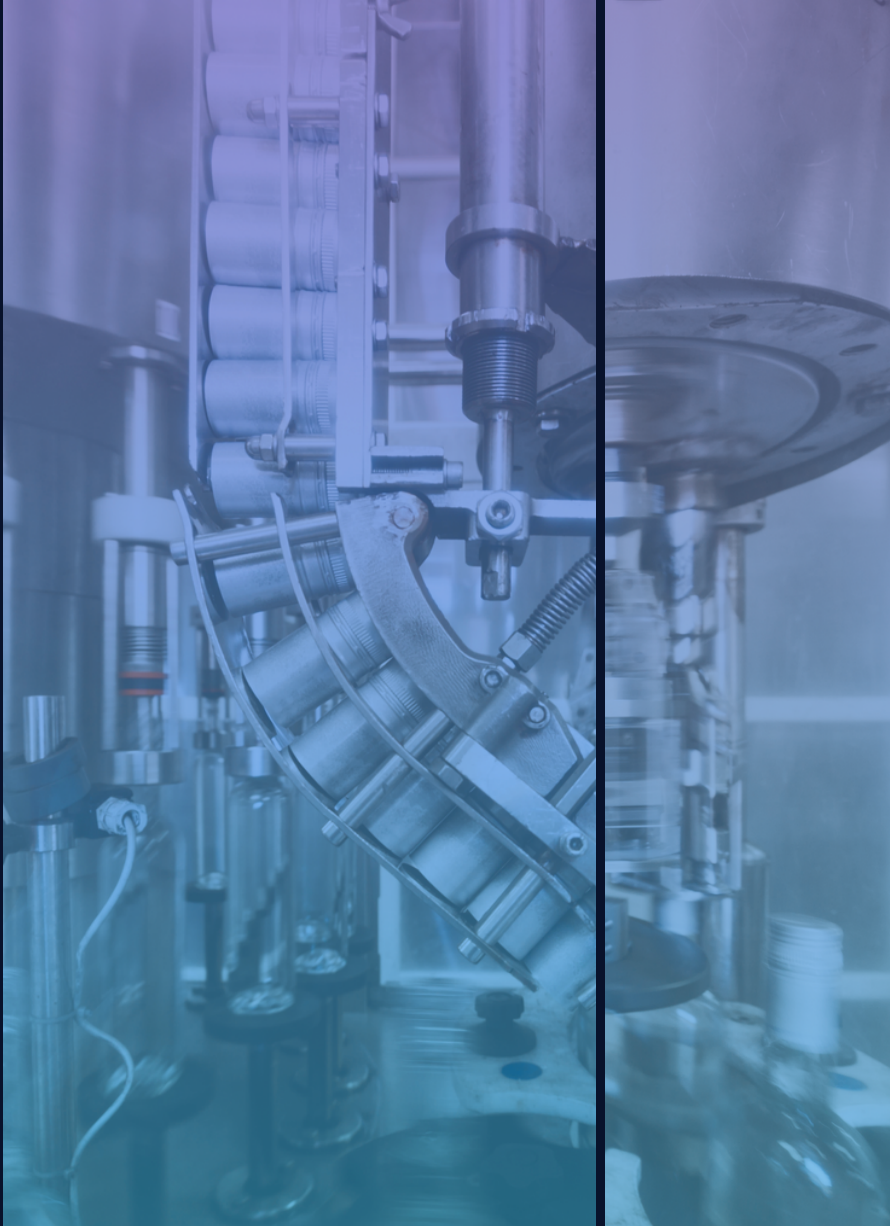




# Accessing and Managing Leads

with LeadWorks + MYS Exhibitor Dashboard



# PACK EXPO Connects Leads

Lead generation is one of the benefits of exhibiting at PACK EXPO Connects. We have automated lead capture, so you can focus on selling. Leads reports are available in your **exhibitor dashboard** and via PMMI Media Group's free, lead management platform, **LeadWorks**. As an exhibitor, your company is automatically enrolled in the LeadWorks platform.

