

Exhibitor Guide to Success



Prepared by Shepard Exposition Services

Making the most of your Trade Show Experience

In today's buyer-empowered world, marketers need to seize every opportunity to start a relationship, nurture an existing one, and earn the trust of prospective buyers. Trade shows provide the unique ability to meet face-to-face with attendees who seek to gain a firsthand sense of a company's capability, perspective, and personality.

There are three primary keys to success that every exhibitor must use to gain maximum ROI on their event marketing investment:

1. *Have a clearly defined picture of what success looks like for your organization*
2. *Seek to understand the goals and needs of your target attendees*
3. *Create an experience and environment that aligns your needs and objectives with those of your customers and prospects attending the show*

Exhibitors must be aware of evolving needs and meet them with strategies and tactics that are engineered for success. On this page, we've included some valuable information to help you get started.

Whether you're a seasoned pro or a first-timer, we want to help you design your way to success with the proven process outlined in this guide.

The guide also provides tips, templates, and best practices to help you make the most of your trade show experience. Use it as a workbook - make notes, highlight what you find inspirational, share it with your colleagues, and drive measurable results.

Did You Know...

81% of trade show attendees have buying authority

67% of all attendees represent a new prospect and potential customer for exhibiting companies

The **#1** reason for attending trade shows is to see new products

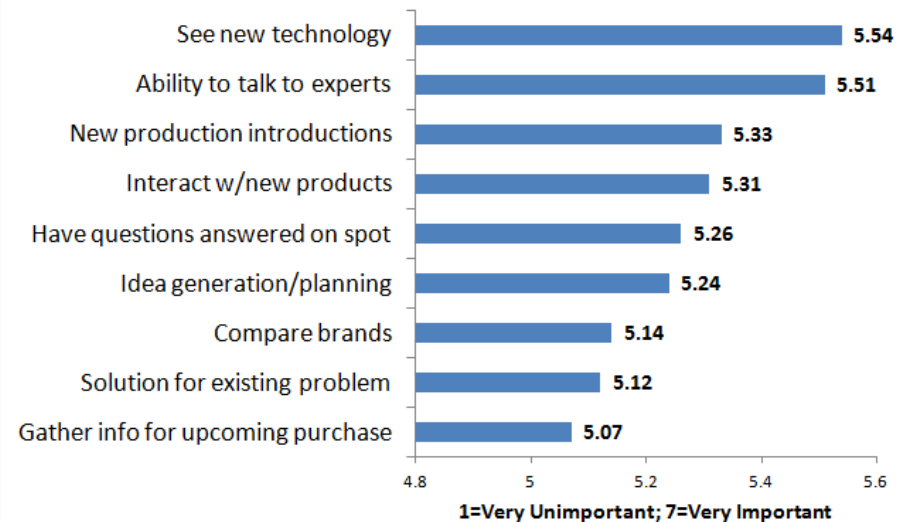
48% of attendees say face-to-face interactions are more important today than ever before

76% of attendees plan their booth visits in advance

High-Value Takeaways as stated by Attendees (CEIR Survey)

- Keeps me informed of leading trends/new products
- Provides a deeper understanding of product/services available
- Ability to meet a large number of vendors in a short period of time
- Ability to see and interact with a wide variety of products
- Helps me advance in my career via networking
- Knowledge to make successful business decisions
- Meeting new people who have become friends/mentors/colleagues
- Knowledge that gives my organization a competitive edge
- Knowledge to make successful purchasing decisions
- Helps me effectively identify/evaluate prospective vendors
- Exhibition(s) enable me to get the education/training
- Provides solutions for pressing problems I am facing at work
- A chance to meet the people behind the products

Attendee Top Shopping Needs



SOURCE: Center for Exhibition Industry Research

Six Rights of Success

Before we look walk through the process, let's examine the *Six Rights of Success*. These are the components necessary to create and execute a plan that will deliver maximum results.

The Right Intelligence

Know your audience and their motivations, marketplace challenges and opportunities. Using your own organization's marketing and sales goals, create a set of actionable objectives that serve as a realistic target.

The Right Strategy

Align business and sales objectives with needs of attendees then create a simple strategy to guide creative development of experiential tactics.

The Right Experience

Design booth experience with tactics that will engage and persuade audience to act on objectives. Ask the question, "what do attendees need to feel, think, know and do to act on our show objectives?"

The Right Actions

Treat your plan as a campaign to communicate with your attendee targets before, during and after the show. Integrate all communication and experiential tactics into a seamless series of touchpoints that tell a cohesive story to your targets.

The Right Measurement

Two kinds of metrics: 1) Based on business goals and, 2) Those actions (behaviors) needed to accomplish those goals while at show.

The Right Results

Leverage your show success into continued success through follow-up. Also, capture learnings from show and use to plan next cycle.

Six Steps to Success

Planning for success begins with a roadmap. Following this turnkey and all-encompassing process will help you generate the Six Rights of Success, and to flawlessly execute your experience:

- 1 Discover**
- 2 Define**
- 3 Design**
- 4 Develop**
- 5 Deliver**
- 6 Discover**

As marketers, we have many demands placed on our limited time and often struggle to make the changes required to improve our show performance. The "D's", along with the checklists and attached templates are designed to help you focus on those things that will raise your game and strengthen your results.

We hope you find this to be a valuable tool as you begin your planning.

Six Steps to Success

1 Discover [8-12 months out]

Developing an effective event marketing strategy and plan requires a thorough consideration of your sales, marketing and communication objectives. Discussions with key company stakeholders during the discovery phase will uncover critical information to inform the development of strategies and plans.

Equally important is an understanding of the needs of your customers and prospects. These insights should include the information they are seeking as well as the types of experience that will increase their engagement with your company ambassadors. Today's attendees have an expectation of "personal experiences." They come to shows armed with an agenda and a plan for their own personal experience. To ensure you're on their radar, you must understand their needs.

