How to Leverage Lead Insights as a Salesperson

<u>Internal Reporting Dashboard</u>

This Power BI report will help you keep track of various data points throughout the event, including how your clients are performing.

Ther are two pages to the report: ‘Platform Logins’ and ‘Lead Activities’.

Platform Logins:

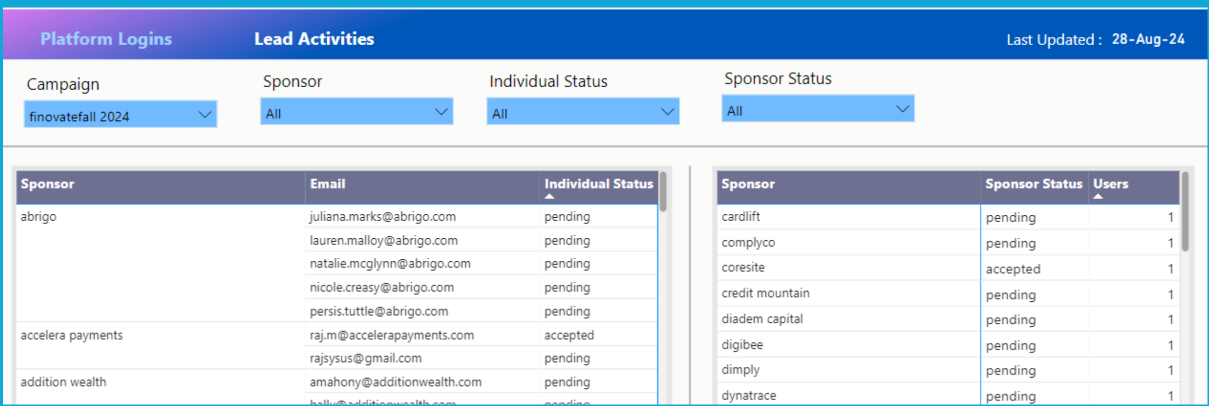
This is where you can track who from a company has been given access, and whether they have logged in or not.

Use the drop downs at the top to filter by your event. The table on the left will show you each individual from the company and whether they have logged into Lead Insights. The table on the right indicates at a company level whether *anyone* from that company has logged in.

‘Accepted’ = the user has been granted access and **<u>has</u>** registered.

‘Pending’ = the user has been granted access but **<u>has not</u>** registered.

‘Revoked’ = the user’s access has been removed; they can no longer access the account.



Sponsor	Email	Individual Status
abrigo	juliana.marks@abrigo.com	pending
	lauren.malloy@abrigo.com	pending
	natalie.mcglynn@abrigo.com	pending
	nicole.creasy@abrigo.com	pending
	persis.tuttle@abrigo.com	pending
accelera payments	raj.m@accelerapayments.com	accepted
	rajsysus@gmail.com	pending
addition wealth	amahony@additionwealth.com	pending

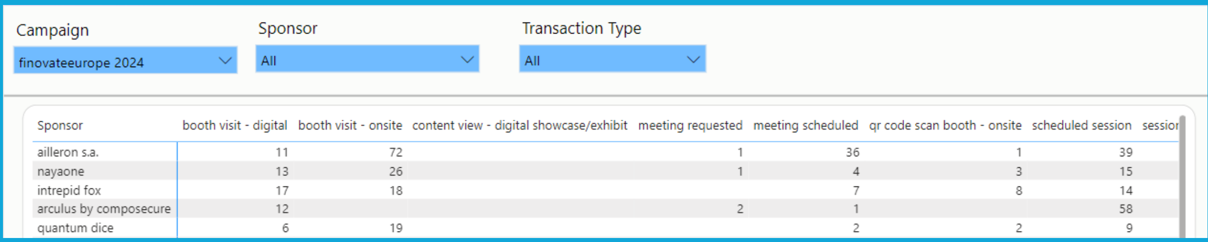
Sponsor	Sponsor Status	Users
cardlift	pending	1
complyco	pending	1
coresite	accepted	1
credit mountain	pending	1
diadem capital	pending	1
digibee	pending	1
dimply	pending	1
dynatrace	pending	1

If a user is listed on this report, then it means access has been sent to them already, and therefore they can access LI using the QR code here, or by simply navigating to www.leadinsights.com/login. If this is their first time using LI then they will be prompted to enter a bit of information, otherwise they can just log in using the password they set previously.

If they do not appear on the report then they have not been granted access yet. You can either tell them to ask their colleague to assign them access from their account, or you (the salesperson) can contact the LI team and ask them to provide access to an additional user.

Lead Activities:

The Lead Activities tab will allow you to track how your clients are performing. Use the drop downs at the top to filter the data. Once you have selected your event, you will see the table populate with your clients. Across the top you will see each of the Activity Types (the interactions generating leads), and how many leads each client generated. The final column will be their total unique leads.



Sponsor	booth visit - digital	booth visit - onsite	content view - digital showcase/exhibit	meeting requested	meeting scheduled	qr code scan booth - onsite	scheduled session	sessior
ailleron s.a.	11	72		1	36	1	39	
nayaone	13	26		1	4	3	15	
intrepid fox	17	18			7	8	14	
arculus by composecure	12			2	1		58	
quantum dice	6	19			2	2	9	

Impersonation

Impersonation is part of the back-end version of Lead Insights and allows you to view your client's reports exactly as they do. We expect that this tool will be most valuable to you after the event, when you have a bit more time to dig into each client individually, rather than onsite. We recommend using it during follow up calls with clients, so that you can go into those conversations prepared, especially in cases where the client might be less satisfied with their experience.

In order to leverage this to it's fullest potential, ensure that you are confident navigating the dashboard, so you can discuss the various features with your client if you need to. This video will help with that.

If you don't yet have access to Impersonation, please let one if the Lead Insights team know and we can set that up for you.

When you log in you will be able to see which families or brands you have access to. Check that this is correct. On the right-hand side there is a drop down where you can select a specific event or campaign to filter the clients. Alternatively, you can use the search bar at the top if you'd like to view specific clients.