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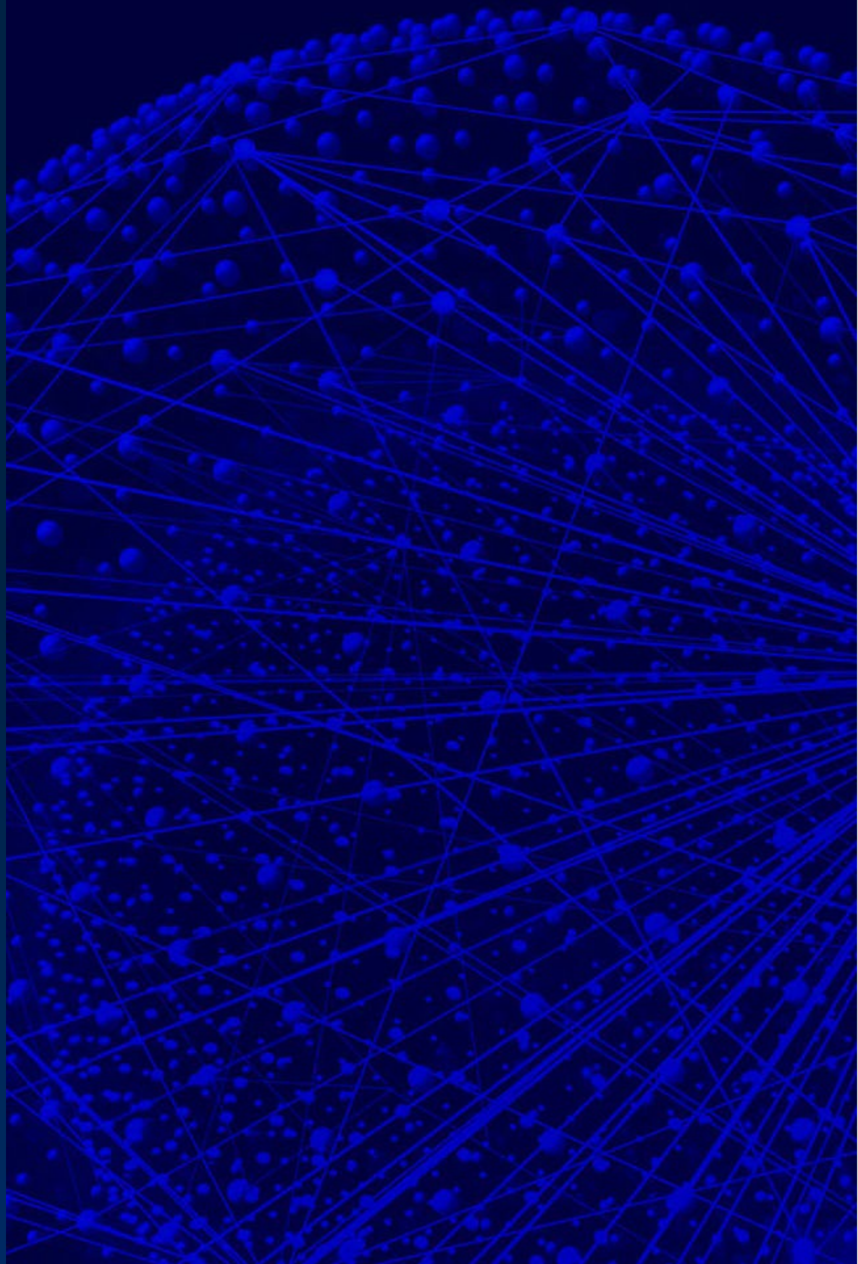
Lead Retrieval Guide

