

Lead Insights **how-to guide:**

From **engagement** to **action**

Welcome to your comprehensive guide to Lead Insights – your strategic tool for transforming event engagement into measurable business outcomes.

In today's fast-paced business environment, success at events isn't just about exhibiting; it's about meaningful connections, strategic follow-up, and demonstrable ROI.

Lead Insights has been designed by Informa specifically to address these challenges, giving you complete visibility of every interaction and the intelligence to act on it effectively.



Your insights summary

Your starting point: an overview of all your campaigns and leads, in one single view.

Total Campaigns:

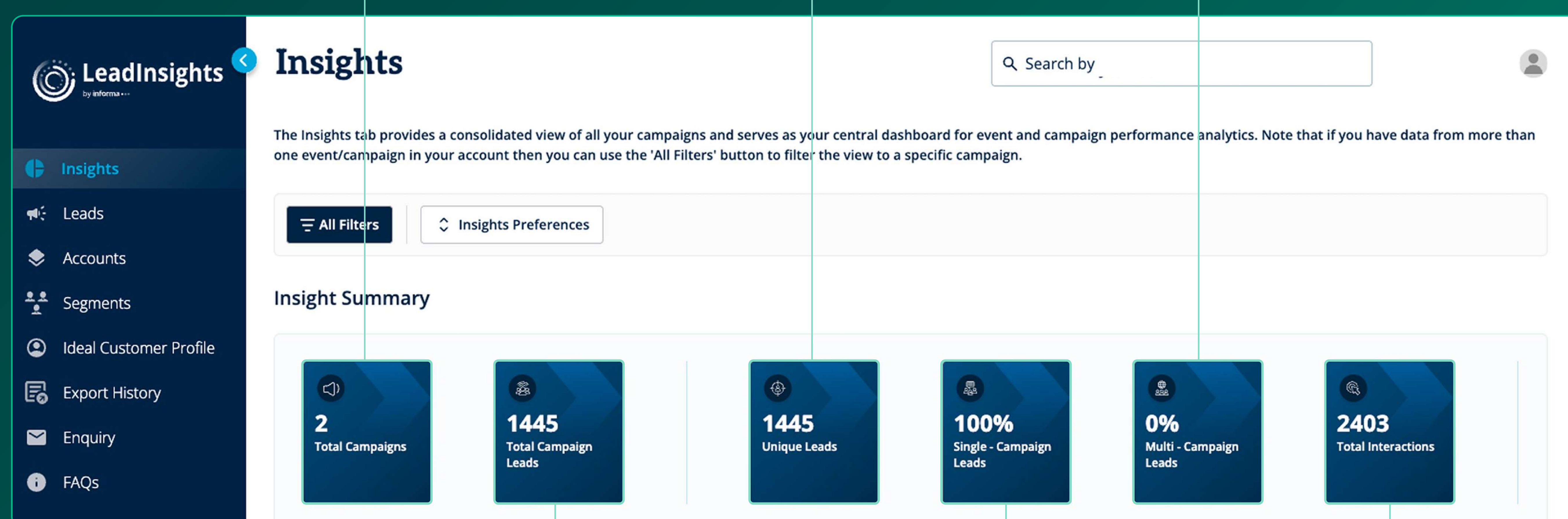
Total number of events and digital campaigns being reported on.

Unique Leads:

The unique number of leads generated across all your campaigns.

Multi-Campaign Leads:

The number of contacts you connected with in multiple campaigns.



Total Campaigns Leads:

Sum of the leads generated across all your campaigns.

Single-Campaign Leads:

The number of contacts you connected with in one campaign.

Total Interactions:

The total number of interactions, such as a badge scan, profile view, of session scan.



How are **leads generated?**

Badge Scan

An attendee's badge was scanned by your team at your booth.

Content Download

An attendee downloaded your sponsored online content.

Scheduled Session

An attendee added your sponsored session to their custom agenda.

Session Attend - On-Site

Attended your live sponsored session in-person.

Meeting Scheduled

Pre-arranged meeting with a specific time accepted between your staff and an attendee.

Session Attend - Live Digital

Attended your live session presented on the digital platform.

Meeting Requested

An attendee requested a meeting with your staff with no response from your staff.

Registered Webinar

Someone registered for your sponsored webinar.

Session Attend - Live Webinar

Someone viewed your webinar session live.

Content View

An attendee viewed your sponsored online content.

Poll Respondent

An attendee answered a polling question from your company.

Peer to Peer Scan

Digital business card exchange between your booth staff and an event attendee.

On-Demand View

An attendee viewed your on-demand session or video.

Ad Click

An attendee clicked an in-platform banner ad from your company.

Session Question

An attendee asked a question at your sponsored session.

Booth Visit - Digital

An attendee visited your company's listing in the digital exhibition.

Session Attend - OD Webinar

Someone viewed your webinar session on-demand.

Session Questions - Webinar

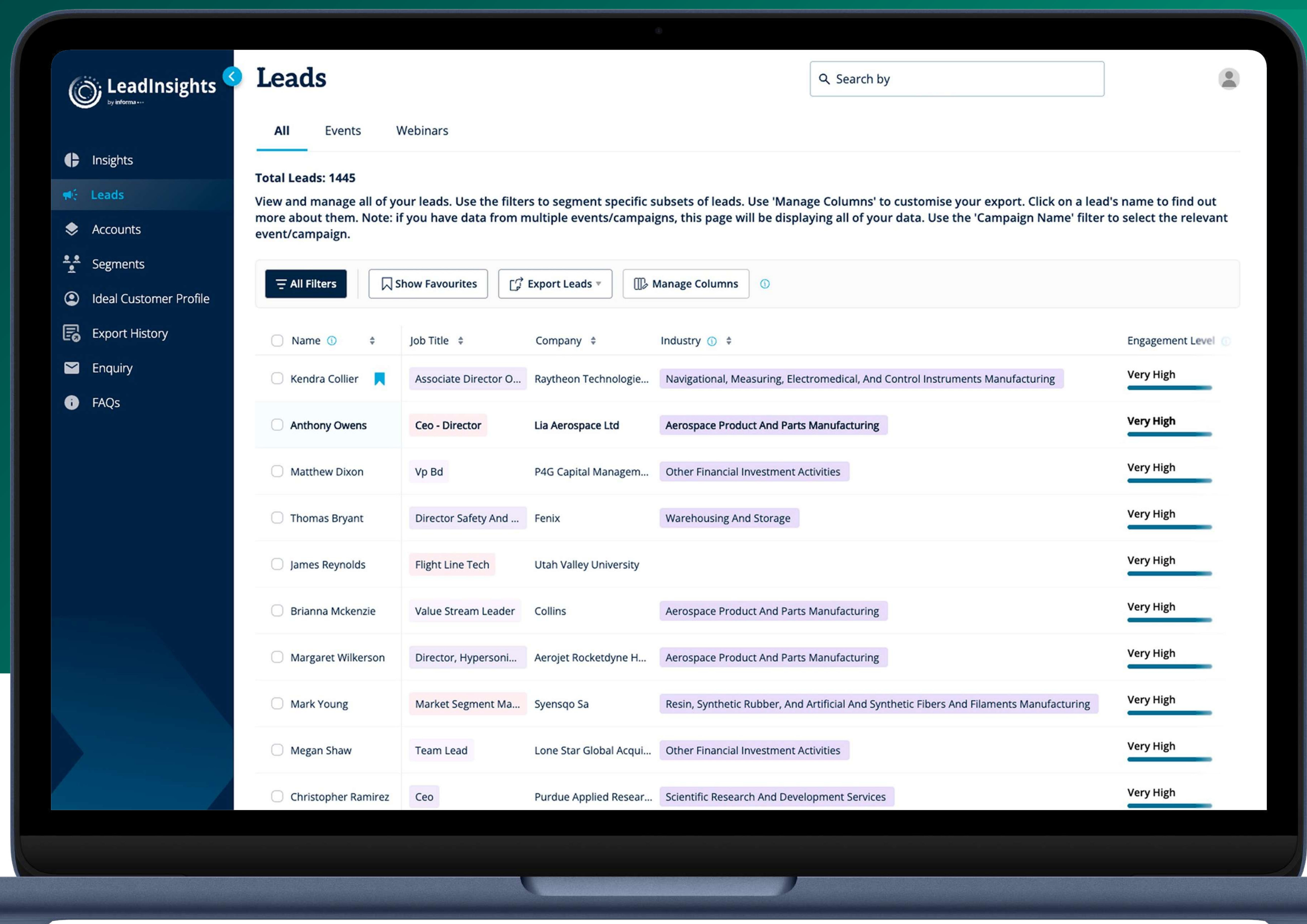
Someone asked a question at your webinar session.

