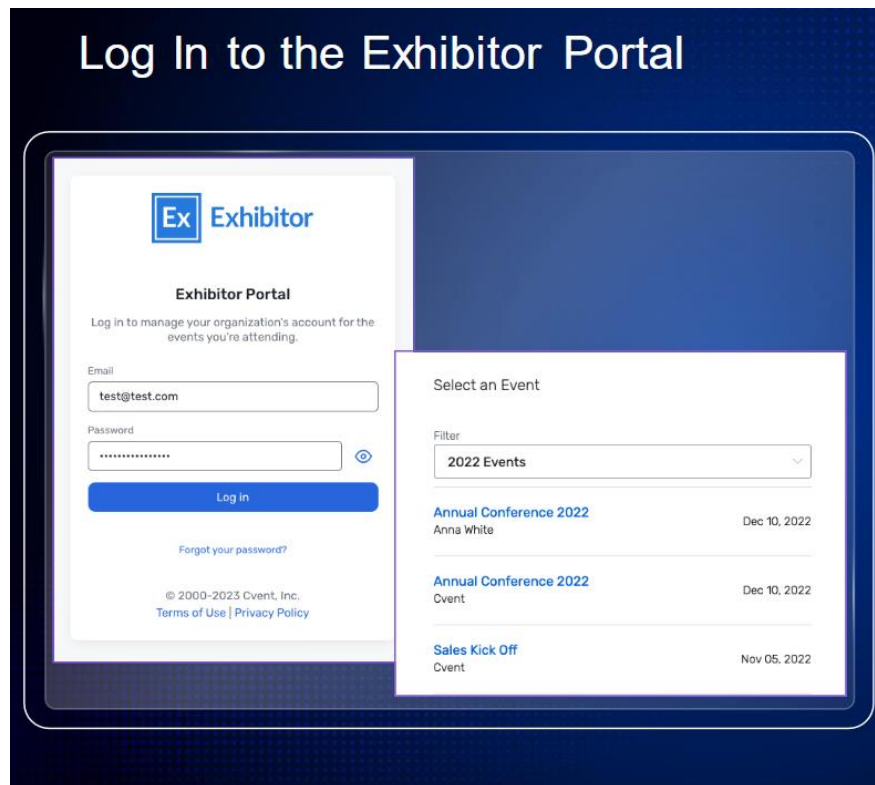


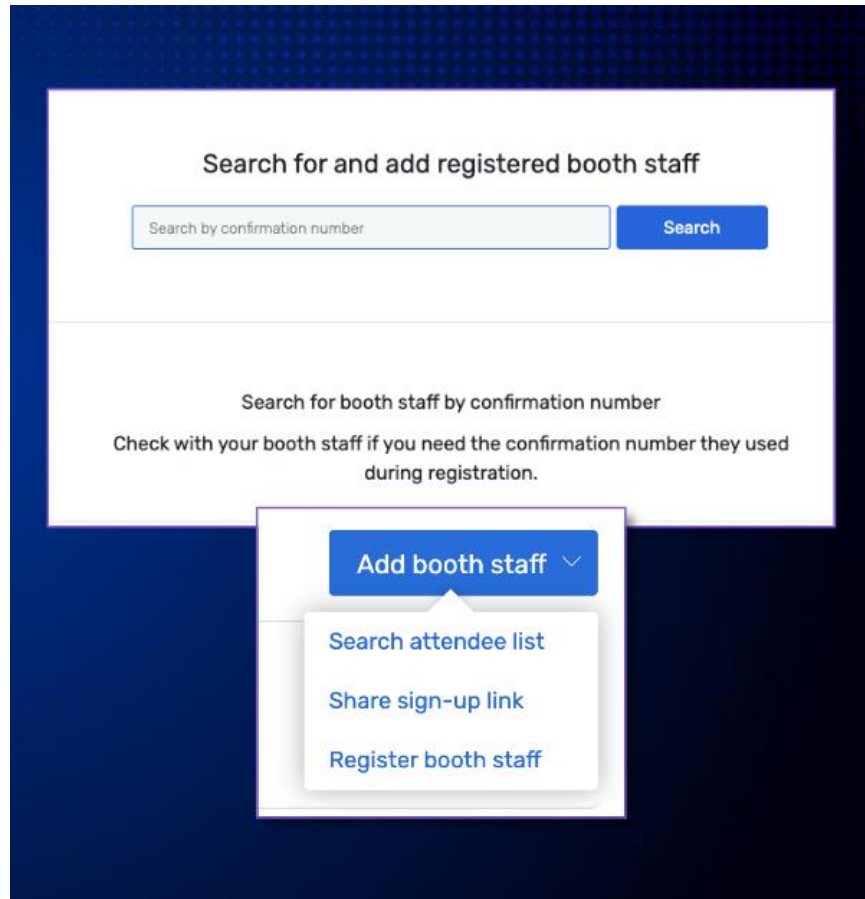
2024 WCQI LeadCapture Instructions

1. Your company's exhibitor/sponsor fulfillment contact will receive an email "Welcome to WCQI" from Meghan Dineen on April 19th
2. Fulfillment contact will log into their Cvent Exhibitor Portal via this email or by visiting <https://exhibitors.cvent.com/login>
3. Once logged in, select 2024 ASQ World Conference on Quality & Improvement from the event dropdown



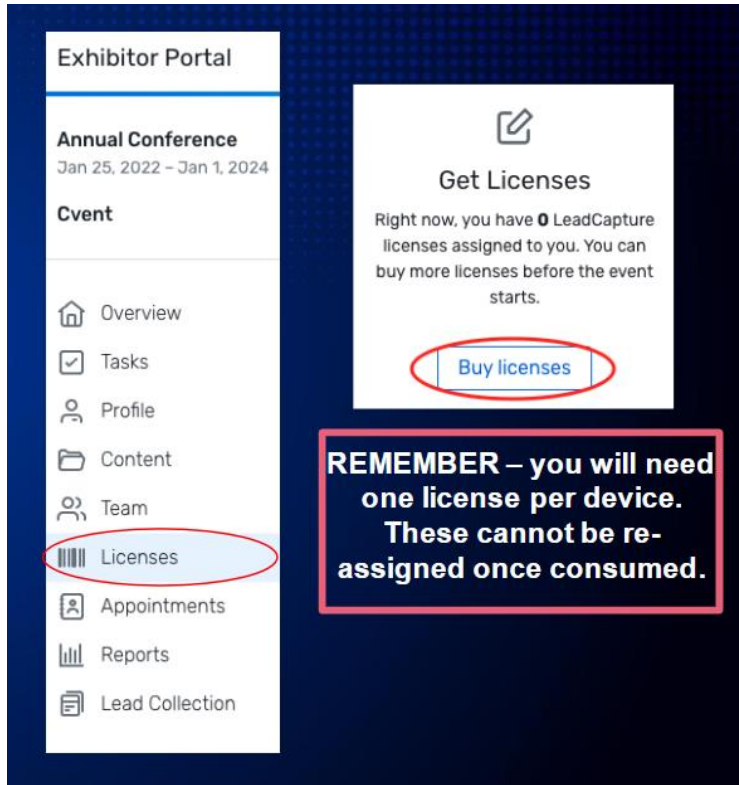