You must also have a keen understanding of the show environment (marketplace) in which you'll be participating as well as available sponsorship opportunities. Gather all available information from the show organizer and conduct your own independent research as well.

Your key to success will be the alignment of your company's needs with those of your target audience so you can make the most of the opportunities provided by the show organizer.

Capture and organize all of your insights so the next phase of the process, Definition, will be well-informed.



Key Task Checklist

- Stakeholder interviews - identify sales, marketing and communications goals
- Customer interviews - determine needs and preferences related to trade show experience
- Review all available show information from Organizer - gain full understanding of the show, attendee demographics and sponsorship opportunities
- Conduct additional research, if needed
- Prepare a Discovery Brief to capture all gathered insights
- Identify team for remaining phases

Six Steps to Success

2 Define [7-8 months out]

You can't be successful unless you know what success looks like.

The Definition phase of the process seeks to answer the question, "We will be successful if..."

OBJECTIVES

Using the intelligence gathered in the Discover phase, set realistic and meaningful objectives. Be realistic - too many objectives will only complicate the booth experience and dilute your results. Focus on those things that are achievable and provide you with a good ROI, then aggressively go after them.

At the end of this guide (appendix A), you'll find a list potential objectives to help you get started. Ensure you choose objectives that:

- Align with your business objectives
- Align with attendee's needs
- Are achievable
- Are measurable

STRATEGY

Once you've defined what success looks like, it's time to define a strategy for success. Create a simple statement of strategy that articulates your experiential approach to achieve success. Here's a link to help you get started:

<https://hbr.org/2014/02/the-art-of-crafting-a-15-word-strategy-statement/>

MEASUREMENT

Next step is to define the metrics by which you will measure your success. If the objectives you've defined are easily quantifiable, the metrics will be obvious. You should also consider the behaviors and actions of your prospects that are required to achieve your objectives. For example, lead generation is a common business objective for trade shows. In addition to counting the number (or \$ value) of the leads,

determine what actionable experiences need to happen in the booth for that lead to be generated. A business card dropped in a fish bowl is a weak lead, but a lead generated by a meaningful problem-solving conversation or a hands-on demonstration is a strong lead. Add those kind of actions to your measurement plan - this will ensure your booth ambassadors are creating strong engagement activities that lead to a valuable return.

MESSAGING

Like all good campaigns, messaging needs to be succinct and compelling. It needs to connect with your audience by speaking to their needs, creating curiosity and a desire to visit with you.

Effective messaging transcends product attributes and features. Ideally, messages relate to users' needs and goals. Begin the process by asking, "How do we help our customers achieve success?" The messages you define will form the core of your communications before, during and after the show.



Key Task Checklist

- Define success with key objectives
- Create a statement of strategy
- Define metrics to determine ROI objectives
- Identify success metrics (actions)
- Set a budget
- Create messaging plan
- Create planning document:
 - Calendar/schedule
 - Tasks
 - Responsible persons
 - Organizer (show) deadlines

3 Design [6-7 months out]

Experience First!

The attendee's experience with your organization begins with the first touch-point and continues through follow-up communications after the show.

While the story you need to tell is your own, you need to package it in a way that makes it compelling and attractive. Customers receive a daily barrage of ads, emails, phone calls and direct mail. You do as well, so put your customer hat on and start keeping track of what gets your attention and makes you interested.

At the end of the day, you're trying to build a relationship with someone. By nature, people need to have a few requirements fulfilled before they'll enter into a new relationship:

- Feel, on a personal (emotional) level that there's a good fit. People do business with people they like, who are genuine and feel they can trust.
- Think (believe) that you have their best interest in mind and that you're willing to do whatever it takes to help them.
- Know that your product will help them solve a business need.

ATTENDEE PROFILE

The first step is to build an attendee profile from which you will base all design decisions. The profile contains the answers to two questions:

1. *“What do the attendees need to feel, think, and know to act upon our objectives?”*
2. *“What do the attendees need to do (experience) so they can feel, think, and know?”*

The answers to question #1 will help you determine the content of your messaging, communications, collateral, signage, presentations and conversations.

The answers to question #2 will help you create the tactics the attendee must experience to receive and engage in.

For example:

KNOW - That our product has a series of new time-saving features that will increase efficiency and save costs.

CONTENT - Specific features and supporting data that illustrates how the product provides stated benefits. Side-by-side comparison of similar products.

DO - Visualize the performance data in an impactful manner. Witness a live product demonstration. Hear testimonials from peers.

You can see how your attendee experience is starting to take shape. It's important to begin your design phase with this strategic approach - it will help you focus on constructing a framework for success before beginning the creative work.

