THE 2027 TRADE SHOW PLANNING GUIDE

Better shows start here.

A practical playbook to plan your exhibit, prepare your team, and turn conversations into opportunities.



From the first planning meeting
to the follow-up that moves business forward.

2027

PLAN

Align goals, budget, and design.

PREPARE

Equip the team to deliver.

FOLLOW THROUGH

Turn conversations into next steps.

A NOTE FROM MARK TAYLOR

Great exhibits start with human connection.

For 35 years, Apogee has helped brands bring their stories to the trade show floor. I believe face-to-face marketing remains one of the most valuable ways to build trust, start meaningful conversations, and create lasting business relationships.

I'm proud of the people behind that work. Our staff brings care, creativity, and attention to detail to every project, helping clients turn an idea into an experience that feels true to their brand.

Our new 112,000-square-foot facility is fully equipped to support the execution of our clients' events. It gives our team the space and resources to prepare your exhibit and bring your vision to life.

Even as costs rise, a well-planned trade show program can deliver a return that makes the investment worthwhile. Clear goals, thoughtful design, a prepared team, and consistent follow-up all play a part.

We created this guide to help you make those decisions with confidence. Wherever you are in the planning process, our team is ready to help.

Let us help bring your brand to life on the show floor.

Mark Taylor

President and CEO
Apogee Exhibits and Environments

PROPOSED OPENING NOTE / FOR CEO REVIEW



START HERE

Define success before you design the booth.

A strong exhibit starts with a clear business goal. Use this playbook to make the decisions, assign the work, and keep your team moving toward it.

DECIDE 04

Choose what belongs

Ideas that serve your goals

PLAN 05-07

Build the plan

Budget, design, and logistics

PREPARE 08-09

Get ready to deliver

Team, technology, and final checks

DELIVER 10-12

Turn effort into outcomes

Show days, follow-up, and measurement

Audience

Who do we most want to meet?

Outcome

What should happen next?

Target

How will we know it worked?

Owner

Who is accountable for the result?

COMPLETE ONE SENTENCE

At this show, we will help [audience] take [next step], measured by [target], with [owner] accountable.

Suggested planning windows. Your exhibitor manual, suppliers, and project scope determine the actual deadlines.

IDEAS FOR YOUR 2027 PLAN

Make every feature serve a purpose.

Choose technology, materials, and experiences around the job your exhibit needs to do. Keep what helps visitors understand your value and take the next step.

2027

DESIGN CHOICES

- ☐ **Capture the conversation**

  Choose lead tools that record needs, timing, and the agreed next step. If you add AI, test how it supports your team and sends usable information to your CRM.

- ☐ **Plan for the next show, too**

  Consider reusable structures, refreshable graphics, and rental options. Ask what can be stored, repaired, reused, or recycled after the event.

- ☐ **Keep the demonstration focused**

  Give visitors one clear problem, one useful demonstration, and one reason to continue the conversation. Test the experience with someone new to your product.

- ☐ **Design for a comfortable conversation**

  Use lighting, sound control, materials, and seating to support your visitor journey. Give people room to see, ask, and talk.

CONNECT BEFORE AND AFTER

Use invitations, a useful landing page, and relevant follow-up to connect the booth experience to your wider marketing plan.

Leave this stage with: A short list of features, each tied to a visitor need or business goal.

120+ DAYS BEFORE THE SHOW

Set the scope. Build the whole budget.

Confirm the show, audience, footprint, and business goal with your exhibit partner. Start earlier when the build, approvals, or shipping demand it.

120+
DAYS OUT

- [ ] **Choose and reserve your space**

  Review the floor plan, contract, exhibitor manual, and published deadlines. Confirm placement, access, and any constraints before committing.

- [ ] **Name an owner for every decision**

  Assign responsibility for the exhibit, logistics, marketing, sales, and approvals. Put due dates and dependencies in one shared plan.

