. Your pages may vary slightly.

Lead Retrieval: The Attendees' Experience

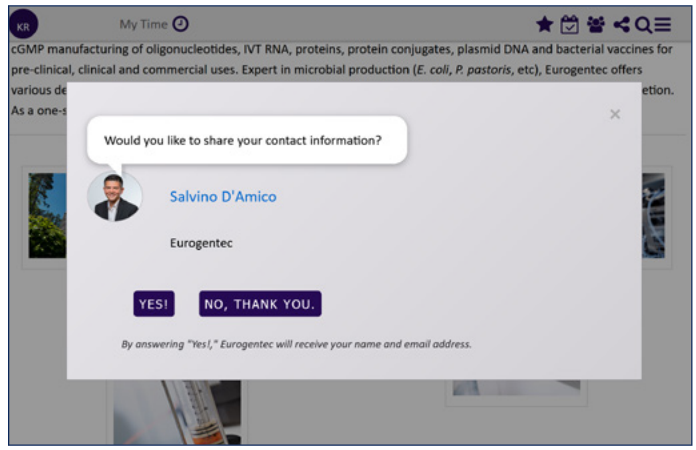
1 • Attendees' Access to Exhibitor Pages

Attendees (meeting attendees/registrants) who log in to the Meeting site will be able to browse the site, including the Exhibitor Index. Optionally, exhibitor pages may be publicly available, but lead retrieval only works with logged in users.



2 • Attendee's Initial Contact

Once an Attendee clicks on an Exhibitor's page, they will be prompted to give permission to share their contact information.



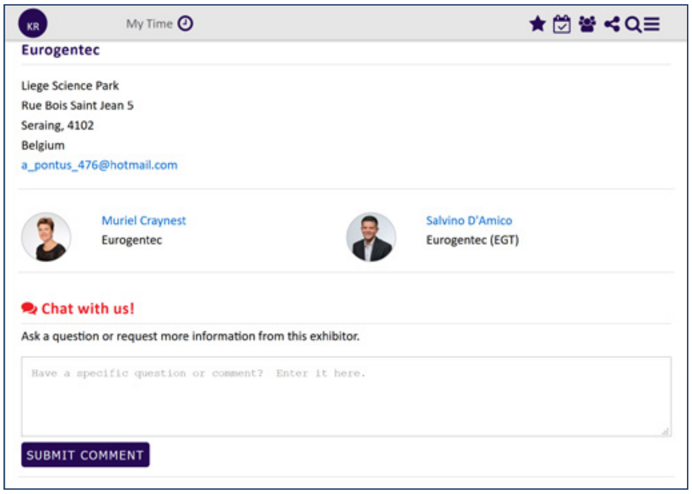
The Attendee has 3 options:

1. They can **close the prompt** without answering. They will be prompted again on their next visit. No information will be sent to the exhibitor.
2. If they **choose YES!** the prompt closes, and the exhibitor now has a new lead in their contact list. They will not be prompted again. Information will be sent to the exhibitor and their choice will be saved into the meeting site data.
3. If they **choose NO, THANK YOU**, the prompt closes. No information is sent to the exhibitor. No data is saved to the meeting site, but their choice will be stored locally on their device. They will not be prompted again *unless they clear the cache in their browser, or use a different device to log in and access the page.*

Screenshot samples are representative pages. Your pages may vary slightly.

3 • Attendee's Pre-Conversation View of Exhibitor Pages

Whatever option the Attendee has chosen upon their initial contact, they will see an invitation to chat at the bottom of the page.

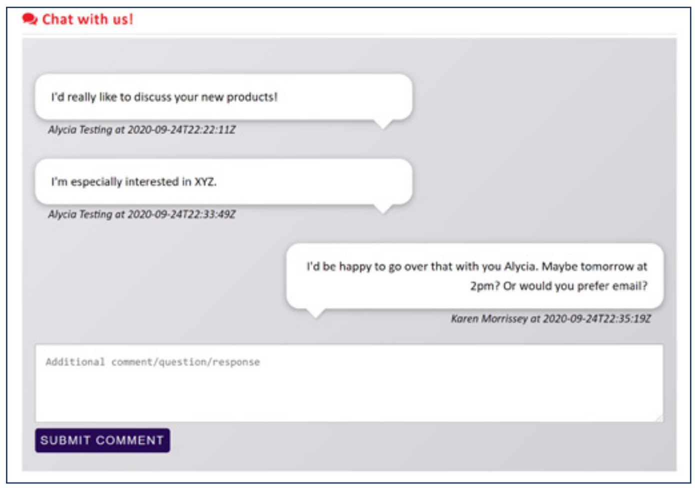


If the Attendee previously chose NO at the prompt, or if they simply closed out of the prompt, they still can initiate a conversation with the exhibitor, just like those who chose YES.

