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The Art of the Follow-Up: Closing the Deal After a Conference

How to Avoid Common Mistakes That Turn Into Missed Opportunities

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Conferences and trade shows take a lot of time and effort to pull off, but the real work for education technology companies starts the minute the booth is packed up. That's when companies have the chance to turn all the promising conversations and connections they've made into full paying customers.

But according to the Center for Exhibition Industry Research, more than 80 percent of trade show leads are not effectively followed up.

"The most important thing that is often overlooked is the follow-up," said Jennifer Ragan-Fore, the chief events officer for the International Society for Technology in Education. (ISTE sponsors the largest ed-tech conference in the United States, to be held this June in San Antonio.)

"It's important to have a strategy in place for your follow-ups," Ragan-Fore said, suggesting a quick contact after the event, another during the summer, and then again when the school year begins.

Jefferson Davis, the president of Competitive Edge and a recognized expert in the industry on best practices in exhibitions and conference management, agreed. He said failing to follow up after shows is "a huge problem."

Good sales leads are people who have agreed to a clear next step on information they need.

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"The real value that you are going to walk off the floor with are leads, so when an exhibitor doesn't follow up on a lead, it not only limits the value and the [return on investment] that they can get from an event, but it reduces the value that the attendee gets from their time at the trade show as well," Davis said.

Not All Leads Are the Same

So what can you do to put in place an effective follow-up strategy? First, companies need to examine what makes a good lead, and what is the best way to capture a good lead.

"For many exhibitors, they will scan every badge they can get near, and they will call it a lead. That is not a lead," Davis said. He added that a fishbowl full of business cards for a contest is also not a lead.

A lead, he said, is a capture that contains information beyond what is embedded in the badge. Leads also mean visitors who have agreed to a clear next step on what information they need and whether they will set up a follow-up phone call with you. "This is where 95 percent of exhibitors break down," Davis said. "It's the difference between getting 500 swipes and two conversions and getting only 100 swipes with 25 conversions."

Davis recommends that companies shell out the extra money for a lead-capture scanner, which is offered at most conventions or trade shows. They also should take the time to customize the scanner so that they can collect as much information about attendees as possible. You want to know the person's name, title, location, background with your product, and timeline for purchasing decisions so that you can customize your follow-up approach, he said.

Tanya Mas, senior marketing manager for K-12 education for the language-learning company Rosetta Stone, agreed, saying

Tips for Success

"Ask each staffer to review their leads at the end of a show and fire out five handwritten thank-you notes. Do it immediately, at the convention, and have the manager put them in the mail. Does this take a little bit of work? Yes, but does it make you stand out from the crowd? Well, when was the last time you got a handwritten thank-you note?"
– Jefferson Davis, President, Competitive Edge

"We have account managers who are all educators and who started as classroom teachers, so they have a real connection to classrooms and they also have developed relationships. So, they will often that paying for the convention-provided lead-capture system is critical. "A lot of people steer away from that because it's an added expense. They just take photos of business cards. But the added time it takes to input all of that information into your system takes away from the time you need to follow up," Mas said. "Time, to me, is money and value."

have a connection to a district, or they will have a story about how they used the program that they can tell to add a personal touch."
– Natasha Martin, Marketing Manager, TCI

"One of the things that we usually do is that if somebody had a conversation and connected with them [an educator or school official] at the event, then that person would do the initial contact."
– Tanya Mas, Senior Marketing Manager, Rosetta Stone

Calling Before Your Competitors

When it comes to the follow-up, a timely response is important. Research shows that the first vendors to respond win 35 percent to 50 percent of the sales, Davis said. That's because potential clients typically network with more than one vendor. Who will they hear from first?

Mas, of Rosetta Stone, is a proponent of very timely follow-ups.

"They should be in your system within 48 hours of completing a show, and within 72 hours, there should be a contact," Mas said. "If it's still fresh in their minds and it's easier for them to recall their conversation with you, then your success factor increases."

Davis recommends connecting with potential leads on social media, such as LinkedIn, immediately, maybe even on the convention floor.

But others have found that giving clients a bit of breathing room between the conference and the follow-up can also work.

