boabee

Lead Retrieval App

User Manual

powered by

fielddrive

This manual contains

introduction: what is boabee?

boabee is a lead retrieval app that will help you improve the way you gather lead information at your booth. The app supports three simple yet powerful functionalities for each interesting lead that you meet.

Scan the visitor's badge

All available information will be displayed on your device and can be edited.

Qualify the lead...

with the default questions or your own set of qualifiers.

Share information

Select uploaded brochures, files or weblinks and send them directly to the visitor.

two different ways to use boabee

You can use boabee in different ways, depending on your needs and the extent of the customization you would like to include.

1. no effort, the easy way

The "no effort" approach means that you can start working with boabee without any preparation. You will be able to scan visitor badges and to qualify leads with a set of standard pre-loaded questions.

1

before the event: install the application

Go to the Apple AppStore or Android Play Store
Search for boabee or boabee 2 and install the app
Log in with your credentials, and select your event.

2

at the event: collect leads

For each potential lead: scan the badge, edit or complete the contact details if necessary, and qualify the lead with the standard questions (optional).

3

during the event: leads report via e-mail

At the end of each event day, a leads report will be sent to the main license holder for your exhibitor account. This report contains all the collected leads of all event days, for all licenses associated to your exhibitor account

4

three days after the event: final report via e-mail

Three days after the event a final version of the leads report with additional information on open rates and click throughs is sent.

two different ways to use boabee

2. "go pro" and use all features

With a bit of extra effort you can "go pro" and make use of the full potential of boabee. Follow the preparation steps below to optimize the way boabee can support you at the event: qualify leads with your own lead questions, and select documentation, weblinks, social media channels and more for sharing instantly with your visitors.

1

before the event: prepare your boabee app

Create a set of questions that are relevant to your sales worklfow and follow-up after the event. Try to limit the number of questions to keep interactions at the event effective. Where possible, provide selection lists.

Gather all the information you would like to provide to your visitors: brochures, price lists, links to your website, youtube movies, links to your social media, etc. Preferable format for files is pdf.

Log into the boabee portal to configure your questions, to upload your documentation or links, and to select an appropriate email template.

Go to the Apple AppStore or Android Play Store.
Search for boabee or boabee 2 and install the app. Log in with your credentials, and select your event.

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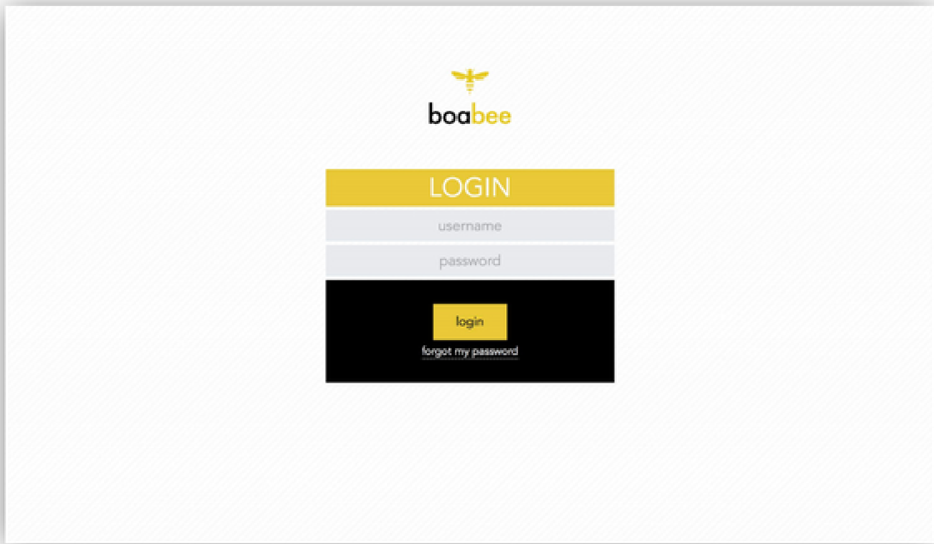
how to prepare if you ‘go pro’

If you choose to work with the standard questions and not to use the sharing functionality of the boabee app, then you can skip this chapter. Follow the procedure below if you want to do one of the following:

- add your own qualifying questions
- upload your documentation and weblinks for sharing
- select the email template that will be used to send information to your visitors