4 • Attendee's View of Conversations with Exhibitors

Once a conversation is started, that conversation will be visible to the Attendee only, as shown below, at the bottom of the Exhibitor's page.

- **Each Attendee can only see their own conversation with an individual exhibitor.** If someone else has started a conversation with the same exhibitor, they can not see each other's conversations.
- The Attendee comments are always on the left.
- The exhibitor comments are always on the right.
- All comments are marked with the person's name and a time stamp.



Screenshot samples are representative pages. Your pages may vary slightly.

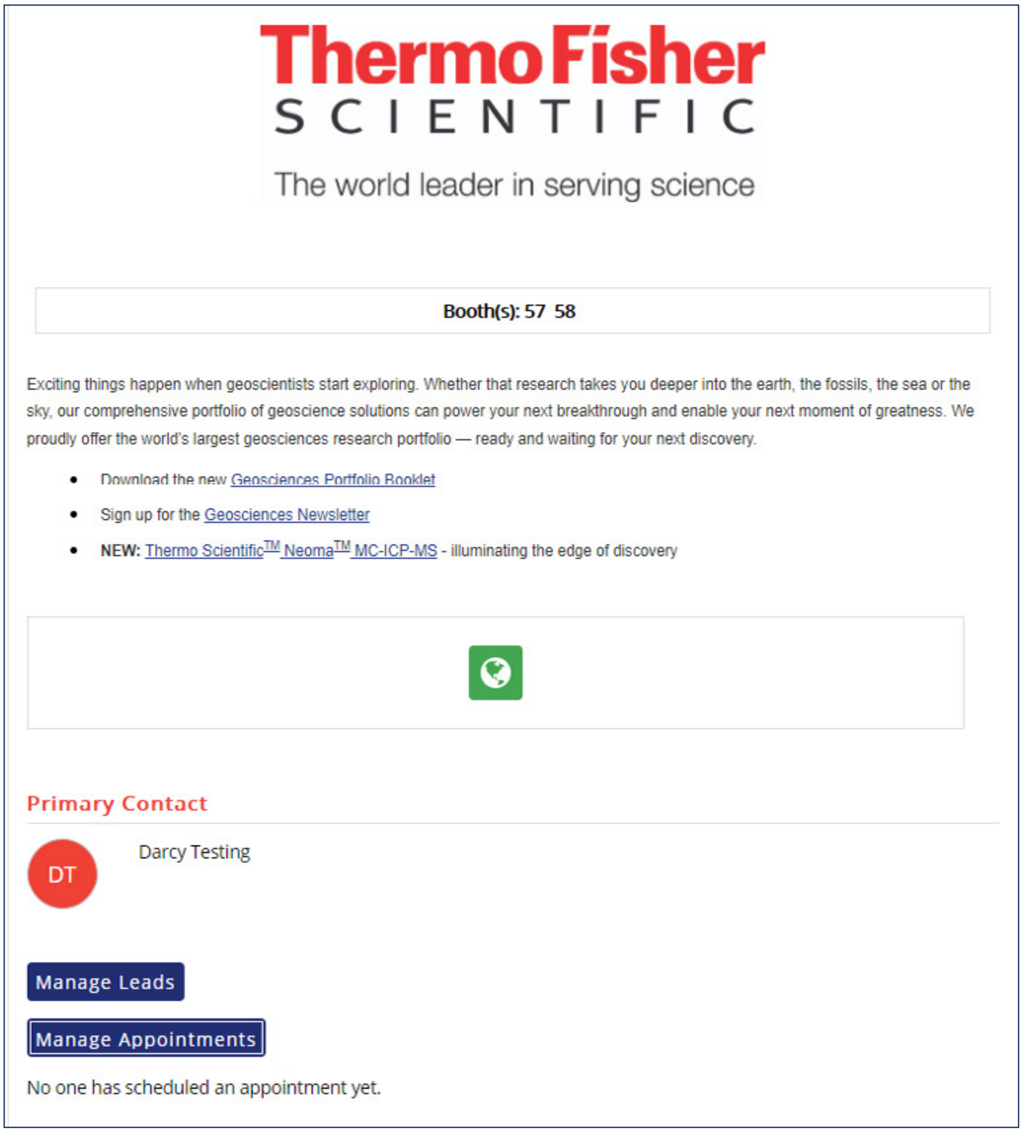
Managing Appointments to Leverage Visability and Communication