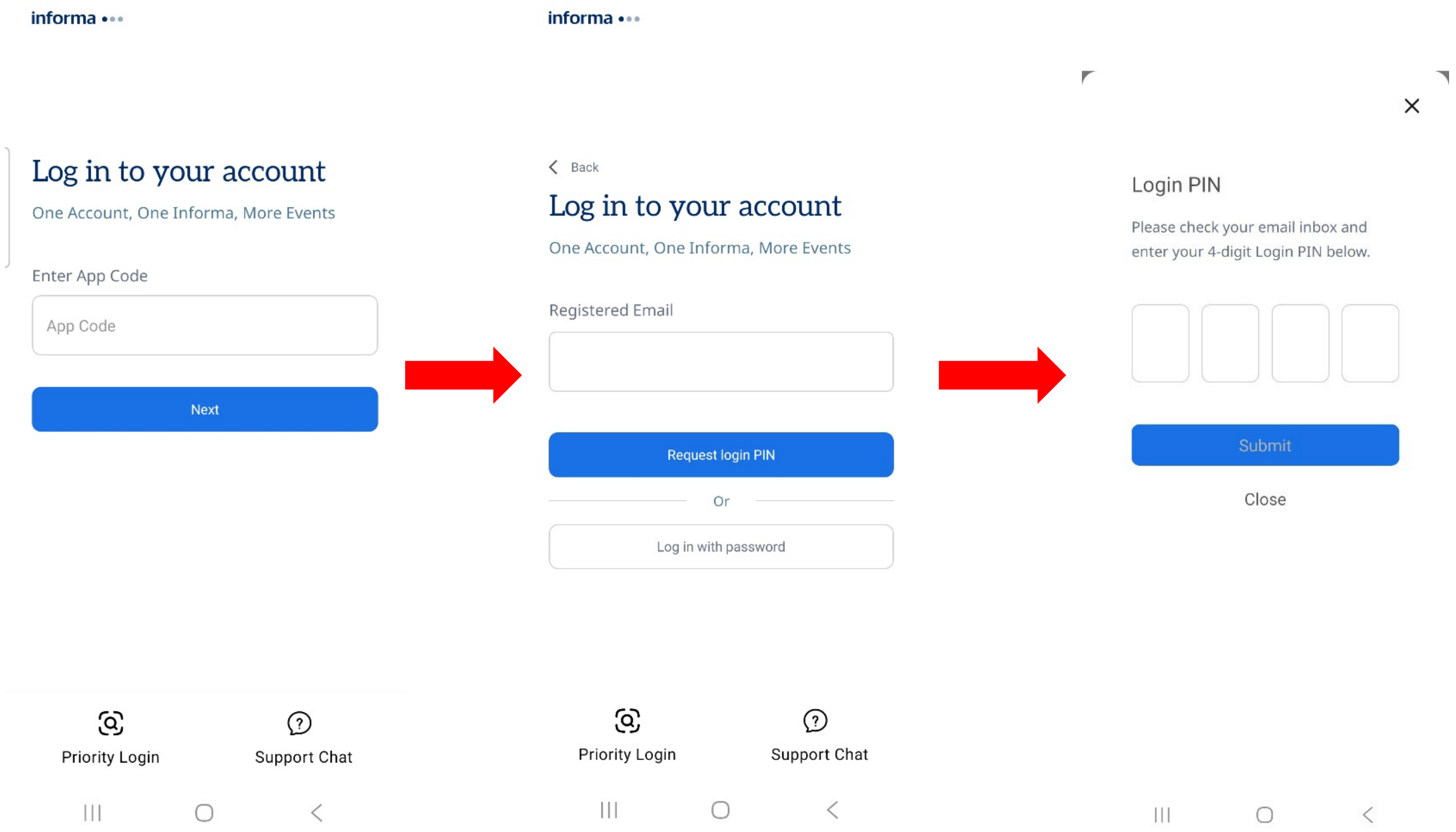


LEAD RETRIEVAL – HOW TO SETUP, SCAN & COLLECT LEADS ONSITE

1. On your personal device, please download the ConnectMe app. To find it in the App Store / Google Play, please search ***'ConnectMe by Informa'.***

2. Once downloaded, please enter the app code: **LS2026**

3. Enter your email address used to register for the conference, to which you will receive a 4-digit pin to login

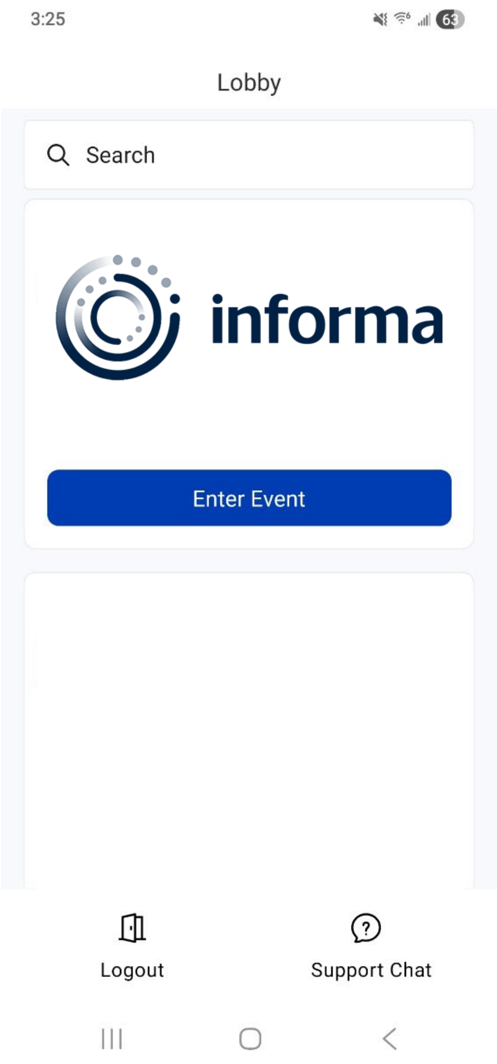


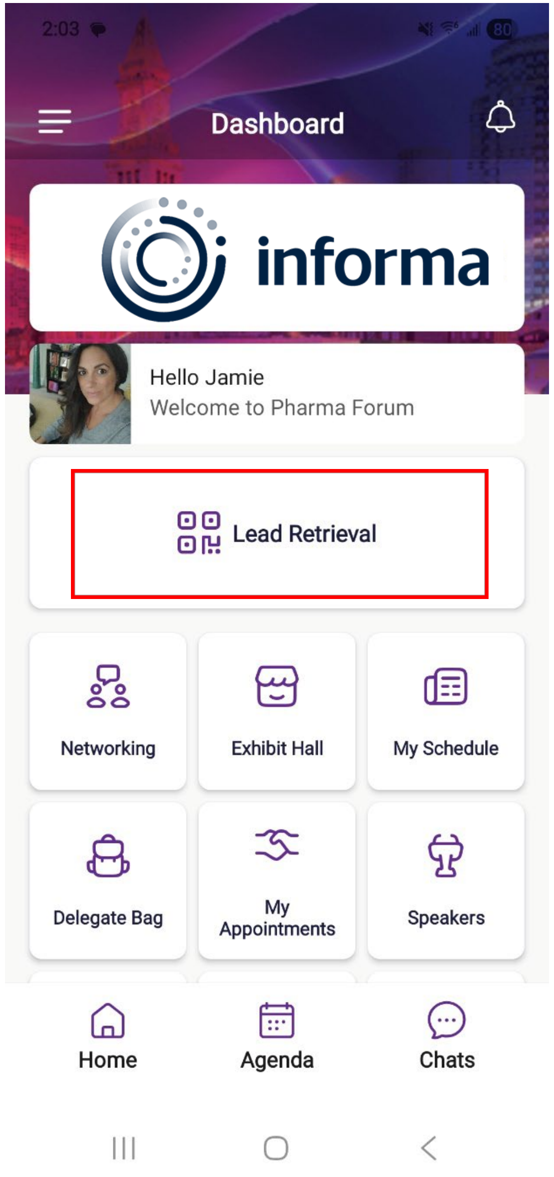
*If you do not receive a 4-digit pin, please email **LSDigital@informa.com**.*

LEAD RETRIEVAL

4. Once entered, please select the Clinical Data Disclosure US event to enter. The dashboard on the right will appear and you will have the Lead Retrieval button which will take you to the lead scanning page.

