

Mobile Data Collection at Events

Your 7-step checklist to success



You're planning to set up a booth at a tradeshow or consumer exhibit soon?
And you want to successfully collect data or turn visitors into leads?
This 7-step checklist is all you need to reach for the stars and skyrocket your results!

□ Step 1: Define your goals

Make sure you have a communication plan in order BEFORE you get started. Answer these questions to set the right goals for your event:

- Why are you part of this event?
To better your brand? To collect leads? Or raise awareness?
Base the rest of your goals and communication strategy on this.
- What is your positioning statement?
What do you stand for? How is this relevant for visitors? What are your key selling points?
All of your messaging before and after, your booth, visitor approach, ... should reinforce this.
- Who is your target audience?
Who are you trying to reach? What drives them? Why will they be at this event?
Adapt your communication to your 'ideal visitor'.
- What actions do you want your booth visitors to take?
Leave their data? Take part in a contest? Give feedback? Sign up for a newsletter?
Translate this in a strong call to action and incorporate it in all your communication.

□ Step 2: Pick the right hardware

Time to get practical! Take the following items into account when choosing and using your hardware.

Before the event:

- Decide on the number of devices you'll need.
Consider how many people will man your booth and add a device or two as a spare.
- Specifications to look out for: An updated operating system, a recent model, insurance (optional), 4G.
- If Wi-Fi is provided at the venue: don't make it the only option.
Make sure that the download capacity is at least 5MBPS for up to 5 users/devices at a time. And have an alternative to fall back on.
- Invest in 3G sim cards or a personal MiFi (Wi-Fi hotspot) that works on a 4G connection.
- Look for a data collection tool that allows you to capture data even when you're offline.

At the day of the event:

- Bring chargers, make sure all devices are charged beforehand.
Also check for a spot at or near your booth where you can recharge if necessary.
- Test your survey on every device.
- Gain battery life by disabling GPS settings and adapting the clarity of the screens.

□ Step 3: Choose the right survey tool

Use a survey tool to collect additional info with a personal touch, and to have an opt-in from visitors to contact them again after the event. Look for features that suit your needs:

- Room for branding, for a strong visual communication.
- Easy in setup. You shouldn't have to reinvent the data collection survey!
- Offline data collection capabilities when you can't depend on a reliable internet connection.
- Options to engage with your audience in a fun, personal way.

□ Step 4: Ask the right questions

Be fun, be engaging! But never lose focus on getting the info you need! Base yourself on a good, ready-to-use data collection template. [Like this one right here.](#)

- Personalize your questions
- Limit your survey to 5-7 questions
- Work with features like [Skip Logic](#) to increase efficiency and relevance
- Focus on additional face-to-face interaction at the event

□ Step 5: Add an incentive

When you ask people for personal information, give them something in return.

- What: Consider a special prize, loyalty points, coupons, insights and perks to your product, ... There are many things you can give, without necessarily having to pay a lot of money.
- How: With a contest. By adding a fun-factor to the standard survey (like a [digital scratch card](#)), you increase the chance of personal interaction and make people curious to come and see you.
- Who: Try to reward everyone. Give away one very big prize to hook your visitors. Provide an additional little something for all other contestants and have a booth filled with happy faces!

If you set up a contest in your survey, make sure you add all necessary legal info. [Here's a great terms and conditions template for contests to get you started.](#)

□ Step 6: Get your booth in order

If you can, work with representatives at your booth for a face-to-face approach. But you could set up unmanned tablets via "Kiosk Mode" if needed. Find more in this [easy guide to set up kiosk mode for your iPad, Windows tablet or Android device.](#)

When you're working with representatives:

- Plan ahead! How many people will you need to man your booth?
- Make a briefing. Make sure everyone tells the same story and focuses on the right things.

- Test the tablets and survey together, so your team operates it correctly and follows the storyline.

One additional check: Remember your goals from step 1? Pay extra attention to your call to actions within your booth. Make sure they are bold, big and clear!

□ Step 7: Analyze and communicate afterwards

Help visitors to remember you, follow up:

- Prepare email templates based on the answers your respondents could give. Using the right survey tool will help you send out different emails that feel personal and to the point.
- Send out a first reminder right after the trade show.
- Make your follow up actionable: People came to your booth, they left their contact data, what do you want them to do next?
- Find [more tips for successful follow up here](#).

Analyze how you did:

- Did you collect data before at similar events? Use those numbers as a benchmark.
- Take your goals from Step 1 and compare how you can answer those questions now, after the actual event.
- Some additional numbers to consider: How many people attended the event? How many visited your booth? How many of those left a response? How many respondents turned into leads and afterwards into customers?

Here's what to do next

1. Let us know how we did with this checklist via snelen@surveyanyplace.com
2. [Follow us on Twitter](#), where we share more helpful content on using surveys as an engaging tool.
3. Accept this tiny award. You've just read a 4-page checklist!

