WORLD CONFERENCE ON QUALITY & IMPROVEMENT

MAY 12 - 15, 2024 | SAN DIEGO, CA

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
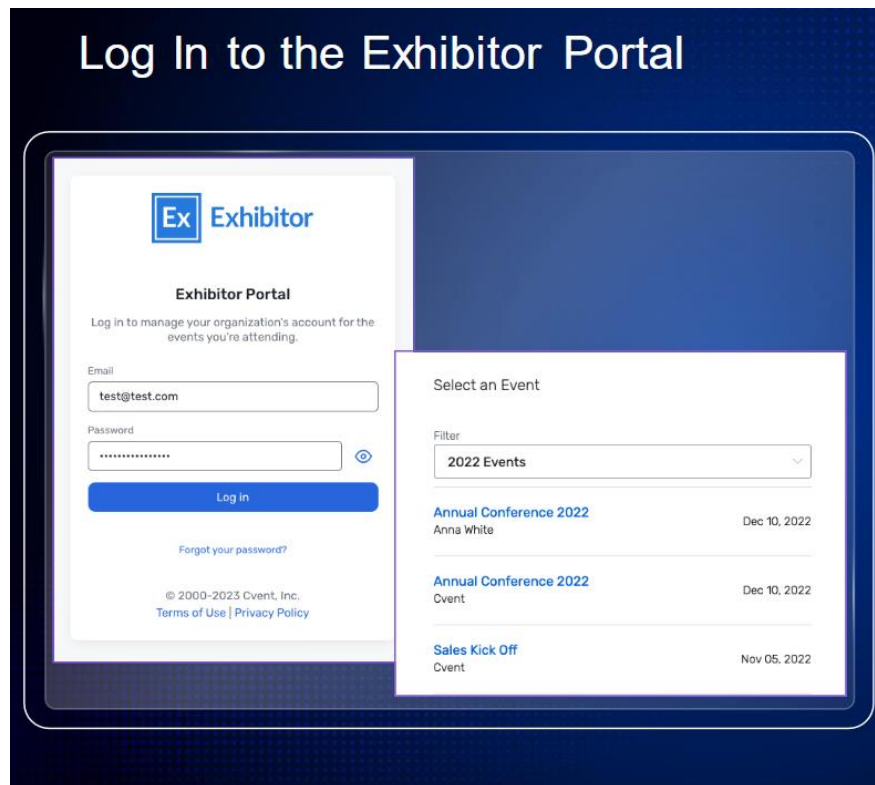

4. Assign your <u>registered</u> onsite staff to your company's booth in the exhibitor portal
   a. Click TEAM on left-hand navigation

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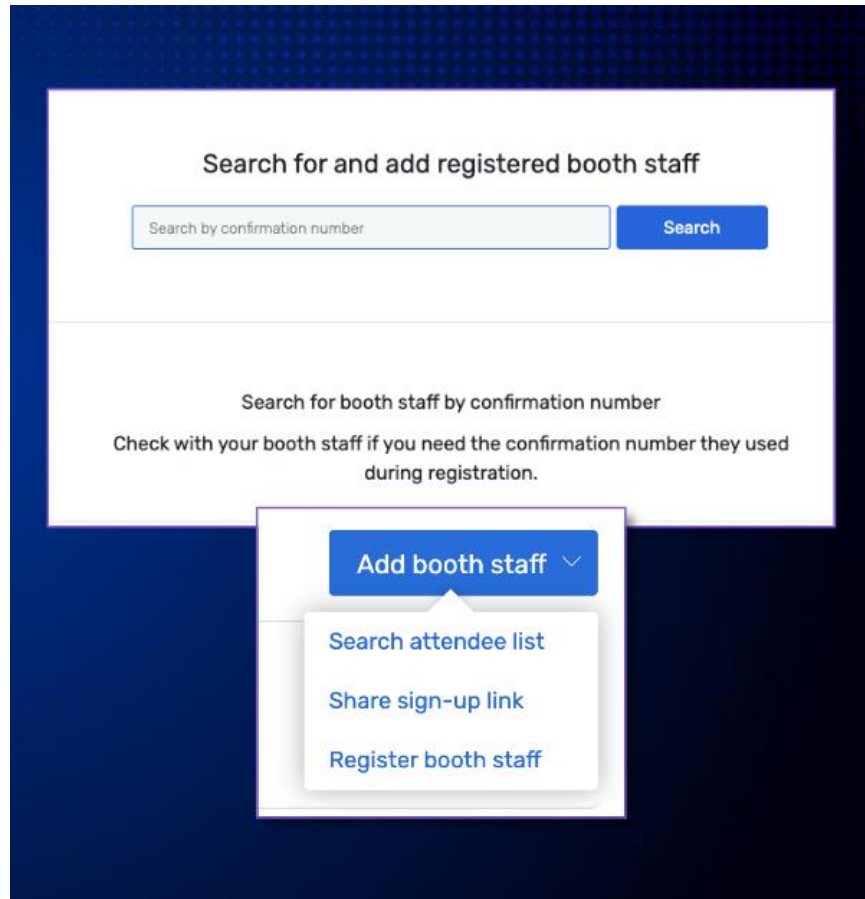
Onsite staff must be registered for WCQI in order to be assigned as booth staff