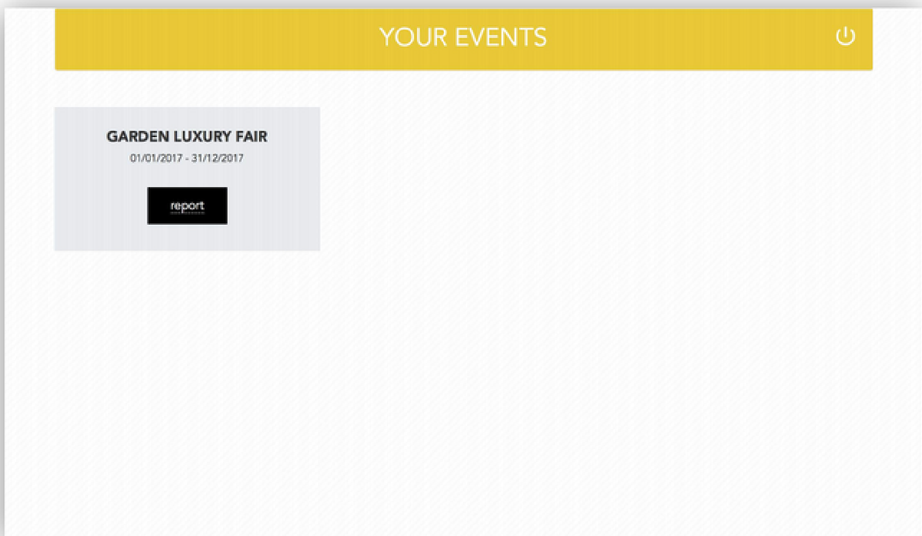
1

Go to www.boabee.com, click Sign in, log in with your username and password.



2

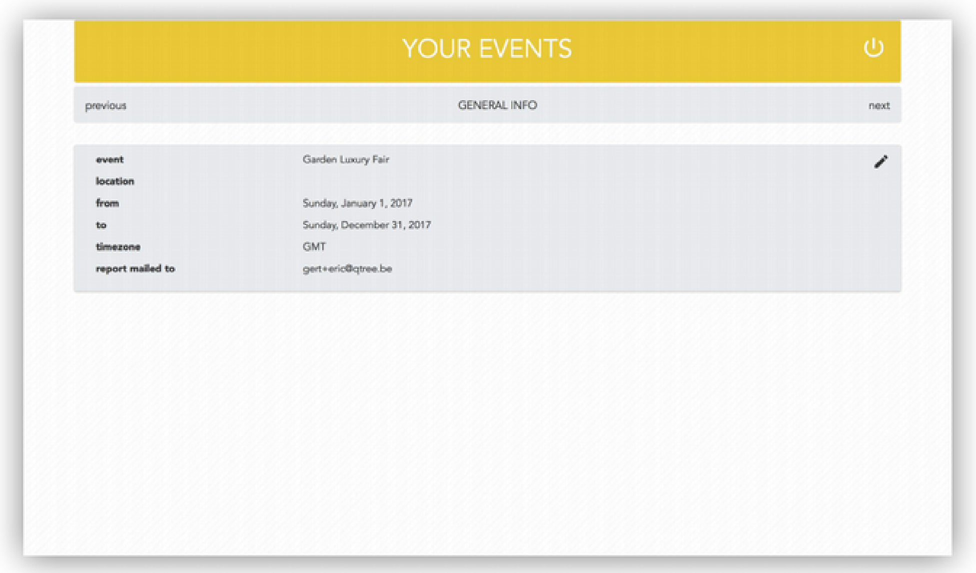
After logging in, you’ll get an overview of available events. Select your event.



how to prepare if you ‘go pro’