4. Assign your registered onsite staff to your company's booth in the exhibitor portal
 - a. Click TEAM on left-hand navigation

- b. Click ADD BOOTH STAFF
- c. Search the WCQI attendee list by your onsite attendees registration order number (confirmation number) which can be found in their registration receipt upon registration for WCQI
- d. If you have additional staff members that need access to the Exhibitor Portal, you can add them on the Admin tab



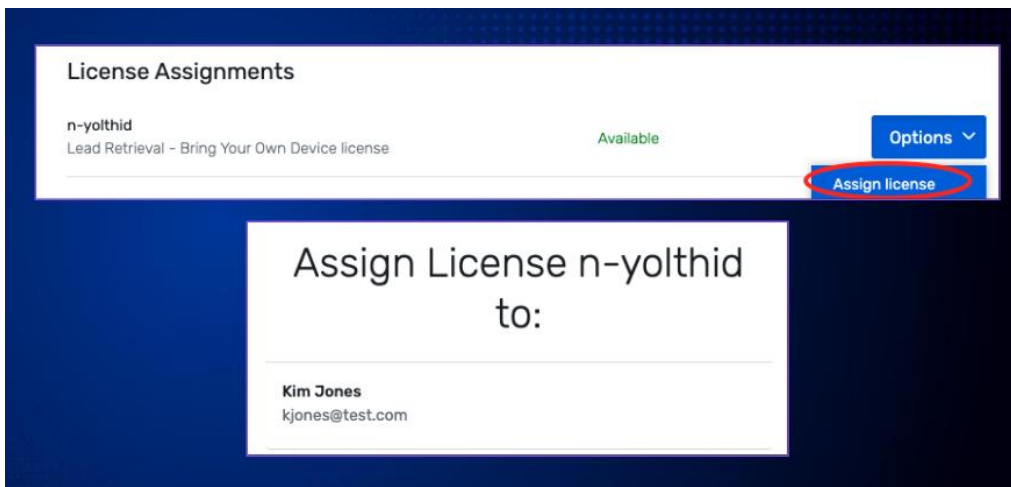
Onsite staff must be registered for WCQI in order to be assigned as booth staff

