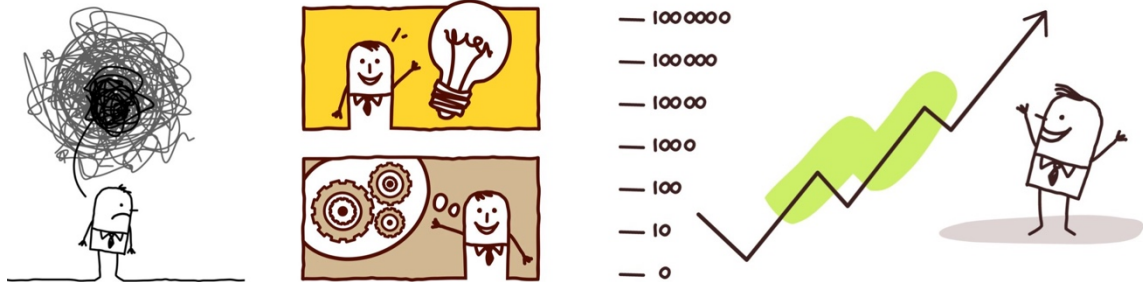




Ruthless Qualification for Trade Shows

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**Are you getting the desired results?
Consider trying something a little different?**

“With Ruthless Qualification for Trade Shows, I will share with you and your team how to qualify opportunities to get the most from your trade shows.” -Steve Ghareeb

As a business, a "for-profit" business, generating real revenue is the primary purpose. It is required to keep the business going, to pay employees, to develop new offerings, solutions and even technology. This only works with a revenue stream.



If your business has a "sugar daddy;" this conversation is for naught.

Let's approach this pragmatically with new revenue and ROI in mind. And let's approach this with our eyes wide open, with candor, intelligence, awareness and pragmatism. And let's have some fun growing this revenue stream. Pursuing un-qualified opportunities is not helpful to anyone or any organization.

Developing this skill of qualifying opportunities is valuable in life for both individuals, and for organizations. It is extremely powerful.

Do you know who your best customer prospects and opportunities are?

Notes: I will include some italicized personal comments. Some of these items may be better addressed with a personal "face-to-face" discussion.

*"Ruthless Qualification" – 'rōOTHləs kwälə fə ' kāSH(ə)n/
adjective-noun*

- 1. "unwavering clarity in qualification, (not wishy-washy, not violent or vicious), extreme clarity, often brought about by a disciplined process."*



Why start with Trade Shows?



Yes, why start with trade shows?

- ✓ If people are coming to the show/conference, they are probably coming to address a specific problem or need.
- ✓ We get to ask real questions, in-person, that one could never ask over the telephone or by email, especially prior to meeting someone in person.
- ✓ We get to determine who really has a need for our business offering!
- ✓ In summary, the best reason is that we get to meet all these people, face-to-face, having real conversations in person, and finding truly qualified opportunities.

Or at Event, face to face:
Qualify in 2-5 minutes





6 Tenets of Ruthless Qualification

Following are the 6 primary tenets of “Ruthless Qualification.”



Do you have an organizationally "agreed on" criteria for qualified opportunities? I hope so. If so, or if not, this is a place to start.