CREATING THE EXPERIENCE

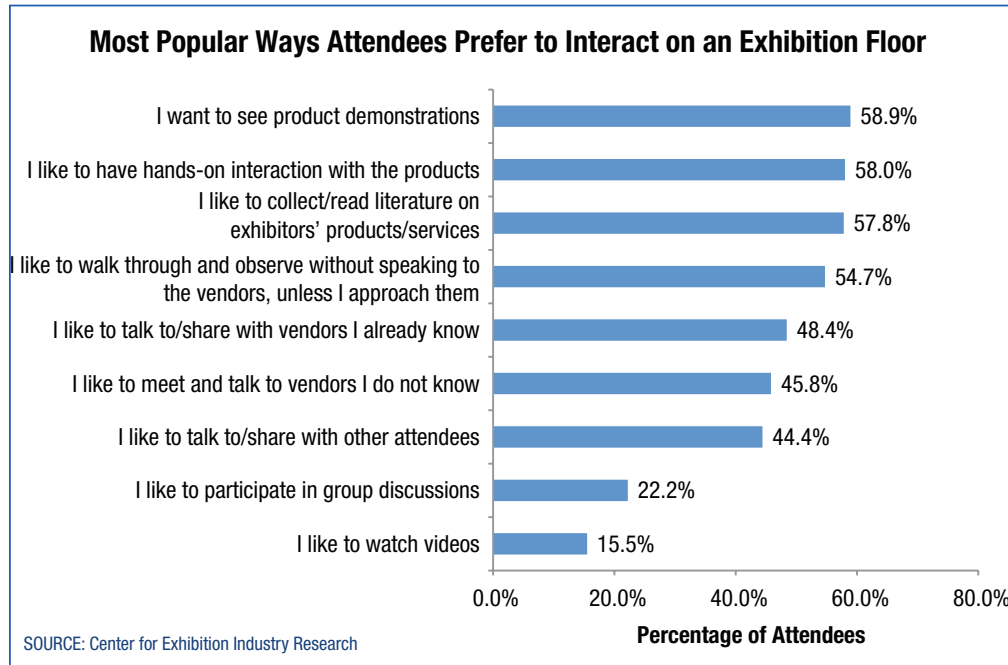
Armed with the insights from phases 1& 2, and a complete attendee profile, you're ready to get creative. Whether you're working with an internal team, or an agency, you have everything need to conduct brainstorming session.

Couple of tips for your brainstorming session:

- Design from the perspective of your customers & prospects. Keeping their needs in mind will help them act on your objectives.
- Appeal to all of their senses - find ways to surprise & delight.
- Keep the entire journey in mind - from first touchpoint to follow-up. Each part of the experience is an opportunity.
- Make it fun. Both the brainstorming session and the experience you design for your guests. People are more receptive when they're having a good time.

3 Design [6-7 months out]

As you brainstorm, consider the information presented on this chart as well as the research on page 2. Produced by CEIR, it shows today's attendees preferences for interaction on the trade show floor.



ATTENDEE JOURNEY DOCUMENT

Your creative session should yield an **Attendee Journey** document. The purpose of the document is to map every detail of the attendee's experience from first-contact through follow-up communication.

Creating a complete experience that's engineered to accomplish your defined objectives requires you to put yourself into your attendee's shoes. Using your message plan and creative tactics from your brainstorming session, build your attendee journey from their perspective, ensuring you've anticipated all possible interactions one would encounter before, during and after the show.

2D & 3D DESIGN

Now it's time to create the environment that will move your audience to action. Your booth is both a physical and visual experience that needs to attract, communicate and provide meaningful interaction. No detail is too small to consider when bringing your brand and your products to life for your target audience.

PRE-SHOW MARKETING PLAN

Attracting the right attendee to your booth is critical for success. Identifying, and communicating with, qualified prospects prior to the show is the best strategy. Attendee lists, previous year's leads and LinkedIn are valuable tools to augment your own prospect list.

Communication tactics should include email, direct mail, social media and telemarketing.



Key Task Checklist

- Build Attendee Profile
- Inform creative team with all insights
- Conduct Brainstorming Session
- Create Attendee Journey document
- Design Booth
- Write Communications Components
- Write & Design Marketing Materials
- Write & Design Media Components
- Design Booth Signage & Graphics
- Create Marcomm Plan

4 Develop [1-12 months out]

EVENT PLANNING

There are a myriad of logistical details to plan and execute for a successful show. The planning guide at the back of this document will help you organize your budget and tasks. Here's a checklist and schedule to help you stay ahead of your deadlines. Keep in mind that the suggested time-frames are just that - suggestions. Your actual timetable may differ depending on the complexity of the project.

12 Months Out

- Determine purpose for participating in show.
- Select space: Study floor plans, traffic patterns, services, audience makeup.
- Read contract carefully: Understand terms, show rules, payment schedule, and space assignment method.
- Send in space application and first payment.
- Prepare budget.



Six Months Out

- Determine exhibit objectives.
- Select primary vendors (exhibit house, transportation company, installation/dismantle supplier).
- Decide if new exhibit is needed. If so, begin design process. (If using a portable, the design process may not require this much lead time.)
- Plan show advertising.
- Submit Block Housing Request

Four Months Out

- Select staff.
- Make airline and car reservations.
- Determine exhibit needs (if using existing properties): refurbishments, additions, changes. Select display products.
- Communicate with primary vendors (exhibit house, shipping, installation/dismantle) regarding services needed and dates. Develop floor plan for exhibit.
- Finalize new exhibit design.
- Execute show-related marketing plan.
- Meet deadlines for free publicity in the exhibitor guide/preview.

Three Months Out

- Carefully read and review exhibitor manual. Select portable exhibit supplier.
- Review exhibit floor plan and note target dates and restrictions. Plan any in-booth presentations/demonstrations.
- Create list of required services, noting deadlines for “early-bird” discounts. Distribute show plan to staff.
- Reserve any additional meeting rooms (hospitality events, press conferences, etc.)
- Select catering menus (for hospitality events, press events, etc.)
- Submit authorization form if you are using an exhibitor-appointed contractor.
- Plan pre-show meeting.

Two Months Out

- Preview new custom exhibit. Finalize graphics art/copy. Order staff badges.
- Send information to other departments exhibiting in booth.
- Create and order lead forms. Finalize inquiry processing procedures.
- Prepare orders for: drayage, electrical, cleaning, floral, etc. Take advantage of any pre-pay discounts. Follow up on all promotions, making sure everything is ready to ship by target date.
- Prepare press kits.
- Check with staff on airline and hotel reservations and travel dates. Make needed changes. Develop briefing packet for booth staff.
- Schedule training for booth staff at show.
- Send reminder to upper management about briefing meetings (in office and at show); include agenda.