5. Purchase LeadCapture licenses
 - a. On the home page, click on GET LICENSES and select BUY LICENSES or select LICENSES from the left navigation bar and click the PURCHASE tab
 - b. Add the desired number of licenses
 - c. Click GO to checkout and complete the transaction



6. Assign your LeadCapture Licenses

- Click the AVAILABLE LICENSES tab within the LICENSES section in the portal
- Click OPTIONS next to a license, then ASSIGN LICENSES
- Select from your available booth staff members and click ASSIGN
- The booth staff member will then receive an email including their LeadCapture license access code



7. Customize lead qualification questions – create custom questions for your onsite staff to qualify leads (if interested) in your Exhibitor Portal
 - a. Click LEAD COLLECTION from the left navigation menu. Click LEAD QUALIFICATION QUESTIONS tab and CUSTOMIZE QUESTIONS
 - b. Press BUILD and select question type to add new questions or click into an existing question to edit text
 - a. Reorder questions by clicking and dragging them into a new area
 - b. Hover over a question and click to delete questions or add sub questions
 - c. Press SAVE to preserve changes

Lead Collection

0 scans
0 leads collected

Leads Collected (0)

Lead Qualification Questions

LeadCapture Settings

Lead Qualification Questions for Annual Conference

Customize questions to help your booth staff qualify leads at the event. After they scan a lead, they'll answer the questions in the **LeadCapture app**. You can find the answers to these questions with your collected leads and in your leads export.


[Customize Questions](#)


Chapter 1

1. Lead Score


1 5
 ☆ ☆ ☆ ☆ ☆


2. Notes

 Choice Question

 Text Question

 Date and Time Questi...

 Rating Question


Build

8. LeadCapture Settings – Click the LEADCAPTURE SETTINGS tab to configure further settings
 - a. Add Device Names for accurate reporting of your collected leads. Staff will be able to select from this list in the LeadCapture App
 - b. Required Lead Fields – confirm what fields you want booth staff to be prompted to collect (you can also make them required so staff will not be able to complete a lead if left blank)
 - c. Require Lead Qualification Questions – If turned on, the qualification survey will start as soon as a lead is scanned. If it is not switched on, the booth staff will be able to skip the questionnaire and fill it out later

Leads Collected (0) Lead Qualification Questions **LeadCapture Settings**

Device Name
Set device IDs for accurate reporting of your collected leads. Booth staff can select from this list in the LeadCapture app.

Main Booth Options ▾

Sub 1 Options ▾

Sub 2 Options ▾

Add device name

Require Lead Qualification Questions

Heads up
By turning on this setting, qualification surveys start immediately after scanning a lead. This setting doesn't make all survey questions required but you can choose which ones you'd like to require. If you have appointments turned on, surveys won't turn on automatically. Booth staff need to qualify the lead from appointments details after checking them in.

