Lead Capture Case Study:
Caterpillar

Sales professionals understand that their ability to drive revenue depends on their ability to capture new leads quickly and efficiently. When the processes behind lead capture are time consuming and error prone, the overall effectiveness and return on investment of sales activities plummets.

The Problem

Caterpillar is an example of one company that was suffering from poor lead capture. In the past, the construction manufacturer depended on manual lead capture processes, where sales personnel were required to type in each lead's information by hand. This process took up valuable time, and put the process at risk of human error. As a result, salespeople were limited in the amount of leads they could collect in a given time period, while the company was limited in how much revenue they could collect from those leads.

The problem was especially limiting in trade show contexts, where the salespeople were surrounded by literally thousands of possible leads that they couldn't interact with due to the time-consuming nature of manual lead capture.

The Solution

For this reason, the company chose the CONEXPO 2014 construction trade show in Las Vegas to roll out the solution to its problems. Working with App Data Room, Caterpillar was able to put the power of Lead Capture, App Data Room's new automated lead capture feature, directly in the hands of their salespeople.

The new feature required very little extra training to use. Salespeople were able to use Lead Capture on iPad mini tablets that they could carry with them during the show. A good number of the people had never used an iPad, and the 20 minute training was sufficient to get them up to speed completely.

Instead of entering lead data manually, the sales staff was able to use the iPad's onboard camera to scan the barcodes found on attendee badges. Once the barcode is scanned, the app automatically fills in predetermined information fields for the lead, including name, contact information, and industry. The salesperson is then able to easily qualify the lead by including the lead's time-frame for purchase, what type of equipment the lead is interested in purchasing, and how much the lead intends to spend.

Once all of the lead information has been captured, the salesperson is then able to fire off a follow-up email to the lead immediately, ensuring that the lead doesn't have to wait days or even weeks to hear back from the company. The leads are automatically transferred into a centralized repository overseen by the Caterpillar event staff, allowing management to see a detailed list of all the leads captured in real time. They were also able to see which locations were collecting the most leads and make adjustments to their event strategy based on that data.

This entire process can take place in a matter of seconds, far faster than Caterpillar's previous lead capture strategy. Once a salesperson has completed the lead capture and sent the follow-up email, they are free to continue working the trade show floor in search of other leads.

The Technology

Caterpillar benefits from deploying the Lead Capture app on the iPad mini for a couple of reasons. To begin with, the solution was highly mobile, going wherever the salespeople went, and offered an intuitive, easy-to-use platform that one salesperson described as "light years" ahead of the company's previous lead capture solution.

In addition, Lead Capture also offered Caterpillar the ability to store lead data locally on the iPads, meaning that there was no risk of losing the leads, even when network connection was poor. The lead records would be captured and stored on the iPads when WiFi or LTE was not available, and then offloaded to a central server whenever the devices came into range of a network.

The Results

Caterpillar's pilot session was a complete success, both from the amount of leads captured at the show and the ease of use of the solution.

Caterpillar was able to shatter their own lead capture expectations for the show. Using App Data Room's efficient automated lead capture features, they were able to collect over twice the amount of leads than they had hoped for.

Salespeople also praised the solution for its simplicity, while management valued it for its ability to give a complete view of all the leads captured at the show.

The Next Step

If you're interested in empowering your sales staff to capture leads more quickly and efficiently just like Caterpillar did, you too can take advantage of the Lead Capture app to make time-consuming manual lead capture a thing of the past. Contact App Data Room today to learn more about how you can turn your sales team into a lead-capturing, revenue-generating machine.