



SPONSOR SUCCESS GUIDE

*Tips to Plan, Promote & Sell More
at CUNA Councils' Conferences*



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About the Sponsorship Program

Our members know how important vendor partners are to their success as credit union executives. We also know how important it is for you to be able to reach credit union executives across the country with information on your products and services. And we've been told that vendors want to show support for the CUNA Councils in a way that's meaningful to the relationships you want to build.

Our sponsorship program provides you with an opportunity to show your support while gaining a high-profile image with the country's premier credit union executives. Here's a chance to have the attention of hundreds of relevant decision makers all in one place.

Through the Partners program, you'll be able to sponsor popular social events and dynamic educational sessions that give the conference its unique feel and flavor. There's no need to staff an exhibit booth and hope that the right participants stop by. Our program allows you to mix and mingle with all participants while showing financial support in a public way. Your support will earn the respect of executives, and the thanks of the Council through signage, the program guide, and other public recognition. In addition, it will allow you the opportunity to discuss your services/products in detail to a captive audience.

Participation in our sponsorship program will mean a high profile with just the right credibility, attracting the attention of the most influential group of credit union executives.

This guide contains general information we've gathered for you to maximize your sponsorship and make it the best possible experience for you and our members.

Questions?

If you ever have any questions about the program, please feel free to contact Bobbi Bischke at bbischke@cuna.coop, or 1-800-356-9655, ext. 4018.

Council Sponsor Testimonial

Highlights



"In order to provide appropriate service to our clients, it is very helpful to learn alongside them."

- CMBDC Sponsor

"As a vendor, I would rate this conference very high. The audience is targeted and from the beginning we were able to tailor our message to their needs. At the big conferences, vendors waste a lot of time trying to find the people they want to hear their message. This work was done in advance for us because the conference is so specific to the needs of operations and sales decision-makers."

- OpSS Sponsor

"The CUNA CFO Council conference has consistently been my favorite meeting of the year. The content is relevant, the sessions are engaging, and while the conference provides many takeaways and good information, it is festive and social. Thank you for putting together another great event!"

- CFO Sponsor

"You have far exceeded the other trade associations in our industry with your continued commitment to the education of credit union marketers. When marketers need it the most, you seek new and innovative ways to cope with membership, growth and the economy. As marketers and as an industry already searching for a larger national presence, you would take that extra step to find ways to help others in our industry who aren't able to come to some of these conferences...helping others so we can better help the member."

- CMBDC Sponsor

"As a sponsor, I think there is great value in the variety of activities. I enjoyed some of the sessions and it was a great way to hear what is on the minds of the members."

- CMBDC Sponsor

"Attending sessions allows for one on one time. I got to sit next to some of my top prospects at the lunch and awards dinner! Also, all of us are able to learn about credit union topics as well so we can serve our clients better."

- CMBDC Sponsor

"The CUNA Councils are the best at inclusion of vendors. Thank you so much for that."

- HR/TD Sponsor

Seven Deadly Exhibiting Sins and How to Avoid Them

By: Susan A. Friedmann, CSP, The Tradeshow Coach

Since exhibiting comprises so many different components and functions, it's no wonder that we make blunders trying to remember everything that needs doing. However, some are more lethal than others and as such should be avoided at all costs. The following seven points fall into that category. Learn to avoid them and you will increase your chances for a more successful and profitable tradeshow.

Sin #1: Failing to have a proper exhibit marketing plan.

In order to make tradeshow a powerful dimension your company's overall marketing operation, there must be total alignment between the strategic marketing and your exhibit marketing plan. Tradeshow should not be a stand-alone venture. Know and understand exactly what you wish to achieve - increasing market share with existing users; introducing new products/services into existing markets or into new markets; or introducing new products/services into new markets. This is the nucleus on which to build your program, which should include pre-show, at-show and post-show promotional activities. Know whom you want to target and then consider having different promotional programs aimed at the different groups you are interested in attracting.

Sin #2: Failing to set quantifiable exhibiting goals.

Goals, or the purpose for exhibiting, are the essence of the whole tradeshow experience. Knowing what you want to accomplish at a show will help plan every other aspect - your theme, the booth layout and display, graphics, product displays, premiums, literature, etc. Exhibiting goals should complement your corporate marketing objectives and help in accomplishing them. Make sure they can be measured after the show to establish how well you did.