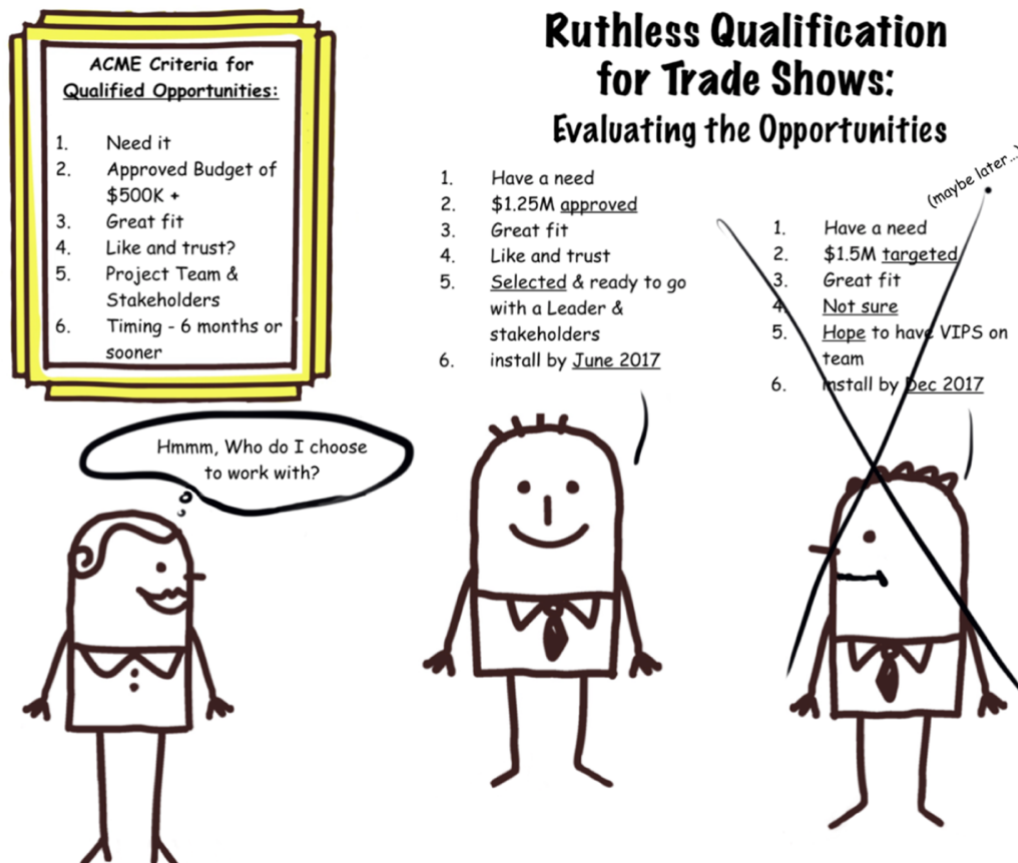
Criteria for Qualified Opportunities (specifically for your organization)

What should the criteria for a “qualified opportunity” be for your organization? It will be a little different for each organization, but typically would start with some elements of the 6 Tenets of Ruthless Qualification for Trade Shows.

Performing the qualification well (“ruthlessly”) and with a solid criteria and process will help keep your “Do-to-Say ratio” strong. This is how things get done, organizations move ahead and careers advance. Being soft (lackadaisical or unfocused approach) is costly to you and your organization. A lot of time and money (and opportunity cost) will needlessly be lost.

Trying to explain what happened to stakeholders later is ugly.

Are you getting real benefits from your trade shows?



Developing a reputation for being “ruthless in qualification” tells the world you choose to deal in the reality of “what is” and “what is likely to be.” It does not mean you are not a nice and a good person. It is typically a pretty good reputation to have in most aspects of life.



Let's start here.

1. Need- Do they need it?

This comes down to the value and clarity of our organization's **value proposition** to the marketplace. A very specific value offering and value proposition is easier for the marketplace to realize and understand.

Does their firm have a quantifiable and significant need? Do they know it?

Can we help them figure this out and communicate this in a way that they see it for themselves? If the prospective opportunity customer does not see it, then they will never move forward with your firm's offering.

2. Money- Do they have money?

Be very clear here. The question to be answered at this point in time (today and now) is basically "yes" or "no." **Money "soon" still a "no money today."** It is worth watching but not worth planning for. Be selective and smart here.

Does their firm have a quantifiable and significant need? Do they know it?

Can we help them figure this out and communicate this in a way that they see it for themselves? If the prospective opportunity customer does not see it, then they will never move forward with your firm's offering.

Do they have money for this project/problem/offering? Are they willing to pay for it? Can they pay for it? Basically, is there a willingness to exchange money for a solution to their problem or need?

3. Product Fit- Does our offering fit their need?

As an optimistic business owner and sales person, will often fall into the trap of "of course, it is a good fit for them."