Digital Interaction

In Person Interaction

Your leads

All your leads, from every campaign, in one place. Filter, prioritise, and export your data to turn your connections into customers.



Campaign Categories:

View all your leads from every event and digital campaign, or focus in on a particular campaign type.

Filters:

Choose from account, lead, campaign or custom filters. Filters include country, company, industry, job title, activity type, and engagement level.

Leads:

All your leads, in one place. Scroll down to see the list, and across to view all the columns you've selected.

Export Leads:

Choose from a full or custom export, so you can integrate the data into your processes.

Manage Columns:

Pull in the data that's most important to you.

Engagement Level:

Lead Insights uses engagement scoring to rank and prioritise leads based on their interactions with your company, taking into account the type and frequency of the interaction.

Lead profiles: An overview

Each lead profile has all the information you need about each person who has interacted with your company. This includes who they are, like their job and company overview, how they engaged with you, and the contact information to follow up with post-event.

1 Lead Overview:

Including engagement ranking full name, job title, company, location, phone number and email address.

2 Key Actions:

Buttons to add the lead to your favourites, add notes, and rate them.

3 Interactions:

A single view of every interaction a lead had with you, across both digital platforms and on-site.

4 Segments:

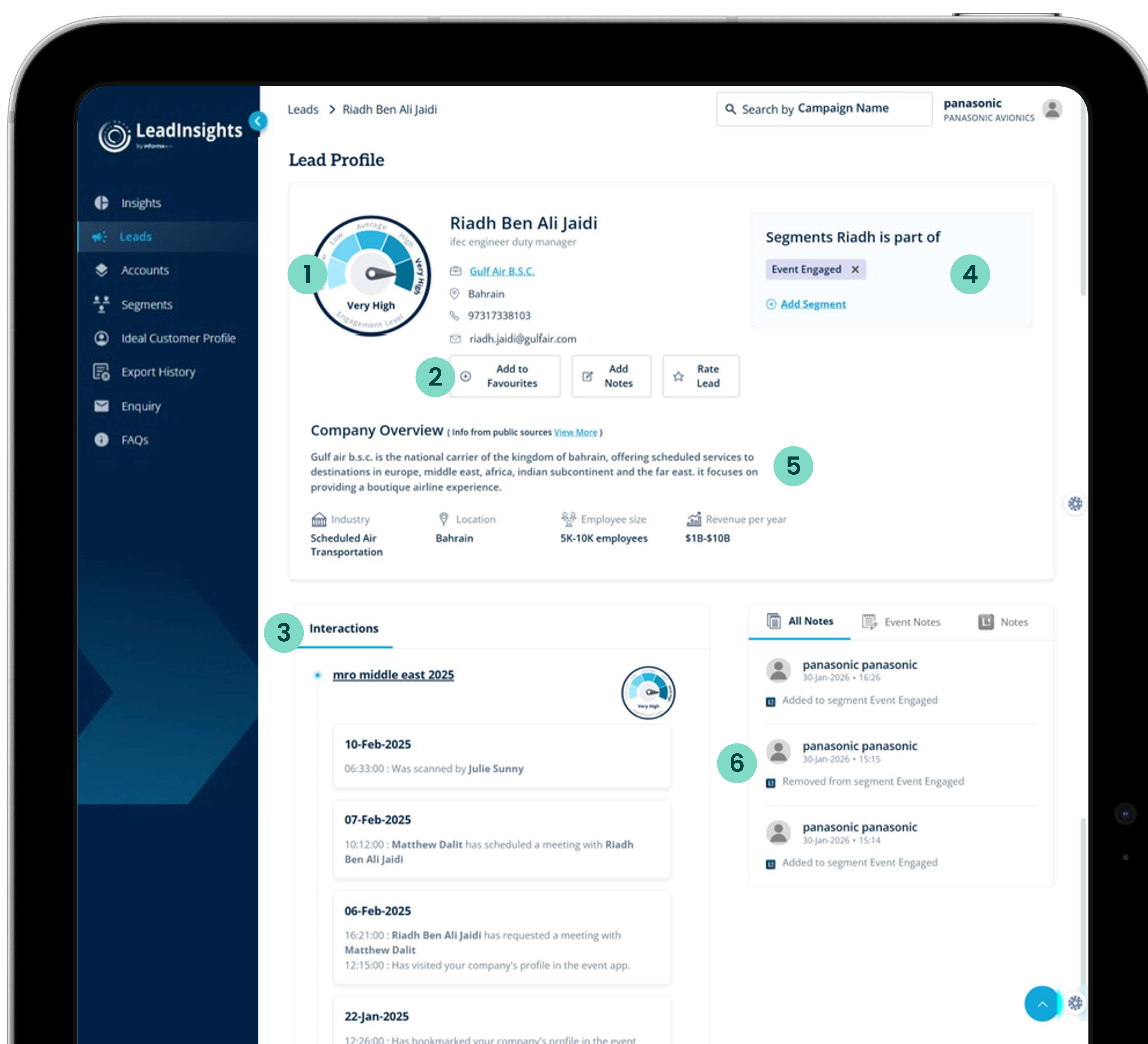
A quick view of the segment(s) this lead is a part of.

5 Company Overview:

Key company information so you immediately know how they fit into your sales strategy. See their industry, location, employee size and revenue per year.

6 Notes:

A compiled view of the notes on this lead, so everyone has all the information they need, whether they were on-site or not.