Making connections is a primary goal for all who attend meetings. The following pages are broken down into two sections on how to use Managing Appointments. Section one covers the **exhibitors' experience**. The second section is a breakdown of the **attendees' experience** as noted below.

Screenshot samples are representative pages. Your pages may vary slightly.

1 • Exhibitors' Access to Manage Appointments

The exhibitor/sponsor will see see two buttons on their page, Manage Leads, and Manage Appointments.



Manage Leads and Manage Appointments

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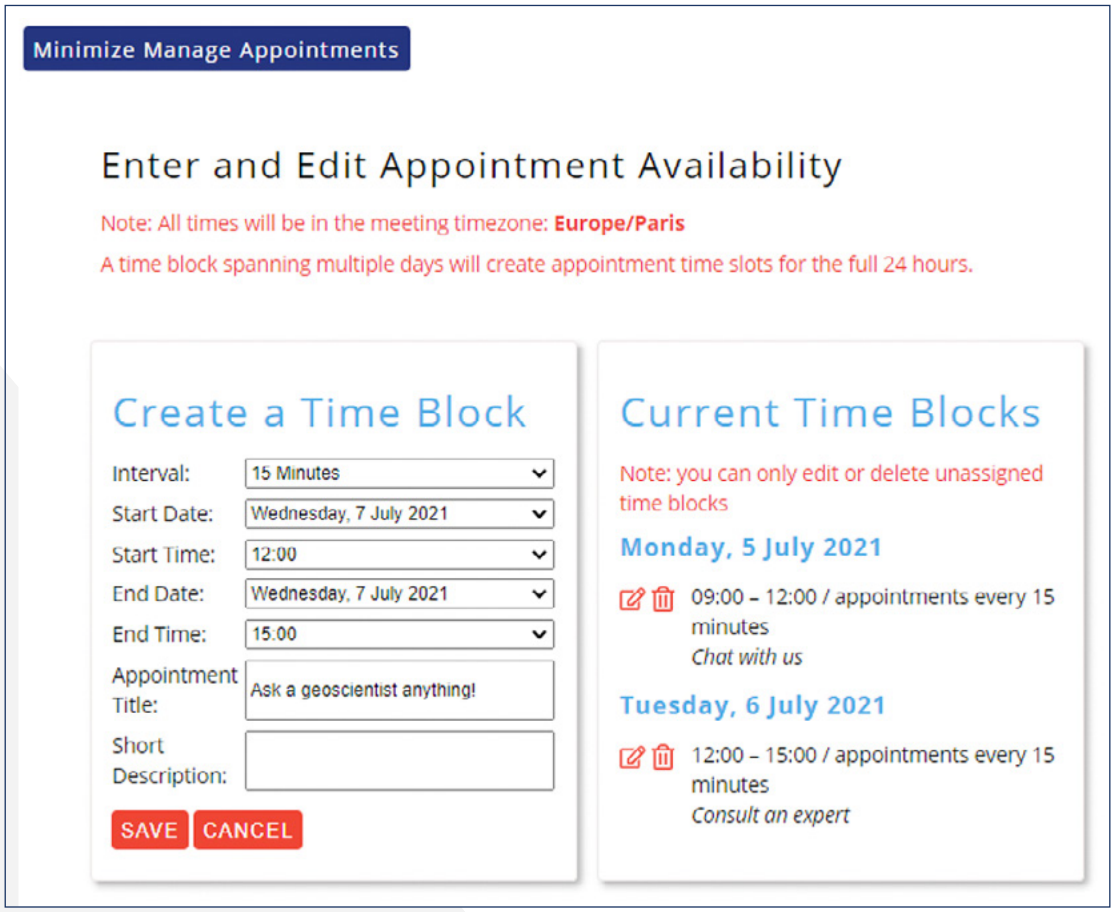
2 • Creating Appointment Times