If you do not see this button on your screen, please contact your Digital Event Ops Contact which can be found at the end of this document.



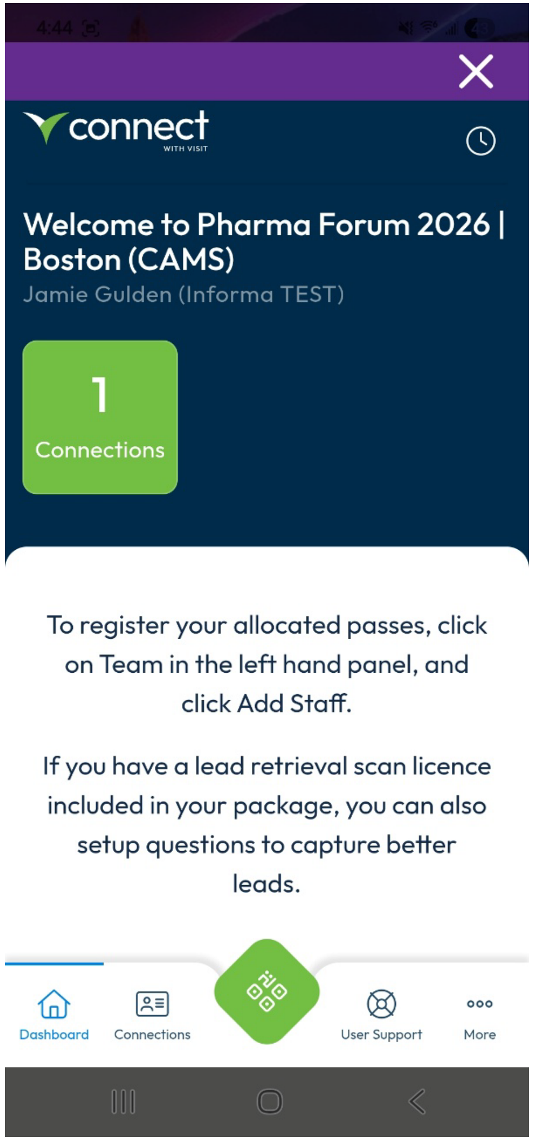


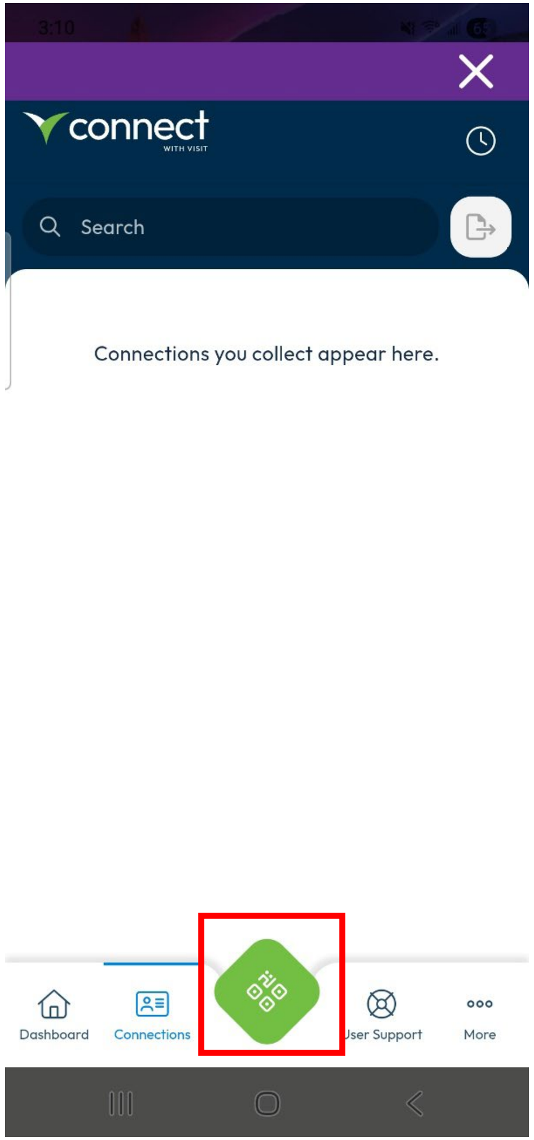
LEAD RETRIEVAL

5. This takes you to the partner portal for capturing leads. To begin scanning click the QR button at the bottom of your screen.