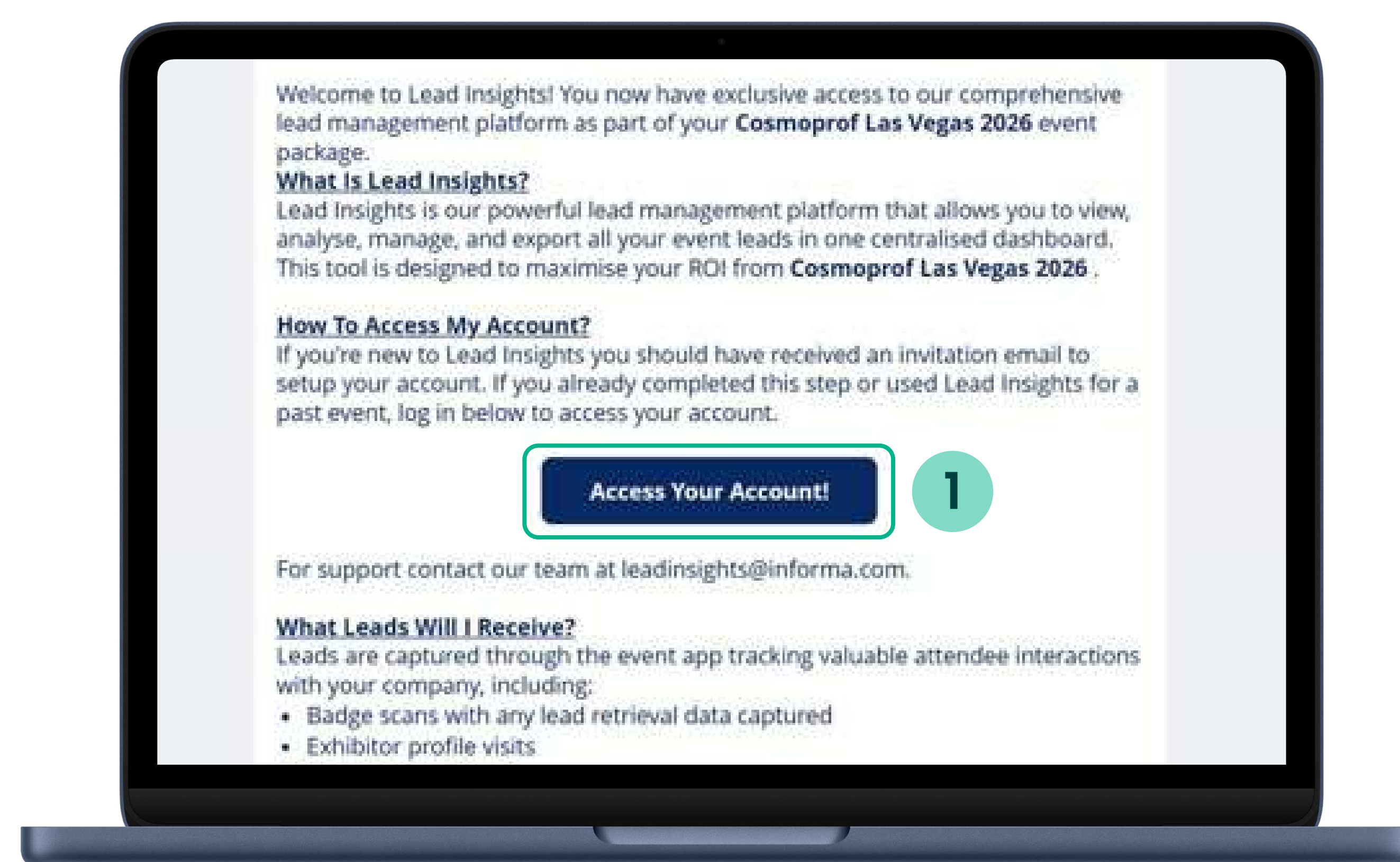


Access your account

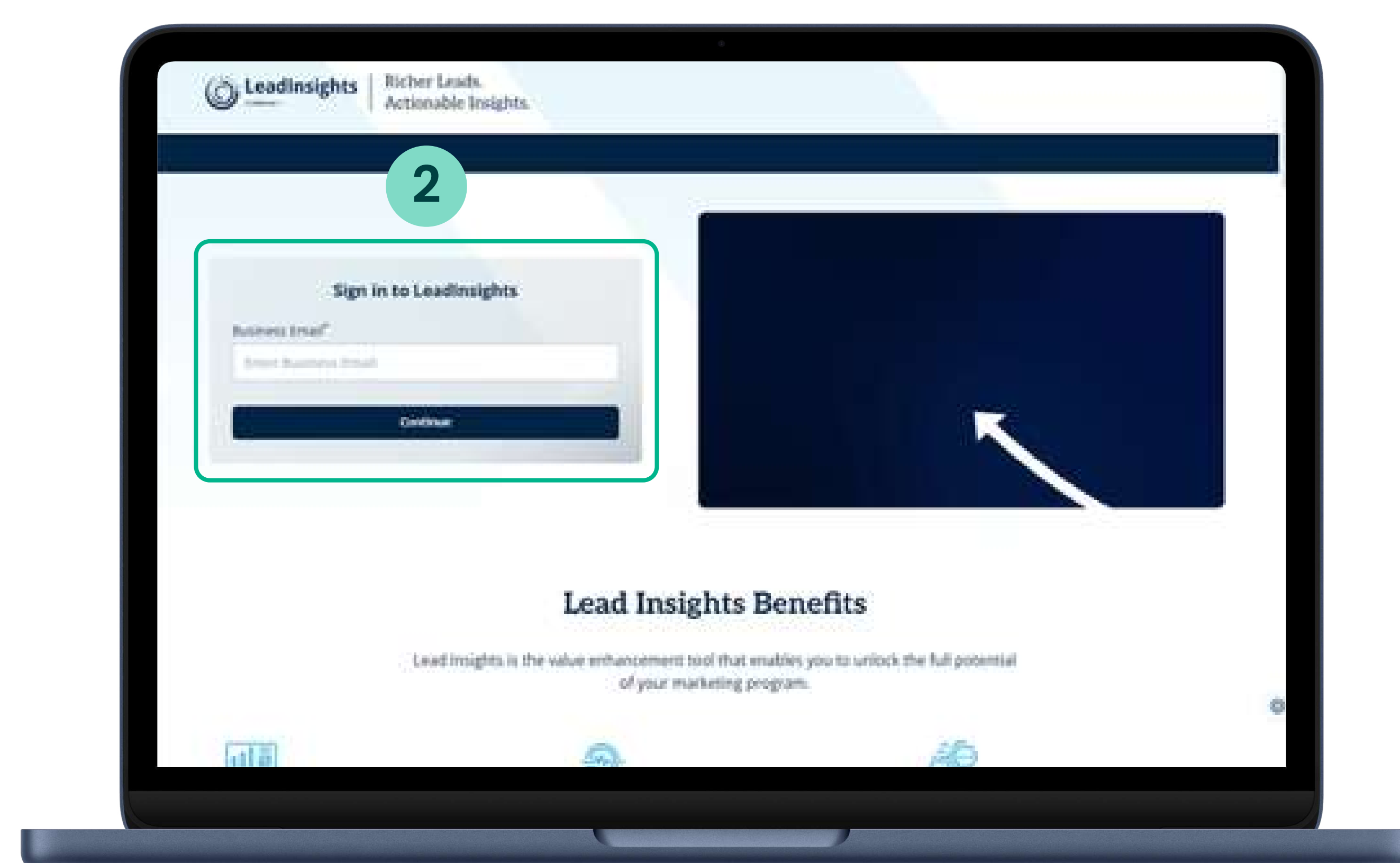
Accessing and setting up your Lead Insights account is quick and easy – and the sooner you get into the platform, the sooner you can start making use of the data available to you.

1

Look out for an email from **leadinsights@informa.com**, and click '**Access Your Account**'



2



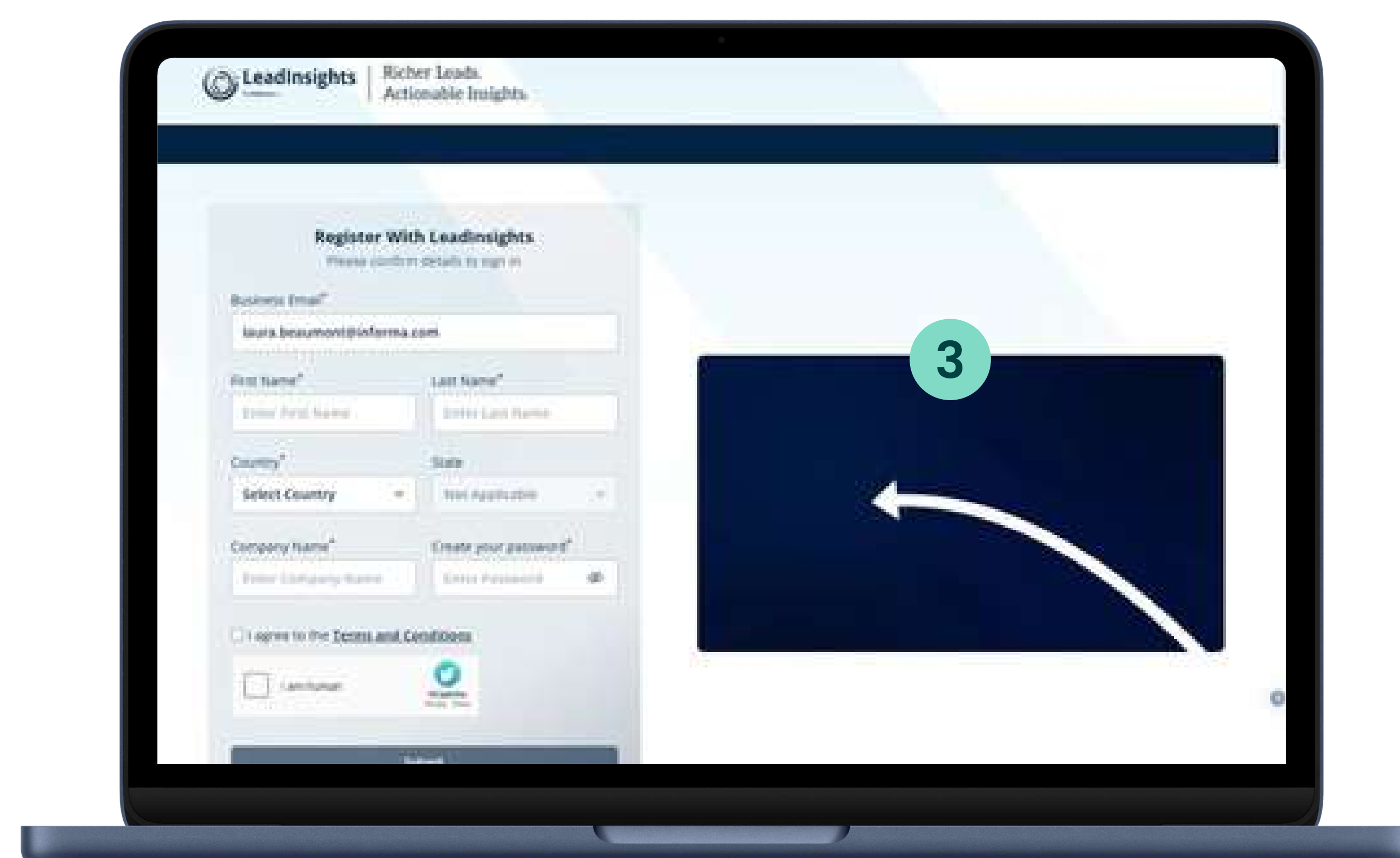
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This will open the log in page, for you to add your email and click '**Continue**'.



