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EXHIBITOR LEAD RETRIEVAL GUIDE

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EXHIBITOR LEAD RETRIEVAL GUIDE

Make the most out of your 24Fintech experience by using the lead retrieval tool provided by our registration partner Visit Connect.

If you have purchased the lead retrieval tool, you will have a main point of contact who has access to the Visit Connect Portal. This is where you can complete your team member's registration and manage the lead retrieval tool.

Benefits of Visit Connect lead retrieval

- Scan the QR codes on visitor's and exhibitor's badges and record their details
- Optional: Set questions, which can be answered and recorded during the interaction
- Optional: Attach text notes, images and voice memos to potential leads
- Review the data post event

Step 1



Access Visit Lead Retrieval Tool

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Step 2



Scan a visitor badge

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Step 3



Retrieve Leads

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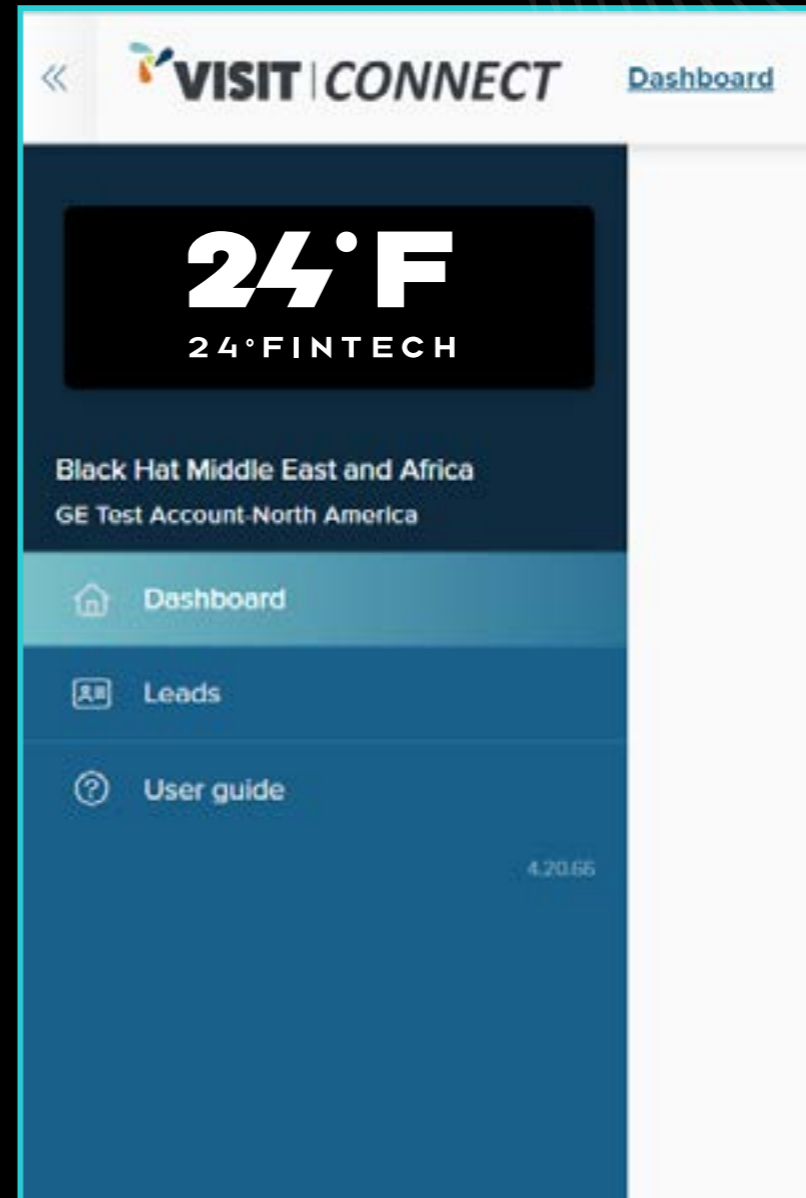
VISIT CONNECT PORTAL

Once logged in to Visit Connect, in the left-side menu under Event, you will find the following options:

- Dashboard – View a list of your events and see lead collection statistics
- Manage questions – View and configure your (custom) questions

Under Service Centre you will find:

- Stand personnel – View, register, import, export, delete, and send scan licenses to your stand personnel
- Leads – View, filter and export leads collected



CREATING QUESTIONS (OPTIONAL)

Exhibitors can add questions for their leads to answer, which they can set up under **Manage Questions**.

By tailoring your questions to your customers and business needs, your post-event follow-up will be more effective.

Example questions:

- What is your buying cycle?
- What is your preferred method of contact?
- When are you looking to place an order?
- What is your purchasing authority?
- Who is your current supplier for?

NOTE: The type of answer can be changed from this drop-down menu to include free text, multiple choice or single choice.