## WHY WE OFFER TWO LEADS REPORTING PLATFORMS

While your exhibitor dashboard provides contact information of individuals who have generated a lead, LeadWorks offers more in-depth qualifying information. With LeadWorks, where information is available, you'll see the contact's industry, job duties, buying interest category or categories, and plans for plant expansion.

In addition, LeadWorks offers a view of multi-touch lead activity via a free tool called **Converge**. Converge combines activity across multiple campaigns, revealing your most engaged contacts and companies. An optional companion technology is a free website beacon called **Scout**. Scout is compliant with all privacy regulations and will enable you to track activity on your company's site by recognizing the identity of visitors from PACK EXPO Connects, or who have responded to your PMMI Media Group digital ad campaign. For suppliers who have Scout installed, website activity will be displayed in the Converge view in LeadWorks.



# How are event leads generated?

**Event leads are generated** by a registered attendee when he or she:

1

Clicks on your demo to watch it

---

2

Starts a live chat with one of your exhibitor personnel

---

3

Adds to their MyConnects planner or “favorites” anything related to your company:

- your virtual showroom itself
  - one of your demos
  - one of your collateral items
  - a virtual business card
- 

4

Requests a private meeting

---

5

Uses your unique Customer Invite link\* to register for PACK EXPO Connects

\* The Customer Invite Program, managed by Nvytes, offers customizable email templates, social media posts and other downloadable materials to make it easy to invite your customers to attend PACK EXPO Connects. Login to your Exhibitor Dashboard to access materials. See more details at [packexpoconnects.com/cip](https://packexpoconnects.com/cip).



# View your leads in real time

View your leads in real time in both the exhibitor dashboard and in your LeadWorks account. Here's a quick view of the information collected:

## ACCESSING AND MANAGING YOUR LEADS

INFORMATION INCLUDED	EXHIBITOR DASHBOARD	LEADWORKS
First and last name	✓	✓
Company name	✓	✓
Location <i>(if provided/available)</i>	✓	✓
Email address	✓	✓
Job title		✓
Lead source <i>(what action produced this lead—favorite a product, watch a demo, use a Customer Invite Code to register, etc.)</i>	✓	✓
Primary industry		✓
Job duties		✓
Buying interest categories		✓
Plant expansion		✓
Multi-touch leads information <i>(if applicable)</i>		✓
Activity on your Website <i>(if Scout is installed)</i>		✓

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# Leads in the Exhibitor Dashboard

Exhibitors can generate qualified leads and monitor them through the exhibitor portal. Attendee contact information (name, email, company/title, and location) will be shared with any exhibitors they add to their MyConnects Planner. Exhibitors can access this leads list at any time through their exhibitor portal, see how the lead was obtained, and reach out to them to continue networking.

## ACCESSING LEADS IN MYS EXHIBITOR DASHBOARD

### Login

Login to your exhibitor dashboard with your assigned credentials.

A screenshot of the "Exhibitor Sign-In" form. The form has a blue header with the text "Exhibitor Sign-In". Below the header, there are three input fields: "Exhibitor ID:", "Password:", and "Your Name:". To the right of each label is a white input box with a blue border. At the bottom right of the form is a "Login" button. Below the button is a link that says "Forgot ID or password?".

Exhibitor Sign-In	
Exhibitor ID:	<input type="text"/>
Password:	<input type="password"/>
Your Name:	<input type="text"/>
<input type="button" value="Login"/>	
<a href="#">Forgot ID or password?</a>	



# Accessing Leads

## in the Exhibitor Dashboard

### Advantage Bedrock Lc

#### Activity

What is this?

31

Views

18

Clicks

8

Leads

HOW DO I RANK?

1

Click the “Leads” option in the Activity section at the top of the portal home page.

Date	Contact	Company/Title	Location	Sales Person	Rank
12/9/19	<b>Allen Booker - NEW</b> Martinez@Help.com	Rose Obtain	no location	Sales Person	Unranked ▾

2

On this page you will see a list of leads including: name, email, company/title, location (optional), where the lead came from and the date they added your company to their planner.