3

Finally, fill in your details, create a password and click '**Submit**'.



3



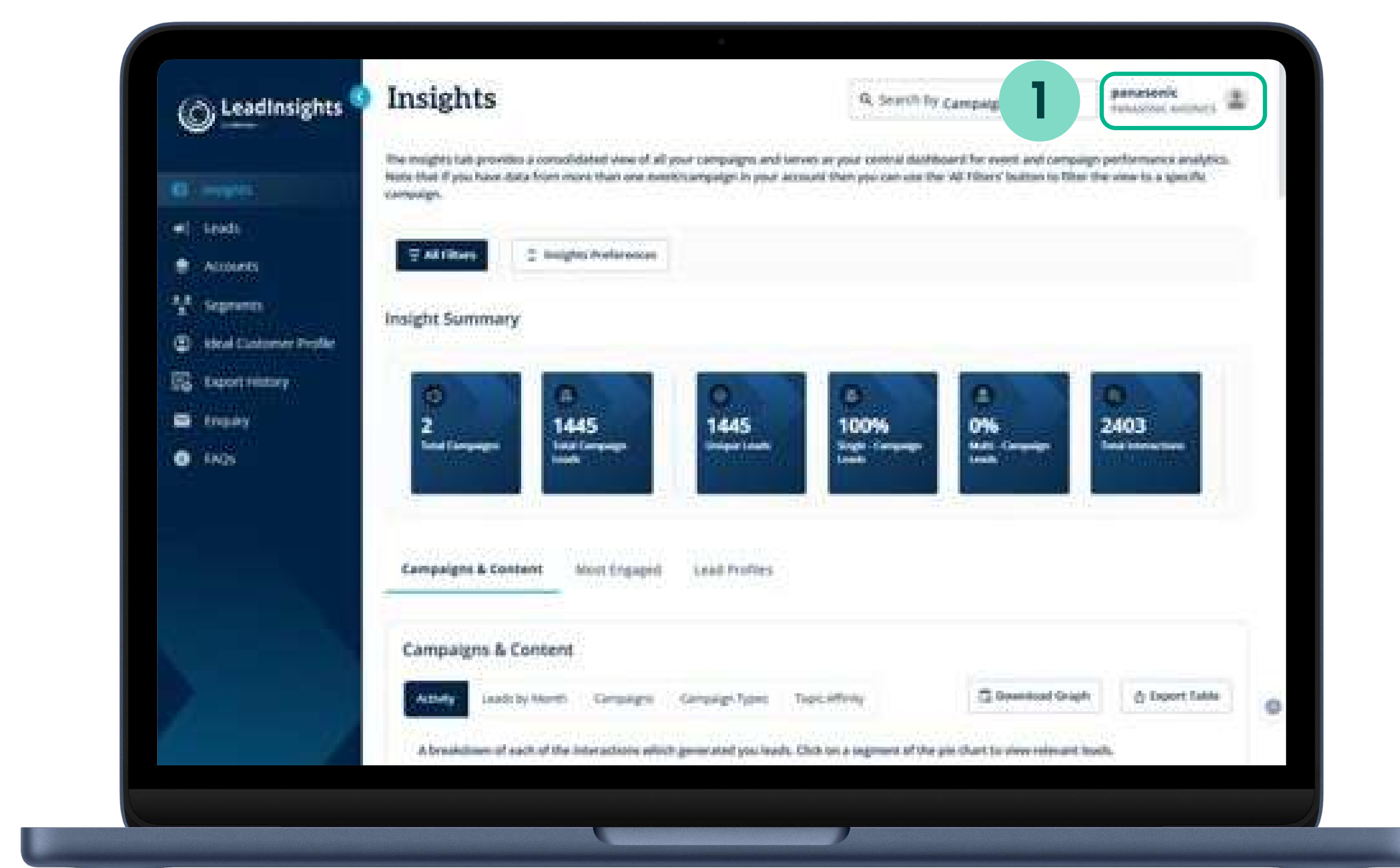
Have any questions? Reach out to the Lead Insights team at **leadinsights@informa.com**

Add additional users

You can add as many users to Lead Insights as you'd like, so when you're setting up your account, send invites to those who will be using the platform. This includes those making use of the data, and those who will be on your stand on-site.

1

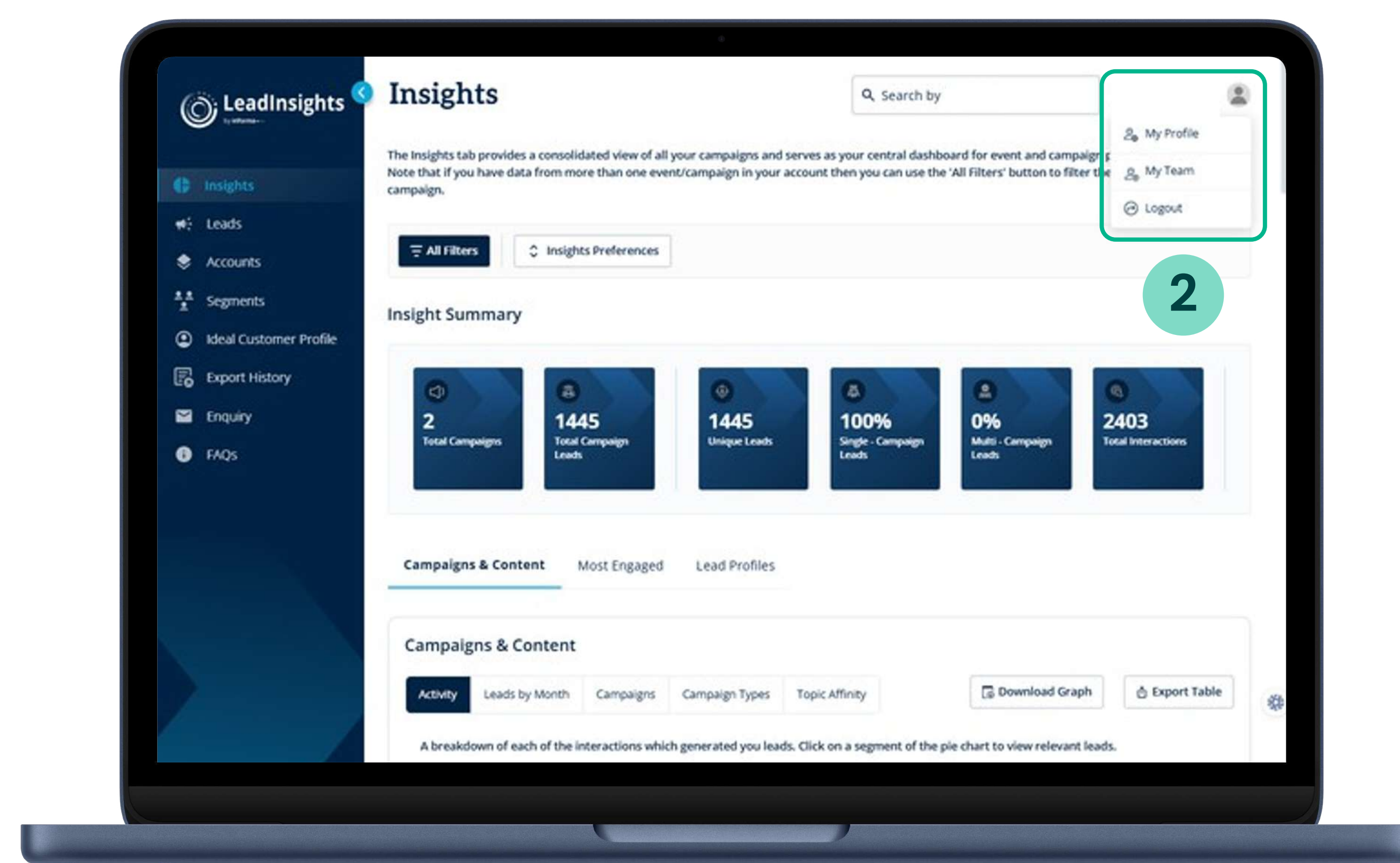
Navigate to the Insights page and click on your account icon in the top right corner.