One Month Out

- Follow up on shipping orders.
- Follow up on installation/dismantle schedule; get an estimate on costs.
- Call to reconfirm airline, hotel and car reservations. Make needed changes. Follow up on target dates with all vendors.
- Confirm availability of display products/literature. Preview new portable display.
- Send all needed materials by target shipping date to avoid express mail shipments. Distribute briefing packet, including training materials, to all booth staffers.
- Set up and hold pre-show briefing meeting in office.

4 Develop [1-12 months out]

One Month Out *(cont'd)*

- Set up in-booth conference room schedule for pre-arranged meetings at show.
- Send follow-up reminder to upper management about briefing meeting, include agenda.
- Determine date and time for briefing staff at the exhibit. Review agenda, purpose of show, demonstrations, rehearsals, show specials, etc.
- Ensure that you have the following items before leaving for the show: important phone/cell numbers, traveler's checks, credit cards, copies of all orders and checks for services paid in advance, phone numbers and addresses of all vendors, engineering certificate for exhibit, shipping manifest, return shipping labels, and additional badge forms.



Upon Arrival

- Check on freight arrival.
- Check with hotel about reservations for staff, as well as any meeting rooms and catering orders. Find service area. Meet electrician and confirm date and time for electrical installation.
- Supervise booth setup.
- Hold pre-show briefing and training for staff the day before the show.

During Show

- Reserve next year's space. Conduct daily meetings with staff.
- Make arrangements for booth dismantle and shipping.
- Arrange for lead forms to be shipped back to office daily for processing.

After Show

- Supervise booth dismantle. Handle leads.
- Debrief staff.
- Send thank-you notes.

5 Deliver



Exhibit Staff Training Checklist

According to a 2012 report by the Center for Exhibition Industry Research, The Role and Value of Face-to-Face Interaction, only 26 percent of exhibitors conduct training for all or most events. This lack of training can severely impact an exhibit staff's effectiveness and visitors' perception of their professionalism.

As exhibit managers who need to prove the ROI (return on investment) for an exhibit marketing program, they cannot afford to forget that exhibit staff needs at least a "refresher course" before every exhibition.

Even though they are well-versed on the products they represent, they do not know everything about the exhibition, the attendees, the exhibit hall, the target market, and the finer points of the exhibit layout.

Do not lose sight, though, of the target audience's expectations. When attendees visit exhibits, they expect to find a friendly, professional staff that is well-versed in all aspects of the company's products. They expect to have the ability to have a one-on-one conversation and get answers to their questions, and do not expect to be limited in the time of this engagement.

According to a CEIR Report, the two top preferred methods of obtaining information from exhibitors are face-to-face conversations with exhibit personnel (56%) and one-on-one demonstrations with exhibit personnel (20%). Especially effective in meeting attendees' information needs is pairing knowledgeable marketing or sales staff with technical product personnel who can provide a wide range of product information and hands-on product interaction.

This comprehensive checklist should be considered when reviewing the pre-show orientation that will help staff members get acclimated to their award-winning role. Hopefully, feeling more of an insider to the trade show team will improve exhibit staff members' morale and their personal interactions with the audience, which should, in turn, improve ROI.

A kick-off by highest management staff members attending the show, highlighting:

- Measurable corporate and individual staff goals and objectives
- Key corporate message(s)
- Reinforcement of management's commitment and support of the trade show program

- Preparation time and the corporate financial investment to participate in the show
- The concept that all staff are ambassadors representing the entire company so professional behavior is expected at all times
- Appreciation for staff members' efforts, long hours, sore feet, and being away from home/family and office

Introduction of all exhibit staff:

- For large or new staff, allow time for each person to answer a few key questions about themselves (name, office location or territory, length of time with company or division, product specialties, languages spoken, etc.)
- Assignment of tasks (daily booth captain, press and media contacts, technical staff for demos, competitive intelligence, attendance at educational seminars or sponsored events, etc.)

Strategy review:

- Review of show, attendee profile and anticipated total number of attendees
- Brief review of the profile of target audience
- VIP customers/prospects who may visit exhibit
- Overall measurable goals and objectives for entire exhibit and individualized goals
- Show/exhibit theme
- Review of corporate pre-show, in-booth and post-show promotions
- Two to three key corporate messages (takeaways) to deliver to all visitors
- Review last show's 10 most frequently asked questions (FAQ's)
- Determine consistent answers to any difficult or sensitive issues (cost, quality, production, etc.)

Pre-printed product overviews including small, laminated "cheat sheets" including:

- Benefits for this target audience
- Applications
- Specifications
- Availability
- Pricing (with any show specials being offered)
- Competitive product review (models/features and benefits/costs)

SOURCE: Center for Exhibition Industry Research Report

5 Deliver



Exhibit Staff Training Checklist (cont'd)

Boothmanship and booth etiquette:

- Review differences in selling on the show floor vs. conventional sales encounters (i.e. time allotted per interaction, immediate comparison to competitors and access to business partners, sensory overload, access to diversified staff knowledge, etc.)
- Review staff's role as booth "host" and emphasize that they are being "graded" by attendees on a number of criteria: enthusiasm, friendliness, company and product knowledge, active listening and consultative selling skills and overall professionalism
- Review successful verbal and non-verbal communication with attendees including engaging, qualifying, presenting, gaining commitment for a follow-up action, recording information and disengaging
- Review consultative/relationship selling and active listening skills
- Identifying attendees by badge or ribbon color
- Compile three to four most effective qualifying questions
- Compose a three- to four-line elevator speech
- Review of positive and negative body language
- Engaging multiple attendees in the same conversation
- Handling the press, industry analysts, VIP's, international prospects, key accounts, and current clients
- Handling angry customers, unqualified prospects, "booth beggars" and competitors
- Review booth etiquette (no eating, drinking [unless bottled water is allowed], chewing gum, talking on cells phones, checking emails on laptops or PDA/ smartphones, reading the newspaper, talking with other exhibit staff in closed circles, etc.)
- Role playing using elevator speech, qualifying questions and hone critical listening skills