It is recommended to have 10 questions maximum and rank them by importance for ease of asking the questions to the potential lead



ONSITE STAFF

Accessing The Lead Retrieval Tool & Scanning A Lead

Visitor's information (which could be a potential lead) is shared when the exhibitor scans their digital badge. The scanning is done through Visit Connect and this can be accessed two ways:

1. There is a button on the homepage of the 24Fintech app called My Badge & Lead Retrieval. Once you click on this button it will re-direct you to Visit Connect.
2. If you don't download the 24Fintech app, you can also access Visit Connect by a link that will be emailed to exhibitors before the event.

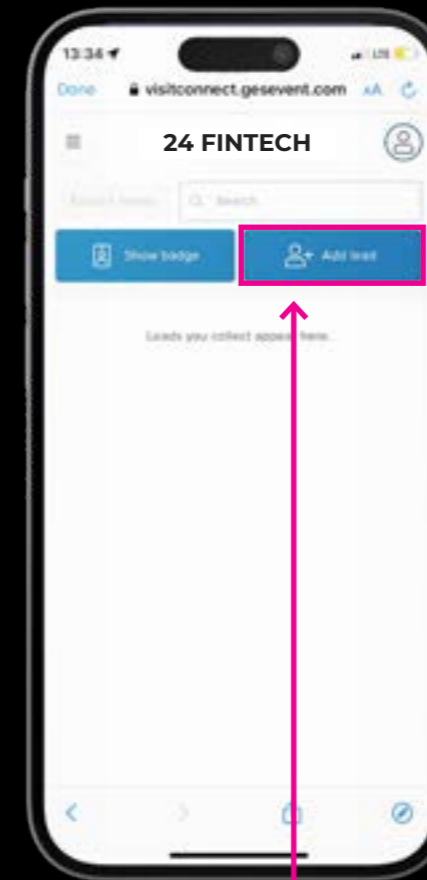
Once you access Visit Connect, please follow the steps below:

1. Tap the Add lead button in the top-right corner of your screen
2. Allow the app to use the camera on your device
3. Scan the QR code on the visitor's badge
4. When the scan succeeds, your device may vibrate or make a sound, depending on the device settings

If the scan fails, you can manually enter the visitor's 15-character code on the Enter code tab. This code is three groups of five letters printed on the badge.



Visit Connect



Add Leads Button

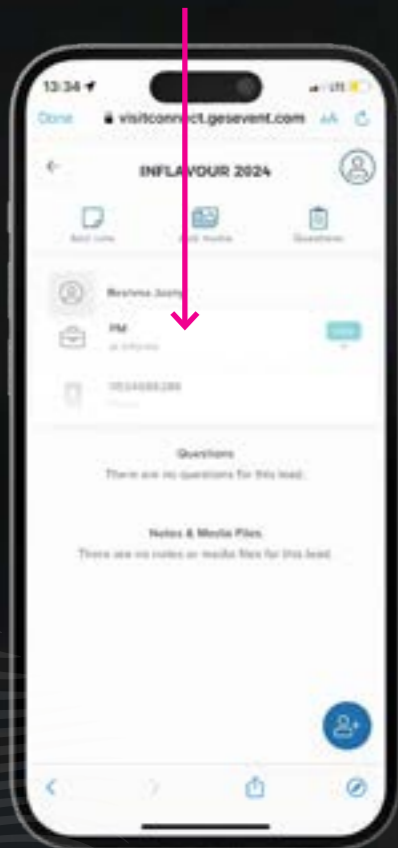


15-Character Code

COLLECT AND REVIEW LEADS

In the main screen of Visit Connect, you can see a list of all the leads collected. Tap on one to see the details, and you can continue to annotate after the visitor has left.

Optional: After adding the lead, you can enter answers to questions which were setup pre-event and attach memos, images or notes.



RETRIEVING YOUR LEAD DATA

Visit Connect app: Perform a manual sync.

Your leads should automatically synchronise to the visit connect portal. If the sync icon is **red** it means the information has not fed through.

Please follow the steps below to ensure that all data is saved to the portal.

- Connect your device to the internet (be online) and open the Visit Connect app
- Go to the Leads page and swipe down to start synchronising your leads
- Wait until you see the message "All leads are synchronised", then close the app
- Log in to your Visit Connect account in the web portal (<http://visit.gesevent.com/>) and verify that all the leads are visible and have been synchronised