The positive attitude is great to see, yet the impact of business planning based on false expectations is dangerous. **The product offering fit needs to be right on many different levels.** The market and prospects will rarely tell you if your fit is not quite right. You have to be candid ("ruthless") with yourself and your organization on a true product fit.

Sometimes we have to help the potential customer determine the "real" fit. We don't need opportunities that never seem to close or bad references. If it is not a good fit, let's be truthful with ourselves, the prospect opportunity team and their organization. No need to waste anyone's time. There are plenty of good opportunities out there.

If the fit is poor too often, we probably should be doing something else.

Likewise, pay attention to situations when there is value there, yet the market or prospective customer is concerned about your firm's ability to **execute and deliver** in a timely way. Successful businesses run on budgets, project plans and schedules.



A great offering that crashes a budget, project plan or schedule can spell the end of a career for the champion or a key stakeholder. It can also put smaller (and possibly a larger) firms out of business.

Making your solution the safe, great decision for your prospective customer makes it easy for them to choose your offering, convince their management it is the right solution, and helps you generate a lot of revenue for your firm. This how a firm **scales growth and generates recurring revenue** from the customer base.

4. People Fit- Do we like and trust each other? Do we want to work together to solve the problem? Are the issues of integrity and personalities aligned?

Ultimately, technical offerings, problems and implementations are only as good as the people and their relationship when implementing the solution. Poor systems can be made to work and perfect solutions can be made to fail, all depending on the intention and relationships of the people (all the people involved in implementing the offering.)

Don't overlook the "people fit" issue. It is very important for complex solutions. Many individuals do this but it is not talked about in the organization. That would be acceptable if the corporate criteria were consistent when unspoken. I doubt that it is. Contact us if you would like to discuss this further.

5. Timing- Do they have a committed time frame; does it meet our priorities and needs?

A funded project will almost always have a time frame and project implementation schedule. If it doesn't, beware. Funding can always be re-allocated. Unscheduled projects are vulnerable to losing their funding and being pushed off indefinitely. Be **"ruthlessly" smart** on this one.

Consider the sales cycle and the implementation cycle for your offering. Use "timing" as a barometer to prioritize opportunities and evaluate the project's significance in their organization.

6. Sustainable Need and Business Model- Does this apply to your business? How long will the "need" be there?

Make sure their business model and the specific opportunity will be around for a while. An example of projects that are not sustainable are all the Y2K projects that were time-boxed; to be completed by Dec. 31, 1999. After Dec. 31, 1999, all the project opportunities expired.



Recap: Criteria for Qualified Opportunities - for your Organization:

Make sure everyone in your organization is on the same page with the same understanding of your “qualification criteria.” Your qualification criterion is important, especially at trade shows where team members that typically do not talk to the market, prospects and customers will be talking to the market, prospects and customers, representing your company and offering. Make sure everyone is on the same page, and singing the same tune.