Natasha Martin, a sales and marketing manager for Teachers Curriculum Institute, a K-12 publishing company that creates science and social studies curricula, said that while quick follow-ups have their place, a timely response that gives potential clients some time for reflection can also be quite effective. “We usually wait at least a week because when people come back from a convention, they are usually traveling and they are tired and want to catch up on their work and sleep,” she said.

Window Shoppers vs. Serious Buyers

Martin emphasized that for TCI a key part of lead collection is differentiating between those who are just interested in receiving materials versus school officials who are seriously in the market for curriculum. “We have people who sign up for all kinds of resources when they are at our conferences, and for those people, we always do an email follow-up, thank them, and see if there is any additional information that they need from us,” Martin said. “That is standard.”

But for those who are ready to start looking seriously at TCI, the company has a strategy in place for a comprehensive follow-up that starts with learning more about the school district’s buying process. “We ask them when will they be renewing materials so that we get a date, and that helps us figure out when is going to be the best time to follow up with them,” Martin said. “We feel like that is going to be the best investment of our time–and their time.”

Stephen Skinner, the director of marketing for Public Consulting Group, a longtime SXSWedu conference partner and sponsor, focuses on a multiyear playbook in which his managers work to build relationships at multiple events over several years. “It is not a heavy-handed approach,” Skinner explained. “Our team

Mistakes to Avoid

“Most marketing managers hand their leads over to their sales team, and they don’t know what happens to them after that. You have to make sure that whoever you are handing over your leads to are following up so that the lead doesn’t fall into a black hole.”

is encouraged that with the folks who they might make a connection with, if they see an article that they think they might be interested in, email it to them. If you do that once or twice through the year, then they will remember you the next time they see you at the convention, and you will have a stronger relationship."

– Jefferson Davis, President, Competitive Edge

"One thing that we are really conscious about is that we don't want to over-email people. Everyone is in email overload, so that is definitely something that we try to avoid."
– Natasha Martin, Marketing Manager, TCI

"The worst thing that anyone can do is say that they are going to follow up and then they don't. You don't want to mislead anybody and then disappoint them. If you do, then your credibility goes out the window."
– Stephen Skinner, Director of Marketing, Public Consulting Group

Persistence Pays Off

One of the biggest mistakes companies make in the follow-up game is to send one email, or make one phone call, and then call it quits.

Davis recommends that companies reach out to potential clients three to six times over the next six months, ideally through multiple media. "Don't just use the same method," he said. "Mix it up. Send a handwritten note, make a phone call, send an email, and deliver value in the follow-up as well."

Martin of TCI said she has found success using a combination of phone calls and personal emails. "Sometimes, if we make a phone call, it will make them more likely to respond to our email because it's at the top of their mind, so they will go back and look for that email and respond," she said. If the prospect is swamped, Martin said, TCI will try again in a week or so.

Mas, of Rosetta Stone, described a similar approach. "Every follow-up has to entail a phone call first, and if you can't reach the person, an email. And then after that, another phone call and another email," she said. "We can't rely solely on one or two touches, because we know everyone is busy."

Crissy Trus, the director of marketing and member communications for the 60,000-member National Council of Teachers of Mathematics, said that after her association's annual meeting in April, all new members get a series of specific emails and a postcard highlighting the perks of their new membership. "Email is definitely preferred. We're seeing great open rates, so I'm confident that it's working," she said. "I still do the postcards because it's a reminder in another format for those who don't check their email."

Deliver Added Value Via Tip Sheets, White Papers

Davis, of Competitive Edge, said it's important for companies to ask themselves: How can I make my follow-up not just about asking for time and money, but also adding value?

"That might be a newsletter, it might be a tip sheet, it might be an industry white paper, it might be a video, but build education into the follow-up," he said. "Deliver value."

Martin said people at TCI typically advertise their free 30-day trial in follow-up emails, and look for teachers to try out TCI materials in their classroom for free in exchange for giving feedback. "We would be trying to find those teachers while we are at the conference, but we also would include something like that in a follow-up email that we sent out after the conference," she said.

Mas said Rosetta Stone often offers potential clients the chance to speak with peers who can share success stories and talk about how they use the materials.

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See also:

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