# Accessing Leads

## in the Exhibitor Dashboard

**Rank**

Unranked ▾

A  
B  
C  
✓ Unranked  
Ignore

3

Use the “Rank” column to rank your leads by giving them a letter grade based on importance, or you can select the “Ignore” option. All leads will default to “Unranked” until you manually update them.

4


Use the “Sales Person” column to assign a sales person from your company to a lead. You can export this information within your leads list for internal reference.

**Sales Person**

John Smith|

5

Use the “Notes” icon to enter additional information about the lead or to track conversation details.

Date	Contact	Company/Title	Location	Sales Person	Rank
12/9/19	<b>Allen Booker - NEW</b> Martinez@Help.com	Rose Obtain	no location	John Smith	Unranked ▾
<div>  <div>Bring order forms </div> <div>save</div> </div>					



# Accessing Leads

## in the Exhibitor Dashboard

6

Filter your leads list by rank, status, or sales person using the options at the top of the page.

FILTER

Show by Rank:

Show All ▾

New Leads Only? ☐

Show by Sales Person:

Show All ▾

7

Use the search function to search your leads list by contact, company, or location.

SEARCH BY CONTACT, COMPANY OR LOCATION

Search:

Type To Search

8

You can export your full leads list to Excel by selecting the “Save data to an Excel spreadsheet” link.

### Advantage Bedrock Lc

#### Leads for ExpoMYS1 Sample Show

14 total users have added you to their "MyPlanner"; 8 of them have decided to share their contact information.

[Save data to an Excel spreadsheet](#)



# Leads in LeadWorks

Exhibitors can monitor qualified leads through LeadWorks. If a PMMI Media Group reader or PACK EXPO Connects attendee agrees to share their information, their contact information (name, email, company/title, location, etc.) will be shared with any exhibitor whose content they engage with. Exhibitors can access this leads list at any time through LeadWorks and Converge and reach out to them to continue networking.

## ACCESSING YOUR LEADS IN LEADWORKS

### Login

To login, go to <https://cloud.pmmimediagroup.com/site/login> and use your existing credentials. Your user name is your email address. There is also a forgot password link below the Login button for your convenience.

A screenshot of the LeadWorks login page. At the top, there is a navigation bar with "Home / Login". Below this is the "Login" heading, followed by the instruction "Please fill out the following form with your login credentials:". A note states "Fields with \* are required.". There are two input fields: "Username \*" and "Password \*", both with a small "PMMI" logo on the right. Below the password field is a checkbox labeled "Remember me next time". A blue "Login" button is centered below the form. At the bottom, there is a link for "Forgot Password". The footer contains copyright information: "Copyright © 2020 PMMI Media Group. All rights reserved." and a support link: "Problems or questions? Contact LeadWorks support at [help@pmmimediagroup.com](mailto:help@pmmimediagroup.com)".

# Event & Digital Campaign Leads

Your PACK EXPO Connects leads, as well as results from digital campaigns, (such as an ad in the Exhibitor Preview newsletter), will appear in LeadWorks.

1

After logging in, you will be directed to the **Campaign Overview** page. To filter campaigns for PACK EXPO, check "PACKEXPO" and unselect all other Brands. "Recent Campaigns" will be preselected.

The screenshot shows the 'Progenia Corp.' page in LeadWorks. At the top, there's a breadcrumb trail: Home / Advertisers / Progenia Corp. Below this, the 'Recent Campaigns' radio button is selected (callout 1). To the right, a list of brands is shown with checkboxes: PW, AW, HCF, OEM, OPX, DW, LatAm, PFW, PMG, LLS, SC, **PACKEXPO** (checked, callout 2), and Mundo. On the far right, 'Sales Reps' are listed: Wendy Sawtell and Ron Levinson. Below the brand selection, a table of campaigns is displayed with columns: Leads (callout a), Name (callout b), Brand (callout c), Campaign Date (callout d), and Actions (callout e). The first row shows 45 leads for the campaign 'PACK EXPO Connects Exhibitor Preview Newsletter Cartoning & Multipacking' under the 'PACKEXPO' brand, dated '11-06-2020'. The Actions column contains icons for download (callout e) and view (callout f).