6. Make sure your camera permissions are set to *"allowed"* in order to scan.

**The specific name of your event will be shown*





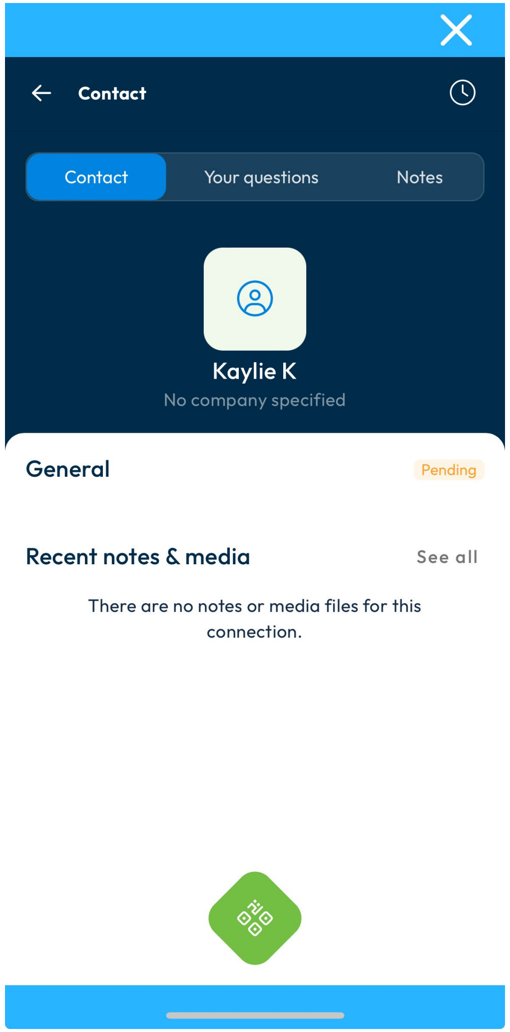
LEAD RETRIEVAL

7. QR codes will be printed on attendee badges as seen in this example.

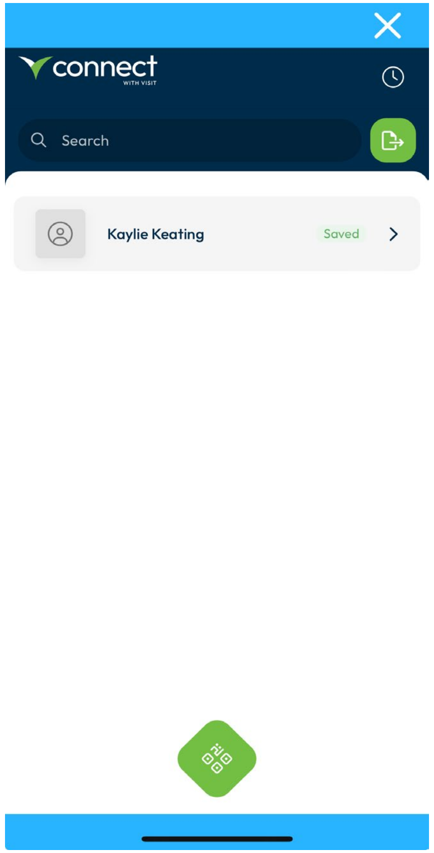
When scanning, please ensure you are scanning the QR code on the attendee badge, and **not** the QR code attached to their lanyard.

Once scanned, the page will show the attendee details and you are then able to add your own notes/media files and answer any preset questions that your company has added.

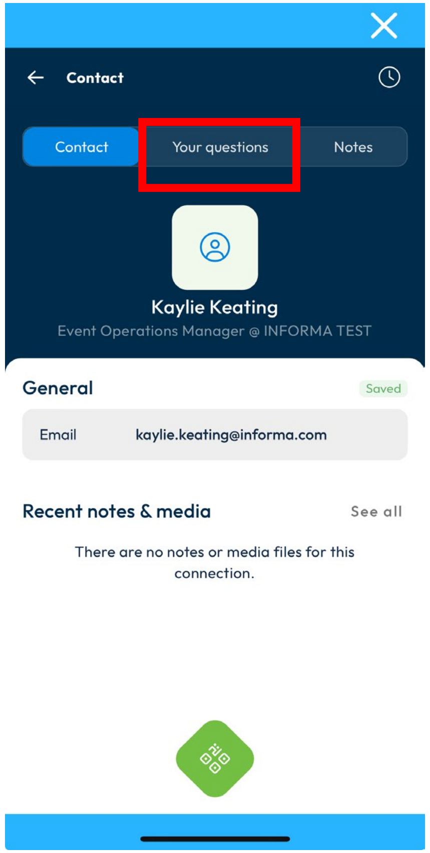
8. Click the back button at the top left to go back to your main dashboard. This will show all the leads you've personally scanned.