Require questions ⓘ

Include cancel option ⓘ

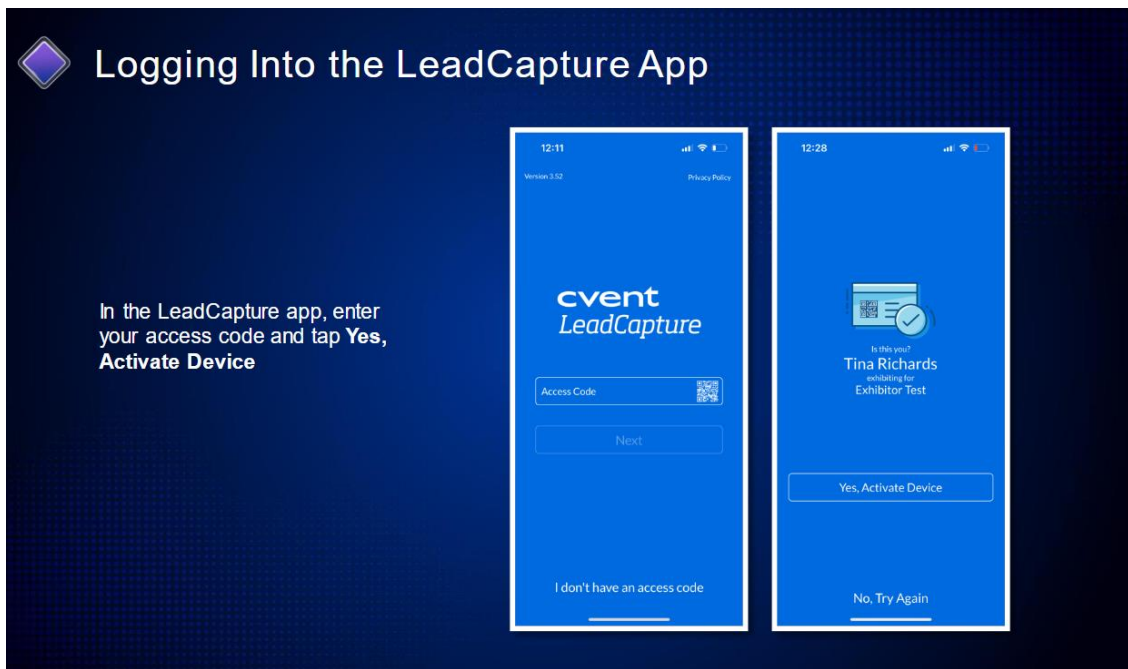
Best Practice: Minimize the number of required questions as this can slow down scanning onsite

9. Ensure all onsite staff downloads the Cvent LeadCapture app (available for Android and iOS devices) prior to arriving in San Diego



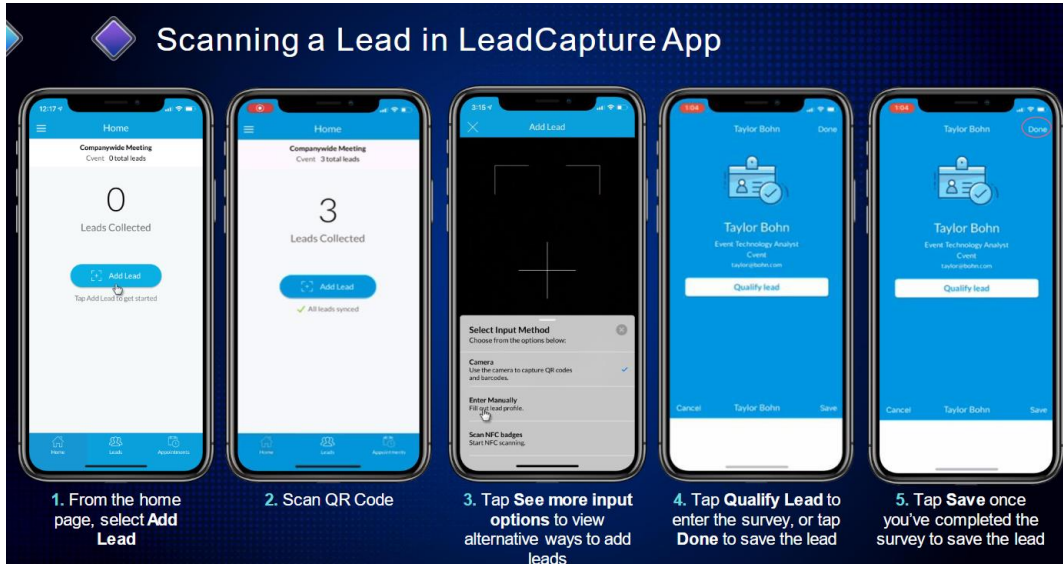
10. Logging Into the LeadCapture App

- a. Once downloaded, enter your access code and tap YES, ACTIVATE DEVICE



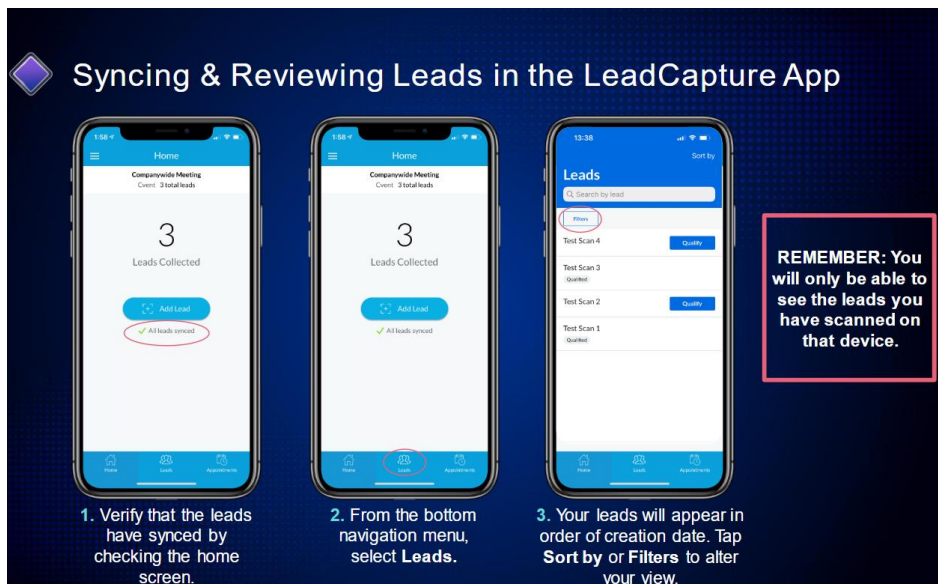
11. Scanning a Lead in the LeadCapture App