2

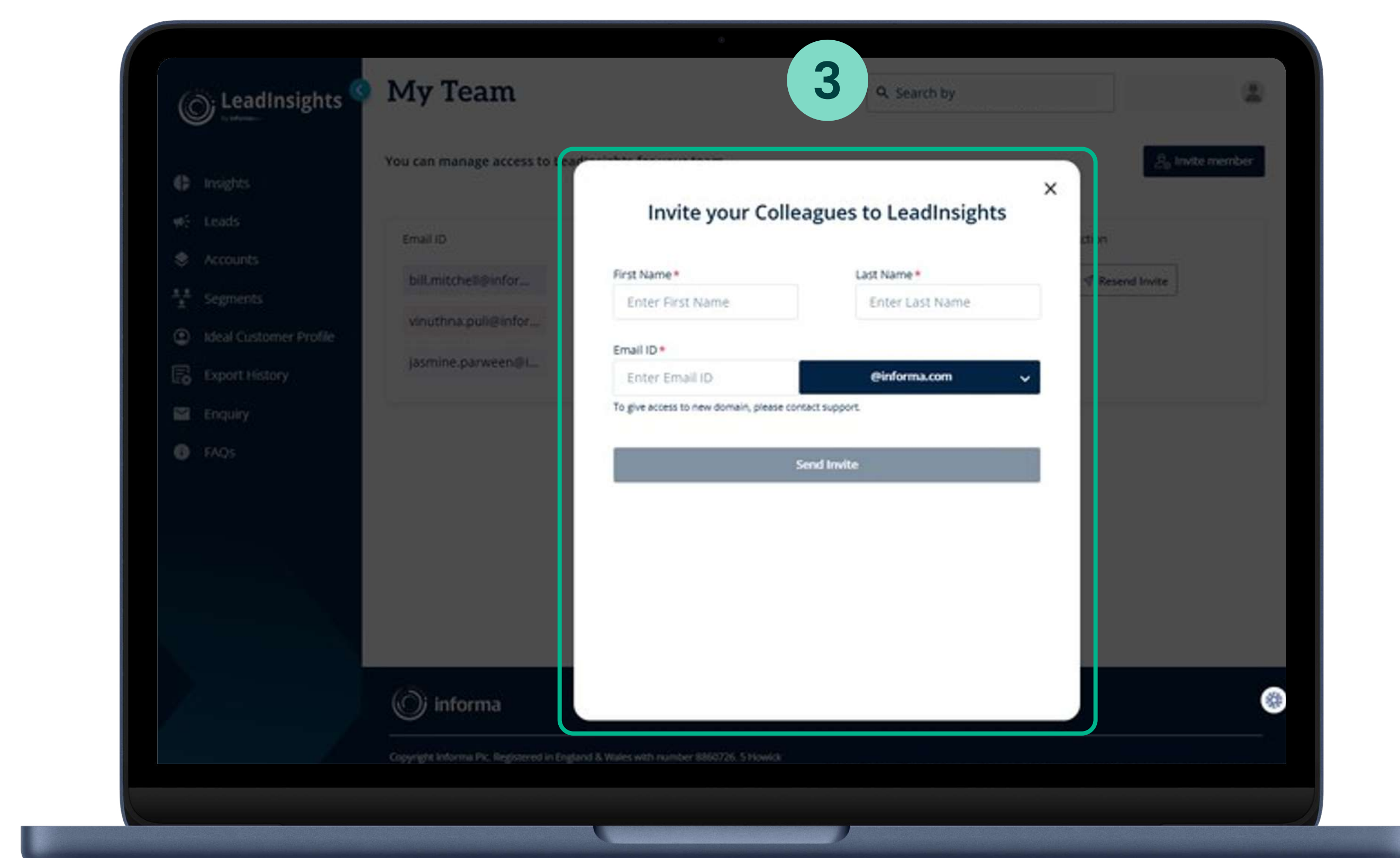
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Click on 'My Team'.



3

Click on 'Invite Member' in the top right corner, and enter their details.



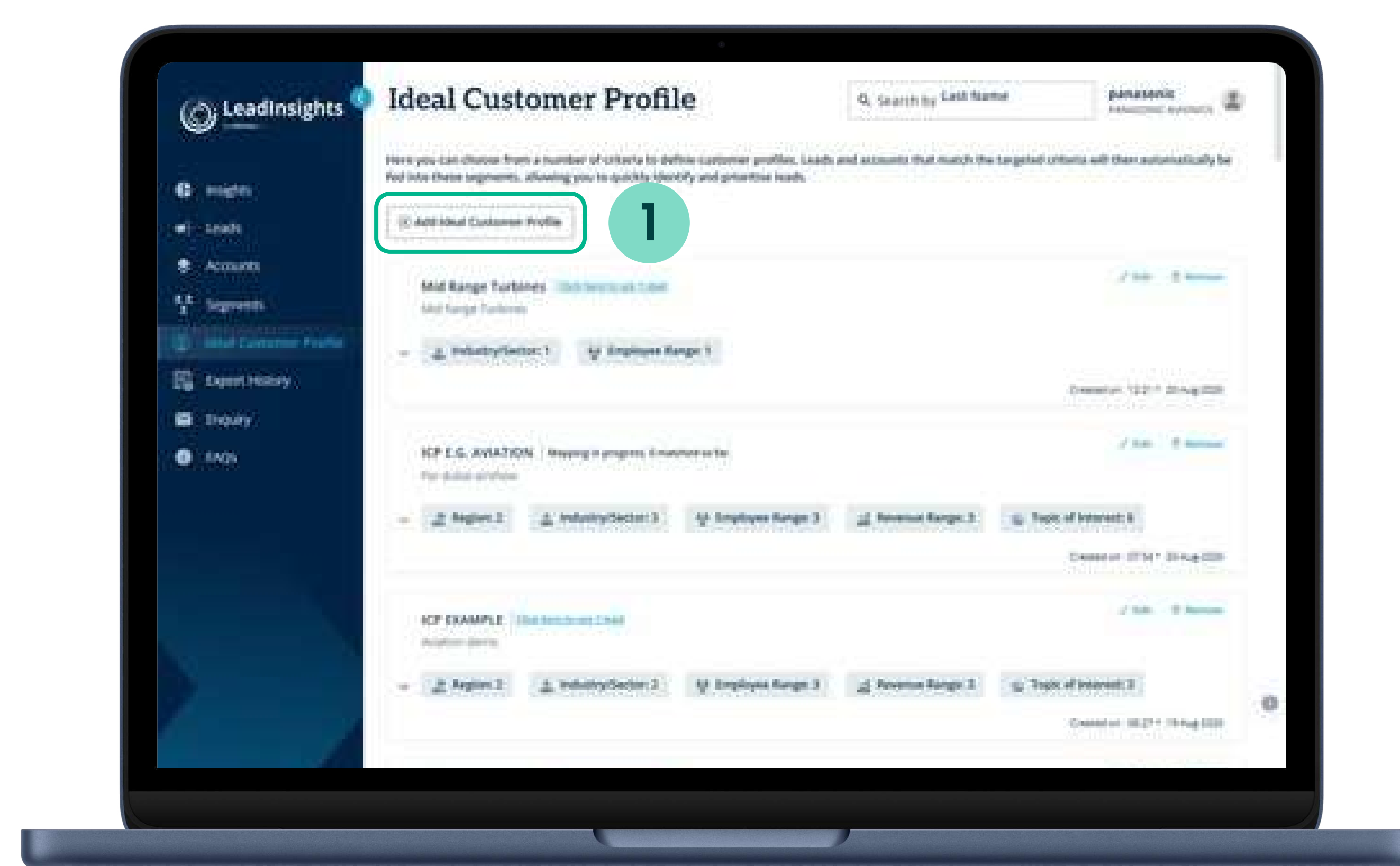
Top Tip! When adding users, think about the different people who will be a part of the process: those who prepare for the event, those who will be on-site, those who are a part of post-event follow up.