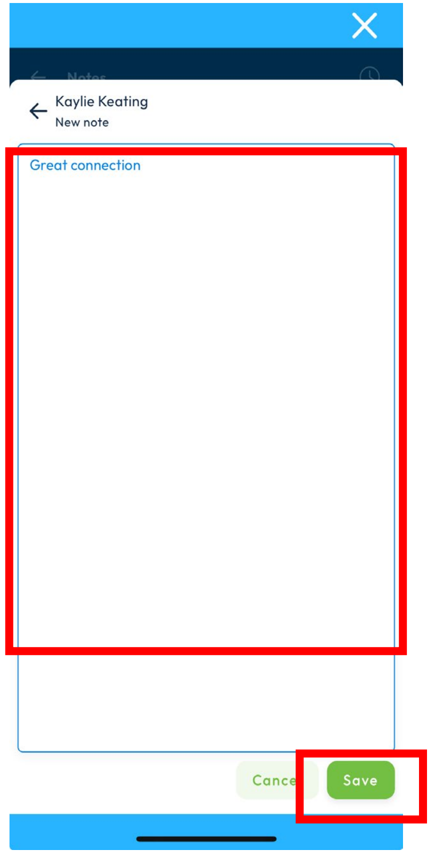


LEAD RETRIEVAL

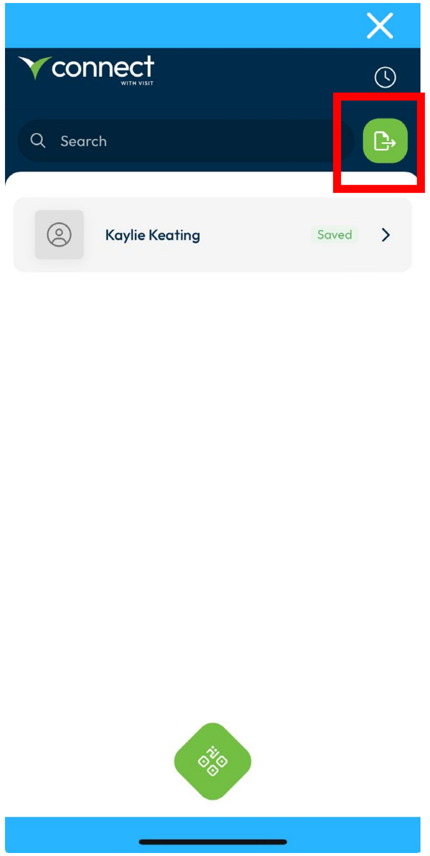


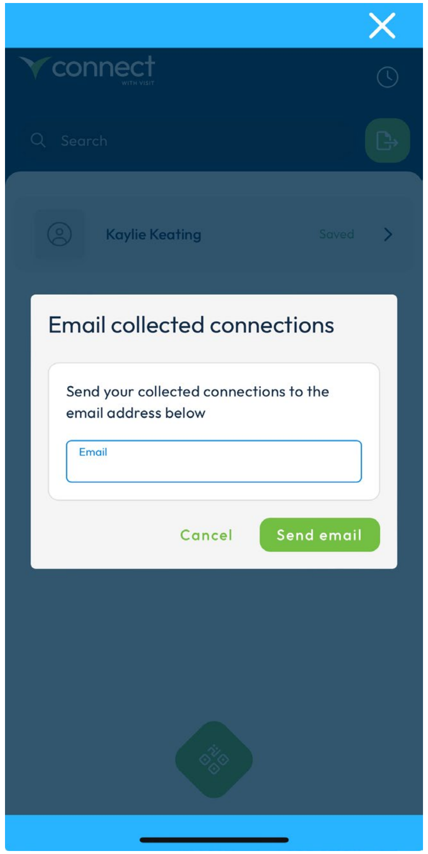
Scanned badges will be listed in your dashboard





Preset questions and notes can be added at the time of scanning or later





Scanned leads can be exported to your email in real time, or accessed by your main contact in the *Visit Connect Portal*

LEAD RETRIEVAL FAQ's

PRE-EVENT

How do I setup my team so that they have access to capture leads?
As the main contact for your team, login to the *Create with Visit* portal link sent to you by your operations manager to register your allocated passes for the event. Go to TEAM on the left-hand side navigation bar, and then select *Add Staff.* Once your team has been entered, they will be automatically setup with access to lead retrieval.

Can I setup custom questions?
Yes – your company's main contact person can set these for your team via the *Create with Visit* portal under *Questions.*

How many custom questions can we have?
You can have an unlimited amount.

Is there a character limit for the questions I set?
There is a 100-character maximum for questions (including spaces).

When is the deadline for customizing questions?
There is no deadline, you can keep updating questions right up until the event.

Is it possible to get a developer's kit so that we can use our own lead retrieval system?
Unfortunately, it is not possible to use your own lead retrieval system. Lead retrieval for this event can only be used via the system provided through the *ConnectMe* app. You cannot scan badges with another program.

I want to stop my colleagues attending from downloading leads. Is this possible?
Yes, in your *Create with Visit* portal, go to TEAM on the left-hand side. Hover your mouse over the attendee whose permission you would like to change and select the *Edit* icon on the right-hand side. From here, you can change whether that person can: capture leads, export leads, show all leads or have admin permissions.

What does "admin" permission mean?
An Admin user will have access to dashboard, users, profile questions, leads and agenda. This included managing registration and downloading the team's leads.

LEAD RETRIEVAL FAQ's

Require help onsite?
Visit the ConnectMe Helpdesk for all Lead Retrieval Support.

DURING THE EVENT

How do I access the lead scanner?
Download *ConnectMe by Informa* via your smart-device's app store. Do not let your booth scan staff log in directly to the Create with Visit website as it may cause issues with your data.

What is the event code for the *ConnectMe* App?
LS2026

How do I login to the app?
Enter the email address that was used to register for the event.

How do I scan badges with the *ConnectMe* App?
Once logged in, on your dashboard you should see a *Lead Retrieval* button. Click this to begin scanning badges. If you do not see this button, please visit the helpdesk at registration.

Are the leads GDPR compliant?
All attendees are asked a consent question on their first log-in to the event app (example here). If your company requires a specific consent question to be asked, you can set up a custom question for your team to enter for each badge scan. When you export this data from your Lead Insights account it will also include additional consent details.

Does lead scanning work if there is no internet connection?
Yes, you can still scan badges. The app will synchronise the missing information as soon as you reconnect to the internet. There will be event WiFi available to all attendees.

Can I see the leads I've scanned in real-time?
Yes, all your scanned leads will show on the lead retrieval dashboard. To download all your leads from the event at the end of the day/event, your best place to export is Lead Insights.

Can I see a consolidated list of leads scanned by my team?
Go to Lead Insights to export all your leads in one place, included all the lead retrieval scans from your team. For help with accessing your Lead Insights account, contact Leadinsights.LS@informa.com. You can also export scans directly from VISIT by GES, but it will be limited to badge scans and will not include other sources such as meeting scheduling, digital booth visits, and sponsored session engagement.