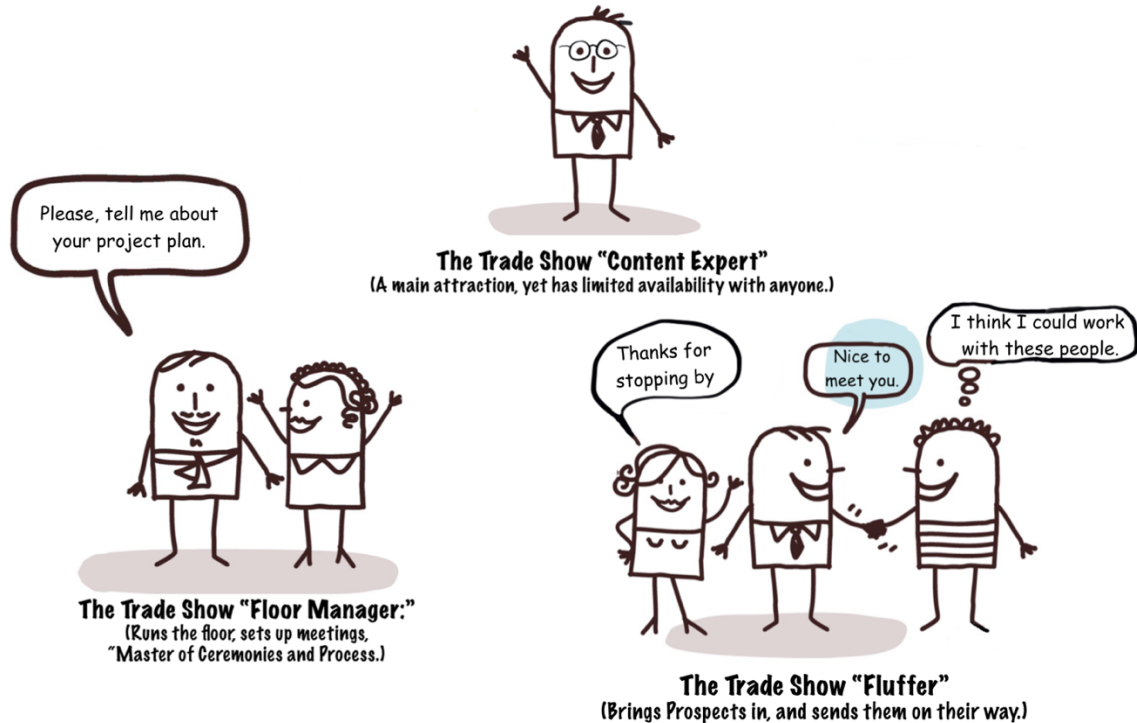
With the qualification criteria finalized and trade show team buy-in; your trade show team can now prioritize where they should be spending their time and focusing on closing “close-able” and truly qualified opportunities.



The Roles for Ruthless Qualification for Trade Shows

Here are three suggested roles. If they don't fit your business, choose your own; just make sure you have created roles with clearly identified responsibilities, plus a process for the event and for each of the individuals and roles.

Three Trade Show Roles

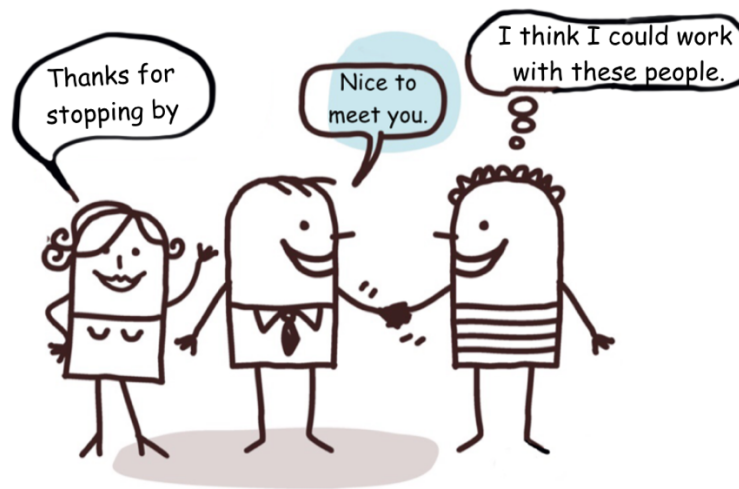


Prepare and rehearse roles prior to the event. Once the event starts and team members get busy; people tend to revert to their old way of doing things. Rehearsing make everything just work a little bit better, and so much smoother.



The 3 Trade Show Roles:

The Trade Show "Fluffer"



The Trade Show "Fluffer" (Brings prospects in, then sends them on their way)

- ✓ Draws the crowd in
- ✓ Is the first line of screening/qualification
- ✓ Sends prospects off in the nicest way if not a truly qualified opportunity
- ✓ This person will also collect the prospect's information for future communication



The Trade Show Floor Manager



The Trade Show "Floor Manager:"
(Runs the floor, sets up meetings,
"Master of Ceremonies and Process.")

- ✓ Is the 2nd line of screening.
- ✓ Typically, will set up calls and meetings with qualified opportunities (is the master scheduler of all follow-up meetings).
- ✓ Will get into details of the application, problem, project and project plan with the prospect.