Housekeeping Details:

- Picking up badges at exhibitor registration
- Ground transportation (shuttles, taxis, directions if walking, etc.) and timing from hotel to convention center on show days

- Show dates and hours; when staff need to be at their stations
- Review of staff schedule and how to change it (if necessary) with booth captain
- Dress code (and distribution of show shirts)
- Storage room in exhibit for laptops, coats, suitcases or on-site alternative
- Special events schedule (mandatory vs. optional)
- Scheduling and location of debriefing at the end of each shift or day
- Tear-down schedule and staffing

On-Site Booth Orientation:

- Location of exhibit in relationship to exhibitor registration, hall entrances/exits, business partners, competitors, restaurants and fast food, exhibitor lounge, restrooms, fire and emergency apparatus, coat check, shuttles and taxis, show office, press room, etc.
- Overall booth layout including information counter, product areas, demonstrations, theaters, meeting rooms, storage, etc.
- Activities at information/reception counter including staff schedule with cell phone numbers, message center, product documentation, press kits, staff business cards, office supplies, fire extinguisher, lead retrieval equipment, etc.
- Review of badge scanning/lead retrieval system or lead forms including hands-on testing by each staff member using their own badge, lead grading criteria, importance of completeness and accuracy, notes, etc.; inform of "Plan B" in case of electronic system failure
- Preview of demonstrations
- Preview of live presentation(s)
- Review collateral literature available (data sheets, brochures, white papers) and location (on memory stick, URL or QR Code to online access or hard copy, etc.)
- Review promotional programs and social media, giveaway items and qualification procedure
- Keepers of the keys to locked areas and/or in-booth hiding places
- Emergency procedures and show floor fire apparatus
- Storage space contents (water, snacks, first-aid kit, tool box, storage for coats or laptops, charging station for personal electronics, etc.) and security of that area

SOURCE: Center for Exhibition Industry Research Report

6 Discover [post-event]

Bookending your plan with Discovery is a sure way to maximize your success. On the front-end, it helps you focus on the creation of strategies and tactics that yield the Six Rights of Success. On the back-end, it helps you measure your success and fine-tune your plan for the next show.

POST-EVENT SURVEY

This is intended to gather observations from your booth staff. Having been on the front-line during the show, they will have valuable regarding the engagement, experience and environment.

MEASUREMENT DATA

Collect all data related to your success metrics. If you have previous years data, be sure to compare for trending purposes.

POST-EVENT DEBRIEF

Best held as soon as possible, this meeting should be used to review and assess all quantitative and qualitative data. The objective is to capture learnings that you will carry forward to your next planning cycle.

A simple and useful format for the meeting is to capture:

- Those things that were positive contributors to success and should be repeated in the future
- Things that were negative or non-contributors to success that should not be repeated in the future
- Brainstorm ways to solve negatives (if possible)

LEARNINGS BRIEF

Document all learnings from the debrief meeting and create an action plan that you will use to kick-off planning for the next cycle.



Key Task Checklist

- Prepare and distribute post-event survey to booth staff
- Collect survey results
- Collect all measurement data
- Conduct post-event debrief meeting to review survey and measurement data, capture learnings
- Prepare post-event learnings brief

List of 100 possible show objectives & metrics

Select the ones that apply to your specific goals for this event. Be sure to quantify your objectives.

1. Sell products and services on the show floor
2. Gather qualified leads for post-show company follow-up
3. Introduce new products or services to a market
4. Demonstrate new products or services
5. Open new markets
6. See buyers who are not usually accessible to sales personnel
7. Find the decision makers
8. Understand prospects decision-making process
9. Support the decision influencers
10. Be compared to the competition
11. Solve customer's problems
12. Find dealers, reps and agents
13. Develop leads for dealers, reps and agents
14. Create customer lists
15. Reach your customers at a low cost per call
16. Distribute product samples to your market
17. Reinforce your marketing plans
18. Distribute product or service information
19. Introduce a new service
20. Showcase new products and services
21. Establish business relationships with international buyers
22. Introduce new products and services
23. Support dealers, reps and agents
24. Influence customer attitudes
25. Create high R.O.I. opportunities
26. Find new business location possibilities
27. Host special industry hospitality events
28. Market research for future product developments
29. Introduce new production methods
30. Direct influence on decision makers
31. Reduce sales costs
32. Entertain special customers
33. Distribute promotional tools
34. Have a portable showroom
35. Introduce product uses through audio or video programs
36. Interact with a highly targeted audience
37. Give your prospect an opportunity to experience your product/ service
38. Open doors for future sales calls
39. Present live product demonstrations
40. Introduce support services
41. Create a three dimensional sales presentation
42. Open foreign markets quickly
43. Demonstrate non-portable equipment
44. Shorten the buying cycle
45. Relate to the competition
46. Generate excitement for new products/services
47. Enhance word-of-mouth market
48. Find other exhibiting opportunities
49. Overcome unfavorable publicity
50. Demonstrate new usages of existing products or services
51. Give your audience an opportunity to meet the experts
52. Give your CEO an opportunity to meet your customers
53. Meet your buyers face to face
54. Learn about your competition
55. Obtain feedback on new products
56. Obtain feedback on existing products
57. Conduct market research
58. Educate dealers, reps and agents
59. Find personnel
60. Educate personnel
61. Reinforce company image to a market
62. Establish a new company image with a market
63. Support your industry
64. Highlight new products and services to the media
65. Highlight new company initiatives to the media
66. Diffuse customer complaints
67. Conduct a sales meeting
68. Support corporate theme programs
69. Introduce a new promotional program
70. Educate your customers
71. Introduce new techniques
72. Re-position your company in a market
73. Change the perception of your company in a market
74. Expose new employees to an industry
75. Learn new industry trends
76. Network with colleagues
77. Network with industry professionals
78. Demonstrate your commitment to a market
79. Gather competitive intelligence
80. Attend the show functions
81. Develop strategic relationships
82. Find new business opportunities
83. Uncover joint venture opportunities
84. Unveil licensing opportunities
85. Determine the effectiveness of marketing and promotion campaigns
86. Have company experts showcased at seminars and work-shops
87. Influence industry trends
88. Build sales force morale
89. Understand / uncover your customer attitudes
90. Give the "behind the scenes" personnel a chance to meet the customer
91. Introduce community awareness initiatives
92. Find ways of reducing exhibiting costs
93. Developing new marketing techniques
94. Creating an image for your company
95. Publicize company associations
96. Explain the effects of corporate changes
97. Bring your senior management closer to your customer
98. Increase corporate profitability
99. Explain new programs
100. Round out corporate marketing mix



