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Tradeshow Staff Training:

How to Create a Lead-Generation Machine

ON TRADESHOW STAFF TRAINING

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GetSynchronicity

Contents

Introduction

Imagine this scene: a tradeshow booth with stunning graphics, sleek kiosks, dramatic lighting, and a top brand splashed across dazzling signage. It's the biggest and hottest-looking booth at the show. Yet, curiously, there are no staffers. Instead, a brochure rack stands at the aisle with a note reading "Please Take One."

Without question, a well-designed exhibit is critical for attracting visitors. But once visitors have stepped across that carpet line, the only thing that matters is their relationship with the staffer. It is at that point that the staffer becomes the most important ingredient in the success of a tradeshow exhibit. Staffers have more influence over prospective buyers than all of the show materials combined, in many cases more than even the brand itself.

If there is a single understanding, therefore, that staffers should not fail to grasp, it is the tremendous power they have to determine the outcome of a show. They don't just "make a difference." *They are the show.*

The statistics bear it out. CEIR reports that 80 percent of the way an exhibit is remembered is based on staffer behavior. *Exhibitor* magazine found that 85% of tradeshow results—namely, the number and quality of leads—are tied to the experience attendees have with booth staff. How they interact with prospects and customers will do more to influence buyer decisions than any other factor.

That power to decide the visitor experience works both ways, of course. Staffers make or break a show. CEIR reports that 98% of the time an exhibit is rated "poor," it's due to staffer behavior.

With so much power clearly in the hands of the staff, it would be easy to presume that most companies make it a priority to invest in training their show staff, to help them maximize their effectiveness and therefore get the greatest return on the tradeshow investment.

But the reality is quite different. Tradeshow Staff Training has been declining significantly in the past 10 years. A 2012 CEIR study showed that only 26 percent of exhibitors conduct training for all or most events, and more than 50 percent rarely train or never hold exhibit-staff training sessions.

The consequences are considerable. A company that doesn't train its staff is not only missing major business-building opportunities but is missing the entire point of the tradeshow. And that "miss" comes at quite a cost. In this article we will explore the many benefits to, and guidelines for, implementing an effective training program for staffers, in whose hands the success of the show depends.

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The #1 Misconception

"Ineffective booth behavior" summons scenes of blatant rudeness, such as a staffer who interrupts a conversation with a prospect to take a chatty personal phone call, causing the prospect to march away in a huff. Or a staffer who yawns and checks his watch while the head of purchasing for a multinational corporation explains her business needs. Though these and other over-the-top-awful scenes do occur, they don't reflect the most common ways that staffers are ineffective. Most staffer performance fails are symptomatic of a much larger, frequently overlooked, and ultimately more damaging problem ...

They don't understand their role at the show.

Staffers may be prepped on their booth duties, briefed on housekeeping, and given a few examples of qualifying questions to toss around. But they're not given a clear picture of their importance to the show and the business-critical activities they must fulfill in order to make the entire investment pay off.

Left to their own thinking, most staffers share a common misperception. Their mistaken belief is that they are in the booth to provide information related to their job title and that their function is to wait for visitors whose problems fall within their specialty to approach them, or be brought to them, and to then answer their questions. From this perspective, product specialists are hanging around in case a prospect wants details on stats; marketing managers are biding their time until a little spin is called for; and IT personnel are in sleep mode until there are technical questions.

Regardless of the titles on their business cards, everyone in the booth has the same function: to develop new business.

What staffers must be brought to understand, however, and quickly, is that their job specialties may not even be relevant during the show. Regardless of the titles on their business cards, everyone in the booth has the same function: to develop new business. They are there to prospect, to open new opportunities and relationships.

It is this razor-sharp priority that gives purpose to all of the operational components, including booth signage, hospitality, etiquette, qualifying processes, and demos. Without the team objective to become a unified lead-generation machine, these elements are an empty gesture.

Effective Staff Training programs lay out solid, actionable requirements for a successful, purpose-driven exhibit. And they prepare staffers with an attitudinal framework and tangible tools for working efficiently and productively to generate the desired results.

> Training presents a strong value proposition for the staff, the company, and the attendees with whom the staff will interact.