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
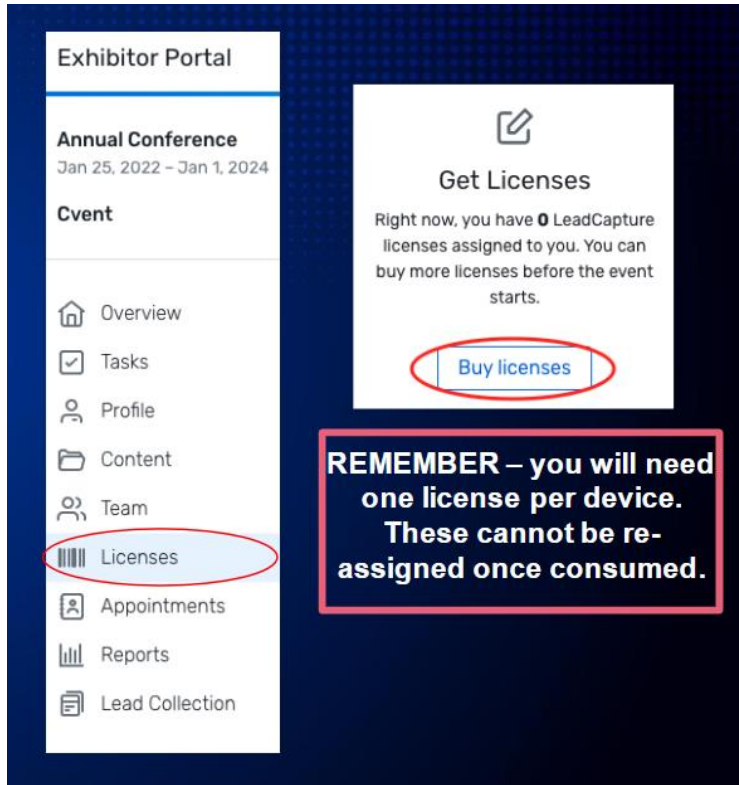
6. Assign your LeadCapture Licenses
   a. Click the AVAILABLE LICENSES tab within the LICENSES section in the portal
   b. Click OPTIONS next to a license, then ASSIGN LICENSES
   c. Select from your available booth staff members and click ASSIGN
   d. The booth staff member will then receive an email including their LeadCapture license access code
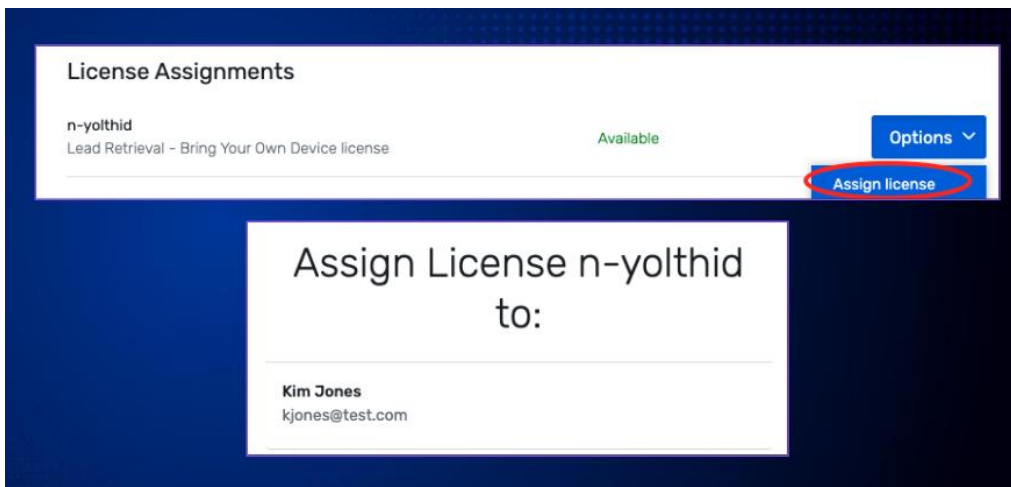
7. Customize lead qualification questions – create custom questions for your onsite staff to qualify leads (if interested) in your Exhibitor Portal
   a. Click LEAD COLLECTION from the left navigation menu. Click LEAD QUALIFICATION QUESTIONS tab and CUSTOMIZE QUESTIONS
   b. Press BUILD and select question 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