Exhibit Planning Worksheets

These handy work sheets will help you organize the details of your show-planning activities, from setting objectives to budgeting and measuring results.

QUICK REFERENCE DATA

Show name: _____

Show Web site: _____

User name: _____ Password: _____

Show producer: _____

Account number: _____

Contact name: _____

Address: _____

Phone: _____

Fax: _____

E-mail: _____

Show location: _____

City: _____ State: _____

Hall/Hotel: _____

Booth number(s): _____ Booth size: _____

Show dates: _____

Exhibit hours: _____

Setup dates/times: _____

Dismantle dates/times: _____

Number of meeting rooms: _____ Meeting room locations: _____

General Services Contractor: _____

Contact name: _____

Address: _____

Phone: _____ Fax: _____

E-mail: _____

SHOW DATA

		Prior year	Anticipated		
Number of attendees:		_____	_____		
Number of exhibitors:		_____	_____		
Exhibit-hall admission:	Admission price:	Per day	Per show	Guest passes available:	
<input type="checkbox"/> General public	Public \$	_____	_____	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Trade only	Trade \$	_____	_____		
<input type="checkbox"/> Restricted to members	Member \$	_____	_____		
	Conference pass \$	_____	_____		
	Exhibits only \$	_____	_____		

Audience profile/demographics:

1. _____
2. _____
3. _____

Participation by competitors:

Company 1: _____

	Prior year	Anticipated
Booth size:	_____	_____
Booth location:	_____	_____
Key products displayed:	_____	_____
	_____	_____
Key messages/promotions:	_____	_____
	_____	_____
	_____	_____
Strengths/weaknesses:	_____	_____
	_____	_____

Company 2: _____

	Prior year	Anticipated
Booth size:	_____	_____
Booth location:	_____	_____
Key products displayed:	_____	_____
	_____	_____
Key messages/promotions:	_____	_____
	_____	_____
	_____	_____
Strengths/weaknesses:	_____	_____
	_____	_____

SHOW PLAN

Why is our company exhibiting at this show? _____

Exhibit theme/focus: _____

Product lines/categories to be displayed: _____

Target audience: _____

Size of target audience: _____

How does the show fit with our company's overall marketing strategies? _____

How does the show fit with our company's sales targets/goals? _____

How does the show fit with our company's marketing objectives? _____

Internal show coordination team: _____

SHOW OBJECTIVES

Objective	Measurement Techniques	Tactics for Accomplishing

PRE-SHOW LOGISTICS

Booth contract submitted (date): _____ Booth number(s) assigned: _____

Exhibitor manual received (date): _____ Booth dimensions: _____

Space cost: _____ Cost: Space only Package

Deposit \$ _____ due: _____ amount paid: \$ _____ date paid: _____

Remaining balance \$ _____ due: _____ amount paid: \$ _____ date paid: _____

\$ _____ due: _____ amount paid: \$ _____ date paid: _____

Booth location: _____

Exhibit area obstructions/limitations (if applicable): _____

Ceiling height/maximum overhead clearance: _____

Maximum floor loading: _____

Freight-elevator dimensions/capacity (lbs.): _____ Columns/ducts: _____

Other obstructions: _____

Exhibit restrictions: _____

Maximum height of back wall: _____ Maximum height of equipment: _____

Applicable fire regulations: _____

Hanging-sign restrictions: _____

Booth equipment/services (record date ordered):

Furniture	DATE	Show services	DATE		DATE
<input type="checkbox"/> Chairs	_____	<input type="checkbox"/> Accessible storage	_____	<input type="checkbox"/> I&D	_____
<input type="checkbox"/> Desks	_____	<input type="checkbox"/> Carpet	_____	<input type="checkbox"/> Internet	_____
<input type="checkbox"/> Tables	_____	<input type="checkbox"/> Catering	_____	<input type="checkbox"/> Lead retrieval	_____
<input type="checkbox"/> Wastebaskets	_____	<input type="checkbox"/> Cleaning	_____	<input type="checkbox"/> Lighting	_____
<input type="checkbox"/> Sofas	_____	<input type="checkbox"/> Compressed air	_____	<input type="checkbox"/> Material handling	_____
<input type="checkbox"/> Other	_____	<input type="checkbox"/> Drains	_____	<input type="checkbox"/> Photography	_____
Shipping		<input type="checkbox"/> Electrical	_____	<input type="checkbox"/> Rigging	_____
<input type="checkbox"/> Booth	_____	<input type="checkbox"/> Electrician	_____	<input type="checkbox"/> Running water	_____
<input type="checkbox"/> Giveaways/literature	_____	<input type="checkbox"/> Floral	_____	<input type="checkbox"/> Security	_____
<input type="checkbox"/> Products/equipment	_____	<input type="checkbox"/> Forklift	_____	<input type="checkbox"/> Signs	_____
<input type="checkbox"/> Computers/AV	_____	<input type="checkbox"/> Gas	_____	<input type="checkbox"/> Telephone	_____
<input type="checkbox"/> Other	_____	<input type="checkbox"/> Hosts	_____	<input type="checkbox"/> Other	_____