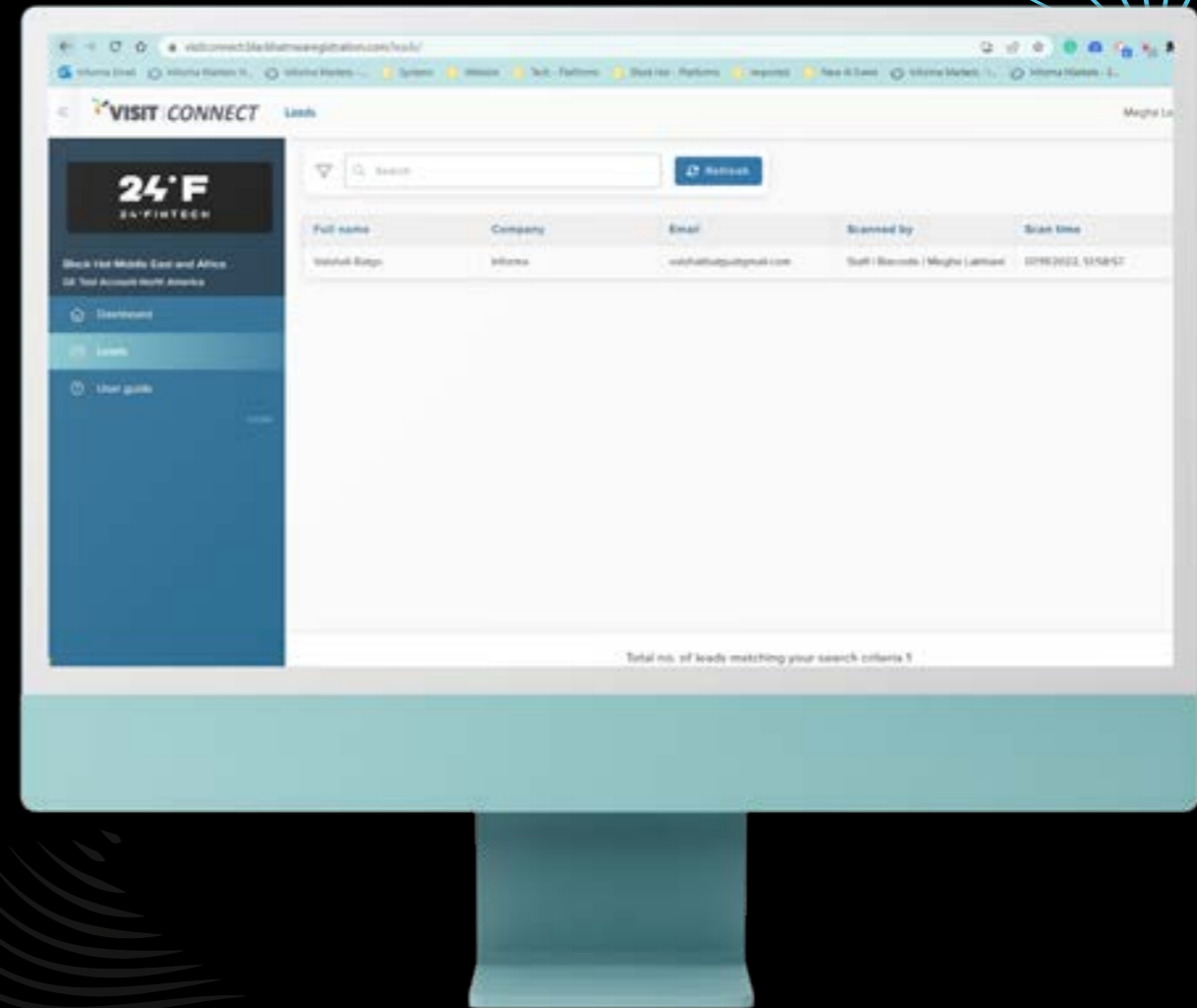


RETRIEVING YOUR LEAD DATA

Within the Visit Connect portal (visit.gesevent.com) you can review all the scanned leads.

Click Leads in Service Centre in the side menu to see a list of all the leads that have been collected during the event

Note: if you click on a lead and select edit, you will see more details. You can also print out the information collected about that specific lead. This way, you have the most important information on hand when you follow up on a lead.



ACCESSING DETAILS FROM A LEAD

Once you click on a lead and select edit, there will be six tabs at the top of the page that let you see various things:

Contact – View and edit the lead’s contact details

Stages – See or choose which stage the lead is in, such as Contacted, Active Opportunity or Long-Term

Opportunity – You can use this tab to build up a contact history for the lead

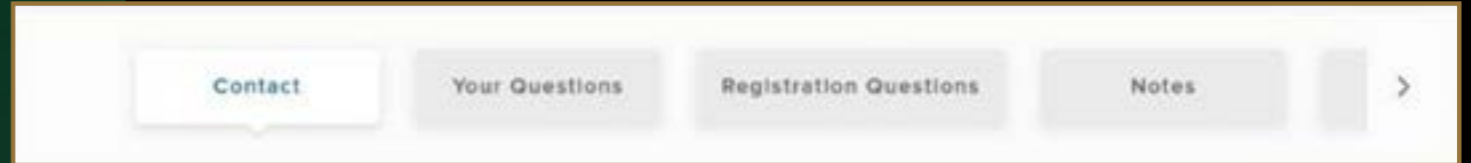
Content – This lets you see the content collected by the lead

Registration Questions – View and edit the answers the lead entered on their event registration form

Notes – View and edit the notes recorded for this lead or add new notes

Only available if questions are set:

Your Questions – View and edit the answers that the lead gave to your (custom) questions





FOR MORE INFORMATION

If you have additional questions or encounter any issues please reach out to our team at 24FintechCS@Tahaluf.com