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

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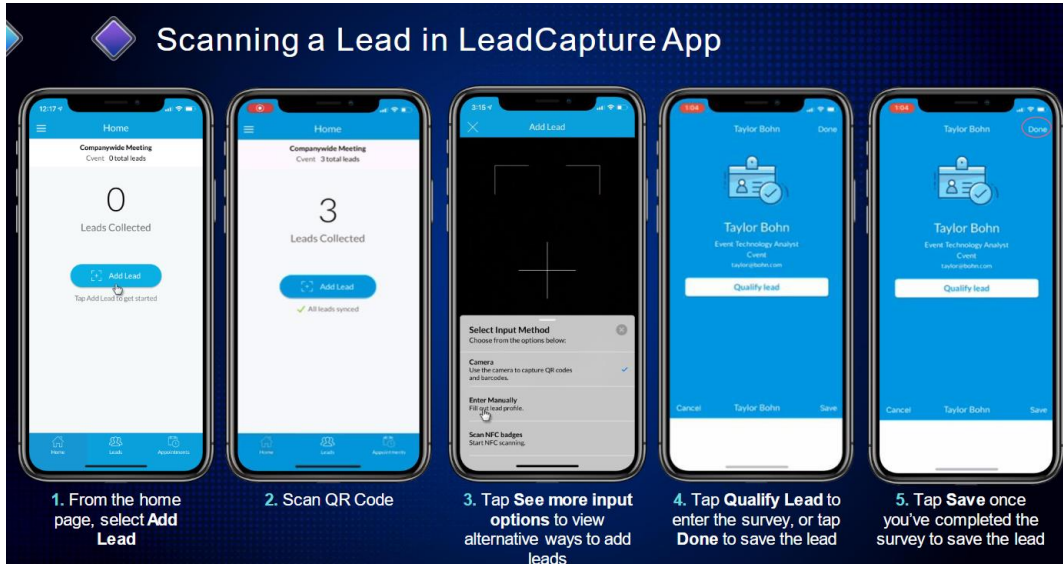

10. Logging Into the LeadCapture App
   a. Once downloaded, enter your access code and tap YES, ACTIVATE DEVICE
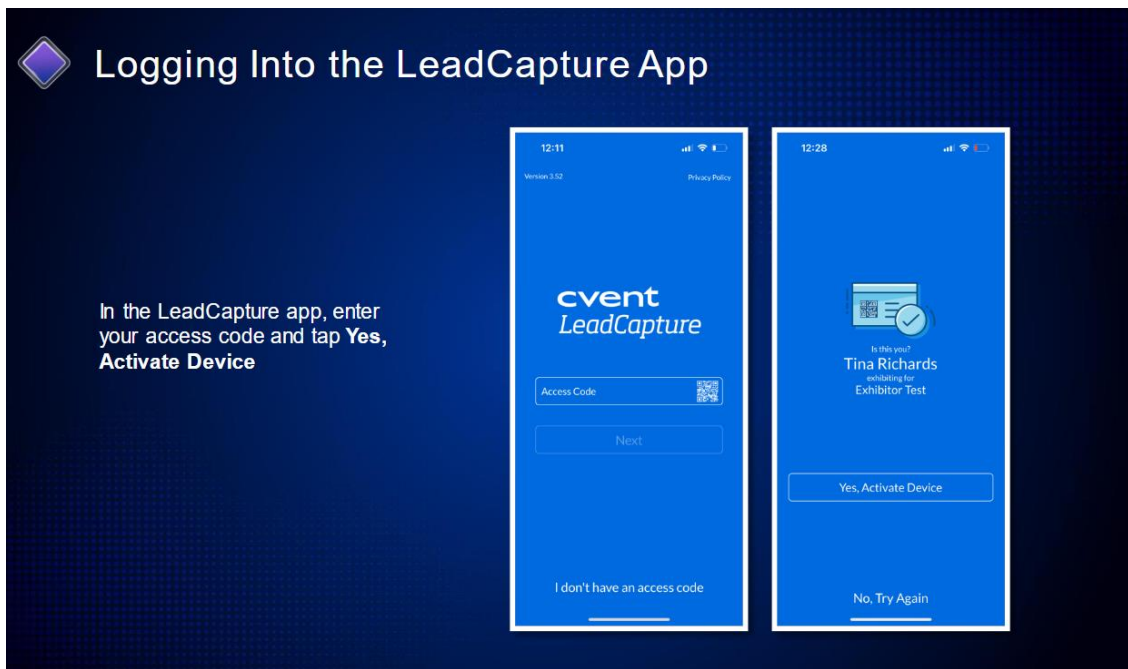
11. Scanning a Lead in the LeadCapture App
    a. From the home page, select ADD LEAD
    b. Scan attendees QR Code
    c. Tap QUALIFY LEAD to enter the survey, or tap DONE to save the lead