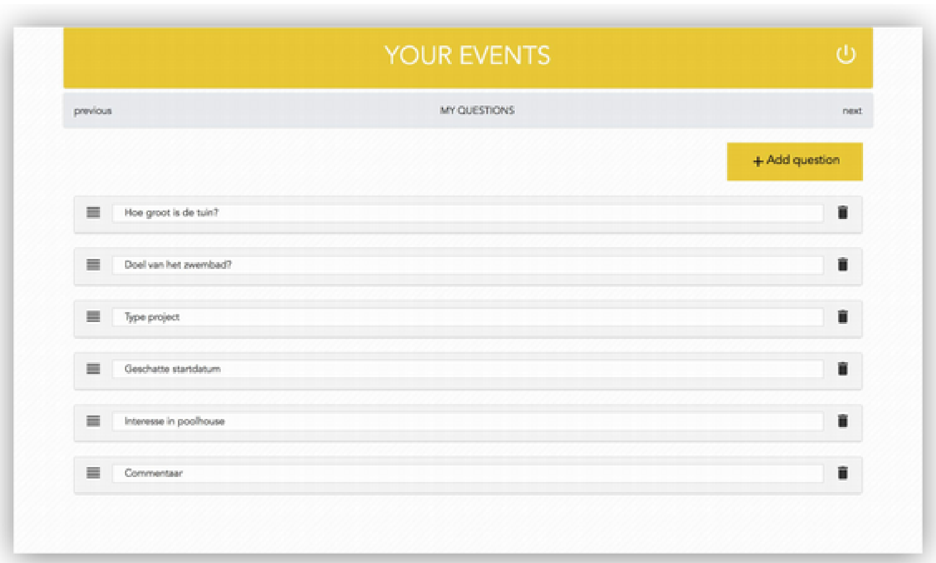
3

The general information about your event is now displayed.
Use the edit button to change the email address to which the daily leads report will be sent. Then first Save, before clicking on Next to move on.



4

The questions to qualify your leads are now displayed.
- Use Drag & Drop to change the order
- Use the Trash-icon to delete questions
- Click + Add question to add a custom qualifying question. Type your question, and select the relevant type of answer, and if required, complete the additional popup. Click Next to move on.



boabee

how to prepare if you ‘go pro’

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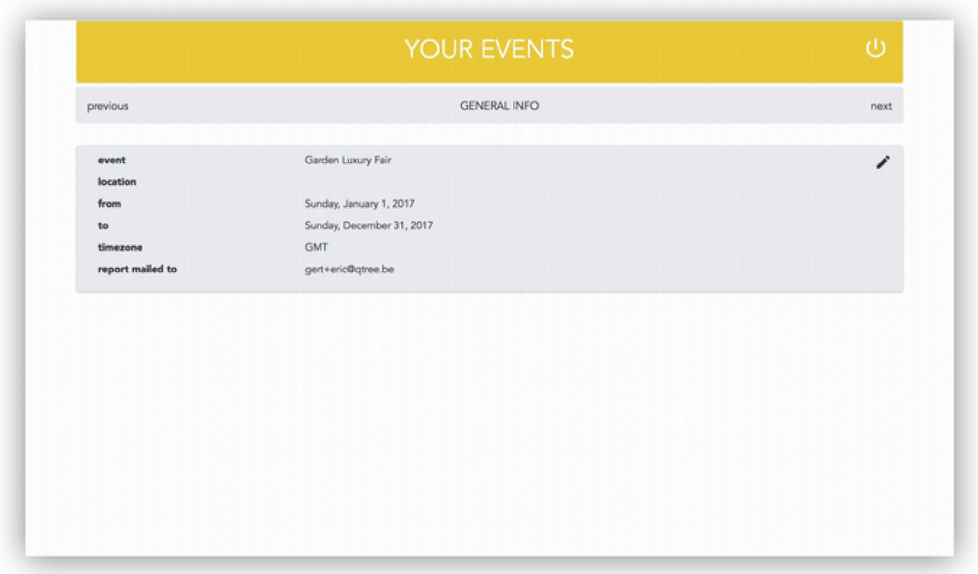

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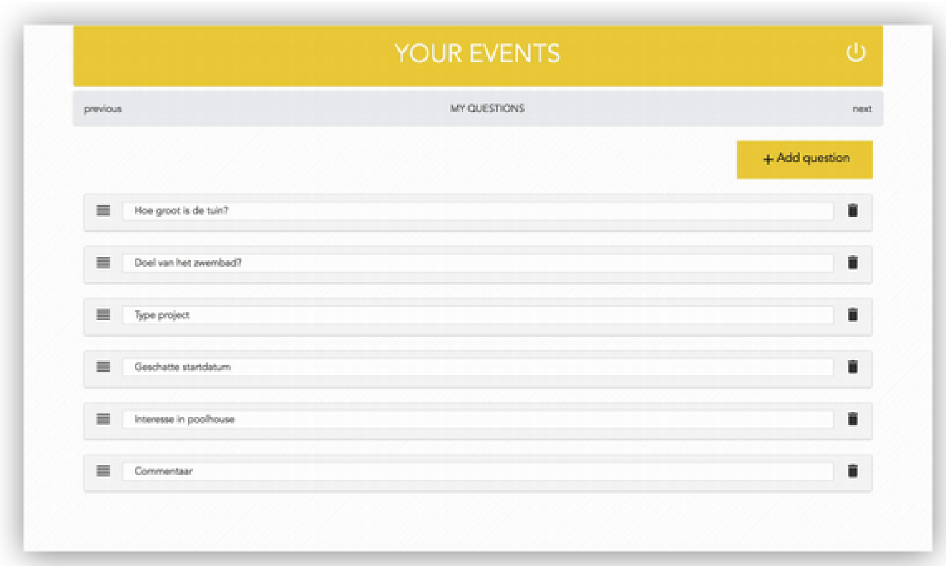