Sin #3: Failing to build brand awareness with your booth.

On the show floor your exhibit makes a strong statement about who your company is, what you do and how you do it. Everything your company stands for, no matter how large or small, is being exhibited on the show floor. This means that there needs to be total consistency, congruity, clarity and focus in every aspect of your exhibiting program, before, during and after the show. The purpose of your exhibit is to attract visitors so that you can achieve your marketing objectives. In addition to being an open, welcoming and friendly space, there needs to be a focal point and a strong key message that communicates a significant benefit to your prospect. Opt for large graphics rather than reams of copy. Pictures paint a thousand words while very few attendees will take time to read. Your presentations/demonstrations are a critical part of your exhibit marketing. Create an experience that allows visitors to use as many of their senses as possible. This will help to enhance memorability.

Sin #4: Failing to give visitors an incentive to visit your booth.

Whatever promotional vehicles you use - direct mail, broadcast faxes, advertising, PR, sponsorship, and the Internet, make sure that you give visitors a reason to come and visit you. With a hall overflowing with fascinating products/services, combined with time constraints, people need an incentive to stop at your booth. First and foremost their primary interest is in "what's new!" They are eager to learn about the latest technologies, new applications, or anything that will help save them time and/or money. Even if you don't have a new product/service to introduce, think about a new angle to promote your offerings.

Sin #5: Failing to have giveaways that work.

Tied into giving visitors an incentive to visit your booth is the opportunity to offer a premium item that will entice them to stop. Your giveaway items should be designed to increase your memorability, communicate, motivate, promote or increase recognition of your company. Developing a dynamite giveaway takes thought and creativity. Consider what your target audience wants, what will help them do their job better, what they can't get elsewhere, what is product/service related and educational. Think about having different gifts for different types of visitors. Use your website to make an offer for visitors to collect important information, such as an executive report, when they visit your booth. Giveaways should be used as a reward or token of for visitors participating in a demonstration, presentation or contest, or as a thank-you for qualifying information about specific needs etc.

Sin #6: Failing to realize that your people are your marketing team.

Enormous time, energy and money are put into organizing show participation - display, graphics, literature, premiums, etc. However, the people chosen to represent the entire image of the organization are often left to fend for themselves. They are just told to show up. Your people are your ambassadors. They represent everything your company stands for, so choose them well. Brief them beforehand and make sure they know: *why you are exhibiting; what you are exhibiting and what you expect from them.* Exhibit staff training is essential for a unified and professional image. This means making sure that they sell instead of tell; they don't try to do too much; they understand visitor needs; they don't spend too much time with visitors; and finally, they know how to close the interaction with a commitment to follow-up.

Sin #7: Failing to have a proper follow-up plan.

The key to your tradeshow success is wrapped up in the lead-management process. The best time to plan for follow-up is before the show. Show leads often take second place to other management activities that occur after being out of the office for several days. The longer leads are left unattended, the colder and more mediocre they become. It is to your advantage to develop an organized, systematic approach to follow-up. Establish a lead handling system, set time lines for follow-up, use a computerized database for tracking, make sales representatives accountable for leads given to them, and then measure your results.

The Elevator Speech

Rehearse with all booth staff, a four part "elevator speech" about your company or product.

- ⇒ Make an irrefutable statement about your company
- ⇒ Establish credibility using current customer names or statistics
- ⇒ List 2 or 3 benefits of doing business with your company, customer testimonials
- ⇒ End with a call-to-action or question of how the prospect could use your services.

- Candy Adams
The Booth Mom (www.boothmom.com)

Avoid Booth Staff Duds: Thirteen Essential Questions You Have to Ask

By: Susan A. Friedmann, CSP, The Tradeshow Coach

Booth staff selection is the single most important factor in your exhibiting success. More than graphics, signage, literature, giveaways, or any other variable, it is the people you put on the show floor that influence visitor's opinion of your organization. They are your ambassadors, representing your company for the whole world to see. It is impossible to stress enough how crucial your team is to your overall success.