Co-op arrangements with other exhibitors (signage, equipment, etc.): _____

Meeting room reserved: _____

Hospitality suite reserved: _____

Dates: _____ Location: _____

Advance registration:

Guest passes: (Make a separate list of names.) Date ordered: _____ Qty: _____

Shipping addresses: _____

Exhibitor badges: (Make a separate list of names.) Date ordered: _____ Qty: _____

Number of badges provided free with booth space: _____

Hotel reservations:

1. Hotel name: _____ Date reservation made: _____

Phone: _____ Cancellation penalty date: _____

Contact: _____ E-mail: _____

2. Hotel name: _____ Date reservation made: _____

Phone: _____ Cancellation penalty date: _____

Contact: _____ E-mail: _____

EXHIBIT PLANNING/PREPARATION

Use existing exhibit: _____ Necessary alterations (such as graphics): _____
Stored at: _____
Refurbishing necessary: Yes No _____

Construct new booth:
Exhibit builder selected: _____
Account manager: _____ Phone: _____
Final design approved date: _____ Pre-show setup/inspection date: _____ E-mail: _____

Rent booth properties:
Supplier: _____
Contact: _____ Phone: _____
Final design approved date: _____ Pre-show setup/inspection date: _____ E-mail: _____

Booth theme: _____

Product displays:
Products to be highlighted: _____
Other products to be displayed: _____

Live presentations/demos:
Supplier: _____ Internal External Phone: _____
Contact: _____ E-mail: _____
Script(s) approved (date): _____

Audiovisual presentations:
Type: _____
Supplier: _____ Internal External Phone: _____
Contact: _____ E-mail: _____

Graphics:
Supplier: _____ E-mail: _____
Producer: Internal Exhibit house Graphics producer Ad agency
Contact: _____ Phone: _____
Final copy/art approved: _____ Date due: _____

STAFF

Total exhibit hours: _____ Number of staffers needed for booth: _____

Special booth attire: _____

Number of staffers needed for hospitality event: _____

Special hospitality-event attire: _____

Temporary personnel needed: Yes No

Pre-show training (date, location): _____

Walk through (date, time): _____

Trainer: _____ Booth-staff schedule created: _____

PROMOTION/PUBLICITY

Pre- and at-show promotions:

List rental from show management (date available): _____

Internal memos/sales letters: _____

Hospitality: _____

Direct mail: _____

E-mail campaign: _____

Tickets for entertainment: _____

PR information to show management: _____

Web page: _____

Advertising schedules for:

Key industry publications: _____

Show dailies: _____

Show directory: _____

Press releases to key industry publications: _____

1. _____ Contact: _____

2. _____ Contact: _____

3. _____ Contact: _____

4. _____ Contact: _____

5. _____ Contact: _____

Banners/signs:

Airport: _____

Show hall: _____

Taxicabs: _____

Billboards: _____

Shuttle buses: _____

Other: _____

Booth promotions:

Literature: _____

General handout Selective handout Booth-reference only

Giveaways: _____

Booth photographer: _____ Date scheduled: _____

Other: _____

Post-show promotions:

Literature request/inquiry fulfillment: _____

Follow-up mailings/phone calls/e-mails: _____

Internal promotion (company newsletter, memo, etc.): _____

Other: _____

PRE-SHOW SHIPPING/BOOTH SET-UP

Advance-warehouse address: _____

Dates freight accepted: _____ to _____

Show-site address: _____

Dates freight accepted: _____ to _____

Target date/time: _____ Times freight accepted: _____

Off-target penalty: _____

Carrier name: _____

Carrier address: _____

Carrier phone number: _____ E-mail: _____

24-hour contact: _____

Official material-handling company: _____

Scheduled setup dates: _____ Times: _____ to _____ Overtime: Yes No

Inbound shipping data:	Exhibit	Products/Equipment	Literature/Giveaways
Shipping date:	_____	_____	_____
Shipped from:	_____	_____	_____
Carrier:	_____	_____	_____
Carrier type:	_____	_____	_____
Tracking number:	_____	_____	_____
Number of pieces:	_____	_____	_____
Bill of lading/airbill number:	_____	_____	_____
Delivery date/time:	_____	_____	_____
Additional insurance:	_____	_____	_____

BOOTH SET-UP

Exhibit setup handled by:

Company personnel: _____

Official/show-appointed I&D contractor: _____

Contact: _____ Phone number: _____

E-mail: _____

Exhibitor-appointed I&D contractor (EAC): _____

Contact: _____ Phone number: _____

E-mail: _____

Exhibit insurance confirmed (date): _____

Proof of insurance sent to show management (date): _____

EAC appointment form due date: _____

BOOTH DISMANTLE

Booth dismantling handled by: _____

Supervisor: _____

Scheduled dismantle dates: _____ Times: _____ to _____ Overtime: Yes No

POST-SHOW SHIPPING

Supervised by: _____

Date/time freight will be forced: _____

Complete return shipping address: _____

Carrier name: _____

Carrier address: _____

Carrier phone number: _____ E-mail: _____

Carrier contact: _____

Tracking number: _____

Return shipping data:	Booth	Products/Equipment	Literature/Giveaways
Shipping date:	_____	_____	_____
Shipped to:	_____	_____	_____
Carrier type:	_____	_____	_____
Number of pieces:	_____	_____	_____
Waybill/bill of lading number:	_____	_____	_____
Delivery date:	_____	_____	_____
Additional insurance:	_____	_____	_____

EXHIBIT RESULTS

Results:

Number of booth visitors: _____

Number of qualified leads: _____

Orders/sales: _____

Cost-per-visitor reached (show cost/number of booth visitors): _____

Total trade show attendance: _____

Media coverage: _____

Evaluation of staff performance: _____

Staff feedback:

Quality of show/booth attendance as related to objectives: _____

Quantity of attendee traffic: _____

Reaction to exhibit/graphics: _____

Reaction to booth location: _____

Recommendations: _____

Competitive analysis:

Total number of exhibitors: _____

Number of direct competitors: _____

Analysis of return on objectives:

(Refer to Show Objectives on p. 5.)