Notice times are required for Europe/Paris

When clicked, the section below expands to reveal time blocks

Meeting Timezone



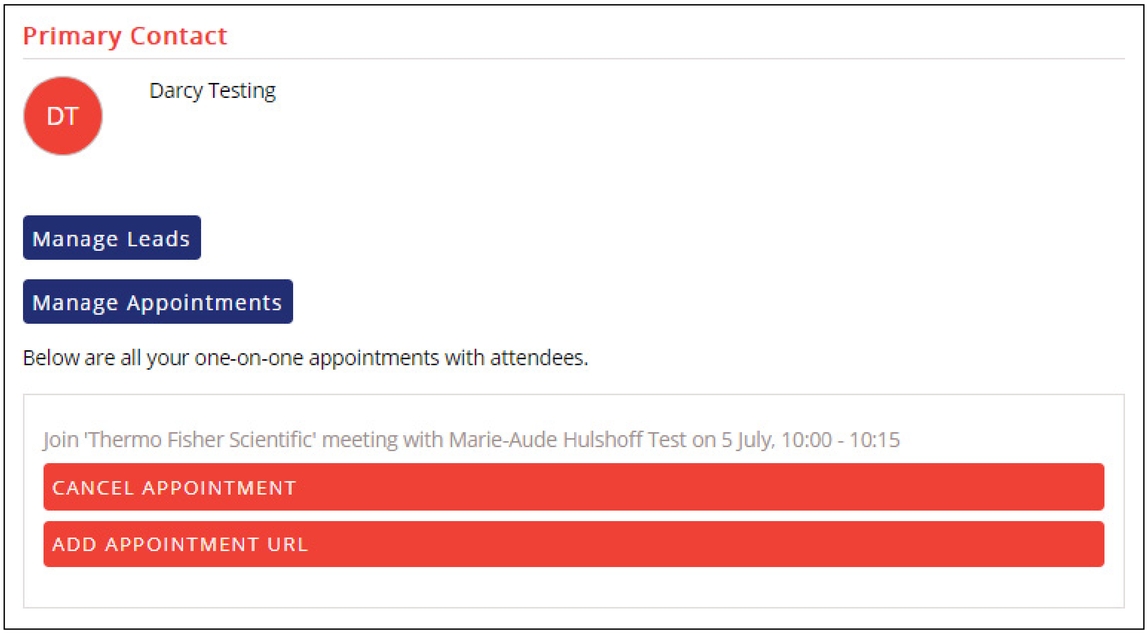
New appointment time block form intervals: 15, 20, 30, 45, 60 minutes. Dates are available for conference dates only.

Time blocks that are created will automatically display here.

Screenshot samples are representative pages. Your pages may vary slightly.