To ensure a top notch performance, begin preparing your booth team four to six months prior to the event. You will need the answers to the following questions:

1. How many people are needed to staff the booth?

A number of variables need to be considered. How big is your exhibit? How long is the show? Will you need employees to give product demonstrations, work the hospitality suite, teach seminars, or supervise contests? Ensure you have enough staffing to have your booth manned at all times, while giving your team a break every four to six hours. No one can be 'on' for twelve hours at a time.

2. Who are the best people to represent the organization?

Working a trade show requires a unique mix of skills. You want employees with excellent product knowledge, superlative people skills, killer sales instincts, and a warm, engaging personality. These people should be motivated self-starters, able to think on their feet and work with little or no direction.

3. Has staff training been organized?

To ensure success, prepare your team with all the skills and tools they need. Training should cover assessing visitor types, asking qualifying questions, handling difficult attendees, lead generation and follow up, and many other factors.

4. Has a pre-show meeting been scheduled?

Pre-show meetings play a critical role in ensuring that your team understands their goals and objectives, expected roles and duties, and is adequately supplied with background knowledge to handle any unexpected surprises. Use this time to clarify any areas of confusion and to address any staff concerns.

5. Is the booth team familiar with the products or services being displayed?

To effectively sell products, you need to have thorough, complete product knowledge. Too many times, organizations send out rookie employees who only possess rudimentary knowledge. This is frustrating for attendees, who won't come back to find another employee who might have an answer – they'll go to the competition instead.

6. Has a practice demonstration session been organized?

Never assume that your employees know how to use the products that they sell. It is entirely possible that they are not completely familiar with every feature, especially if you are introducing a new product. Take the time to thoroughly train your team, and have them practice demonstrating the product to familiarize themselves with the show floor routine.

7. Will a technical representative be available to answer questions?

Depending on your product/service line, it may be entirely appropriate to send a technical representative to handle specific product questions. Train this person in the basics of salesmanship, but keep their duties largely relegated to providing technical answers. Make sure they are aware of the possibility of trade show espionage, to prevent them from sharing too much information.

8. Has a dress code been established?

Well before you arrive at the event, a dress code should be established. Uniforms may be appropriate for your company, but if they are not, clearly specify what you want your team to be wearing. “Casual business” gives far too much leeway. Instead, spell out “Black trousers or skirt, white shirt, black blazer, red tie,” or the equivalent.

9. Have badges been ordered for all booth personnel?

Everyone on your team needs a badge to enter the show floor, access hospitality areas, and move freely about. Order these badges well ahead of time, so that any errors or omissions can be remedied in a timely fashion.

10. Do booth personnel have sufficient business cards?

It is amazing how many business cards you can hand out during the course of one trade show. Make sure your team is adequately prepared.

11. Has a booth schedule been planned?

A complete schedule will cover every moment from show arrival to departure. Include who will be staffing the booth, break times, technical support and assorted responsibilities. It may be a good idea to include ‘check in’ time into the schedule, so sales people acting as booth staff can check messages back at the home office and make needed phone calls. This will alleviate a great deal of staff anxiety.

12. Who will oversee booth installation and dismantling?

Often overlooked, these two items can quickly become logistic nightmares if no one is prepared to address them. Delegate two people to this detail. Many show organizers provide this service for a fee, but you may still want to have staff members on hand supervising.

13. Does that person understand the move-out procedure?

Someone has to arrange for moving the exhibit out of the convention center, ensuring it is properly packed, and coordinate shipping the whole thing back to the home office. Again, a team should be clearly delegated this responsibility, and provided with all the tools and resources they’ll need to succeed.

Are You “Cell”ing Yourself Short?

By: Susan A. Friedmann, CSP, The Tradeshow Coach

Cell phones have changed our world. With few exceptions, we can now talk to anyone we like whenever we'd like. The staccato symphony of ring tones accompanies us through our days: from the morning commute to the crowded restaurant at lunchtime, during meetings and even during the quick stop at the grocery store when the day is done. We're always connected, always reachable. It's a marvel.

It's a marvel that can destroy your tradeshow performance.

Consider the following:

You're at a tradeshow. An attractive exhibit catches your eye. The product on display is exactly what you've been searching for. When you approach the booth, a staffer looks up and with a gesture indicates that you should wait, just one minute, while he finishes his call. When he's done talking to the important people, the message seems to be, he'll be happy to talk to you.