Objective 1: _____

Methods of measurement: _____

Results: _____

Objective 2: _____

Methods of measurement: _____

Results: _____

Objective 3: _____

Methods of measurement: _____

Results: _____

BUDGETING

Budget item	Pre-show estimate	Actual cost	Invoice paid date	Variance
SPACE RENTAL				
Booth space	_____	_____	_____	_____
Meeting-room space	_____	_____	_____	_____
Deposits	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
EXHIBIT STRUCTURE				
Design	_____	_____	_____	_____
Building/refurbishing	_____	_____	_____	_____
Tool-box supplies	_____	_____	_____	_____
Graphics design/production	_____	_____	_____	_____
Drayage outbound	_____	_____	_____	_____
Drayage inbound	_____	_____	_____	_____
Tax on materials	_____	_____	_____	_____
Storage (prorated)	_____	_____	_____	_____
Insurance (prorated)	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
SHIPPING				
Ground transport to show	_____	_____	_____	_____
Ground transport from show	_____	_____	_____	_____
Air/sea freight to show	_____	_____	_____	_____
Air/sea freight from show	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
ON-SITE SERVICES				
Audiovisual	_____	_____	_____	_____
Carpet rental	_____	_____	_____	_____
Cleaning	_____	_____	_____	_____
Computer-equipment rental	_____	_____	_____	_____
Custom signage	_____	_____	_____	_____
Drayage	_____	_____	_____	_____
Electrical	_____	_____	_____	_____
Exhibitor badges	_____	_____	_____	_____
Floral rental	_____	_____	_____	_____
Furniture rental	_____	_____	_____	_____
Setup/dismantle labor	_____	_____	_____	_____
Lead-gathering system	_____	_____	_____	_____
Photography	_____	_____	_____	_____
Plumbing/compressed air	_____	_____	_____	_____
Riggers	_____	_____	_____	_____
Security	_____	_____	_____	_____

Notes

Budget item	Pre-show estimate	Actual cost	Invoice paid date	Variance
Telephone	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
PROMOTION				
Advertising	_____	_____	_____	_____
Customer hospitality	_____	_____	_____	_____
Direct mail	_____	_____	_____	_____
Kiosk space	_____	_____	_____	_____
Incentives/premiums	_____	_____	_____	_____
Literature	_____	_____	_____	_____
Mailing-list rental	_____	_____	_____	_____
Presentation (production costs)	_____	_____	_____	_____
Presenter/talent	_____	_____	_____	_____
Press kits/materials	_____	_____	_____	_____
Press conference/reception	_____	_____	_____	_____
Sponsorships	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
PERSONNEL EXPENSES				
Salaries	_____	_____	_____	_____
Staff training	_____	_____	_____	_____
Pre-show dinner	_____	_____	_____	_____
Special attire for booth staffers	_____	_____	_____	_____
Transportation	_____	_____	_____	_____
Hotel	_____	_____	_____	_____
Food/entertainment	_____	_____	_____	_____
Temporary personnel	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
LEAD GATHERING/FULFILLMENT				
Printing lead forms	_____	_____	_____	_____
Printing cover letter	_____	_____	_____	_____
On-site equipment rental	_____	_____	_____	_____
Postage	_____	_____	_____	_____
Labor	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
MISCELLANEOUS (add 10 percent)	_____	_____	_____	_____
GRAND TOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>

Notes

PLANNING TIMELINE

PRE-SHOW

Scheduled date

Date completed

Select booth space	_____	_____
Determine exhibit objectives	_____	_____
Set show budget	_____	_____
Set exhibit-design goals	_____	_____
Set exhibit budget	_____	_____
Evaluate promotion opportunities	_____	_____
Select exhibit designer/builder	_____	_____
Select display products	_____	_____
Plan promotion strategy	_____	_____
Select transportation/I&D companies	_____	_____
Finalize exhibit design	_____	_____
Plan direct-mail promotion	_____	_____
Review exhibitor service kit	_____	_____
Select booth staffers	_____	_____
Reserve hotel rooms	_____	_____
Finalize lead-fulfillment plan	_____	_____
Finalize lead follow-up mailings	_____	_____
Order show services	_____	_____
Implement promotion strategy	_____	_____
Order badges	_____	_____
Notify show management if using exhibitor-appointed contractor	_____	_____
Preview new exhibit	_____	_____
Plan exhibit setup/dismantle	_____	_____
Finalize availability of display products/literature	_____	_____
Send direct-mail promotion	_____	_____
Plan pre-show staff-training session	_____	_____
Preview portable display	_____	_____
Finalize graphics copy/art	_____	_____
Finalize shipping information	_____	_____
_____	_____	_____
_____	_____	_____

POST-SHOW

Fulfill show inquires/requests	_____	_____
Write thank-you notes to booth staffers, vendors	_____	_____
Audit invoices/finalize show budget	_____	_____
Measure/analyze results	_____	_____
_____	_____	_____
_____	_____	_____