Can I give permission to my colleagues to view and export all the leads on their devices?
Yes. As an admin user, you can click on the homepage > Team and see all the colleagues who are using Create with Visit. In the Permissions column, there are shown the 4 types of access:

- *Admin permissions – in this case, the user becomes an admin user*
- *Show all leads – the user will be able to see the leads captured by other team members*
- *Allow capture leads – this option is already enabled when a user is registered*
- *Allow export leads – when enabled, the user can export the leads*

LEAD RETRIEVAL FAQ's

Where can I find my booth scan leads post-event?
The best place to export your booth scan data is Lead Insights, which allows you to analyse and export all your data from Lead Retrieval, plus any additional leads generated from meeting scheduling, digital booth visits, and sponsored content engagement. Lead Insights provides all your leads in one place, with consent details included. If you already have a Lead Insights account from a previous event, just log-in. For questions about your Lead Insights account, please contact Leadinsights.LS@informa.com. If you only want badge scans, your main contact can access Create with Visit from a desktop to export your scans directly.

Will the leads I scanned be sent to me?
Your leads are made available within your Lead Insights account before, during, and after the event. You'll receive instructions for access before the event begins. Contact Leadinsights.LS@informa.com for assistance.

What is Lead Insights?
Your dashboard contains all your event lead data in a single view. One week prior to the event you will receive an email from "Lead Insights" with directions on how to access your data. The leads in your account will start flowing in pre-event and will continue during and after the event – all accessible through the same login credentials. To enable your colleagues with direct access, just log in, click on your account settings in the top right corner, click "My Team" then add your colleagues so they will receive an automated invitation to set up their accounts. Contact us for assistance.

Why doesn't my Lead Insights dashboard show the booth scan notes my team entered?
All your lead retrieval data, including booth scan notes, custom questions, and "scanned by" details are included in Lead Insights, within your full data export. Contact Leadinsights.LS@informa.com for support so you can access and export all your lead data in one place.

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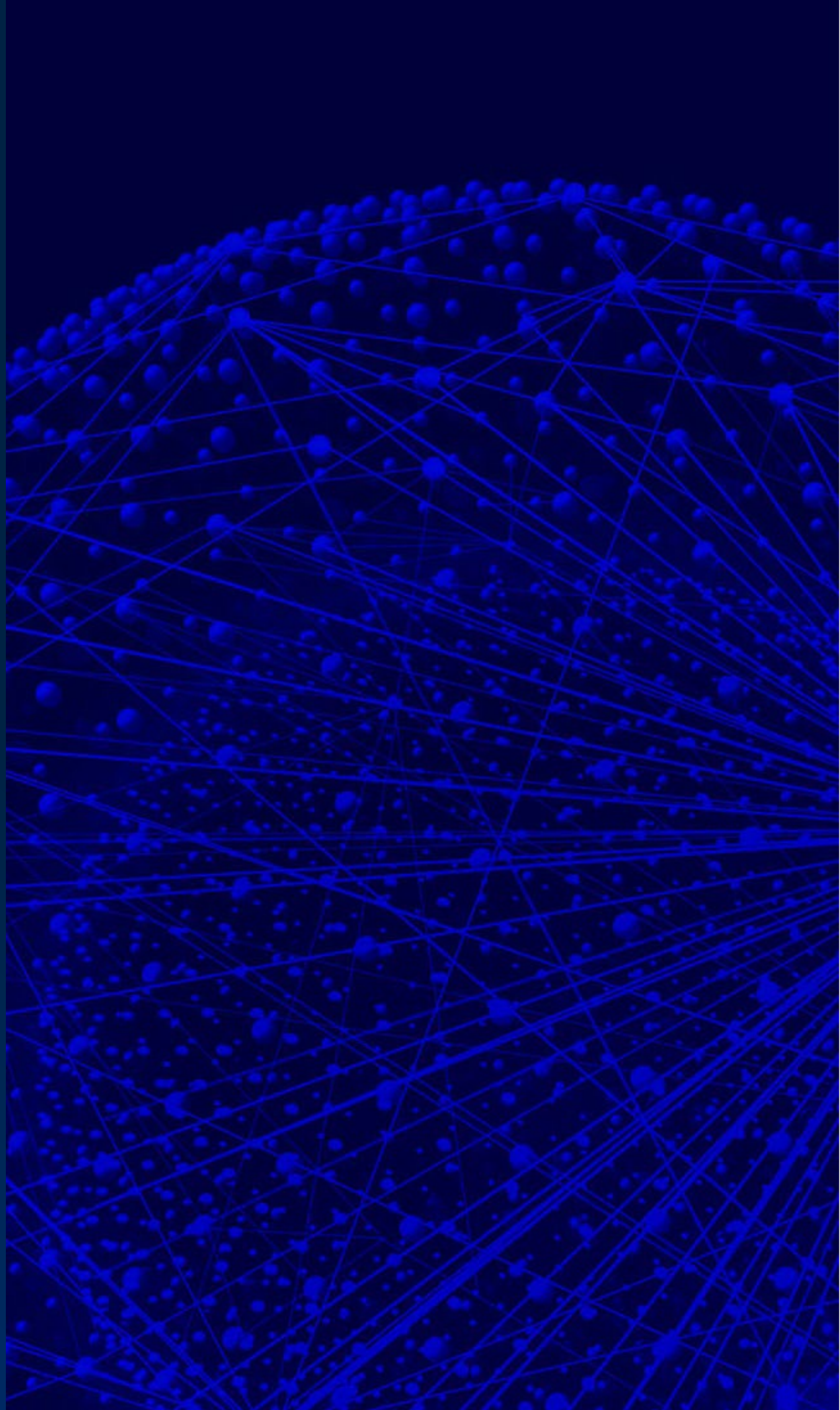
Your Lead Insights Dashboard



CHECK ALL YOUR LEADS BEFORE, DURING, AND AFTER EVENT

LeadInsights
by informa

Lead Insights consolidates all your event leads, providing insights into who has engaged with your event presence by tracking interactions from multiple touchpoints.