2

From this view, you can quickly see the number of leads for the campaign (a), name of the campaign (b), brand associated with the campaign (c), and campaign start date (d). You can also download excel docs (e) and view campaign results via impactful graphs and charts (f).



# Event & Digital Campaign Leads

# 3

Clicking on the “Name” of the campaign (b) will bring you to the **Lead Data** page where you can view all the leads you have for that campaign.

b

Leads	Name	B
45	PACK EXPO Connects Exhibitor Preview Newsletter Cartonng & Multipacking	P

# 4

Use the filters at the top of the **Lead Data** page to change the date range and filter countries and classifications.

Home / Progenia Corp. / Lead Data /

## PACK EXPO Connects Exhibitor Preview Newsletter Cartonng & Multipacking

Filter

From 2019-09-18 To 2020-09-19

Countries
☒ USA (0)
☒ Canada (0)
☒ International (701 / 100%)
☒ None (0)

Classification
☒ All leads (684 / 97.6%)
☐ Junk (0)
☐ Summit (0)
☐ Internal (17)
☐ Competitors (0)

☐ Include Repeats

Refresh

[Manage Field Display/Order](#)

Displaying 1-100 of 684 results.

Export to: Excel(\*.xls)

←

1

2

3

4

5

6



7

→

Date	Email	First Name	Last Name	Title	Company	Address 1	City
11/06/2020 03:51:38 PM	jjohnson@aurobindopharma.com	Jill	Johnson	Manager, Pharmaceutical Preparations	Aurobindo Pharma	1234 Anystreet	Dayton
11/06/2020 03:51:38 PM	johlsen@heinzkraft.com	Jeff	Ohlsen	Maintenance Lead	Heinz Kraft	2684 Dibrell Trail Dr.	Collierville
11/06/2020 03:51:38 PM	skehoe@kussfiltration.com	Suzanne	Kehoe	Packaging Dev. Manager	Kuss Filtration	1 Ppg PL Ste 3200	Pittsburgh
11/06/2020 03:51:38 PM	rbrickey@monsanto.com	Robin	Brickey	Process Engineer	Monsanto	1657 Spring Dr	Felda
11/06/2020 03:51:38 PM	sgarrison@bwcontrols.com	Stan	Garrison	Engineering Manager	B&W Control Systems	60 West Parkway	Stockton
11/06/2020 03:51:38 PM	jsayat@randwater.com	Jacque	Sayat	Process Engineering	Rand Water	6581 Rand Rd	Mesa

07 LEADWORKS | EVENT & DIGITAL CAMPAIGN LEADS

# Event & Digital Campaign Leads

Displaying			
	Brand	Campaign Date	Action
			
Preview Newsletter Cartoning	PACKEXPO	11-06-2020	


# 5

Go back to the **Campaign Overview** page and click on the “Campaign Date” (d) to view a preview of the creative that you ran on that date.

**PACKAGING**  
WORLD.

Video Spotlight


**Junior's Cheesecake Drives Greater Efficiency with Delkor Equipment Line**



See how Junior's Cheesecake boosted their operating efficiency with the Delkor Trayfecta S Series tray and carton erector! Junior's produces two different package formats at one time on their dual-head Delkor former, feeding both of the company's hand-pack stations! Meet Delkor at one of three upcoming shows this month.

WATCH VIDEO

Brought to you by:









Above is an example of the type of creative you might see by clicking the “Campaign Date” (d).

# Event & Digital Campaign Leads

6

From the **Campaign Overview** page, click on the pie chart icon (f) to go to the **Analysis** page which allows you to aggregate lead data results into charts for a wide range of demographics (more details below).

Displaying 1-100 of 117 results.