Space & build	Space rental, exhibit, graphics, furnishings, and flooring.
Move & install	Freight, material handling, storage, labor, and rigging.
Services & tech	Power, internet, A/V, lead tools, cleaning, and security.
People & reach	Travel, lodging, staffing, promotion, materials, and follow-up.

BUDGET FROM CURRENT QUOTES

Include taxes, applicable fees, and a contingency agreed with your team. Keep planned, committed, and actual costs visible in the same worksheet.

Leave this stage with: An approved scope, a complete budget, and a shared deadline calendar.

90 DAYS BEFORE THE SHOW

Give visitors a reason to stop.

Build the booth and the invitation around the same clear promise: who you help, what you solve, and what visitors can do with you at the show.

90

DAYS OUT



- [ ] **Approve the visitor journey**

  Map the path from aisle to welcome, demonstration, conversation, and next step. Confirm graphics, furnishings, storage, and accessibility in the design review.

- [ ] **Lock the production plan**

  Confirm dimensions, artwork, materials, approvals, and delivery dates with your exhibit partner. Resolve A/V, power, and connectivity needs before production.

- [ ] **Start booking useful conversations**

  Build a target-account list. Invite customers and prospects with a specific reason to visit, and make it easy to arrange a meeting.

Leave this stage with: An approved design, a production schedule, and a focused invitation campaign.

60 DAYS BEFORE THE SHOW

Make the move-in plan work on paper.

Use the exhibitor manual to confirm requirements, order services, and align vendors. Review each deadline against your own show calendar.

60
DAYS OUT

- [ ] **Coordinate freight and material handling**

  Confirm shipment size, weight, delivery window, destination, and return arrangements. Compare advance-warehouse and direct-to-show options with your logistics partner.

- [ ] **Book labor, power, and rigging**

  Share setup instructions and drawings with the relevant providers. Confirm service locations, loads, labor coverage, and the work each provider will perform.

- [ ] **Resolve approvals and support services**

  Check height limits, hanging signs, materials, and any required approvals. Arrange storage, cleaning, and security where your exhibit needs them.

- [ ] **Confirm the people and the tools**

  Finalize staffing, travel, attire, lead capture, and marketing materials. Check that rented furnishings and equipment match the approved design.

ONE CONTACT SHEET

Keep vendor names, phone numbers, order confirmations, shipment details, and escalation contacts together for the on-site lead.

Leave this stage with: Confirmed service orders, a coordinated shipment, and clear vendor responsibilities.

30 DAYS BEFORE THE SHOW

Rehearse the experience, end to end.

A working screen is only one part of a working exhibit. Test the complete visitor experience with the people who will deliver it.

30
DAYS OUT

- [ ] **Practice the opening conversation**

  Train staff to ask useful questions, explain your value, and agree on a next step. Rehearse handoffs between greeters, specialists, and sales.

- [ ] **Test the lead-to-follow-up workflow**

  Enter a sample lead, confirm the required information, assign an owner, and check what arrives in your CRM. Prepare an offline capture option.

- [ ] **Check the technical dependencies**

  Test demos, displays, audio, internet needs, and power requirements. Keep backup content, adapters, and contact details available to the on-site team.

- [ ] **Confirm meetings and materials**

  Reconfirm appointments and staff schedules. Check signs, digital resources, giveaways, and shipping labels against the final plan.

GIVE EVERY LEAD CONTEXT

Capture the visitor’s need, buying timeline, relevant solution, owner, and agreed next action. A badge scan alone cannot tell that story.

Leave this stage with: A prepared team and a tested visitor-to-follow-up process.

THE FINAL WEEK

Arrive ready to open.

Use one final review to close gaps. The on-site lead should know what is confirmed, what is still open, and who can resolve it.

7

DAYS OUT

- ☐ **Freight and return shipping confirmed**
  Tracking, delivery windows, labels, and return instructions are accessible.
- ☐ **Service orders and drawings available**
  Labor, electrical, rigging, internet, and cleaning details match the final plan.
- ☐ **Team brief distributed**
  Everyone has shifts, meeting schedules, contact details, and the daily goal.
- ☐ **Lead capture and demos tested**
  Accounts work, devices are ready, and offline backups are packed.
- ☐ **Appointments and invitations confirmed**
  Visitors know where to find you and why the meeting will be useful.
- ☐ **Open issues have named owners**
  Each remaining item has a responsible person and a resolution time.