3 • An Appointment has been Scheduled

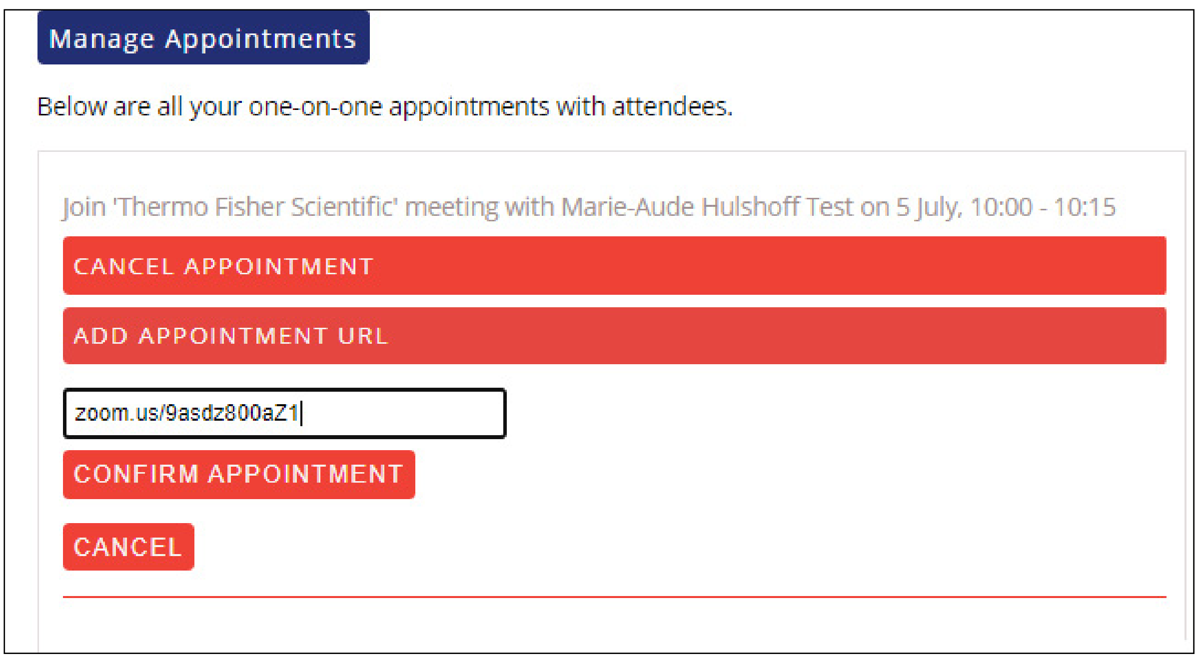
When the exhibitor/sponsor logs in, they will see the appointment has been scheduled:



4 • An Appointment Has Been Confirmed

They may then add an appointment URL and confirm the appointment.

Add your Appointment URL



Screenshot samples are representative pages. Your pages may vary slightly.

5 • Managing Appointment Conversations

All Attendees who book an appointment with an exhibitor, will be added to the exhibitor's **Inquiries** on the left side of the exhibitor's lead management page.

Expanding each Attendee's conversation will give access to the full conversation. All responses from any of a particular exhibitor's contacts will show in the same chat conversation.

- The Attendee comments are always on the left.
- The exhibitor comments are always on the right.
- All comments are marked with the person's name and a time stamp.
- During the course of this, the attendee and exhibitor/sponsor contact are receiving automatic email notifications to let them know of activity.

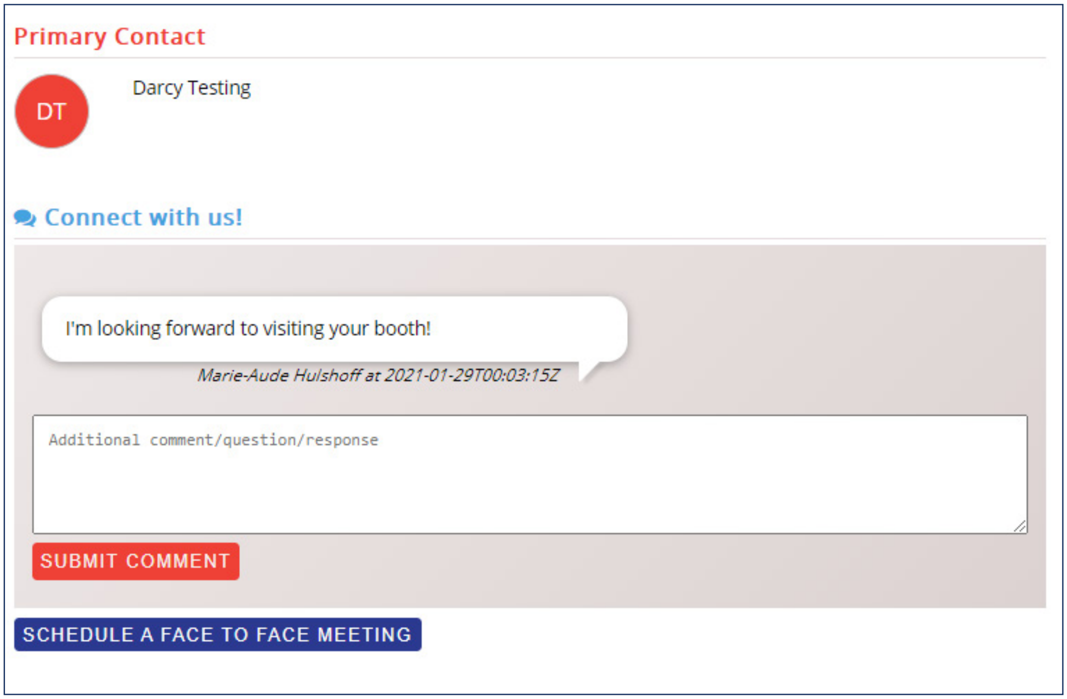
EXPANDED VIEW
During the course of this, the attendee & exhibitor/sponsor contact are receiving automatic email notifications to let them know of activity, sessions, topics or programs.