	Brand	Campaign Date	
Newsletter Cartoning	PACKEXPO	11-06-2020	     

7

From the **Analysis** page, you can view lead data as charts by demographic type (title, etc.) or by ad (1). You can also filter the data by date range, country, and classification and change the chart type (2). In addition, you can print or download the chart as a jpg, png, pdf or svg by clicking on the hamburger menu (3).

Home / Progenia Corp. / PACK EXPO Connects Exhibitor Preview Newsletter Cartoning & Multipacking / Analysis

Classification	Title	Company	Country	Industry	Job Duty	Primary Industry	Robotics Need
Washdown Environment	Validated Company Type	Plant Expansion	Robotics Interest	Source	Internal Source		

Filter

From: 2019-09-18 To: 2020-09-19

Countries: ☒ USA (40 / 88.9%) ☒ Canada (5 / 11.1%) ☒ International (0) ☒ None (0)

Classification: ☒ End Users (45 / 100%)  
☐ Junk (0) ☐ Summit (0) ☐ Internal (0) ☐ Competitors (0)

☐ Include Repeats

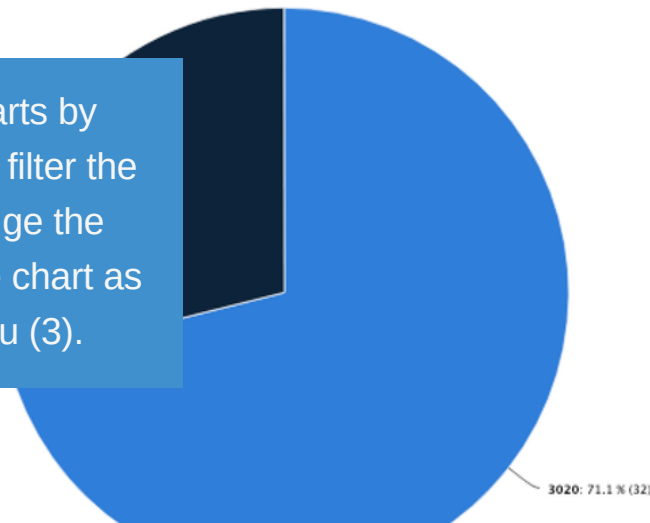
Chart Type: pie

Refresh

1

2

3



# Digital Print Reporting

*Game Plan* for PACK EXPO Connects offers a way for exhibitors to promote their products and demos with a photo, description and shortened URL to drive prospects to their showroom. *Second Look* is a post-event resource distributed to attendees and other qualified professionals, in which exhibitors can promote their PACK EXPO Connects showroom products after the live event ends. *Second Look* content is personalized by recipient, customized to match expressed interest in a particular product category.

1

From the **Campaign Overview** page, click on “Game Plan & Second Look” to go to the **Digital Print Campaigns** page where you can view data from your print campaigns.

Sales Reps:  
Wendy Sawtell  
Ron Levinson

☒ PW ☒ AW ☒ HCP ☒ OEM ☒ OPX ☒ DW ☒ LatAm ☒ PFW ☐ PMG  
☐ LLS ☐ SC ☒ PACKEXPO ☐ Mundo

Displaying 1-100 of 117 results.

	Brand	Campaign Date	Actions
New Newsletter Cartoning	PACKEXPO	11-06-2020	
	PACKEXPO	11-03-2020	
Book	PFW	11-01-2020	

- Media Planner >
- Converge (beta) >
- Update Advertiser >
- Manage Advertiser >
- View Banner Ads >
- Create Contract >
- Marketing Program Analysis >
- Game Plan & Second Look >**
- Audience Network >
- Company Lookup >
- Salesforce >



# Digital Print Reporting

# 2

From the **Digital Print Campaigns** page, you can see how many prospects received your publication (1), the publication that your print campaign ran in (2), the category of your print campaign (3), and the publication date (4). Click on the publication name in the “Description” column (2) to go to the **Audience Profile Report** page where you can view metrics for the campaign by category.