The Trade Show Subject Matter Expert



The Trade Show "Subject Matter Expert" (A main attraction, yet has limited availability with anyone)

- ✓ This individual is in some way a "main attraction" to the show or event and "the" main attraction as our "Subject Matter Expert."
- ✓ Access to this person is intentionally limited. The person in this role typically will have about 5-8 interactions per day and are limited to 20-30 minutes each.
- ✓ They may need to be taught how not to "give the keys to the kingdom" away, especially to organizations thinking of building their own solution.
- ✓ They will also not give competitors a full profile of our offering and plans
- ✓ It is a worthwhile investment to practice some "scripts of intrigue" with the person in this role.

Roles Recap:

These are three suggested roles. This is a starting point. Choose and determine what roles fit your business. Make sure the roles are clearly defined, rehearsed and practiced; along with the process and responsibilities for each role.

Try to make sure that every interaction with prospects is positive, clear and complete; moving your qualification process, and their project forward.

Let's take the 6 primary qualification criteria and the 3 Trade Show Roles to create a **process** for shows and events.



The Ruthless Qualification for Trade Shows Process:

The process, and the practice and refinement of the process is critical to your success. Pre-planning and post-show follow-up are required.

Note: Please forgive me here. I am so anal about this pre-show step. At a trade show/event, I intend to accomplish 2-4 months of revenue generating activity in a few short days with extensive face-to-face interactions. Let's make sure the opportunity is not wasted.

Pre-show planning:

- ✓ Start 2-3 weeks in advance.
- ✓ Confirm your organization's "qualification criteria," the roles and the process.
- ✓ Practice (rehearse) scripts in each role and prepare for all kinds of issues and questions. (This is especially true with new teams, a new team member or if team members take on different roles.) Be prepared.
- ✓ Confirm the trade show/event expected attendees (people and companies).
- ✓ Set up meetings with key prospects and partners in advance.
 1. Schedule pre and post-conference meetings off-site meetings. This helps with time management and minimizes distractions.
 2. Define and set-up critical face-to-face meetings for the event.
 3. Arriving a day early and staying a day late often expedites additional face-to-face meetings and new qualified opportunities. You can also set-up critical face-to-face meetings, unplanned follow-ups, and 2nd & 3rd meetings in a short interval with prospects or partners. This will reduce the time and expense of separate trips later.
 4. Have an agenda and plan for every scheduled meeting, all meetings.

During the Event:

- ✓ Practice the defined process and protocols.
- ✓ Re-access on the fly as required.
- ✓ Monitor performance.

Post-event follow-up:

- ✓ Review and create plans specifically for the "qualified" opportunities.
- ✓ Execute pre-defined "follow-up" protocol for qualified opportunities and all other participants met at the event.
 1. Following up too quickly may be a waste of time and energy.
 2. Following up too slowly may negate the purpose of the event.
 3. Follow up as discussed and **as agreed upon** in meeting participants at the event.
 4. Log names, companies, etc. in the CRM (Customer Relationship Management) system, then execute the follow-up protocol.
 5. How will they remember you and the conversation with your firm? Have a plan for this. *This may require a discussion.*



Trade Show Planning & Execution / Measurement:

Pre-show planning and execution are not to be taken lightly. Participating in any tradeshow or conference is a time and money intensive endeavor. Your organization's success is dependent on the team's preparation and execution.

