Lead Retrieval App

1. Access the Lead Retrieval app
   a. Each business partner has a Lead Retrieval license associated with the admin account. To share access with your salespeople:
      i. Open the Boomset Admin portal
      ii. Navigate to the QR Code under Manage Options
   b. Salesperson will download the Lead Retrieval app from the app store. Lead Retrieval is the green app, rather than the orange app.


c. Open the app
d. Click the Scan a Code button

e. Scan the QR code from the admin portal.
f. Enter password for the admin user.
g. You have entered the platform

h. The ILTA events are private and not searchable until you have logged into the app.
i. Under Options, you can see the options in the management portal.

2. Scan a Lead
a. Click the Add Lead button in the app.

b. Scan the QR code on the attendee’s badge. You can’t scan a badge for your own company.
c. Once Lead is Saved, allow the attendee to select the information they are willing to share with you, per GDPR regulations.

GDPR Consent

Thanks for your Submission!

Thanks for visiting our Booth today!

Please be sure to check in to https://iltanet.org for more information regarding our organization.

Prefix
First Name
Last Name
Email
Company / Organization
Work Phone
Website
Job Title
What pronouns should we use for you? (ex. She/Her, They/Them)
Okay to receive postal promotions from ILTACON Business Partners?
Okay to receive email from ILTACON Business Partners
Please select three areas of interest in which to receive information from Business Partners

Accept


d. Choose Accept at the bottom of the screen.
e. This will bring up the Lead Qualifier questions you have set up, which the attendee can answer before completing.

Leads Management


Two tabs available to Booth admin side, not to the attendees: Leads and Staff

1. Staff Leads Assignment
   a. Display all Staff members who are assigned to the booth.
      i. If you have an additions or removals to this list, contact ILTA via support@iltanet.org to make those changes.
   b. All which are attached will be displayed on the booth
   c. Auto Assign
      i. This allows leads to be assigned to the individual in a round robin style. The lead will be assigned to the next available person.

2. Review Leads
   a. Shows everyone who has started a Chat or Dropped a Card.
b. Status – Inquiry (started a chat), Connection (shared contact information with booth), Meeting Booked (created a meeting to discuss)
c. View or Join Chat already started.
d. View information about the lead.
e. Start a group video Chat. (video camera icon at the top of the chat box)

3. Lead Retrieval Application
   a. The Leads are synched between the main app and the lead retrieval app.
   b. Every badge will have a QR code.
      i. Hand your device to the attendee to answer your questions (or ask them)
   c. Add notes to recall conversation.
   d. Grade your lead
      i. To remove your grade, deselect the currently selected option.

4. Export your Leads
   a. Can be done from either the Boomset Event app or the Lead Retrieval app.
   b. From the main screen, click Export

   ![Image of Export button]

   c. Enter the Boomset account password to email the leads to you.
d. Email will be sent to you.

Dear International Legal Technology Association,

Thank you for using Boomset’s Lead Retrieval App. We hope your event was a huge success!

You successfully scanned 11 lead(s) at ILTACON 2021 Annual Educational Conference.

To access your report, please click here.

Thank you for utilizing our app, looking forward to seeing you at the next event!

Call us: 1 (850) 266-8738 - Contact us: help@boomset.com

Follow Boomset on

Copyright © 2021 Boomset, Inc.

e. Export will contain same information from the registration to the event and how they came to be in your leads.

Custom Qualifiers


1. What are qualifiers?
   a. Questions you want to ask everyone who comes to the booth
   b. Ways to filter what would help the attendee

2. Types of Qualifiers
   a. Text box
   b. Multiple choice
      i. Can allow for sub-questions for each choice. Sub-choices can be any of the types of qualifiers.
   c. Checkboxes
      i. Can allow for sub-questions for each choice. Sub-choices can be any of the types of qualifiers.
d. Rating
   i. 5-star ratings only
   ii. You can add an image to this qualifier.