How long are you going to wait? After all, you've only a limited amount of time at the show, and there are dozens of other booths on your 'must-see' list. When you discover that the display just a little further down the aisle also appears to feature a product that could fill your needs, chances are that's all the impetus you'll need to move along. There's no sense waiting for the staffer to finish his call, not when there are other people who are more than ready to talk to you right now.

Let's flip the scenario around. You're on the other side of the aisle when your cell phone rings. Do you take the call?

I can hear you now. "But that's different! My call is important!"

Guess what? The salesman in the first example thought his call was important too. And it was -- to him. It was more important than you were, at least.

Talking on your cell phone tells tradeshow attendees three things:

- Your team's focus is NOT on the tradeshow.
- Your attendee is not the most important person in the room -- that honor belongs to whoever has your cell phone number.
- The attendee's business is not valuable to your company.

Add to this the very real possibility that attendees are listening to at least one side of your staffer's cell phone conversations. What might they be hearing?

- Confidential business details, including customer names, order size and more. What great info for your competitors to have.
- Intimate, personal conversations. Nothing's more off putting than TMI (too much information)!
- Humor or observations that may be considered offensive. What a PR nightmare!

How does this impact your marketing message? How does cell phone use by your staffers affect how that message is received by the show attendees?

It's entirely possible that cell phone use by your staff will eliminate the clear communication of your marketing message. Sad but true: that's the best you can hope for. Worse, and far more likely, attendees are getting different messages from your company, including:

- We're too busy for you.
- We're too important for you.
- We don't care about you.
- You're not worth our time.
- You don't deserve our attention.

Is that the message you want to send? Emphatically NO! That's why you need a cell phone policy. This policy will obviously vary by company, but should include the following:

- Cell phones must be shut off when you're on the floor.
- Give staffers regular breaks so they can check messages and make calls, away from the exhibit.
- Staffers who have personal reasons to be in constant contact (i.e. small children, ailing parents, etc.) should be encouraged to program their phones to signal 'high priority' calls with a distinctive ring or vibration pattern. That way, staffers can only answer emergency calls and let voice mail pick up the rest. This offers your team the security of being constantly connected while still keeping the focus on the tradeshow attendees.

Expect some resistance when first introducing this policy. Cell phones have become such a part of our lives that many people feel naked without them. Explain the benefits and reasoning of the policy. Minimize tension by being flexible, providing ample opportunity for staffers to 'check in', and leading by example. You can't tell your people to turn off their phones and then spend the day chatting on yours!

Written by Susan A. Friedmann, CSP, The Tradeshow Coach, Lake Placid, NY, working with companies to improve their meeting and event success through coaching, consulting and training.

Author: "Meeting & Event Planning for Dummies," and "Riches in Niches: How to Make it BIG in a small Market" (May 2007). For a free copy of "10 Common Mistakes Exhibitors Make", e-mail: article4@thetradeshowcoach.com; website: www.thetradeshowcoach.com

Capturing Leads & Contacts

With today's privacy laws and anti-spam regulations, companies must be diligent in getting permission to follow-up with booth visitors by asking. If attendees say "yes" to being contacted after the conference, you can add them to your follow-up plans.

If they say "no", then you cannot.

If you are conducting a drawing in your booth, add a line on your lead form that asks, "Would you like a representative to call you to discuss the benefits of our new product?" Or, "Would you like to receive our quarterly newsletter?"

When your staff is qualifying an attendee they should ask, "Can I give you a call next week to continue our conversation? Would that be okay?" Following these simple procedures will give attendees a positive feeling about your company.

- Barry Siskind

International Training & Management Company

Post-Conference: “They’re Only Young Once”

By: Steve Miller, Exhibiting Marketing Magazine

They get stuffed into pockets, tossed into briefcases, and packed into exhibitor cases. **Why, oh why, are so many trade show leads** left abandoned, growing old and valueless when in fact they could have been turned into sales?

Some estimates put the number of show leads that never get followed-up at as high as 50%. Why, you might ask, would someone spend the money and time on exhibiting only to leave the leads unworked! Distraction might be an answer.

