

# The Ultimate Trade Show Checklist

Whether you're an expert or a novice at exhibiting at trade shows, your success depends on your level of preparation. Even if you already know your target audience, your strategy, and your message, a great deal of work must be done ahead of the show to achieve your goals and receive a good return on your time and investment.



## Twelve Months to Go:

- ☐ Set your budget, as well as your targeted return-on-investment (ROI).
- ☐ Set your goals and strategic objectives for the show. Are you there to generate leads, make sales, increase brand exposure, or debut a new product?
- ☐ Make sure you're clear on how to calculate your show ROI. If you've attended this show before, build on your past successes and make a plan for improvement. If the show is unfamiliar to you, conduct research. Talk to prior participants about their challenges, successes, and failures.
- ☐ Reserve your trade show booth space as early as you can to ensure you get your ideal spot. Do research in advance to find the best high-traffic location in which to position your booth and to determine which booth size will best suit your needs.
- ☐ Review all contracts and printed materials carefully and note all deadlines for submitting paperwork and payments.
- ☐ Start planning and creating your trade show booth, and make sure you have a firm timeline in place, from design through manufacturing. If you're creating a new booth, you'll need to allow as much time as possible. Even if you're reusing elements from an existing booth, you'll still want to start thinking about any adjustments that will need to be made, from adding new elements to swapping out old graphics for new ones. The more complex your exhibit, the more time you'll need.

## Six Months to Go:

- ☐ Plan and prepare your booth graphics.
- ☐ Plan and prepare your sales and marketing materials, including brochures and handouts. If you want to give away any

freebies, now is the time to make sure they'll be ready for the show.

- ☐ If you're launching a new product or service at the event, confirm that it will be fully tested and ready for its public debut at the show.
- ☐ Choose your shipping, installation, tear down, and storage vendors, and make sure all concerned parties are aware of the correct dates and the scope of services required.
- ☐ Choose your onsite trade show team.
- ☐ If your event staff will be wearing uniforms, order them now.
- ☐ Book a professional photographer to take photos of your booth and the event.
- ☐ If your team is traveling internationally, make sure all passports, visas, and other travel documents will be ready in time.
- ☐ Confirm your event registration.
- ☐ Make all travel and hotel reservations for you and your team.
- ☐ Make sure your booth construction is underway and on schedule.

## Two Months to Go:

- ☐ Confirm that all signage, swag, brochures, and other marketing collateral will be ready by the event.
- ☐ Lock down your logistics. Confirm all dates and details with your shipping, installation, and storage vendors.
- ☐ Finalize and confirm payment information with your vendors. If any vendors will need to receive payment at the event, make sure the payment method—company check, credit card, cash—is agreed upon and arranged well in advance of the show.
- ☐ Start marketing your show presence. Send out press releases and notify your customer base. Consider an email campaign themed to the trade show. Don't forget to take advantage of social media.
- ☐ Find out which of your competitors will be at the event.
- ☐ Contact targeted attendees and book meetings in advance.
- ☐ Make sure you and your event team are clear on how personal travel expenses will be handled: Will corporate credit cards be used? Will team members receive a per diem?
- ☐ Train your booth staff. Make sure everyone working your booth can field questions about your products or services. Ensure that they know your goals and strategy and have their sales pitches rehearsed and ready. You never know where a big lead might come from; don't let potential sales escape due to lack of proper engagement.

## Day of Show:

- ☐ You've done the work! Execute your plan and reach your show goals.
- ☐ Keep your booth staff fed, hydrated, and happy. Trade shows can be grueling, and your staff will be the public face of your brand. Unhappy workers can lead to a disappointing brand impression.
- ☐ Make sure you keep careful track of contact information collected at the show—one misplaced tablet or notebook could result in a show's worth of leads lost.

## Mini Checklist: Sales Meetings at Trade Shows

- ☐ Reserve your meeting space. If you want a good location to set a professional tone for your sales meeting, and if your trade show booth doesn't feature a dedicated area for private meetings, you'll need to plan ahead to book the perfect spot.
- ☐ Set an agenda. Respect everyone's busy schedules by distributing agenda items and briefing material in advance of scheduled meetings. You don't want to waste time covering the basics when you could be talking numbers.
- ☐ Know the names and job titles of everyone with whom you meet. Be professional and courteous, and make sure you're meeting with decision-makers.
- ☐ Collect specific, useful feedback. Ask direct questions about the meeting on any evaluation forms you distribute. Specific answers will help you improve your performance at future events.

### **Mini Checklist: Live Trade Show Presentations**

- ☐ Plan, rehearse, and refine your presentation well in advance of the show. Seek feedback from specialists in both sales and public speaking.
- ☐ Make your presentation as simple and straightforward as possible. Focus on only a few major message points.
- ☐ Brief is better—keep your presentation short and to the point. Under ten minutes is ideal.
- ☐ Appeal to your target audience. The organizers of the trade show should have attendee demographics and psychographics from previous events available upon request; use this information to tailor your presentation to the show attendees.
- ☐ Stick to your message. This will help build your brand, set you apart from the competition, and increase sales.
- ☐ Have a specific, measurable goal for your presentation, such as a certain number of sales leads or increased social media chatter about your brand or product post-show.

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