# Queenstown Convention Bureau

## Lead management processes

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## 1. Overview

This document outlines the Bureau's work flow for all leads and covers the following four key areas:

a) How leads are received/generated and the initial communication with the client
b) Information gathering – what information we source from the client prior to sending the lead to our members
c) Details of lead communicated to members for quotation and delivery of destinational proposal to the client
d) Follow up – immediate and ongoing

## 2. Complete process summary

**a) Leads received or generated**

There are numerous ways the Bureau sources leads. These include directly from the client via phone or email (due to ongoing relationships), via the website (either via the RFP form or sales manager contact details), at tradeshows, sales calls, referral from industry partners or via other clients.

Sometimes clients advise they will have a new lead coming up in the future – they may be waiting to complete an event this year, don't have a full brief yet or it may be an event on rotation so NZ will be considered in a few years' time. In these cases, the Bureau set a trace in the account to follow up with the client at an appropriate time.

**b) Information gathering**

Once a lead is received (unless via a tradeshow meeting or sales call where we gather the information at the time), the relevant QCB sales manager will contact the client **within 24 hours of receiving the initial communication** to clarity the information provided and/or request additional information. In most cases, this initial contact with the client occurs on the same day.

There are 2 types of information we try to gather:

**I. Detailed information for the lead:**

- Name of event and company (auto, finance, insurance, FMCG, association etc)
- Date, plus alternative dates – are they flexible? Days of the week pattern
- If corporate direct, will they be appointing a PCO to manage any components of the programme?
- If PCO – are they pitching for the business or have they won it?
- Will they require theming, team building or transfers?
- Number of pax (delegates and partners or just delegates)
- Type of event annual conference, dealers meet, leadership summit, product launch, incentive for staff or clients etc

- Number of accommodation rooms per night – single/double/twin occupancy
- Star rating of hotel
- Will they split accommodation between hotels if needed?
- Any inclusions in rate – B&B, wifi etc
- Meeting room requirements – style of seating, breakouts
- Would they consider conferencing off-site?
- Social functions – on or off-site, details of all requirements
- Activities/team building requirements
- Competing destinations – who are we up against?
- If it is a conference for 200 pax and over and we (NZ) is in a competitive bidding situation against other countries, then they may be eligible for the TNZ Conference Assistance Programme (CAP) –follow up with TNZ where appropriate
- Where have they done this event previously?
- What are the main decision making factors?
- Who is the decision maker?
- Any other information about the group that is relevant – demographics etc
- Decision making timeline

II. **If appropriate we also try to gather general information regarding the company/client for account management**:

- About their business, industry
- Number and type of events they have each year (conference and/or incentive)
- Corporate/association - have they done events in NZ before? Is there a cycle of onshore/offshore?
- PCO - what other clients do they work with, size and type of events

During the discussion with the client, the Bureau account manager also discusses the options around advising our operators who the event is for. We explain that in order to get a more customised quote from the hotels and venues it is preferable for them to know who is booking the event ie. which PCO and/or corporate company and the name of the event. The decision is left to the client and the Bureau will communicate to the operators accordingly. If the client does not agree, the Bureau will still pass on generic information about the company's sector and type of event.

**c) Lead out to members and proposal to client**

Communication of the lead details is sent out **to members required to provide a written quotation within 24-48 hours** of receiving the initial lead opportunity, depending on how quickly we obtain all the information we need from the client. Again in most cases, this actually happens faster i.e. same day.

A lead alert is sent out to relevant members via Simpleview. This alert gives top level lead information such as lead number, sales manager, event type and the expected number of attendees. A response date for proposals is given to the members along with a quick access hyperlink to the members RFP portal on the extranet where the members are to submit their response to the lead.

A user guide for the members RFP portal is available to users that have an extranet login. This document can be found in the partner bulletin. To obtain a login and access to the members RFP portal, the Bureau needs to know that you are the contact for DQ lead opportunities, appropriate security settings will then be activated that will allow you to set up a profile on the extranet.

We state the timeframe the members need to respond within based on discussions with the client. This is clearly outlined in the email with a specific date and time the quotes need to be back by.

In most instances we request quotes back from the members within **48 hours**.

For some urgent leads, we will turn a proposal around in **24 hours**. Members are advised if a lead is high priority.

Occasionally, where the process needs to be expedited even further, the client/PCO is happy to have the hotels/venues send proposals directly to them. The Bureau sends out the lead with client contact details and advises to forward proposal directly to the client with cc to the Bureau.

A full proposal includes quotes from a minimum of 3 hotels or at least 50% of the accommodation providers sent the lead; or in some instances only specific properties that have been requested by the client.

Moving forward, the Bureau will not be sending reminder emails to the hotels and venues if we have not received their proposals in the timeframe advised.

Proposals also include information on dinner venues, restaurants, activities, transport, DMCs, and other ancillary services as requested by the client.

**d) Follow up**

I. Pre-decision

The full destinational proposal is sent **to client within 72-96 hours** of the initial enquiry. The proposal will be sent in two parts in PDF format:

Part 1: Welcome letter, general information and accommodation/conferencing/venue quotations as requested by the client

Part 2: Why Queenstown information followed by all the ancillary services the client has requested/requires– activities, transport, restaurants, theming, team building, catering etc. This section will also include a contents page with links to the various pages/categories for ease of use.

The Account Manager sets a trace to follow up in **5 days** from date sent to check the client has received our proposal and if they have any questions regarding the content.

A second follow up trace is set based on the lead time of the event as follows (or as per client information re timeframes):

- More than 18 months lead time – a **90 day** follow up trace is set to touch base with the client for an update. Subsequent traces are set according to the decision making timeframe given by the client.
- More than 12 months but less than 18 months lead time - a **60 day** follow up trace is set to see where the client is at with decision making. Subsequent traces are set according to the decision making timeframe given by the client.
- Less than 12 months lead time - a **30 day** follow up trace is set to see where the client is at with decision making. Subsequent traces are set according to the decision making timeframe given by the client
- Less than 6 months lead time – a **14 day** follow up trace is set to see where the client is at with decision making.

II. Post decision:

- All prospective leads will have a follow up trace pending until business is confirmed or lost
- If confirmed, the host hotel is noted in Simpleview and an update on room blocks etc is entered
- A subsequent trace is set for **2 weeks** prior to the event for the Account Manager to check they have everything they need
- If lost, the reason is noted in Simpleview for future reporting. Reasons recorded are as follows:

  Hotel/meeting space not available

  Rates too high

  Dates not available

  Infrastructure constraints

  Event cancelled/postponed

  PCO lost the business

  Lost to alternative destination (destination noted in comments section)

  No air service

  Budget cuts

  No response from client during follow up

  Other
- When the status of a lead is updated in SV by the Bureau, an email will be sent by the account manager via SV to the members who have quoted as follows:

a) Confirmed – advising Queenstown has won the business

b) Lost – advising Queenstown has lost the business and the reason why. Any additional information obtained will also be provided.

III. Post Event:

- The last trace is set for **2 weeks' post-event** to follow up on their Queenstown experience, obtain feedback etc. Any other traces regarding future business opportunities to follow up on are then entered at an account level.