How to Login

1. One week before the event, you received an email from **leadinsights@informa.com** asking you to set your password.
2. If you're already set up, simply log in to view your leads. (https://leadinsights.informa.com)
3. Please contact **leadinsights.ls@informa.com** for support.

2 ways it can help your meeting scheduling efforts:

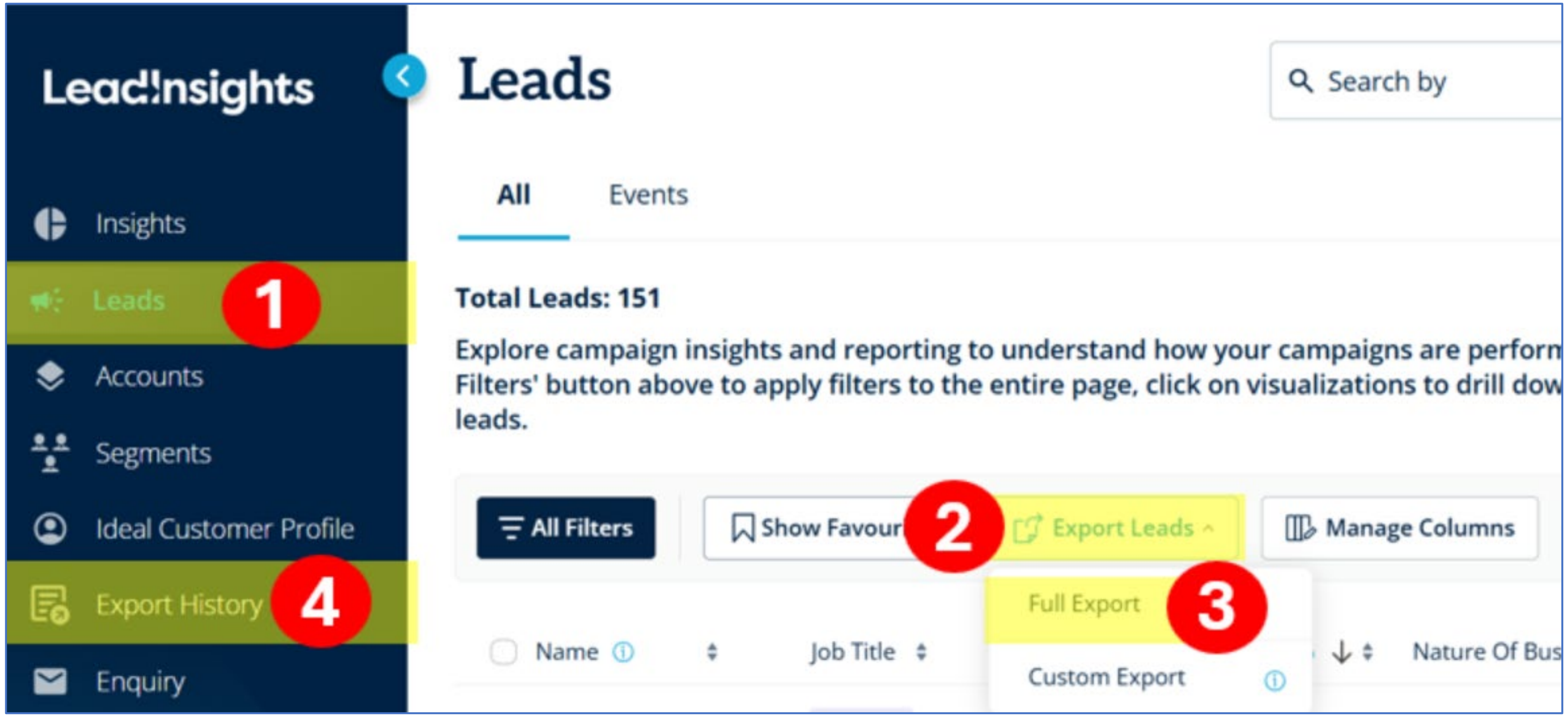
1. **Add a personal touch:** Extract email addresses from your scheduled meetings at the event's start to send personalized confirmation emails and communicate outside of the event app.
2. **Target high value prospects:** Gain valuable insights into which companies and individuals have actively engaged with your event presence, enabling you to tailor meeting invitations based on expressed interest e.g. "I see you engaged with our virtual booth"

Pre-event, you can already see:

- Digital booth visits
- Meetings scheduled
- Content downloads
- Sponsored Session RSVPs

EXPORT YOUR FULL DATA FROM LEAD INSIGHTS

Export all your lead data from the event within a single dashboard!



Lead Insights has email address of attendees from your:

- Scheduled meetings
- Digital booth visits
- Lead retrieval scans
- Sponsored session RSVPs
- Sponsored Session attendance

Navigate to the **LEADS** tab

Click "Export Leads"

Click "Full Export" in dropdown menu

Navigate to the **EXPORT HISTORY** tab to download

RETRIEVE YOUR LEAD DATA

After you request an export, check your email or download it directly from the **EXPORT HISTORY** section.

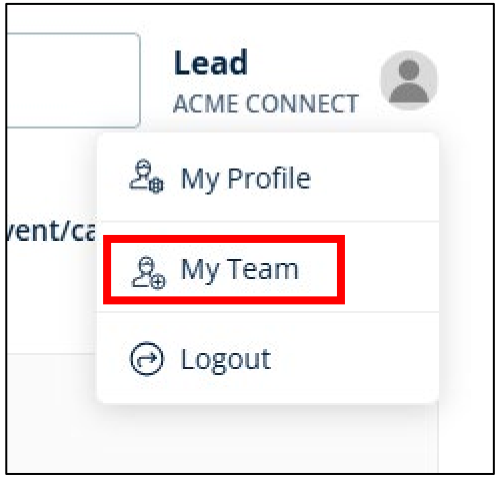
Navigate to the "Export History" tab, where you will find a download button. Once the export process is complete, the button will become active. Simply click "Download" to retrieve your file.