Preshow Meeting Versus Staff Training

In this article, we make a distinction between the preshow meeting and Staffer Training. The preshow meeting covers a wide range of important items, such as staffer introductions and scheduling, tradeshow goals, promotional campaign and strategies, lead-capture systems, and housekeeping-related items. The meeting may also touch on basics of booth etiquette, reminding staffers to look approachable and to refrain from eating or drinking in the booth. From there the meeting typically moves to the booth itself for an orientation.

While these components are essential for preparing staff, they are purely decorative unless they are fortified by a deeper dive into the mindset and mechanics of driving new business. A training module targeted to this objective should therefore be integrated within the preshow meeting or scheduled apart from it. An on-target program design will enable staffers to:

- understand the show goals and their role in relation to these goals
- understand their verbal and nonverbal impact on prospects and customers and therefore on the success of the show
- provide effective qualifying strategies and work as a team to generate quality leads
- ensure consistency with a unified marketing message that can easily be delivered in interactions with prospects
- support and maintain the company's image with appropriate behavior, including superior hospitality skills
- speak about benefits rather than features
- respond to obstacles to the show objectives with practical, proven solutions

Naturally, any substantive exploration of these objectives takes time. Whether the training is allotted 90 minutes, a couple of hours, or a weekly series of short classroom sessions or online modules, it presents a strong value proposition for the staff, the company, and the attendees with whom the staff will interact.

> The verdict is in. Staff training makes good business sense, with benefits for all stakeholders.

Value of Staff Training

According to CEIR and Exhibitor, 52 percent of exhibit managers who provide staff training reported lead increases of 20 percent or more. And 68 percent of exhibit managers assert that a properly trained booth staff turns a higher percentage of booth visitors into qualified leads. The verdict is in: staff training makes good business sense, with benefits for all stakeholders:

Staff. When staffers truly understand how important they are, and are given the tools to meet the kind of objectives listed in the preceding section, they have what it takes to become a *major force* on the show floor. The effect is generative: competency leads to confidence, and confidence enhances morale; improved communication creates synergy, and synergy fosters consistency.

At its best, Staff Training is also team building. A team that feels clear about its purpose and has the skills to fulfill it creates a positive energy that can be seen, heard, and felt by attendees – just as the *lack* of these conditions is perceived just as readily (though with very different results).

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Visitors. Some customers' only exposure to a business is at the tradeshow. That is where their first, and often lasting, impressions are made. Customers and prospects alike appreciate staffers—and therefore companies—who respect their time through skillful engagement, attentive listening, succinct overviews, customized demos, and other demonstrations of professionalism.

An exceptionally good experience with a staffer reinforces a prospect's belief in the brand, paves the way to the purchase of orders, and gives him or her the satisfaction of having connected face-to-face with someone who understands and values the prospect's business.

Company. By sponsoring Staff Training, the company is able to realize the benefits already described above for the staffers and the visitors. These benefits are measurable, such as an increased number of qualified leads and positive responses on visitor surveys, as well as intangible, such as higher staff morale and better communication. Intangible factors, though not measurable, are key considerations in any ROI analysis.

Tradeshow Managers. The person responsible for producing the show can use the ROI achieved by a well-trained staff to earn the trust of top management, prove his or her value to the company, and justify the next show budget.

Choosing the Exhibit-Staff Trainer

An earlier section in this article revealed that only 26 percent of exhibitors conduct training for their events, and more than half of all exhibitors never offer exhibit-staff training sessions. There are many possible reasons for this omission. And not all of them are related to budget.

First, exhibit managers are extremely busy professionals who must handle a complex assortment of duties (often without assistance) for months in advance of a show. They simply may not have the time to develop a comprehensive training program.

> Setting the performance bar is an act of leadership that should be made from within the organization.

Second, depending on their level of experience, some exhibit managers fail to initiate Staff Training because they lack the expertise to lead a program that sets higher performance standards and provides substantive exercises.

Third, they may assume (falsely) that because their exhibit staff is composed of tradeshow veterans, no training is necessary. Last, they may not possess the clout or charisma to effectively motivate the troops (though an endorsement by a member of top management at the meeting's onset can help to ensure buy-in).

Exhibit managers who wish to focus on the production and preshow meeting have the option, of course, to hire an outside agency or consultant to handle Staff Training. There is some support for this route. In surveys by CEIR, 75 percent of booth staffers reported that they respond more favorably to professional trainers from outside their companies than to trainers from within their companies. The right trainer-for-hire can bring insights and objectivity that help refresh the perspectives of the team.

