



Comprehensive Trade Show and Event Planning Guide



Whether you are an exhibiting veteran or it's your first time, a trade show or event requires a lot of planning. Beginning your planning as early as possible will not only alleviate some of the stress associated with planning such an event, it can also help save money, allowing your marketing budget to stretch further. This comprehensive trade show/event checklist will help you plan and follow a schedule for all things necessary for your trade show and event success.

Before the Trade Show or Event

6 Months Prior



- **Select Your Booth Space**

The earlier this can be done, the better. Early bird rates aren't the only benefit when contracted early, you'll also have a better selection of booth space in most cases. Some other things to consider when selecting booth space are:

- proximity to entrances or main aisles
- columns, ceiling height, and other physical elements of the event space
- the other companies around you- are they big industry players or competitors?

- **Determine Your Objectives**

What are your most important objectives for attending the trade show/event? They could be anything from brand awareness to new product launch.

- **How will you measure the success of your objectives?**

Will you keep track of number of appointments, visitors at your booth, leads generated, website visits, etc. ?

- **Outline Your Budget**

There are many costs to plan for when it comes to trade show planning.

- **Select Shows you Want to Exhibit and Enroll In**

Thorough research is important when selecting shows that are a good fit for your industry, services, and products. Research should include determining if your direct competitors exhibit at a show, if that is the case, there is a good chance that it's a good fit for your company. It's a great idea to reach out to show management for demographic information on the attendees.

- **Review Any and All Exhibit Forms and Contracts**

Note all deadlines, any forms that need to be completed, and payments required.

- **Connect With an Exhibit Solutions and Services Partner**

Whether you need an entire new exhibit or are looking to refresh an existing one, a qualified exhibit house like Apogee will help you meet all of your exhibit needs.





4 - 5 Months Prior

- **Plan and Prepare Your Marketing Strategy**

Emails, social media, print, and mailed materials are all included in your marketing strategy. Your target market needs to know about your presence at the show and why they should visit.

- send out offers to redeem at the show such as deals, sales, discounts, demos, sneak peeks at new products in development, etc.
- promote your attendance and offers via social media and email
- create a landing page on your website that includes show information and free passes that can be linked on social media and emails
- create email campaigns that are event focused
- add a personal touch by having sales persons send current customers and prospects an invitation
- make sure all information on the website is correct and up-to-date

- **Choose Your Trade Show Team**

- Make sure your sales team understands the goals for the show and their responsibilities
- Train your staff on products/service demos and leads/sales goals to ensure a consistent, rehearsed message
- order uniforms for your team



- **Plan Travel Arrangements**

- hotel
- rental car/transportation
- airfare

- **Begin Making Arrangements for Exhibit and Promotional Materials**

- Check the exhibitor's handbook for advanced shipping dates. Shipping to the advanced warehouse instead of directly to the exhibit hall could help you save on costs. This also provides some ease of mind when it comes to potential shipping delays.

- **Prepare Giveaways**

- Customized gifts for potential clients or VIP customers, swag bags, stationary, etc. Whatever you choose to give away, make sure it's ordered and delivered in time to ship with your booth.





1 - 3 Months Prior

- Continue with pre-show marketing
- Plan and schedule the shipment of your exhibit materials- typically three weeks prior to the event; confirm their arrival
- Polish up on booth staff training with your team
- Finalize and confirm everyone who will staff your booth
- Finalize and confirm any and all travel arrangements
- Book meetings or schedule dinners with prospects and customers that will be at the show
- Ensure all payments that are necessary have been made to avoid late payment charges
- Take a second look at your exhibitors handbook checklist to guarantee you haven't missed anything





During the Event

- Execute all of your planning
- Appear approachable; smile, stand and be relaxed and ready for conversation. Standing behind a table, sitting down, or being on your phone are habits that make you seem unapproachable and uninterested in conversation with attendees.
- Trade shows can be wearing on staff and they need to be at the top of their game to ensure trade show success so see to it that they are hydrated, fed, and happy. Ordering carpet padding is a great way to help them endure the long hours on their feet on the show floor.
- Keeping track of contact information is a must! A lead retrieval machine app can help. In addition, instead of using paper and pencil, invest in a business card scanner to avoid losing information.
- Take notes in your lead retrieval app. You'll be meeting and chatting with dozens of people on the show floor. Taking good notes is a great way to remember the conversations you had with different leads at the event.
- Keep the excitement up at your booth by taking advantage of your planned giveaways, raffles, and interactive activities. Attendees will appreciate the change of pace from just walking the long aisles going from booth to booth. Give them a good reason to stop and engage!



- Continue your marketing. Posting on social media is a great way to keep momentum going. Creating your own show hashtag can help engage other attendees.
- Network not only with the attendees, but make an effort to strike up conversation with the other exhibitors as well. Not all exhibitors are going to be your direct competitors. It could be a great opportunity to create a great partnership with another complementary company!





Post Event

Once the trade show or event is over, it's important to remember that your work has only just begun. All of your efforts of lead generation at the show itself now have to be followed up on. Keep up with the show momentum and increase your ROI.

- At the shows end, prior to booth tear down, make a detailed list of any booth elements or marketing materials that need repair or refreshing for the next show.
- Review what you spent and what you spent on to compare to your budget.
- Conduct a post-show meeting with your staff. Discuss what they felt went well, what did not go well, and what changes could be made for the next show. This would be a great time to write some notes on the show itself, the exhibit hall, etc. to have on hand for the next event at that location!
- Make sure all the leads you collected at the show are entered into your CRM database and identifiable as leads from the show to your sales team.
- Share the leads that were generated at the show with your sales team as soon as possible so they can start personal follow-up. Although you may not be able to call every single lead, focus on reaching out to the top few; ones that you had a connection with and are most likely to bring in the most business.



- Prepare an email to thank attendees for visiting your booth. Let them know that you want to hear from them with any questions or comments. Make sure to personalize the email and include a call to action for the best impact. This could mean asking to visit your website, schedule a call, or download an item. Including a photo of your team from the show could help remind them of who you are.
- A often over-looked means of connecting with leads and prospects is engaging with them on social media. Follow their company pages and engage on LinkedIn as well. This is a great way to show effort for you and your company.
- Begin strategizing for your next show or event. Keep in mind all the things that worked well and what didn't so you can make positive improvements for your next show!