Trade show leads are hot. But every day, the leads cool down a degree or two.

Don't Leave Home Without It

The key to post-show success is to do most of the work before the show. Before you leave, as part of your pre-show planning, decide what you'll send as follow-up information. What literature do you plan to send? Do you have enough on hand? Who will send it out, and how?

The Lead Form Will Lead You

If you fill out a lead form completely, you'll have the information for your follow-up. By including one sentence that refers back to something you talked about at the trade show, the prospect won't care that they are getting everything in a form letter. This planning is simple, easy, and will save you tremendous amount of time after the show.

Plus, it feels great to leave for the show knowing you've already made your follow-up plan.

Too Slow or Too Fast

For those who do follow-up, there seems to be two prevailing schools of thought about when to send literature.

The Infinity School of Follow-Up

This one has no time limit. You can follow-up any time between now and infinity.

Won't They Be Impressed School of Thought

Under this system you send your leads at the end of each day and back to the office, where they are turned into information kits with form letters, and sent out to the prospect via overnight express.

Only on the surface this seems like a great idea, but it overlooks one point. After you've been out of the office for several days, two things are guaranteed to be waiting on your desk; a two foot stack of mail and hundreds and hundreds of emails.

The average person just doesn't want to deal with these piles any longer than absolutely necessary. Your buyer will buzz through these stacks ruthlessly culling and tossing just to remove the clutter. They'll spend mere seconds on each piece of mail.

Do You Have a Lead Card/Form?

Make sure you record the following in your own manual lead card from booth visitors and conference contacts:

- ⇒ Title
- ⇒ Buying Influence
- ⇒ Budget
- ⇒ Interest
- ⇒ Time Frame
- ⇒ Additional information they offered or promises staff made.

- Barry Siskind

International Training & Management

Frankly, I don't want my expensive follow-up package to be in that pile. That's why I developed what I call the Forty-Eight-Hour-Rule of Trade Show Sales Lead Follow-Up.

The Forty-Eight-Hour Rule of Follow-Up

is simple by design and, an effective way of reaching the prospect in a timely fashion. The goal of the rule for the follow-up package to arrive no earlier than two working days after the show ends, and no later than fortyeight- hours after that. Think of it as a fortyeight- hour “window.” Why?

- ⇒ **Visibility.** You don't land in the big pile of mail. When your materials arrives, the clutter “while you were gone” pile has been cleared.
- ⇒ **Memory.** The show is still fresh in the prospect's mind. If you develop a good rapport with them they'll remember you and your product line.
- ⇒ **Creditability.** You told the prospect you'll be sending the information out right away, and now you've done it. You anchored in the prospects mind just how professional and dependable you are, and established that you can deliver as promised.

Follow Through on Follow-Ups

Five working days after the show closes, your packet of information should be in the hands of the prospect. Call and ask if they received the information requested. Be sure and emphasize that you promised to send it to them.

Politely ask if they had a chance to look at it. If they have, then ask to set up a phone appointment later to discuss how you might work together.

The request for a phone appointment is very important. Don't assume that just because you've gotten them on the line, they have time to talk to you now.

Be considerate and offer to speak with them at their convenience. The appointment also underscores that what you'll be talking about is important.

If they haven't looked it over yet, then confidently say that you'll follow-up in a week to answer any questions they have. This will put the onus on them to look through the package. Again, set the phone appointment, to give it immediacy.

The 5/10/20/40 Follow-Up

You start the 5/10/20/40/ Follow-Up System with your call to the prospect five days after the show. You continue at ten, twenty, and forty days after the show. With calls at regular intervals you have a plan for real sales progress.

Of course, if you close the deal on the second call, then you're better than most. But good salespeople know it takes time. If they are going to buy, it'll be from the one who stays in the game long enough to win.

Get Leads on New Leads

One more objective is to get the name of another possible contact from the prospect. After meeting a prospect and following-up regularly, you usually build a good rapport with them. You can ask them to give you referrals, whether or not you do business together. In fact, sometime the ones that you don't work with feel a sense of obligation to help because of your relationship.

Remember, selling happens before, during, and after the show. With a timely and effective follow-up, you can take what used to be a two or a three day event and turn it into a campaign that brings returns for a long time to come.