Whether tapped from inside or outside the organization, a trainer should be selected for his or her ability to meet the following criteria:

- **offer experience-based credibility,** to quickly earn the respect of the trainees
- **engage trainees with relevant stories** and real-world examples
- **customize the program to meet staff needs** and tradeshow requirements
- **consult company message owners** to identify key messages
- **effectively facilitate group discussions** and role plays
- **reinforce the importance of staffers** in relation to the show objectives

When it comes to announcing show goals to staff, it is recommended that the exhibit manager or another company representative handle that rather than leave it to a hired trainer. Setting the performance bar is an act of leadership that should be made from within the organization. A hired trainer, however, could articulate what reaching those goals will *require* of staffers—such as how many qualified leads each staffer must find per hour over the course of the show.

In the next sections, we'll look at how a Staff Training program can support the show goals by helping participants stay on message, generate qualified leads, and speak in the universal language of stories and benefits.

Unifying the Message

One sign of a well-trained staff, and an aligned company, is the uniformity of the message they communicate to visitors. An elevator statement is a prepared overview that briefly sums up a company's brand, purpose, value proposition, brag points, and/or other unique characteristics. It can also be somewhat of a teaser, designed to leave a little mystery. Effective elevator statements are no more than a few sentences and can be spoken within about 20 seconds. They are followed by an open-ended question to determine the listener's area(s) of interest.

An elevator statement we've used successfully for our company goes like this:

"We create interactive experiences for tradeshows and events that bring together the message, media, and audience. Our specialty is bringing more of your target audience into the booth and keeping them there longer. So, what big shows or events does your company sponsor?"

> For the health care company's annual Staff Training, GetSynchronicity taught staffers a process by which they could quickly discover their prospects' needs and then deliver the appropriate elevator statement to take the conversation farther.

Although an elevator statement ensures a unified message, one that is merely recited verbatim can sound canned or robotic. There is a better alternative to mass memorization of executive-issued statements (which in most cases are written to be read, not spoken). Having staff create the unified message is a worthwhile team-building exercise that increases their ownership of the message. Drawing from a list of suggested key words or ideas, staff members come up with an elevator statement that hits the right points and is easy to speak. An authentic, comfortable delivery matters to the staff and to the prospects who will hear them.

In some cases, a single elevator statement may not be enough. A multinational health care company created a separate elevator statement for three of its core areas of expertise: Clinical Integration and Collaboration, Patient Focus, and Improved Economic Value. For the health care company's annual Staff Training, GetSynchronicity taught staffers a process by which they could quickly discover their prospects' needs and then deliver the appropriate elevator statement to take the conversation farther. As the staff became flexibly conversant in all three message tracks, their confidence levels increased. Company, customers, and staff benefited from the alignment of message and purpose communicated throughout the exhibit.

Social media has turned every booth visitor into a potential reporter capable of influencing public perception.

Not so long ago, message control at tradeshows was primarily the concern of company representatives designated to speak to the press. Press emissaries are no less important today, but with one critical difference: social media has turned every booth visitor into a potential reporter capable of influencing public perception. Conversations now travel far beyond the booth, which is all the more reason to ensure that the message is both compelling and consistent.

Identifying the Target Customer

Most preshow meeting organizers take time to identify the various job titles and industries that are the company's target customer at the show. However, the discussion should not end there. The staff also needs to understand:

- What are the typical responsibilities of each target customer profile?
- What are likely to be their most pressing needs or concerns?
- What products or services—and related benefits—could therefore be of greatest interest to them?
- Which company examples or success stories would the various target customers find most relevant? Would the same case study selected for a VP Operations be as persuasive for a VP Human Resources?
- How could the demo be altered to be most relevant to the respective target customers?
- Which target customers should be introduced to others on the team?

A more accurate and detailed picture of each target customer will emerge naturally, of course, during the qualifying process.

Qualifying

Relationships begin the moment a staffer makes eye contact with an attendee and starts a conversation. A training module that focuses on engaging openers and icebreakers is time well spent. The more options staffers have to initiate conversations, the greater the chances that each person will find one he or she is comfortable with—and use it to transition into the qualifying process.