How to set up an ideal customer profile

Ideal Customer Profiles help you seamlessly identify and prioritise leads, based on your specific criteria. Create as many profiles as you need, and watch your existing and future leads filter in.

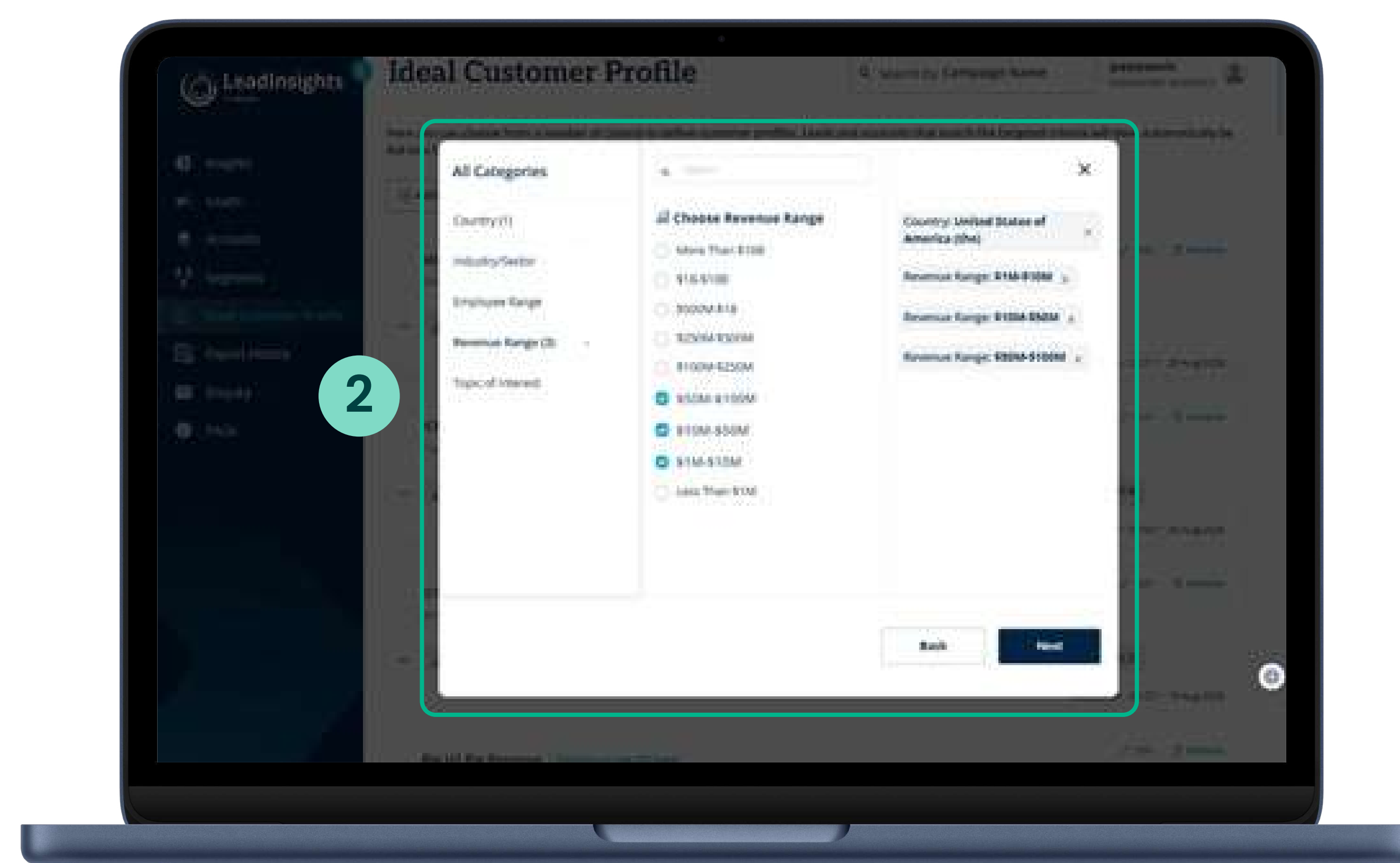
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Click on **'Ideal Customer Profile'** on the left-hand side, and then on **'Add Ideal Customer Profile'**.



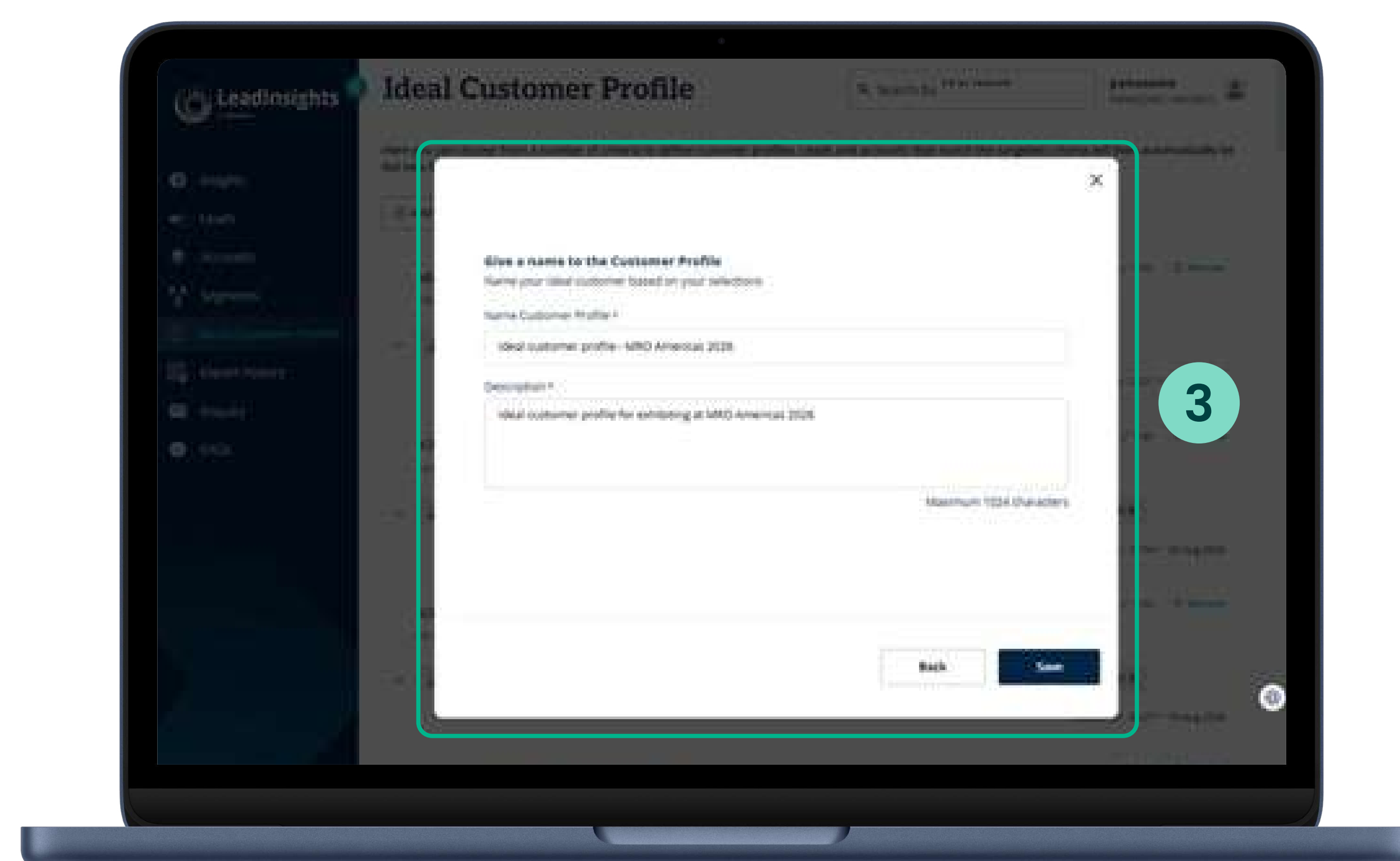
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Select the criteria from the categories to fit the profile you're building.