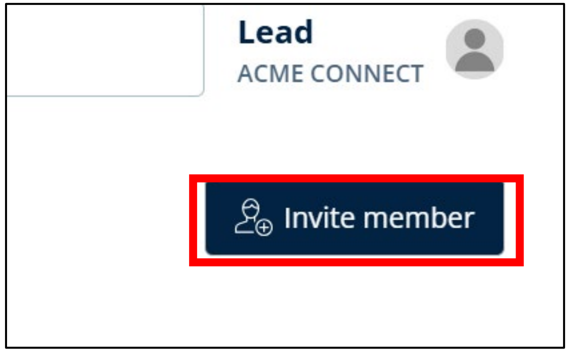
Team Management & Access Control

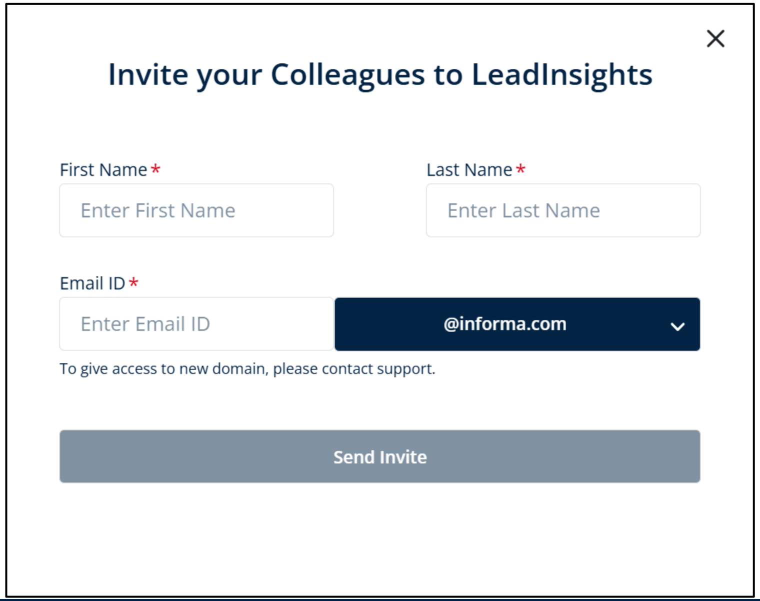
With Lead Insights, you can grant access to as many team members as you wish, as there are no limits on the number of users.

Steps:

- Click the icon located on the right side of your dashboard.
- From the dropdown menu, select "My Team."
- A popup window will appear; click the “Invite Member" button.
- Enter the required details, including First Name, Last Name, and Email.







Engagement Types found on your Lead Insights report

Activity Type	Description
Ad Click	Delegate clicked an in-platform banner ad from your company (not applicable to most sponsors)
Booth Visit - Digital	Attendee visited your company's showcase page
Booth Visit - Onsite	Delegate scanned by your staff at the onsite exhibition
Content View – Digital Showcase/Exhibit	Delegate scanned a QR code at your onsite booth to add your collateral or booth listing to their delegate bag (not applicable to some events)
Meeting Scheduled	Pre-arranged meeting with a specific time accepted between your staff and a delegate
Meeting Unconfirmed	Delegate requested a meeting with your staff with no response from your staff
Poll Respondent	Delegated answered your sponsored poll question
Poster View	Delegate viewed and/or downloaded your sponsored poster presentation
QR Code Scan - Onsite	Delegate scanned a QR code at your onsite booth to add your collateral or booth listing to their delegate bag
Scheduled Session	Delegate added your sponsored session to their custom agenda
Session Attend – Live Digital	Attended a live session sponsored by or presented by your staff on the digital platform
Session Attend - OD	Delegate viewed an on-demand session sponsored by your company
Session Attend - Onsite	Attended a live face-to-face session sponsored by or presented by your staff
Session Question	Question submitted in association with your session (live or on-demand)

Contact leadinsights.lifesciences@informa.com for help with accessing or exporting your data.

CONFERENCE APP

ConnectMe

- Access lead retrieval to scan attendee badges*
- View attendee directory
- Send direct messages and meeting invitations
- Set up and view virtual exhibit booths
- Access event content agenda
- Stream live (hybrid events) and on-demand sessions
- Scan exhibit booth QR codes

Who has access?
Sponsors, speakers and all attendees

Download the app
Enter App code: LS2026
(Event registration required to use conference app)

**All sponsor team members should see a "Lead Retrieval" button on the home screen of the ConnectMe app.*

Key Support Contact
Digital Event Ops Lead
Nicholas.pappas@informa.com

REGISTRATION SYSTEM

create WITH VISIT

- Register staff with contracted complimentary event passes
- Access all badge scan data captured by your team
- View badge scan notes
- Set up custom badge scan questions

Who has access?
Sponsor's main contact only
Your main contact will receive pre-event access via email to set up your team registration and lead retrieval

Key Support Contact
Exhibitor Ops Lead(s)
Kodia.Baye-Cigna@informa.com

LEAD REPORTING & ANALYTICS

LeadInsights by informa

- Access all your event leads, including session attendance, booth/badge scans, scan notes, virtual booth visits, and more
- View individuals/companies that are most engaged with your company
- Export your full event lead data
- Lead data is updated throughout event

Who has access?
Contract signer and main contact
You'll receive an email pre-event with access to your account, and you can extend access to colleagues. If you have questions about your lead data or access, please contact us.

Key Support Contact
Lead Data Delivery
leadinsights.ls@informa.com

Thank You