

## EchoMail®

### IBM's Web-Based Lead Retrieval

Via the Internet, IBM's leads are accessible to sales 24 hours a day.

**H**ow do you capture large amounts of information and respond to thousands of show attendees' requests in a timely fashion?

The answer: Web-based lead retrieval. It's a tool IBM uses to get time-critical trade show leads to salespeople in real-time and to gather marketing and measurement information at shows. Through the use of an advanced e-mail system and a special leads-only Web site, IBM is forging the way to a streamlined paperless lead process.

#### Working the lead:

##### Collection, sorting, delivery

In a typical trade show setting, lead collection works like this: Attendees watch a demo or sales presentation. If they're interested, they request more information. Their card is swiped, or business cards are exchanged. This method leaves a wide margin for error: In-

formation is sketchy. Contact information may not be accurate, and often hot leads cool off considerably before someone actually contacts them post-show.

It starts with lead collection. In the exhibit, each sales staffer has an IBM WorkPad or Palm Pilot. "While an attendee is talking with a staffer, his card is swiped with a traditional card reader and captured in our lead management system," says Randall McComas, vice president of telecommunications, IBM. "During the conversation, the staffer can fill in critical information (on the WorkPad or Palm Pilot) on what this person needs." Besides asking for contact information, IBM asks the attendee what kind of follow-up he wants. (Attendees have the choice of meeting with an IBM rep, requesting detailed information or receiving a free week of consulting services.)

The information from the show site is sent to an EchoMail server via the Internet in real-time. The EchoMail server, which also serves

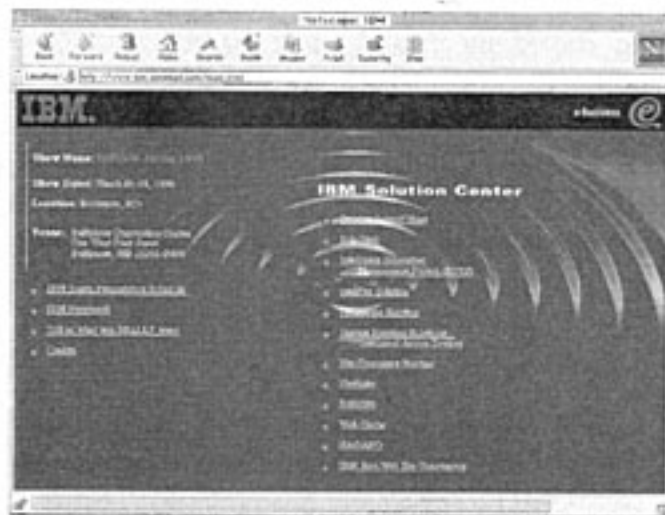
as IBM's leads-only Web site, sorts the leads and generates thank-you letters. "The system categorizes leads by what products or services are requested," says McComas.

Next, the lead is distributed and checked against who represents what ever product or service was requested. EchoMail flags qualified leads based on information gathered from the attendee. Leads also can be rated as, for example, hot, luke-warm or cold. EchoMail will also flag large account leads. "We always send out follow-up e-mails, but if the lead is hot we (also) have

a salesperson call," McComas says.

From there, the information is matched against internal IBM customer lists and is sent to a salesperson in the appropriate area. If an account executive is already calling on the account, the data is sent directly to that account executive via e-mail.

But that's not all. Through EchoMail, the lead is followed up in minutes. The EchoMail system will pull the current account executive's name and generate a letter to attendees thanking them for stopping by the exhibit. "The letters are a great way to introduce a potential client to an account executive and



IBM's leads Web site collects, sorts and delivers show leads to sales.

schedule an appointment," says McComas.

Follow-up e-mail messages are sent to all attendees the day they visit an IBM exhibit. These e-mails include hot-linked URL addresses on specific IBM products or services that an attendee expressed an interest in. If the attendee is a serious buyer, then a hard-copy thank-you letter is also sent. "By getting information off the EchoMail Web site, we are able to have instant follow-up with prospects," says McComas.

The EchoMail Web site also assists sales staff in retrieving lead information. "The reps can go to the site whenever they want, type in a password and pull up leads instantly," says McComas.

Besides storing massive amounts of trade

#### Wiring Your Leads

Here are the nuts and bolts needed to get your leads online.

**SOFTWARE:** A lead management software like EchoMail.

**HARDWARE:** Server, modem, card scanner, laptops or terminals to fill out forms.

**WEB SITE:** Is only required if leads need to be accessed 24 hours a day. Otherwise, leads can be sent to an e-mail address.

IBM lessens that margin for error and eliminates turnaround time by streamlining the gathering, sorting and delivery of contact information in the exhibit.

Besides storing massive amounts of trade

show data, IBM wanted a site that its business partners could access. Thus, the trade show EchoMail Web site is set up as an extranet. (With an extranet, a company opens up its internal company intranet to selected business partners.) Suppliers and other authorized users can connect to the Web site and view sensitive data. "Because we sell our business partners' products at shows, it made sense to include them as site users," McComas explains.

#### Learning from lead data

Besides gathering lead information, Web-based lead retrieval can also be used as a marketing and measurement tool. By tracking attendee interest, McComas knows what products are attracting attendees to the exhibit. "This information helps us refine our trade show program," says McComas. IBM is also studying why products do well at specific shows and why some products might not be conducive to a trade show environment.

Another big plus: The system gives McComas instant feedback that justifies attending the show and product selection. "I monitor how many leads were generated and check to see if all were followed up," says McComas. "I also know what the close rates are associated with those leads and by product." With this system, McComas is getting

feedback on the trade show investment that he didn't have before.

The system also allows McComas to follow a show's success from anywhere in the world. For example, while at a show in Australia, McComas tracked feedback at another show in South Africa. Every day he monitored the number of leads and what products/services attendees were most interested in. "If I receive negative reports on something, I can pull it out of the exhibit immediately," says McComas. "With this real-time information, the show can still be a success." In the future, IBM will add trends-analysis, which can measure buying trends to its measurement menu.

#### Getting your program wired

Web-based lead retrieval is easy to implement, and your company doesn't need to be a technological innovator to use it. To send your leads back to the office in real-time, you'll need a software management program. IBM uses General Interactive's EchoMail, which can be rented. Rental prices range from \$500 to \$10,000 depending on the size of a company, level of service and number of shows. "Right now IBM is scratching the surface of EchoMail," says V.A. Shiva, president, General Interactive Inc., a mes-

saging and marketing solutions firm. "The company has not used EchoMail's fax gateway or its ability to measure perceptions at the show."

To undertake Web-based lead retrieval at a show, you will need a server, modem, card scanner, laptops or terminals for filling out the lead forms. From there, the data gathered will need to be e-mailed back to the office.

A special lead-only Web site is also not necessary to use Web-based lead retrieval. In IBM's case, the company thought it was important to have a \$50,000 Web site to link with business partners and track the success of their products. But you can also send leads to an e-mail address or an existing Web address. "A simple Web page can become a virtual sales force for a company," says Shiva.

In the following year, IBM plans to have all divisions using Web-based lead retrieval at shows or other types of meetings. "Our goal was to get those leads and then do something with them," McComas states. "By tying the

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Web lead retrieval to the EchoMail program, we turned our system into a sales lead management tool." ■

By Kathleen McLaughlin, staff writer.