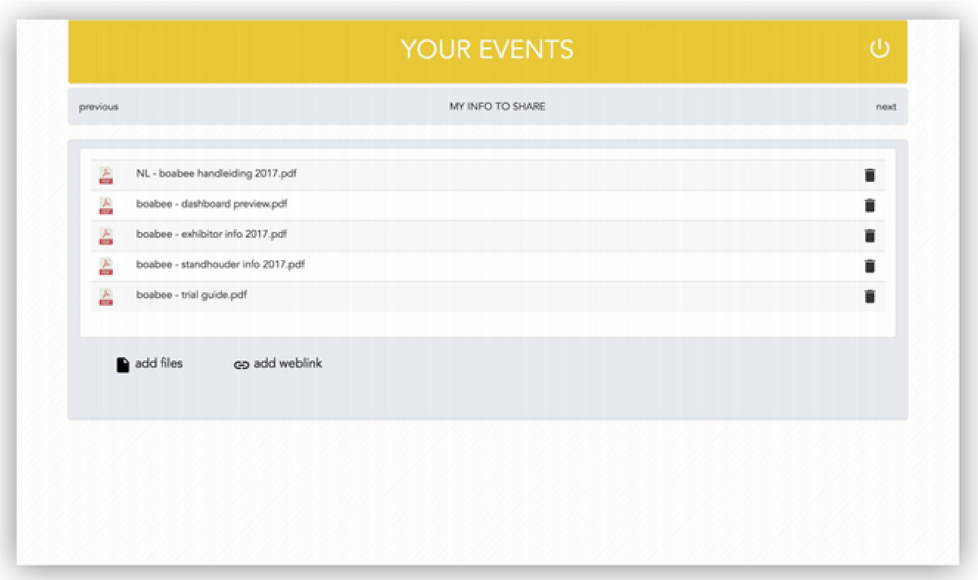
TIPS

- Think carefully about your questions.
- We advise not to use more than 5 to 7 questions.
- Use single/multiple choice as much as possible.
- Ensure that you provide at least 1 free text field.

how to prepare if you ‘go pro’

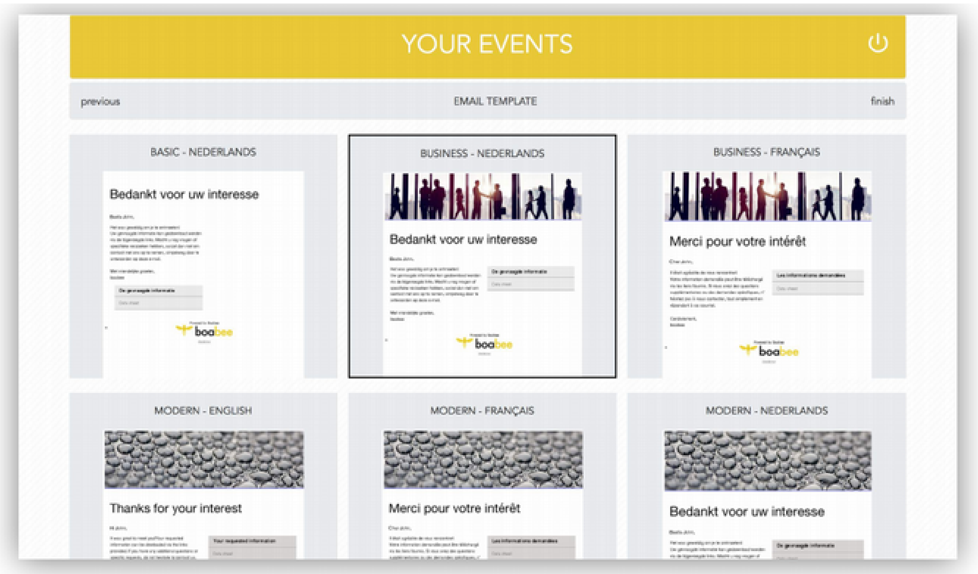
5

In this next screen you can upload your files and links.
In the app, you will be able to select the appropriate document for the visitor that you scanned. The visitor will receive an email with direct download links to the selected material. Click Next to move on.