Qualifying, the pathway to new business, should be the centerpiece of a Staff Training program. Qualifying is a natural corrective to the inexperienced staffer's tendency to talk more than listen. The first thing a qualifying module should stress is that tradeshows are not about showing how much one knows but about discovering how much one can learn. And that entails asking targeted open-ended questions and listening carefully to the responses.

Customized paper and electronic lead-capture systems already include the qualifying questions deemed most important for the company. All the staffer has to do is enter the prospect's responses where indicated. No matter how simple the process is, however, a bit of training is needed here. Because if the staffer is merely entering data rather than *connecting with the prospect*, a major opportunity for relationship building is lost. *(Option: Hiring professional brand ambassadors or concierge staffers to prequalify visitors can help staff focus exclusively on building the relationship.)*

Role plays are instructive and fun ways for staffers to practice qualifying. Learners can benefit from feedback from the facilitator and their peers, to become better at:

- **maintaining eye contact** during lead capture (very challenging when using an electronic device)
- **keeping the process conversational** (especially when asking the same questions hour after hour)
- **asking clarifying questions** when necessary
- **summarizing the prospect's needs** to demonstrate understanding and empathy

The qualifying module is the most potent opportunity to tie the qualifying process to the staff's chief purpose of finding new business leads. From this point in the program, a natural progression would be a discussion on how to secure follow-up with qualified prospects and how to graciously disengage from prospects and nonprospects. Again, role plays are very useful for getting staffers on their feet and trying out skills in a no-risk environment.

And here's a sobering thought. Without Staff Training, company representatives will use *the show* to practice these techniques. How many actual prospects might they practice on—and get it wrong—before they get it right?

Presenting the Products and Services

If the engaging opener evolves to an elevator statement … and the elevator statement leads to qualifying … the staffer has uncovered the information needed to further the conversation about products and services most relevant to the prospect. That conversation may take the form of a more in-depth discussion, a product demo, or a handoff to another member of the staff.

> Stories are like visual aids. The right one can say as much as, if not more than, all the words that bookend it.

A comprehensive Staff Training program should offer staffers presentation guidelines and practice opportunities for the following skills:

Demos. Staffers who focus too much on the mechanics of data capture can lose face-to-face connection with prospects. Demos present similar traps. Demo practice and coaching can help enhance interactivity, spatial relationships, content customization, demo length, summaries, and other professional considerations.

> Speaking in the language of benefits gets to the very heart of what motivates purchases.

Storytelling. Unless otherwise encouraged, most staffers will not include real-world examples, success stories, or personal experiences in their interactions with prospects. Yet the right story well told creates a compelling "Before and After" for the listener. Almost immediately, the structure of a story invites curiosity. The unspoken question *How will it all turn out?* engages (and thus influences) the prospect. Good storytelling integrates seamlessly into conversations, as in …

> *"Evelyn, thanks for that snapshot of your situation. Your business challenges sound very similar to some we helped solve for a client of ours. The client was having trouble keeping its sensitive electronic equipment dust-free in containers that were supposedly airtight. They had already replaced two new systems because of the problem, at great expense, and were extremely frustrated. We came in and proposed a solution that … "*

Stories are like visual aids. The right one can say as much as, if not more than, all the words that bookend it.

Benefits. Untrained staffers waste time touting the features of their products and services instead of communicating the *benefits*. Even seasoned staffers can forget the basic fact that benefits speak to self-interest. How will the item help the prospect save money? Increase revenue? Be more productive? Beat the competition? Reduce stress? Live or work more confidently? Be a hero? Enhance status? Speaking in the language of benefits gets to the very heart of what motivates purchases.

After all, it's not the number of bristles that sells a toothbrush; it's the promise that the toothbrush will help us maintain a sexy smile and avoid the pain of costly dental repairs. That is what staffers need to remember. And adding stories to the value proposition amplifies the potential impact.

Handling Tough Questions

It is important—for all concerned—that staff be able to comfortably navigate through rocky topics. If there are potentially sensitive or embarrassing questions that visitors might ask, these should be discussed in the preshow meeting or Staff Training.

As with elevator statements, a great deal of time can be saved if the questions and recommended answers are identified in advance and shared at the meeting. Staffers can then pair up and alternate in the roles of questioner and responder. At the show, the tradeshow manager can keep staffers on their toes by randomly "ambushing" them with the targeted questions … and providing feedback on their responses.