[Home](#) / [Advertisers](#) / [Progenia Corp.](#) / Digital Print Campaigns

## Digital Print Campaigns

Recipients	Description	Category	Published
2,488	<a href="#">Second Look PELV 2019</a>	Retail-ready packaging	October 2019
3,161	<a href="#">Second Look PELV 2019</a>	Case erect/seal	October 2019
3,361	<a href="#">Second Look PELV 2019</a>	Cartoning	October 2019
3,570	<a href="#">Second Look PELV 2019</a>	Case/tray packing	October 2019
1,811	<a href="#">Game Plan PELV 2019</a>	Retail-ready packaging	September 2019
2,639	<a href="#">Game Plan PELV 2019</a>	Cartoning	September 2019
2,816	<a href="#">Game Plan PELV 2019</a>	Case erect/seal	September 2019

## Multi-Touch Leads in LeadWorks using Converge

Converge, which resides within LeadWorks, is a free marketing intelligence tool from PMMI Media Group that allows advertisers to see the "convergence" of multiple points of engagement by a single person or by several people at a single company. Advertisers can view multi-touch lead activity from digital media campaigns and offline activity, occurring during the past 12 months, when a contact's response reaches 3 or more interactions. This information will appear within the LeadWorks platform.

# 1

From the **Campaign Overview** page, click on "Converge (beta)" to view multi-touch lead data by company. With the Scout add-on you can also track what web pages your leads viewed on your site after the initial engagement.

The screenshot shows the LeadWorks Campaign Overview interface. At the top, there are checkboxes for various sales reps: PW, AW, HCP, OEM, OPX, DW, LatAm, PFW, PMG, LLS, SC, PACKEXPO, and Mundo. A green arrow points to the 'Converge (beta)' option in the right-hand menu, which is also highlighted with a green box. Below the menu, a table displays campaign data with columns for Brand, Campaign Date, and Actions. The table shows two rows of data for PACKEXPO, with campaign dates 11-06-2020 and 11-03-2020. The Actions column contains icons for viewing, editing, and deleting records.

Brand	Campaign Date	Actions
PACKEXPO	11-06-2020	[View] [Edit] [Delete]
PACKEXPO	11-03-2020	[View] [Edit] [Delete]

# Multi-Touch Leads

2

From the “Multi-Touch Leads” tab in Converge, you’ll see company name and location (a), how many unique people interacted with your ad campaigns (b), total number of times they engaged with your ad campaigns (c), the most recent date they showed interest (d) and Facebook activity from campaigns purchased through PMMI Media Group (f). With the Scout add-on, you’ll also see if there has been any recent activity on your website (e).

The screenshot shows a table with columns: Company, Contact, # Touch Events, and Most Recent. Callouts point to specific elements: (a) points to the Company column header, (b) points to the Contact column header, (c) points to the # Touch Events column header, (d) points to the Most Recent column header, (e) points to the 'Recent Scout activity' icon, and (f) points to the 'Recent Facebook activity' icon.

Company	Contact	# Touch Events	Most Recent
Aurobindo Pharma Dayton, NJ	Twenty-one people from different locations	54	Sep 15, 2020
Heinz Kraft Foods Co. Collierville, TN	Three people from different locations	16	Aug 4, 2020
Monsanto	Nine people from this location	14	Sep 15,

The screenshot shows the same report with a callout 'Filters' pointing to the radio buttons for 'All Activity', 'End Users', and 'Suppliers'.

Company	Contact

3

Using the radio button at the top of the “Multi-Touch Leads tab” in Converge, you can filter the companies by All Activity, End Users and Suppliers.

# Multi-Touch Leads

4

From the “Multi-Touch Leads tab” in Converge, if you click on the data in the “Contact” column (b), you will see a modal display with detailed lead information.

5

At the top of the modal, you’ll see name, job title, company address, phone number, and email address for your leads. On the bottom part of the screen, you’ll see details pertaining to your leads’ engagement activity.