6

In this final screen you can choose the email template that will be used to send the selected material to your visitor.
Important: if no document or file has been selected, no email will be sent. Click Finish to return to the Events overview.



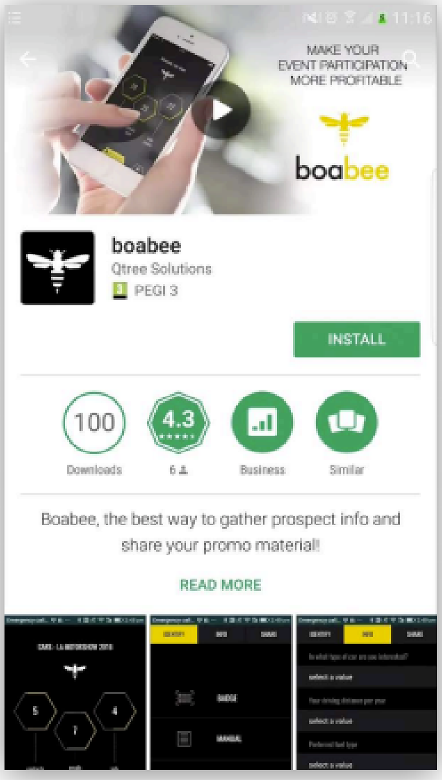
how to use the boabee app

before the event: install the app

Android devices

GET IT ON Google Play

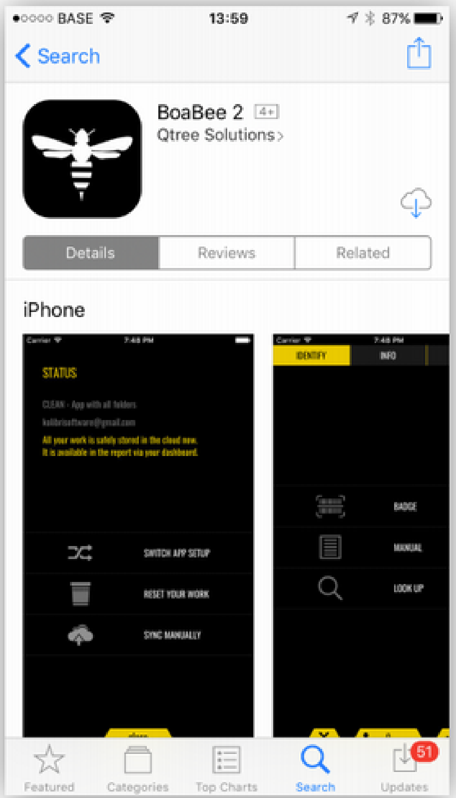
search 'boabee'



IOs devices

Download on the App Store

search 'boabee 2'



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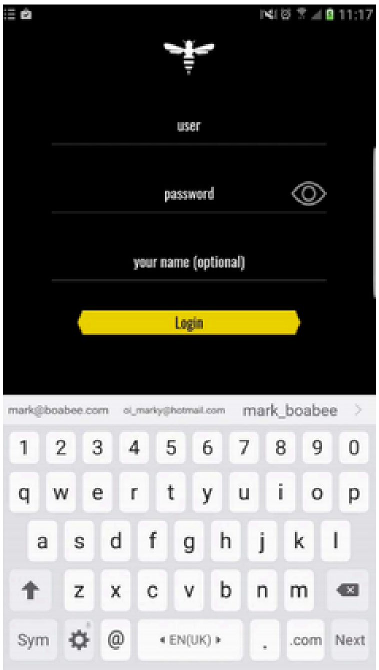
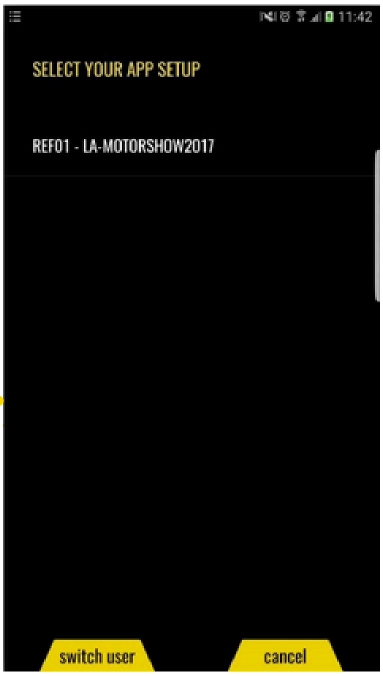
how to use the boabee app