Screenshot samples are representative pages. Your pages may vary slightly.

1 • Attendees Option to Schedule

When the attendee visits a page where appointments time blocks are setup, they have an option to schedule a meeting.

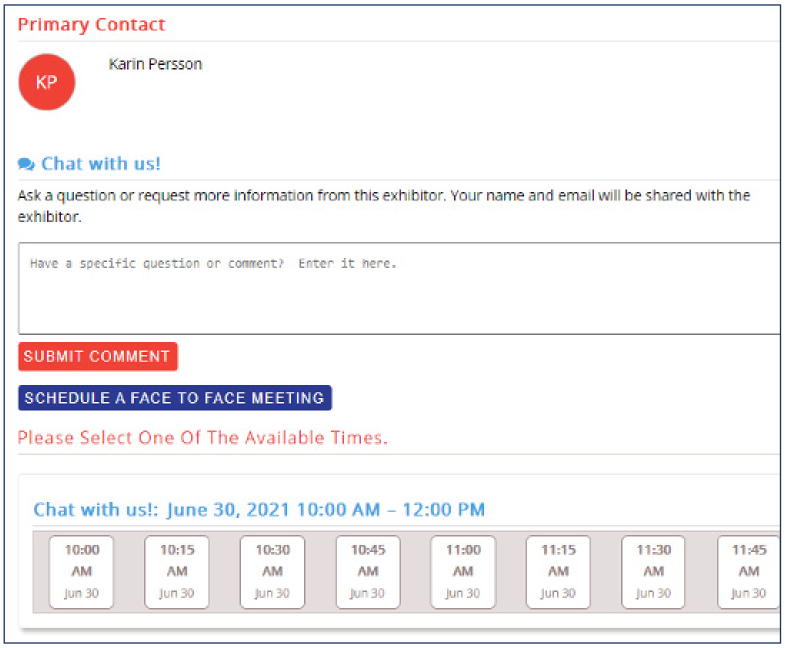
Schedule a Meeting



2 • Select a Date From Available Appointment Times

When clicked, that section expands, the user may select a date, and that day-section expands, to reveal the times (showing in the user's time zone).