12. Syncing & Reviewing Leads in the LeadCapture App
    a. Verify the leads have synced by checking the home screen
    b. From the bottom navigation menu, select LEADS
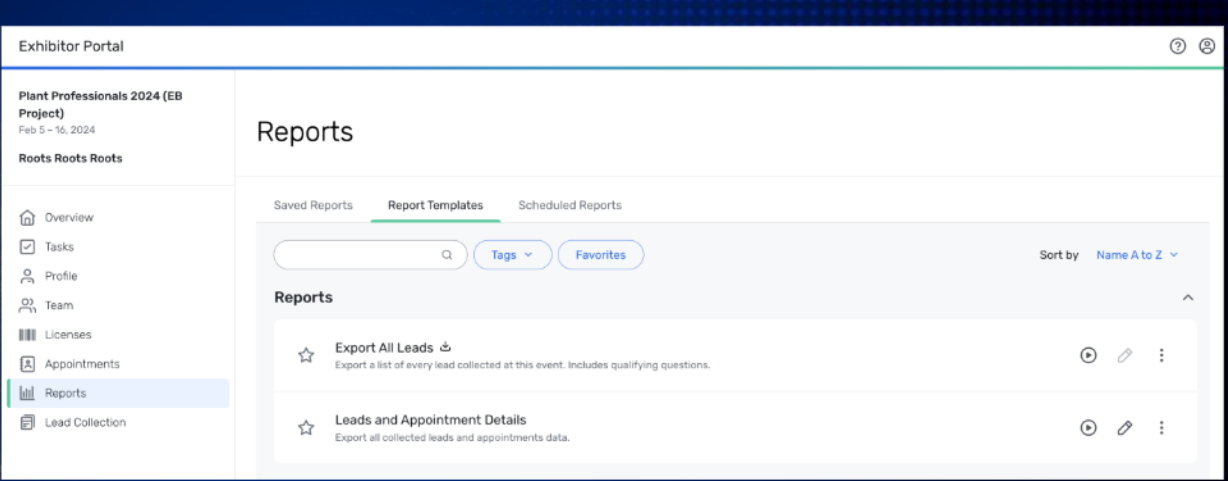   c. Your leads will appear in order of creation date. Tap SORT BY or FILTERS to alter your view
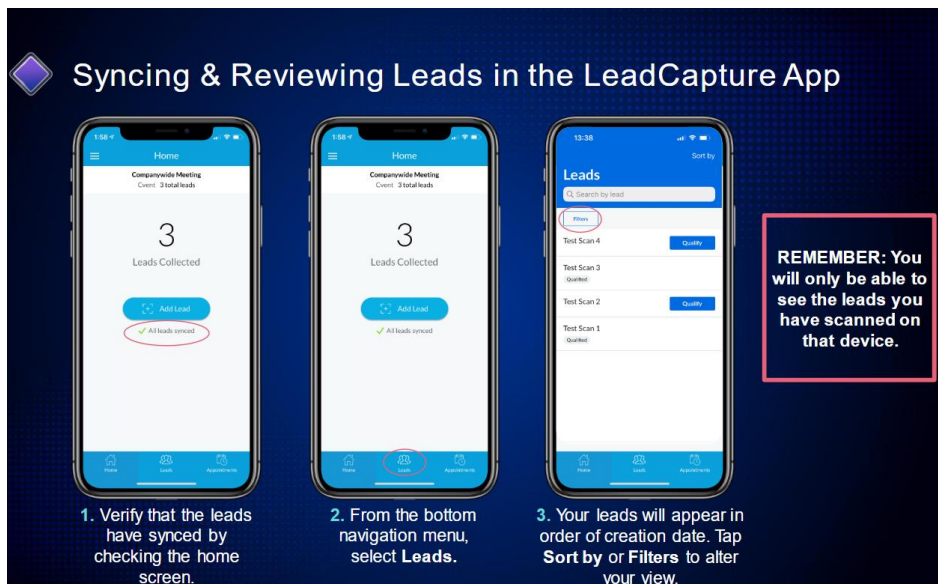
POST EVENT

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.

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