before the event: log in

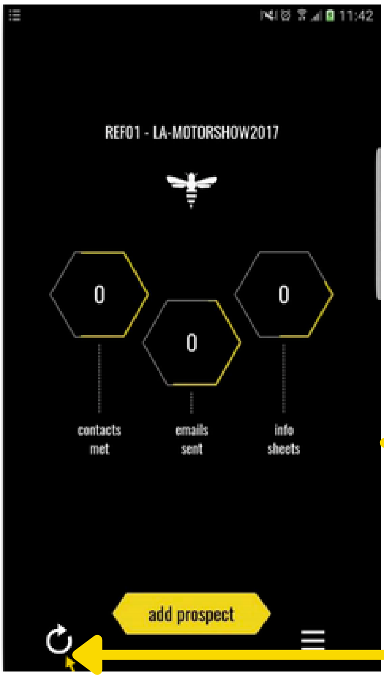
You need to enter your credentials and select your upcoming event. Once that's done, you are ready to use the app at your event.



1 enter username and password, optionally enter your full name



2 select your event. If you have multiple events running in parallel, be sure to pick the right event!



3 The initial configuration then synchronises all your assets and the app is ready to be used at the event

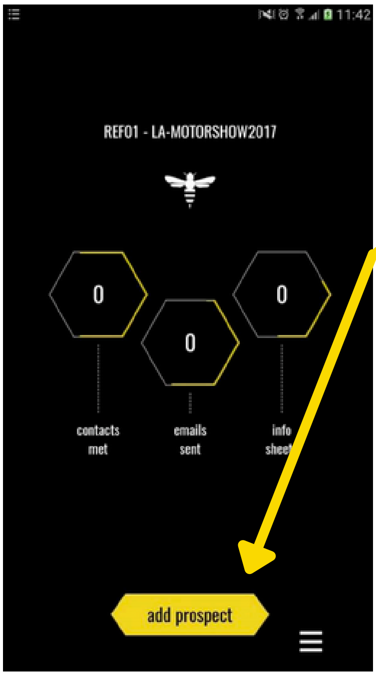
4 Made changes in the online portal? Tap here to synchronize all changes.

how to use the boabee app

at the event: collect leads

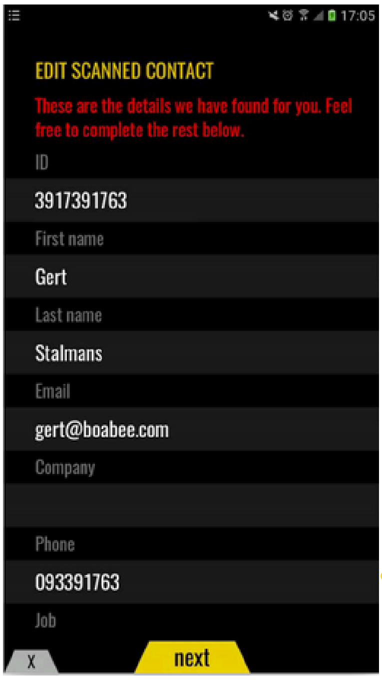
Collecting a lead means you go through three steps, of which only the first is mandatory:

- identifying the visitor
- qualifying the visitor with the questions
- selecting material to send to the visitor



tap on "Add prospect" to start collecting a lead

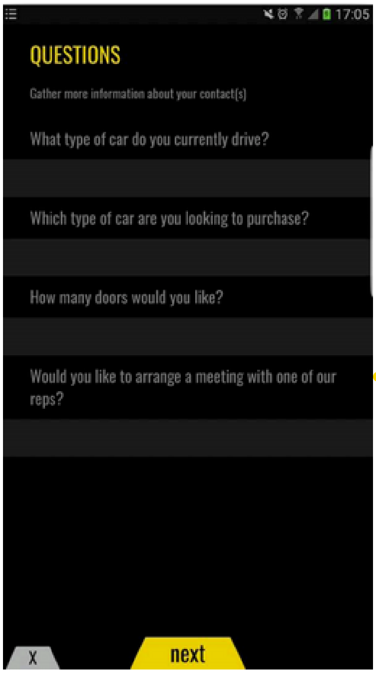
step 1: point the camera at the visitor's badge. Alternatively, you can also manually enter contact data, or use the look up function as well to find a previously scanned lead.



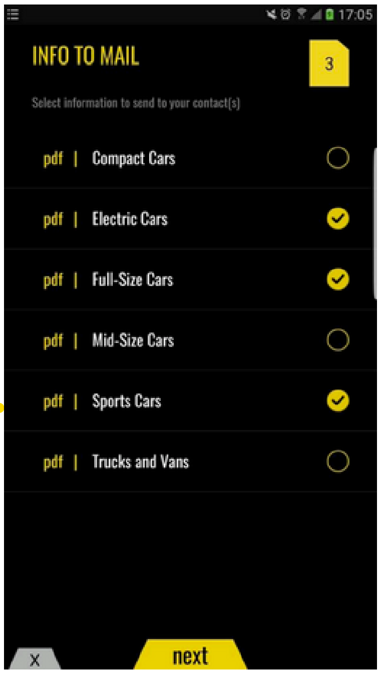
The information of the visitor is retrieved from the visitor database. If there is no internet connection available, the information will not be visible on your device, but it will be automatically added to your report. You may however complete the information on this screen.

how to use the boabee app

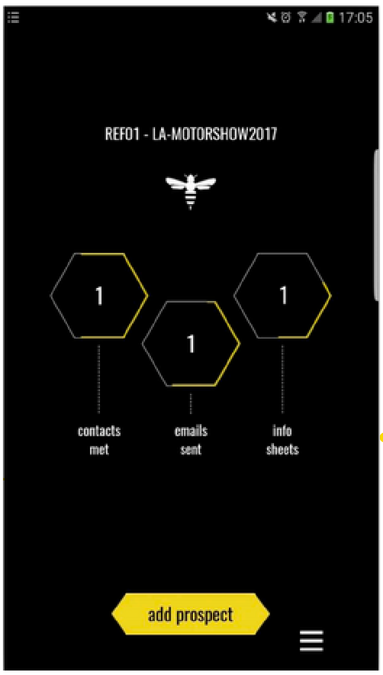
at the event: collect leads



step 2 (optional): use the standard questions provided or your own to qualify the visitor. Or simply skip by clicking Next..



step 3 (optional): select the information you want to send to your visitor by email (needs to be uploaded to the portal prior). Or simply skip this step by clicking Next. That's it, you're done.



Back on the homescreen, you get an overview of your leads and activity by simply tapping the numbers in the hexagons.

about the leads report

when do I get my leads report?

You will receive your report as follows:

- interim versions: at the end of each event day
- final version: three days after the event

The difference between the last interim report and the final report is updated information provided on open rates and clickthroughs of your sent emails.

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Example for a two-day event:

