

Event Lead Entry Application



The Challenge

This large local manufacturing company has affiliates who staff booths and tables at events across the country to generate leads for product replacement at residential homes. These affiliates are responsible for gathering customer information and providing it to the manufacturer for follow-up. Their existing process had affiliates recording customer information on paper and manually entering it into the CRM later. Additionally, these affiliates occasionally needed to communicate lead details to call-center partners by phone for special cases or at-home appointments, diverting their attention from potential sales opportunities. This reliance on manual, error-prone tasks was consuming time and leading to lost leads and delayed follow-ups.

The Solution

We began by gaining a detailed understanding of the current process: how affiliates interact with customers at events, what data was being captured, and how that data was being used. We wanted to understand the timing needs, data requirements, and hidden struggles within the existing process.

Based on this understanding, we chose to develop a mobile application for lead entry with both online and offline functionality. This solution addressed all the aforementioned challenges by eliminating the need for paper-based data collection and automatically sending the data to the CRM system when the device is connected to the internet - since many affiliate events lack Wi-Fi connectivity.

Because iPads were the preferred interface, we elected to build a native iOS application using Swift and SwiftUI. Their existing CRM already had an API for integration, which allowed us to seamlessly send the lead data from our app to their backend system. This enabled us to expedite our deployment of the solution without the need to develop the backend.

The Results

Our customer now has a lead entry application that enables affiliates to capture new customer data quickly, accurately, and consistently at events. The data is automatically entered into the CRM, eliminating the risks associated with manual data entry and speeding up the process from initial contact to in-home

demo. This streamlined approach enhances customer experience by eliminating the need to repeat information across multiple touchpoints and has reduced the call volume to call-centers, maximizing potential sales and streamlining the company's operations.