Select From Available Times



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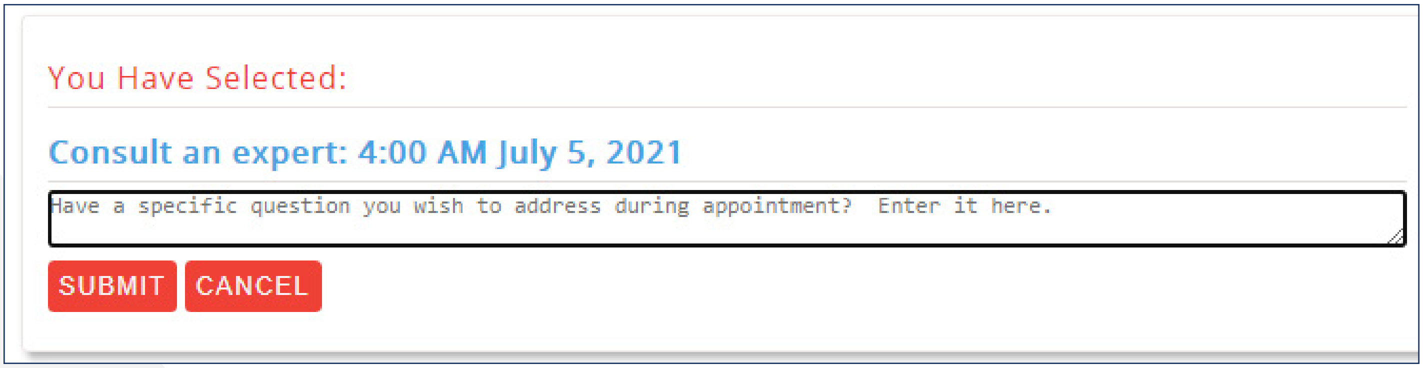
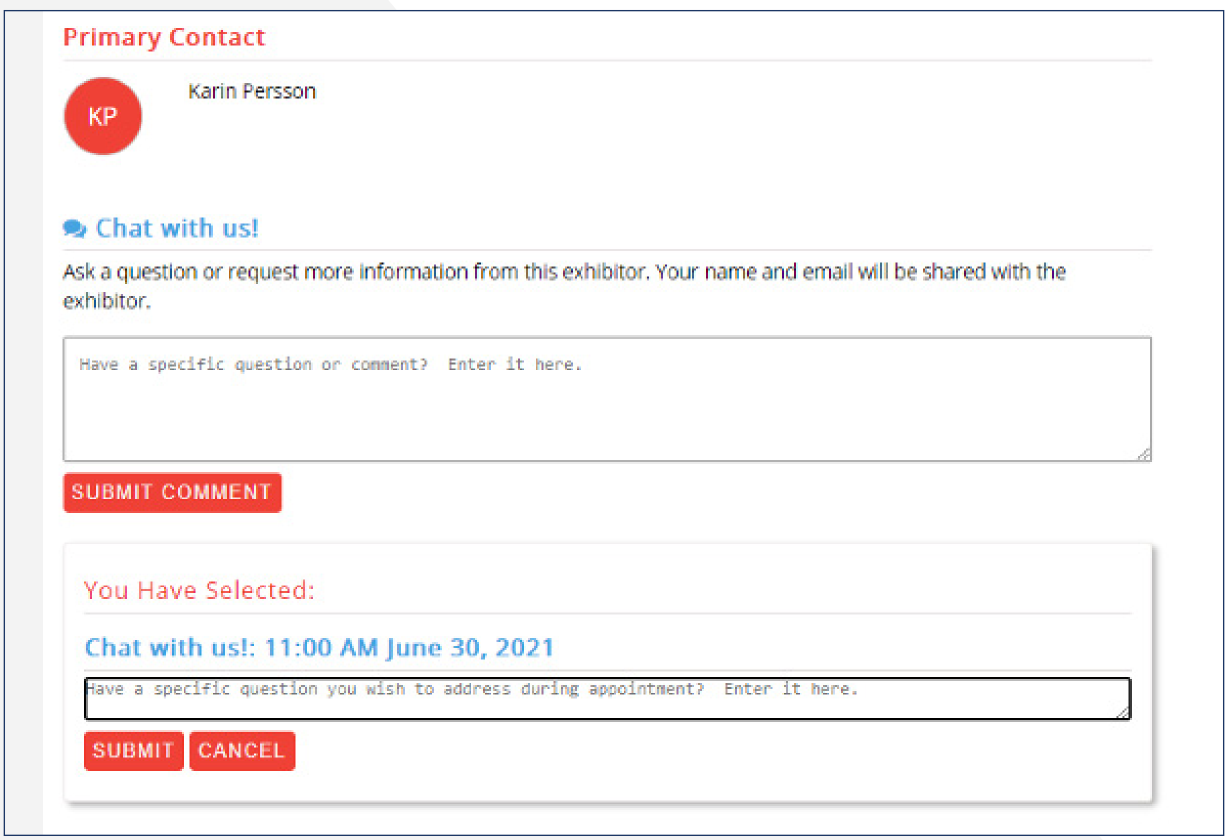
3 • Add Comment or Question

When selecting a time slot, they are asked if they have a question or comment:



4 • Page Will Update

Once a comment is submitted, the exhibitor/sponsor page will be updated (for the specific attendee):