3

Give your profile a name and description so you can easily reference it later.



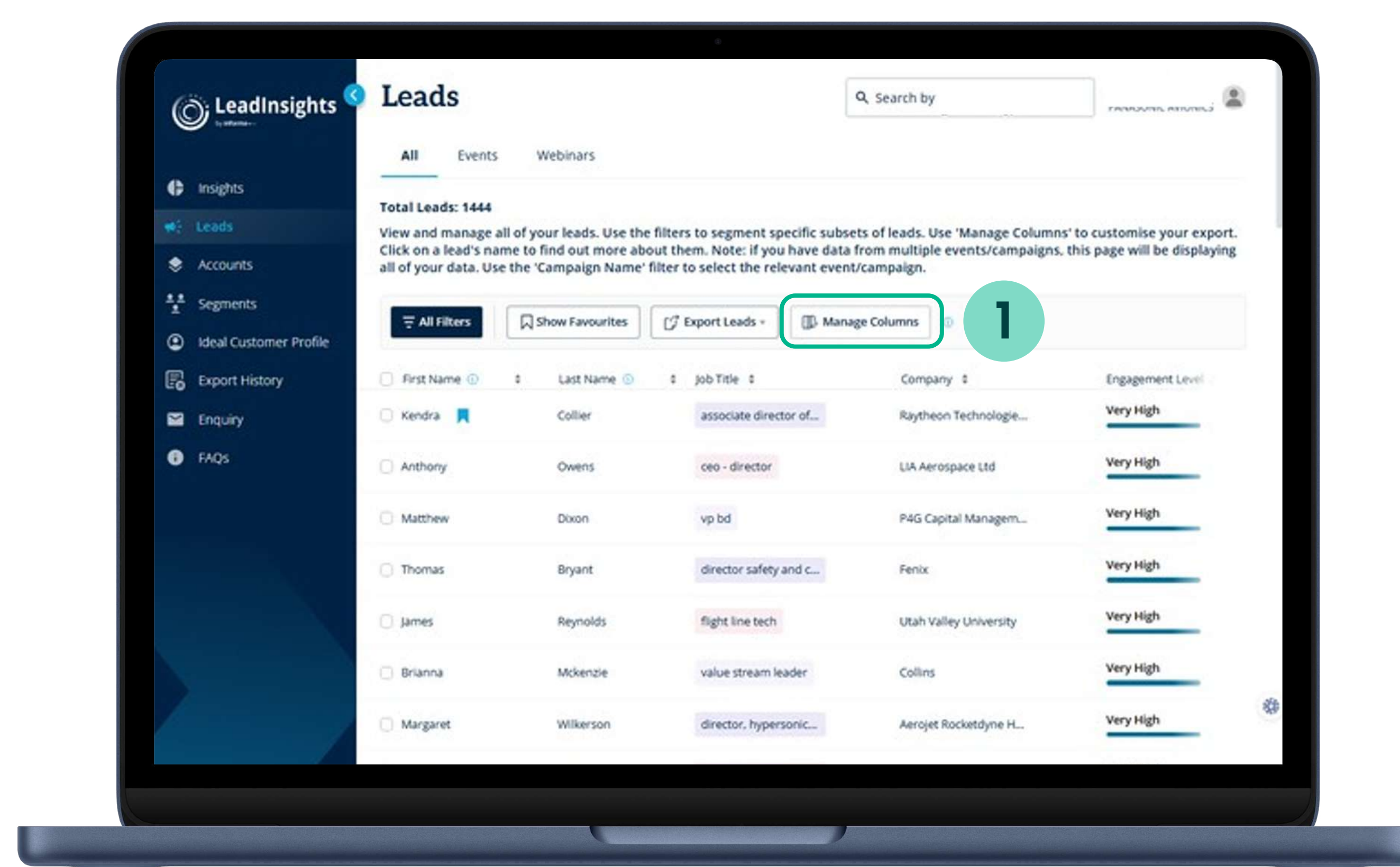
Top Tip! Ideal Customer Profiles are a great way to report on how an event is going on-site. Lead Insights takes your feedback from "it feels busy" to "here's how many of our ideal customers we've reached."

How to export your data

Lead Insights gives you all the information you need to turn your time on-site into results for your business. Each company's follow up process looks different, so you can also export your data to upload into your CRM, or embed into your existing processes.

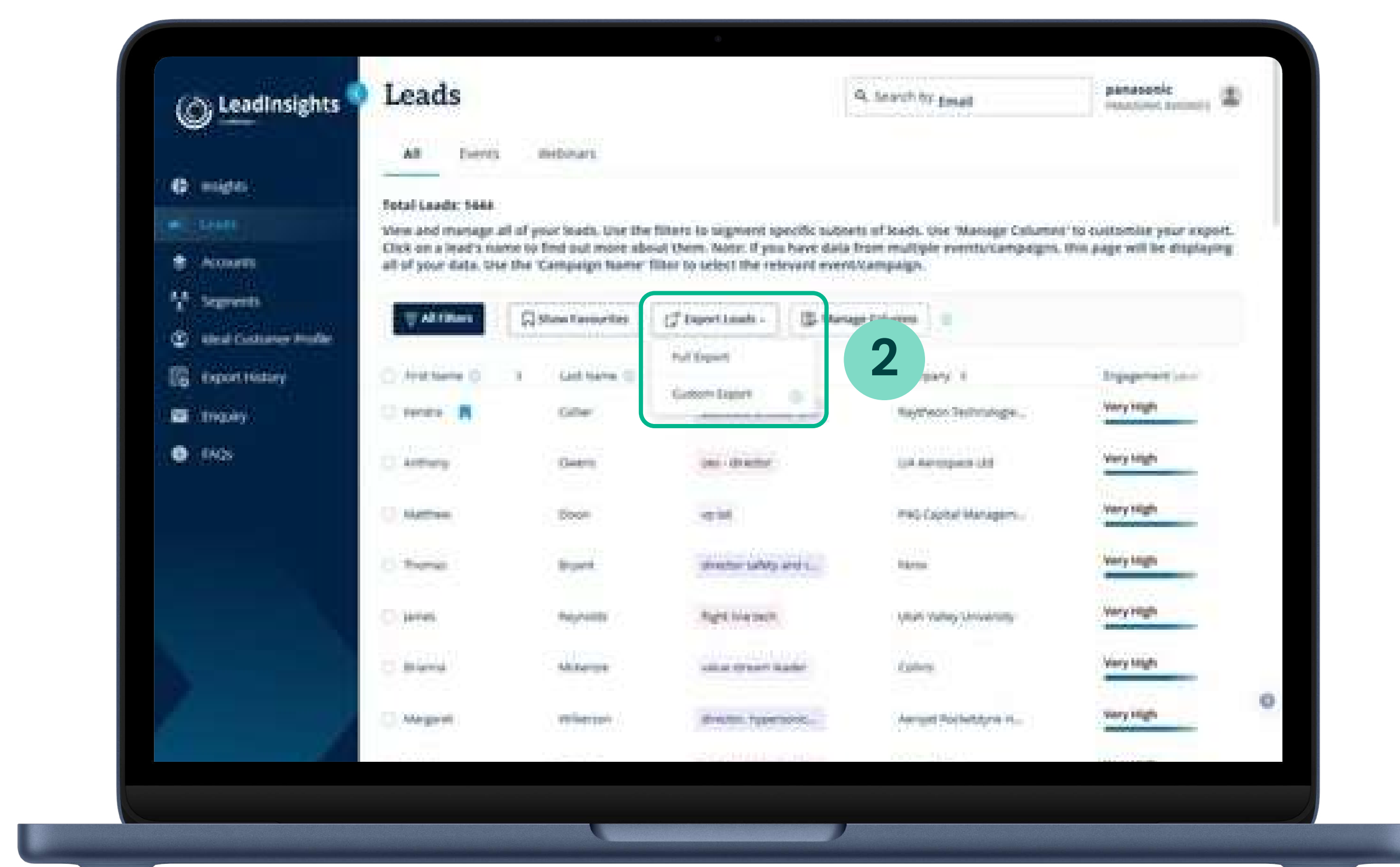
1

Click on '**Leads**' on the left-hand side, and manage the columns and filters to set up the view you want to export.