Multi-touch Lead Report - Progenia Corp.

**Heinz Kraft Foods**

**Jeff Ohlsen** Maintenance Lead • 2684 Dibrell Trail Dr., Collierville, TN 86524 • Phone: 1-901-853-6514 • [johlsen@heinzkraft.com](mailto:johlsen@heinzkraft.com)  
**Suzanne Kehoe** Packaging Dev. Manager • 2684 Dibrell Trail Dr., Collierville, TN 86524 • Phone: 1-901-853-6514 • [skehoe@heinzkraft.com](mailto:skehoe@heinzkraft.com)  
**Rob Simmons** Corporate Eng. Manager • 1 Ppg PL Ste 3200, Pittsburgh, PA 15222 • Phone: 1-412-456-6128 • [rsimmons@heinzkraft.com](mailto:rsimmons@heinzkraft.com)

Date	Action	Person	Vehicle	Item
Apr 15, 2020	Booth scan	<b>Richard Thomas</b>	<a href="#">PACK EXPO 2020</a>	Progenia booth
Mar 17, 2020	Add to my show plan	<b>Suzanne Kehoe</b>	<a href="#">PACK EXPO 2020</a>	Progenia booth
Feb 19, 2020	E-mail Click	<b>Suzanne Kehoe</b>	<a href="#">Spotlight on PACK EXPO</a>	Low-profile cartoning video
Jan 24, 2020	Pageview	<b>Rob Simmons</b>	<a href="#">Progenia website</a>	Model 5900 video

**Sunset Foods**  
 Tuscaloosa, AL  
**Robin Brickey**  
 Packaging Engineer



# Multi-Touch Leads

6

If you have the Scout add-on enabled, you can click on the “Multiple Page Views” link in the “Item” column, and see what specific web pages were visited by your lead. You can click on these links and they will take you to the page on your site that was visited.

Progenia Corp.

Multiple Page Views

[Home Page](#)[Flexible Packaging | Progenia Corp.](#)[Rigid Packaging | Progenia Corp.](#)[Tray Shrink Spot Pak | Progenia Corp.](#)[Case Pack | Progenia Corp.](#)[Retail Ready Packaging | Progenia Corp.](#)

7

The “Your Website Activity (Scout)” tab in Converge, functions the same as the “Multi-Touch Leads” tab except that, using the Scout beacon, it is reporting any (recognized) visits to your website, not just multi-touch leads.

Multi-Touch Leads

Your Website Activity (Scout)

## Progenia Corp. website activity via Scout (Beta)

☒ All Activity
 ☐ End Users
 ☐ Suppliers

Company	Contact	# Touch Events	Most Recent
Aurobindo Pharma Dayton, NJ	1 person	1	Sep 18, 2020
Heinz Kraft Foods Co. Collierville, TN	1 person	1	Sep 18, 2020
Monsanto Felda, FL	1 person	1	Sep 18, 2020
Kuss Filtration Bloomer, WI	1 person	1	Sep 18, 2020
B&W Control Systems... Stockton, CA	1 person	1	Sep 18, 2020
Arcelor Mittal St. Paul, MN	Jill Johnson Pharmaceutical Preparations	2	Sep 17, 2020
Rand Water Mesa, AZ	1 person	1	Sep 17, 2020
Sunset Foods Tuscaloosa, AL	1 person	1	Sep 17, 2020



Lead generation is one of the most valuable benefits of PACK EXPO Connects. Whether you access reports via the PACK EXPO Connects exhibitor dashboard or tap into LeadWorks for more in-depth insights, we are here to help you make the most of your exhibiting investment. Please contact us for more information:

#### **MYS EXHIBITOR DASHBOARD**

[expo@pmmi.org](mailto:expo@pmmi.org)

#### **LEADWORKS**

[ClientSuccess@pmmimediagroup.com](mailto:ClientSuccess@pmmimediagroup.com)

#### **PHONE**

571-612-3200

ACCESSING AND MANAGING YOUR LEADS

# Contact Us