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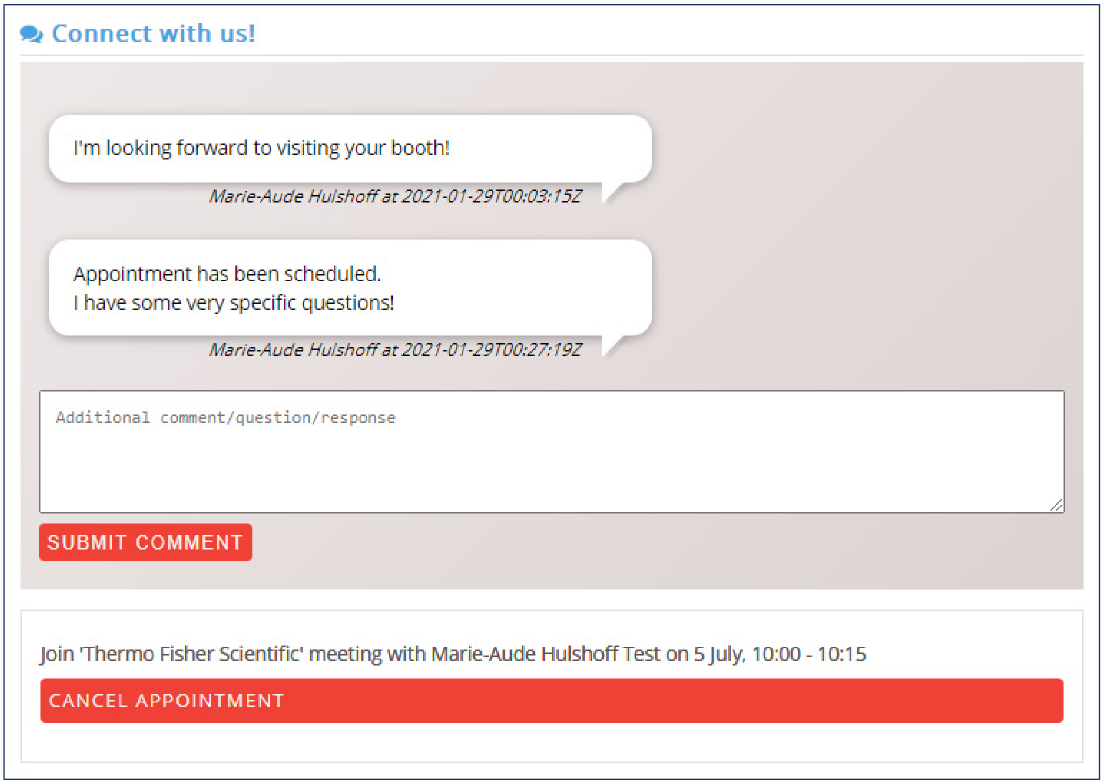
5 • Appointment has been Confirmed

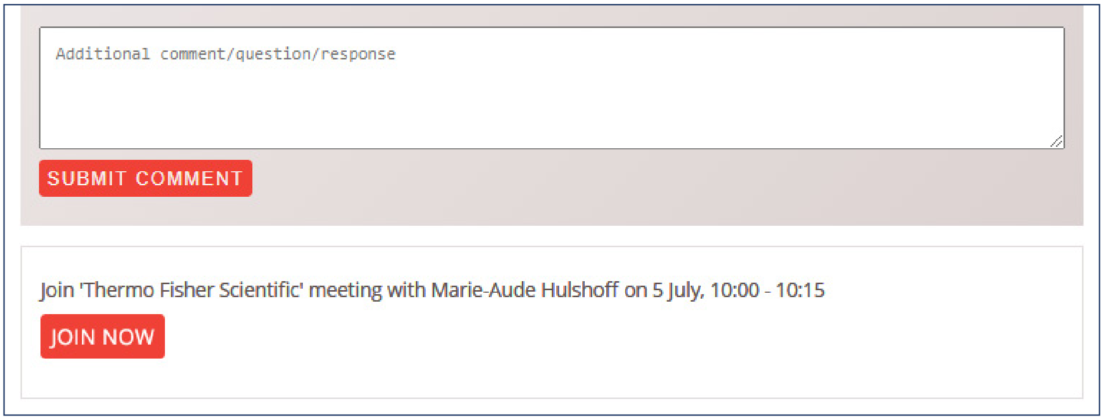
Once the exhibitor has confirmed the appointment, the verified time and date will appear above the 'cancel appointment' button.

Appointment is confirmed



6 • Join Now button will appear 20 minutes before meeting begins.

Join Now button appears 20 minutes before the meeting



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