A similar exercise can help staffers effectively address the most basic (noncontroversial) questions about the brand, products, promotional campaign, or the goals of the show. During a consumer home show, a sales VP used some of the slower moments to approach individual staffers and ask questions that had been covered in the training, such as "How many leads per staffer per hour will it take for us to meet our goals?" and "What are two things that differentiate us from the competition?" Impromptu refresher quizzes can help keep staff sharp.

> Staffers are vulnerable to periods of low energy from the physical demands of a show. At such times it behooves the tradeshow manager to have a plan to reinvigorate the staff's energy and raise morale.

Raising Morale and Ensuring Continuous Improvement

Some employees consider tradeshows like jury duty. They don't want to go but know they have very little say in the matter. Their opinion on shows is low long before the lanyard is slipped over their necks. They may have heard about long hours, stretches of zero booth traffic, passersby who ignore friendly "hellos," and the pressure to find leads. If they are show veterans, they will know these and other challenges from personal experience.

There's no question about it. Working at a tradeshow is hard work. Staffers are vulnerable to periods of low energy from the physical demands of a show. Their enthusiasm too may dip after one too many engaging openers that go nowhere. At such times it behooves the tradeshow manager to have a plan to reinvigorate the staff's energy and raise morale.

> A survey means "Your opinion matters." It asks the staff —the most important players in the tradeshow — to provide feedback on how effectively the Staff Training supported their efforts.

Here are a few recommendations:

Praise. In Ken Blanchard's bestselling book *The One Minute Manager*, the number one rule for praising employees is "catch them doing something right." Though tradeshow managers rarely stop moving during a show, it takes only a few seconds to note a staffer modeling something that was taught in the training, point it out to them, and thank them. *"Nice job disengaging from our competitor, Diane."* Those few seconds may be all it takes to give the staffer a boost.

Photos. Another form of praise is to document the good behavior in pictures. For example, a tradeshow manager spots a staffer maintaining eye contact with a prospect while gathering lead data—and snaps a photo. The accumulated photos of these booth "stars" can later be shared on a tablet with the staff or used to illustrate the skills at the next Staff Training program. When attention is called to a staffer's mastery of a booth skill, it reinforces the importance of the behavior for everyone present.

Awards. End-of-day team meetings are opportunities to problem solve, share best practices, and plan for the next day's show. They also offer a platform for the tradeshow manager—or the staff—to recognize those staffers who most closely modeled the performance standards. Shout-outs (with or without gifts attached) can be given for Most Qualified Leads, Most Fearless Engager, Best Storyteller, or other categories.

Secret Shopper. Secret shoppers work incognito to evaluate staff performance, using the criteria established in the training. When staff is aware that they will be evaluated, they are more inclined to stay on their best behavior. Knowing that a secret shopper may be present can give the atmosphere a certain game-like edge that is energizing. And the secret shopper's report can provide very useful data on how well the staff followed the training.

Training Measurement: A survey means "Your opinion matters." It asks the staff — the most important players in the tradeshow — to provide feedback on how effectively the Staff Training supported their efforts. Together with the lead-generation data, staff survey responses can be factored into the overall tradeshow ROI.

But the survey can do more than merely capture reactions and satisfaction levels. It can use open-ended questions to elicit deeper discoveries:

- What did you learn from your experience at the show?
- How did you implement what you learned in the training?
- What skills, tips, or guidelines did you not implement; why did you not implement them?
- What did you learn from the training that you could apply in your day-to-day work?
- What did you learn that you would like to pass on to peers working at the next show?
- Until the next show, what could help the team *retain* the information and skills learned?
- What will you commit to do differently if you work another tradeshow?

Conclusion

The opening example of the "Please Take One" brochure rack, though absurd, illustrates the necessity of an informed, engaged, and on-purpose group of people to make the large investment in a show pay off. A solid Staff Training program is a way for the company to say, "We understand the critical role you play in achieving our goals and support you in that effort."

In addition to the bottom-line goals, Staff Training presents a rich opportunity for team building within and across the organization. People broaden their understanding of the market, the company, and the role of other departments. In the best cases, they discover a sense of community. And that's a win for everyone. Because whenever people feel connected, great things can happen.

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