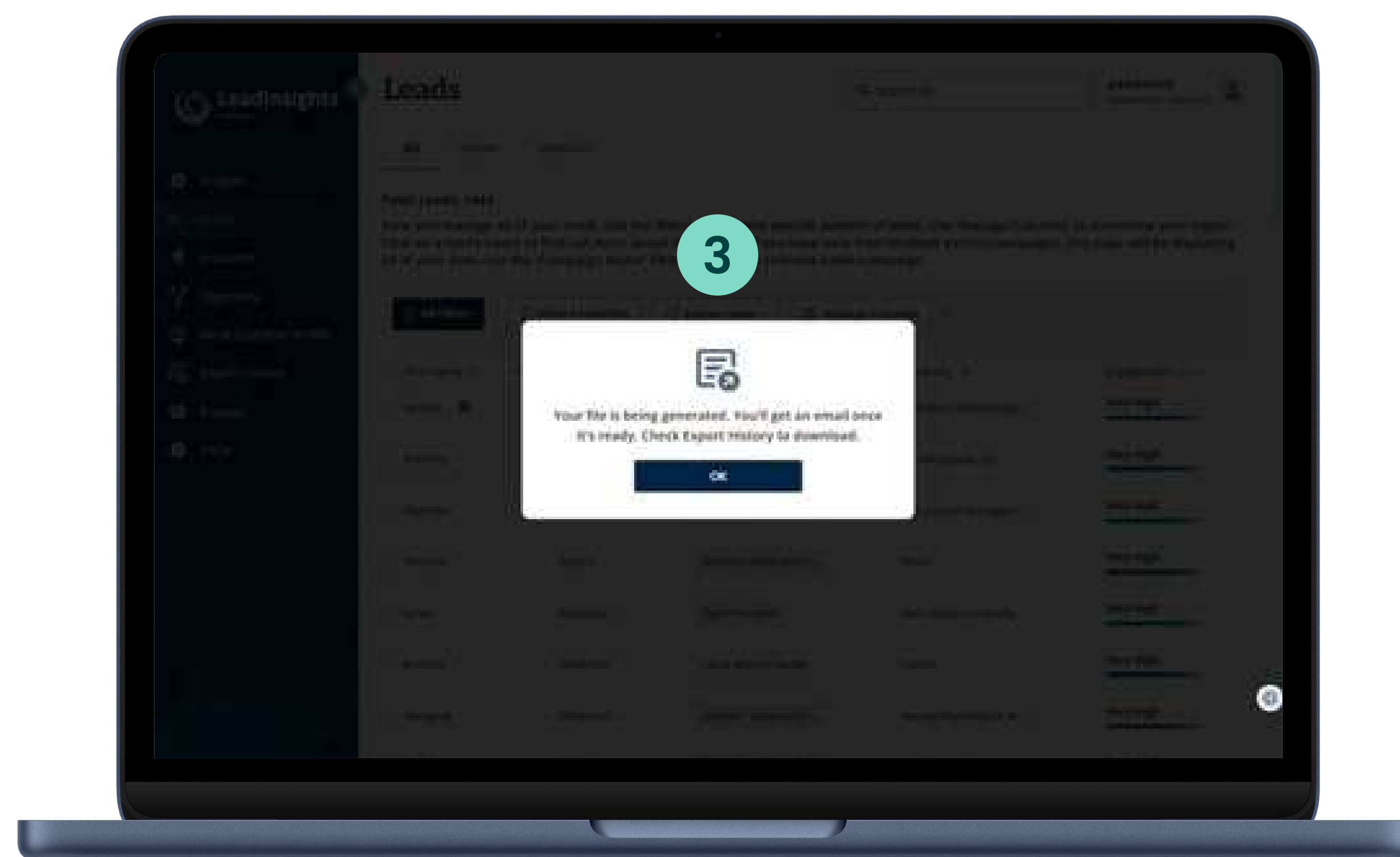
2

Click 'Export Leads' and then choose from '**Full Export**' or '**Custom Export**'. A full export pulls all your data, while a custom export only includes the visible columns.



3

You'll receive an email when your export is ready, and you can always click '**Export History**' on the right-hand side to reference it in the future.



Getting the most out of **Lead Insights**

Attendee interaction with an event extends far beyond their time on-site. To get the most out of your investment, so must your event strategy.

Pre-Event ●●

- In the **Event Planner**, complete your Exhibitor Profile so that attendees can learn about you pre-event.
- Activate your **Lead Insights** account and add as many additional users as you'd like.
- Log in and explore **Lead Insights**, using the User Guide to help. Customise your dashboard to show the criteria that are important to you.
- Join the pre-event webinar, to learn about the digital tools available to you.
- Create your Ideal Customer Profile in **Lead Insights**, so your ideal leads automatically flow into the segment as they are generated.
- Check out the pre-event leads in **Lead Insights**, generated from your digital presence.
- Reach out to your pre-event leads in the **Event Planner** to arrange an on-site meeting.

On-Site ●●

- Each day, log in to Lead Insights to see the leads you generated the day before – including those that fit your Ideal Customer Profile.
- Reach out to your highest priority leads in the Event Planner to arrange a 1:1 meeting.
- Quickly visualise how your event presence is performing, and whether you are attracting the right audience, by using the data in Lead Insights, on the Insights page.

Post-Event ●

- Log into Lead Insights for a full view of every lead you generated, across digital and in person touchpoints.
- Prioritise your follow-up by the engagement score for each lead, so you start with the hottest leads that are most likely to convert.
- Tailor your post-event outreach based on each Lead Profile, with data on who they are, how they interacted with you, and what they care about.
- Segment your leads so each member of your sales and marketing team has all the data they need.
- Using a CRM? Export your lead data at the click of a button, so it's ready to seamlessly upload into your systems.
- Speak to your Account Manager about the data you gathered and how to leverage it to build future campaigns and packages.

FAQs

What does Lead Insights include?

Lead Insights brings all your event interactions into one place, enabling you to act more effectively, prioritize follow-up, and generate more ROI from your investment. From badge scans to digital interactions on the event app, it provides a complete picture of the way attendees interact with your brand.

How do I add additional users to our Lead Insights account?

Once you have access to your Lead Insights account, you can add additional users from within your account. Simply click on your account icon in the top right corner, and then click on My Team. From that page, click on 'Invite Member' on the right-hand side.

How can I view a lead's engagement history?

You will find a list of each interaction a lead has had with your brand on their Lead Profile, and whether they have engaged with your brand multiple times.

What is 'Engagement Level' and how is it calculated?

Lead Insights uses engagement scoring to rank and prioritize leads based on their interactions with your company.

Leads are ranked based on the type of interaction and the number of times they have interacted with your company, and are rated against your other leads, giving a score from "Very Low" to "Very High".

Example: If one lead has interacted with your virtual booth, and another lead has interacted with your company by scheduling a session and having their badge scanned, the second lead will display a higher score.

What is an Ideal Customer Profile in Lead Insights?

Ideal Customer Profile (ICP) defines what a best fit lead looks like for your company. Create an ICP based on characteristics including industry, company size, and location pre-event, and as leads are collected, they will automatically be funneled into your ICP.

Can I export my leads?

Lead Insights allows you to export your leads, to enable you to integrate the insights into your existing processes. On the Leads page, simply click 'Export Leads', and choose from a Full Export, or Custom Export with the specific filters you currently have in place.

Will I see all my leads from every show in my Lead Insights account?

Yes, Lead Insights unifies your leads from event, and all other Informa events and digital campaigns you run. This will enable you to track an individual, or company, and how they interact with your company over the different touchpoints with your brand.

How are company profiles enriched and what information is included?

Company profiles (Accounts) are enriched using 1st and 3rd party firmographic information. Further profile enrichment is aggregated from interactions and engagement scores of all leads from the company.

Where 1st party data are not available, we utilize and regularly update 3rd party information to enrich company profiles, including size, location, market vertical, and revenue.