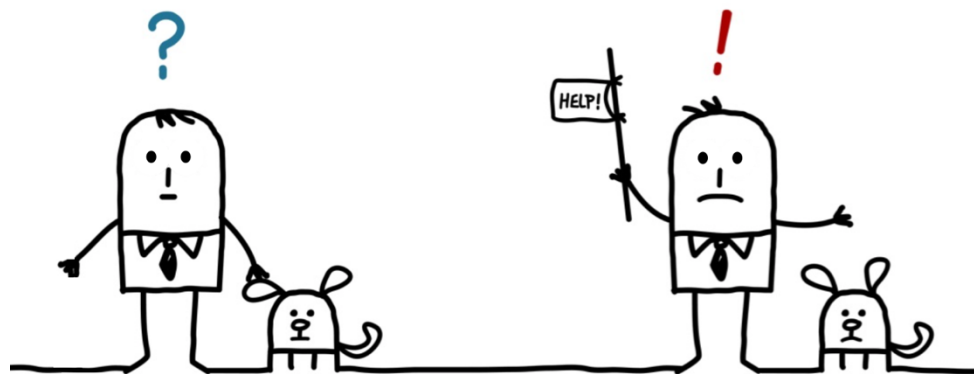
It is also insightful to evaluate performance at the event and of the event itself.

Evaluating inputs and outcomes:

What is the difference in measuring **inputs** and **outcomes**?

Think of inputs as "cause" and measurement outcomes as "results." The correlation between the two is critical. The inputs or "causes" will create or impact the outcomes as "results."

Ruthless Qualification for Trade Shows



Only measuring outcomes?
Unsure of how the outcomes occur?

Input activities are all the activities performed to get the desired outcomes. Only input activities can be modified as behaviors and actions, which in turn will impact the outcomes (the results).

- ✓ Start by making sure that the qualified opportunity "definition" for your organization is complete and clear; if not, fix it.
- ✓ Refine value propositions for the specific audience(s).
- ✓ Develop relatable mini-stories as metaphors and similes for participants at the event.
- ✓ Define the specific input activities to get the desired outcomes, e.g.; calls, emails, etc., all forms of communication and action items.
- ✓ Schedule each of the specific input activities in a project plan, and assign to people and resources. Include the minutia and the small steps.



Specific Input Examples:

- ✓ Calls and emails to set up meetings prior to the show.
- ✓ Confirm all meetings (this is both an input and an outcome).
- ✓ Prepare for specific target industries and prospects. (Relatable stories, use-cases, application notes and ROI examples.)
- ✓ Recheck the value proposition statements for the show's various industries.
- ✓ Recheck the relatable stories for each "value proposition" by industry.

Outcomes to be measured are the “results.”

- ✓ Did we achieve our pre-event task objectives?
- ✓ Did we achieve our event task and outcomes objectives?
- ✓ What else did we learn? (these may not be quantifiable results)
 - About anything related?
 - About anything seemingly unrelated?

Outcome Examples:

- ✓ Completed "pre-event" communications by type, person, timeframe, etc.
- ✓ The quantity of “qualified” opportunities identified at the show.
- ✓ The \$s of the qualified opportunities identified at the show.
- ✓ Post-show profile of each “qualified” opportunity with \$s, plan and steps.
- ✓ Meetings and calls set up at the show with each “qualified” opportunity.

Correlations between our inputs (actions) and our outcomes (results)

- ✓ Determine which inputs impacted which outcomes?
- ✓ What actions are most critical and yield the best resulting outcomes?
 - Get very specific here in evaluating the correlations.
 - Check each assumption in evaluating the outcomes and the correlations.

What's next?

- ✓ What is required now? What is our follow up plan?
- ✓ What about the next event?
- ✓ What about this same event next time?
- ✓ Was this event worthwhile related to the time and cost involved?
- ✓ And how did the team and team members perform?

Note: Be objective in this analysis.

- *Everyone has strong suites. Are the team members being leveraged for the best outcome for this event?*
- *Do we need to modify the team members, roles, and most importantly, the process?*

Please don't short-change the planning, execution and measurement of an event.

A well planned process and strong expectation management insures better execution and subsequent outcomes (**results**).



Why should you get outside help for your Trade Show Qualification Process?

Sure, you can do it yourself, especially with all the information provided and your years of experience. But, will you:

- ✓ Present it to your team optimally the first time?
- ✓ Remember all the nuances and what really works?
- ✓ Create consistency on your team and in your processes?
- ✓ Spend a lot of time and money, while you are saving lots of money...?
- ✓ Get the optimal results and ROI in your sales channel and at your trade show events this month and next?

