

How to get the most value out of Lead Insights

Below is a summary how to access Lead Insights and an example of how to get the most value out of the platform.

Access Platform Early

When you receive access to the platform, familiarise yourself with the features. If you would like a 1-2-1 demo of the platform, please request one through your account manager or using the Business Enquiry section within the platform.

If your colleagues require access, you can request this through your account manager.

Customise Your Dashboard

Customize how you can view your leads and the data export by adding, removing, or repositioning columns at the start of your campaign in the Leads section. The platform will remember the configuration each time you log in, enabling simple integration with your existing systems.

Set Up Your Ideal Customer Profile

Before the campaign starts, set up your ICP, or Ideal Customer Profile, in the platform by selecting the criteria that are important to you. This ensures that leads who fit these criteria are automatically grouped together throughout the campaign.

Access Pre-Event Leads

If you are an event sponsor, you will start generating leads through app engagement before an event. Filter and prioritise them in the Leads section to arrange meetings with them before you get onsite.

Access Leads in Real-Time

Access all your leads in one place, updated in near real-time throughout the duration of your event or digital campaign. That means that if you sponsor a session for example, you will receive the details of all the attendees from that session within an hour of it finishing.

Target Leads for Meetings Onsite at Events

Quickly segment and prioritise leads with sophisticated filtering during the event. Understand how they have engaged with you at the event so you can quickly filter and target them for meetings whilst onsite.

Track Campaign Performance

Quickly visualise how your event or campaign is performing and whether you are attracting the right audience in the Insights section to ensure that you can make changes during the event or digital campaign to maximise success.

Prioritise and Target your Hottest Leads

Use filters or segments to group similar leads together and prioritise them based on how they have engaged with you to pinpoint your hottest prospects.

Engagement scoring in the Leads section allows you to rank leads based on how engaged they are with you – leads who interacted multiple times will be scored higher than those who just engaged once. Pay particular attention to leads who interacted across multiple products.

Customise Your Follow Up Messaging

Understand how your leads have engaged with you, who they are and what their needs are through rich engagement and company intelligence data. This enables you to tailor your follow up messaging more effectively and turn leads into customers.

Further target relevant leads with a webinar or content marketing on a topic they are interested in. Select a segment and send a business enquiry directly from the platform to discuss your options with a sales representative.

Measure ROI

Quickly visualise how your campaign performed and whether you attracted the right audience to analyse the success of different products and measure ROI.

Plan Future Campaigns

Use Lead Insights to compare data from previous campaigns and identify the best ways to maximise lead gen and reach the right audience. Your account manager will work with you to build a package that will help you reach your goals.