- From the home page, select ADD LEAD
- Scan attendees QR Code
- Tap QUALIFY LEAD to enter the survey, or tap DONE to save the lead



12. Syncing & Reviewing Leads in the LeadCapture App

- Verify the leads have synced by checking the home screen
- From the bottom navigation menu, select LEADS
- Your leads will appear in order of creation date. Tap SORT BY or FILTERS to alter your view

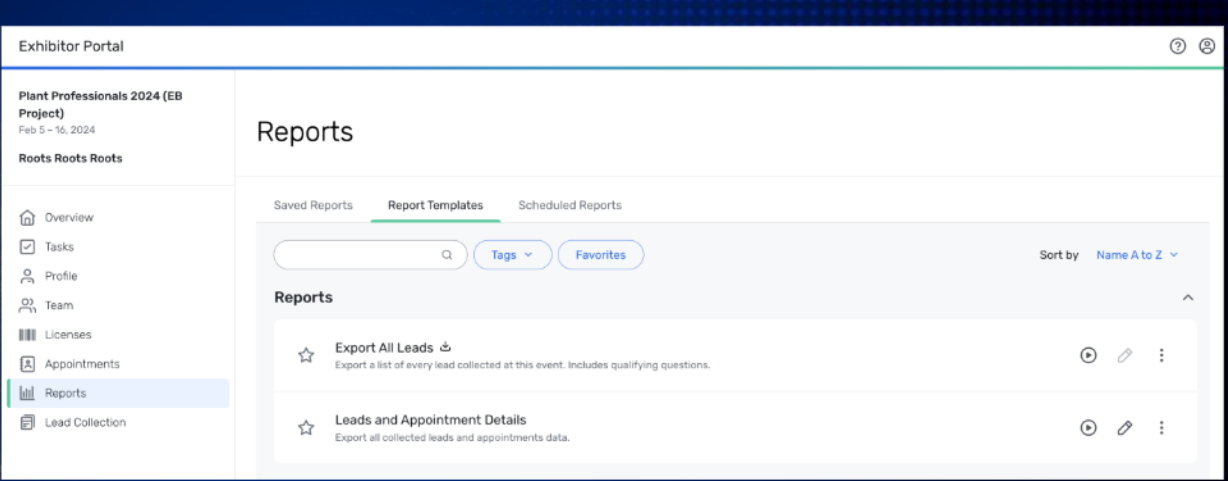


POST EVENT

13. Don't forget to export your collected leads

- a. To access leads, go to left-hand navigation menu and select LEAD COLLECTION
- b. Click on EXPORT to generate a report of your company's captured attendees

Attendee's First Name, Last Name, Email, Company, and Title is collected when scanning leads.



The screenshot displays the 'Exhibitor Portal' interface. On the left, a navigation menu includes 'Overview', 'Tasks', 'Profile', 'Team', 'Licenses', 'Appointments', 'Reports' (highlighted), and 'Lead Collection'. The main content area is titled 'Reports' and features tabs for 'Saved Reports', 'Report Templates', and 'Scheduled Reports'. Below these tabs is a search bar and buttons for 'Tags' and 'Favorites'. A 'Sort by' dropdown is set to 'Name A to Z'. The 'Reports' section lists two items: 'Export All Leads' (with a sub-description: 'Export a list of every lead collected at this event. Includes qualifying questions.') and 'Leads and Appointment Details' (with a sub-description: 'Export all collected leads and appointments data.'). Each item has a star icon, a play icon, an edit icon, and a menu icon.

Your leads will be available in real time through the Exhibitor Portal

LeadCapture questions? Contact Meghan Dineen (mdineen@asq.org)