TRADE SHOW & CONVENTION BOOTH LEAD INTAKE SHEET

PROSPECT PROFILE, DECISION AUTHORITY, BUDGET TIER, PAIN POINTS & SPEED-TO-LEAD FOLLOW-UP

EXPO / EVENT: _____ **BOOTH NUMBER:** _____ **EVENT DATE:** _____/_____/20____

BOOTH REP NAME: _____ **DAILY LEAD GOAL:** _____ **Leads** **LEAD TIER: [ ] Hot [ ] Warm [ ] Cold**

1. PROSPECT CONTACT IDENTIFICATION & COMPANY ATTRIBUTES

CONTACT IDENTITY:

Full Name: _____

Professional Title: _____

Company Name: _____

Business Email: _____

Direct Mobile Phone: (_____) _____

Company Website: _____

ORGANIZATION PROFILE:

Industry / Sector: _____

Company Size: [ ] 1-10 [ ] 11-50 [ ] 51-200 [ ] 201-1000 [ ] 1000+

Annual Revenue: [ ] <$1M [ ] $1M-$10M [ ] $10M-$50M [ ] $50M+

Decision Role: [ ] Final Approver [ ] Evaluator [ ] Technical End User

Current Software / Vendor Used: _____

Badge Scanned: [ ] Yes [ ] No (Business card stapled)

2. PURCHASING INTENT, BUDGET TIER & CURRENT BOTTLENECKS

PURCHASE TIMELINE & ALLOCATED BUDGET:

Buying Timeline: [ ] Immediate (<30D) [ ] Q1/Q2 [ ] 6-12 Months

Approved Budget: [ ] Under $10k [ ] $10k-$50k [ ] $50k-$150k [ ] $150k+

Budget Status: [ ] Fully Allocated [ ] Pending Approval [ ] Researching

Products Interested: [ ] Core Platform [ ] Enterprise Add-On [ ] Services

Requested Demo: [ ] Yes, Virtual [ ] On-Site [ ] Send Recorded Demo

CORE PAIN POINTS & UNMET NEEDS:

Primary Obstacle: _____

Current Frustration: _____

Must-Have Feature: _____

Key Integrations Required: _____

Competitors Evaluated: _____

SPEED-TO-LEAD COMMITMENT & IMMEDIATE FOLLOW-UP ACTION ITEMS:

[ ] Send Personalized Post-Show Email [ ] Schedule 15-Minute Zoom Discovery Demo [ ] Mail Physical Product Sample Kit

[ ] Send Formal Pricing Proposal / SOW [ ] Connect via LinkedIn Connection Request [ ] Route to Account Executive: _____

Target Follow-Up Date: _____/_____/20____ **Rep Signature:** _____