day 1: event

interim report at end of day for day 1

day 2: event

interim report at end of day for day 1+2

day 3

day 4

day 5

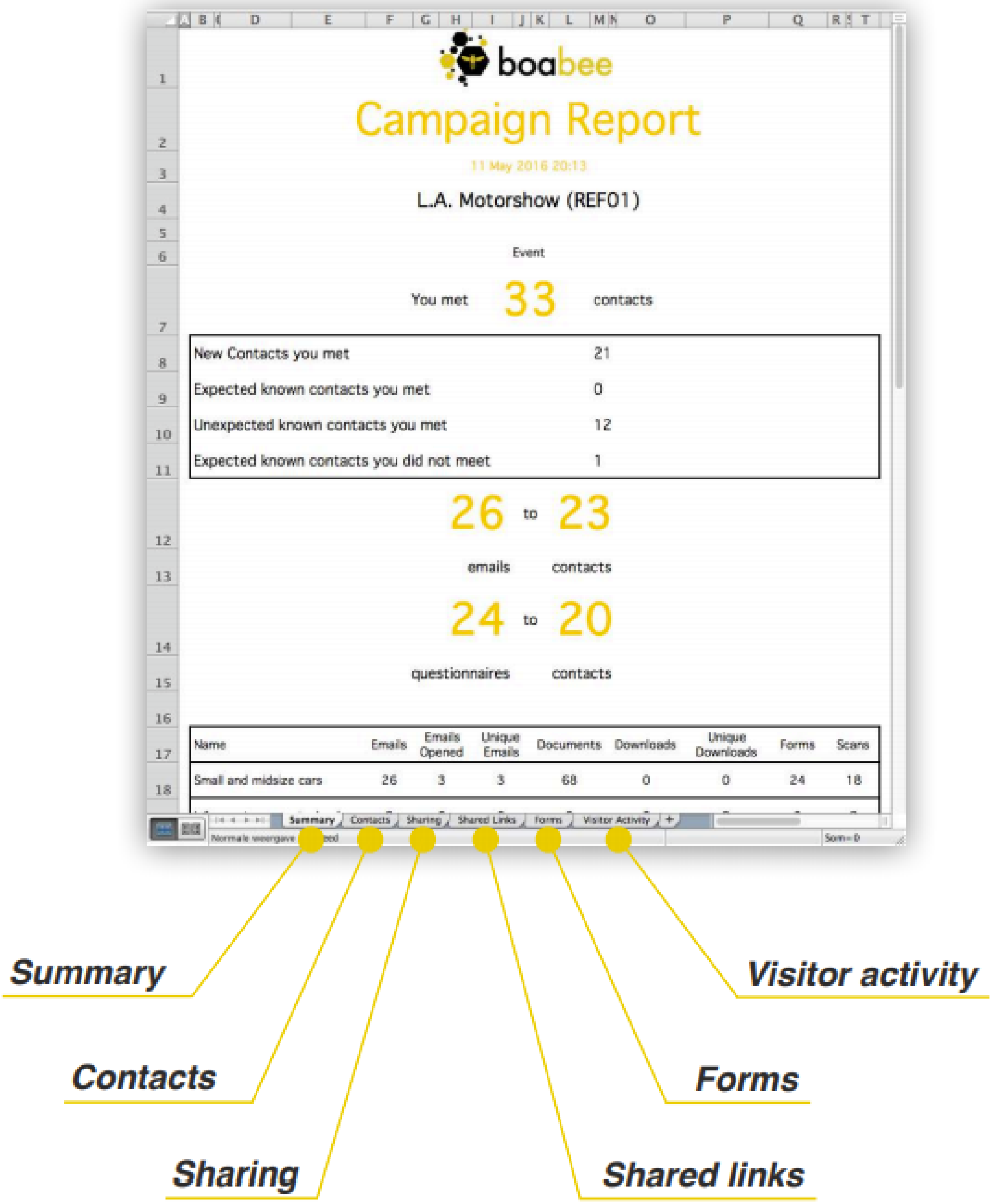
day 6

final leads report with all data of day 1 + day 2 with updated open rates and clickthrough information

about the leads report

what is in the report?

The report is an Excel file, containing all the information collected by your team at the event.



The report contains 6 different tabs, starting with a Summary. The tabs Contacts, Sharing and Forms contain the "raw data" about the scanned badges, the information that has been sent, and the qualifying questions that have been answered.

about the leads report

Important to know

The **Contacts tab** contains one row per contact. In this row you will also find information about how often a contact has been scanned, how many emails have been sent, when your team was first and last in touch with this person, etc. The relevance of this detailed information depends on the number of company representatives using the lead retrieval app at the event.

The **Sharing tab** contains one or more rows per email sent. Each row represents one piece of information. For example, if you have sent your brochure, a price list and the link to your website to a visitor, this will be presented as 3 rows. The columns Email nbr and Link nbr indicate which rows belong together.

The **Shared links** tab presents an overview of all pieces of information that have been emailed to visitors, how often each of them has been sent, and how often it has been opened.

The **Forms tab** contains one or more rows for each completed set of qualifiying questions. Each row represents one answer. For example, if you answered four questions for a visitor, then this will be presented as 4 rows. The columns Form nbr and Question nbr indicate which rows belong together.

The **Visitor activity tab** contains every step completed with the app for each scanned visitor. It is a rather technical tab which is only relevant for detailed analysis on how visitors were handled at your booth.

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www.boabee.com