Leave this stage with: A clear go/no-go review with no unowned tasks.

ON THE SHOW FLOOR

Turn attention into a next step.

Keep the team focused on useful conversations. A short daily rhythm makes it easier to adapt without losing sight of the goal.

Show

DAILY RHYTHM

- ☐ **Before opening / Align the team**

  Review appointments, assignments, the day's priorities, and any unresolved issues. Check the booth, demos, and lead tools before visitors arrive.

- ☐ **During the day / Capture the context**

  Record what the visitor needs, the questions they asked, and the next action you agreed on. Make a warm handoff when a colleague can help.

- ☐ **Between meetings / Keep the space ready**

  Reset demo stations, replenish materials, and maintain clear access. Adjust staffing where conversations are building up.

- ☐ **At close / Review and route**

  Confirm that leads are saved and assigned. Note recurring questions, useful feedback, and changes to make for the next day.

MEASURE WHAT YOU CAN ACT ON

Track qualified conversations, completed meetings, agreed next steps, and lead completeness. Use the numbers to improve tomorrow's execution.

Leave this stage with: Each priority conversation has context, an owner, and a next action.

A PROPOSED FOLLOW-UP RHYTHM

The show ends. The work continues.

Agree on follow-up expectations before the show so sales and marketing can act while the conversations are still fresh.

After

THE SHOW

- ☐ **First 48 hours / Deliver what you promised**

  Prioritize time-sensitive requests. Send the promised information, confirm next meetings, and make sure each lead has an owner.

- ☐ **First week / Keep the context**

  Personalize outreach around the actual conversation. Route longer-term prospects into relevant nurture, and remove duplicate or incomplete records.

- ☐ **First two weeks / Debrief the team**

  Review what drew the right audience, what slowed the experience, and what should change. Capture lessons while details are still easy to recall.

- ☐ **30 / 60 / 90 days / Review the outcomes**

  Check opportunity progress and cost against the original goals. Continue tracking revenue as your sales cycle matures.

MAKE THE HANDOFF EXPLICIT

Agree with sales on lead definitions, ownership, response expectations, and reporting dates. Adapt this rhythm to your sales cycle.

Leave this stage with: Completed handoffs, active next steps, and a scheduled performance review.

PROVE THE IMPACT

Measure the result you planned for.

Set targets before the show, then review actual results at agreed intervals. Use the same definitions across your team so the comparison is useful.

MEASURE	TARGET	ACTUAL
Qualified conversations Use your agreed qualification criteria.		
Meetings held Count completed meetings, not bookings.		
Opportunities created Use your CRM opportunity definition.		
Attributed pipeline Record the value and attribution method.		
Attributed gross profit Review as the sales cycle matures.		
Total show investment Include the full program cost.		

Efficiency

Cost per qualified lead = total show investment / qualified leads. Define "qualified" before comparing shows.

Return

ROI = (attributed gross profit - total show investment) / total show investment x 100. Agree on attribution with finance.

COMPARE LIKE WITH LIKE

Use the same reporting window and cost categories. Keep pipeline separate from realized return, and use your own past shows as a starting benchmark.

Leave this stage with: A clear decision: repeat, improve, resize, or reconsider the show.

PLAN YOUR NEXT MOVE

Bring the goal. Build the plan with Apogee.

Turn your show objectives into an exhibit plan your team can put to work. Start with the event, your audience, and the result you want to achieve.



- ☐ **Share the show and the timing**

  Event name, dates, location, and available booth space.

- ☐ **Describe the business goal**

  The audience you need to reach and the next step you want them to take.

- ☐ **Bring the practical constraints**

  Your working budget, existing exhibit assets, and internal decision dates.

Let's plan your next exhibit.

Talk with Apogee about the design, production, and coordination your next show needs.

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