And getting personal, do your dogs and kids always listen to you?

Cartoon here...

Sometimes an outsider with the right domain experience can help create the “ruthless” qualification process for your organization and generate results at the next 2-3 events, immediately. This outsider can bring:

- ✓ Domain expertise
- ✓ Perspective
- ✓ An unwavering discipline to the process

Ruthless Qualification for Trade Shows



**And then something magical happened...
we were all going the same direction**



Offerings:

<p>INTRO STARTER</p> <hr/> <p>3 hours prep. 3 hours on-site. 2 hours recap- including written summary.</p> <ul style="list-style-type: none"> ✓ CONCEPT REVIEW ✓ VALUE PROPOSITION REVIEW ✓ QUALIFICATION CRITERIA ✓ TRADE SHOW PROCESS DISCUSSION <hr/> <p>\$1600</p>	<p>3-DAY IN-DEPTH ANALYSIS</p> <hr/> <p>INTRO + 3 hours on-site daily.</p> <ul style="list-style-type: none"> ✓ IN-DEPTH CONCEPT REVIEW ✓ IN-DEPTH VALUE PROPOSITION REVIEW ✓ IN-DEPTH QUALIFICATION CRITERIA DETERMINATION ✓ MORE TRADE SHOW PROCESS DISCUSSION ✓ INDIVIDUAL AND TEAM TRAINING ✓ FINALIZE CRITERIA & ROLE DETERMINATION <hr/> <p>\$4200</p>	<p>4-DAY INTENSIVE</p> <hr/> <p>INTRO + IN-DEPTH ANALYSIS + 1 more day</p> <ul style="list-style-type: none"> ✓ RECAP CONCEPT REVIEW ✓ RECAP VALUE PROPOSITION REVIEW ✓ RECAP QUALIFICATION CRITERIA DETERMINATION ✓ RECAP AND PRACTICE TRADE SHOW PROCESS DISCUSSION ✓ MORE INDIVIDUAL AND TEAM TRAINING ✓ REVIEW "WHAT IF?" SITUATIONS, SCRIPTS AND PRACTICE ✓ ROLE REVIEW AND ROLE PLAYING SESSIONS <hr/> <p>\$5600</p>
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Additional Services:

Trade Show Assist:

quoted & billed separately, please call.

Travel T&M:

quoted & billed separately, please call.

(Hotel accommodations at Trade Shows are to be at the Trade Show site.)



About the Author and Ruthless Qualification

Be Ruthless in Qualification. Life is short and there are so many opportunities to pursue. Make the most of your time on new, **qualified**, revenue generating opportunities.

Steve has several years of experience with revenue creation, revenue generation and revenue scaling. He **loves** tradeshows and conferences as a great place to find new, qualified, revenue generating opportunities.



"Revenue Generation," in more traditional job activity terms and titles includes: business development, sales, marketing, product management, operations as well as the management of all these functions.

Steve has been quite successful in generating new and extensive revenue for companies both large and small. Yes, there have been a few speed bumps. But that only creates temporary slow-downs.

His intention is to generate lots and lots of revenue for his company, division, region, district, etc...., He is always thinking, studying, and exploring new ways to achieve the goal of significant new revenue.

Most of his experience is in B2B sales marketplaces, both traditional “direct selling” revenue generation as well as well as digital marketing and revenue generation.

Steve has found bringing a **“ruthless” perspective** to digital marketing and sales generation has worked out pretty well. “Brand recognition” must translate to new and increased revenue, or what’s the point? "It’s strategic," maybe...; but does that “strategic” lead to revenue, pay the bills and keep the lights on?

Lastly, he is extremely pragmatic. He approaches revenue growth with “let’s figure out what works, do it and figure out how to do it better and better, then scale it into the big picture for significant revenue gains. Otherwise, let’s try something else... Life is short and there are so many opportunities to pursue.” (No time wasting; no moss growing between our toes; we can dance when we get home and have something to celebrate.)

The language of Revenue Generation is used specifically and for a reason. (See Revenue Generation vs. Sales)