3. Admin for each qualifier
   a. Hidden
      i. For questions you want to answer about the lead or questions which aren’t ready for public consumption.
   b. Optional
   c. Required – limit the number of required fields

4. Under Qualifiers, select Qualifiers List to see what qualifiers are already available.

5. To create a new qualifier, click on Add New Qualifier.

6. You can reorganize the qualifiers by grabbing the edge and dragging it to the new location.

---

Design Lead Qualifier Form


1. Open the Boomset Exhibitor Management Portal
2. Click on Design

3. Qualifiers
   a. Colors
      i. Select a color scheme which is representative of your organization.
ii. Colors are in hex code. If you don’t have a code, you can click Edit to select a color with a color picker or using RGB codes.

![Color Settings](image)

b. Next to the Color Settings is a preview screen for the app.
   i. As you change your colors, they will appear in the preview.
ii. You can also select different size screens to see what they will look like.

4. GDPR
   a. Allows you to send a completed document back to the lead to show what they submitted. (Toggle for on)
b. Create a thank you screen for the lead.

Calendar Management

1. How Calendars work for Attendees
   a. Display all sessions currently signed up for, can access session from calendar

2. How Calendars work for Exhibitors
   a. Display all sessions currently signed up for, can access session from calendar
   b. Change view: Exhibitor Schedule

3. What happens when a meeting is scheduled?
   a. Attendee
      i. Navigate to the sponsor page
ii. Click Schedule Meeting button

You've dropped your business card!

Schedule Meeting

iii. Select the Date and Time you want to meet
iv. Select the Staff Member you want to meet with.
   1. Can schedule the meeting with any staff members listed under Staff tab.
   2. If exhibitor has blocked off that time, attendee will not be able to schedule a meeting during that time block.

Schedule a Meeting

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday, August 22</td>
<td>02:40 PM - 03:00 PM</td>
</tr>
</tbody>
</table>

Staff Member

Please Select

- Alice Locatelli
  - Head of IT
  - Available

- Andrew Johnson
  - Not available in this time period

- Corey Simpson
  - Chief Operating Officer
  - Available

- Erika Emrick

v. Add Meeting Message
vi. Click Book.
vii. You will see a confirmation message pop up. Click Okay.
viii. Will display on the calendar.
ix. Delete Meeting
   1. Click into meeting on calendar
2. Click on the three dots in upper right.
3. Select Delete Meeting.
4. Add a message
5. Click Cancel Meeting.

b. Exhibitor
   i. Block off sections not available.
   ii. When Attendee requests a meeting
       1. Adds to calendar
       2. Changes the Stage to Meeting on the Leads tab.
   iii. If meeting is cancelled
        1. Removes from calendar
        2. Changes the Stage to Connection on the Leads tab.

4. Blocking off a section
   a. Under Exhibitor Schedule
   b. Navigate to the day and time you do not want to be available.
   c. Click each time segment you will not be available.

5. Boomset Error – Workaround
   a. Sometimes when a meeting is scheduled, it will not appear on the calendar. You can see the scheduled meeting from the chat and can block off the time manually.

Questions
Please contact support@iltanet.org if you have any questions.
Video References

1. **002 – Virtual Platform – BP – Lead Retrieval App**
   a. How to Access
   b. Quick Walkthrough
   c. Scan a Lead
   d. Export Your Leads

2. **007 – Virtual Platform – BP – Leads Management**
   a. Staff Leads Assignment
   b. Review Leads
   c. Lead Retrieval Application

3. **005 – Virtual Platform – BP – Custom Qualifiers**
   a. Types of Qualifiers
   b. Setup
   c. Demonstration
   d. Tips and Tricks

4. **006 – Virtual Platform – BP – Design Lead Qualifier Form**
   a. Qualifiers
   b. GDPR Follow-up

5. **009 – Virtual Platform – BP – Calendar Management**
   a. How Calendars work for Attendees
   b. How Calendars work for Exhibitors
   c. What happens when a meeting is scheduled?
   d. Blocking off a section
   e. Boomset Error - Workaround