

Trade Show Planning Timeline

by Cory Ann Ellis

| Action | | +12 Mo. | 9-12 Mo. | 6-9 Mo. | 3-6 Mo. | 1-3 Mo. | 1 Week | At the Show | < Week After |
|--|--|---------|----------|---------|---------|---------|--------|-------------|--------------|
| Select your show(s) | Research: Show cost, history, # of attendees, ROI, past vendors, target attendee, etc | • | | | | | | | |
| Clarify Value of Show | Clarify the value of attending the show. | • | | | | | | | |
| Expected ROI | What do you expect to gain? Sales, Contacts, Partnerships, B2B Awareness, etc. | • | | | | | | | |
| Set Budget | Create a breakdown of expenses and project/ available spend. | • | | | | | | | |
| Set Objectives | Create objectives to match your justification, expected ROI, lead generation, networking contacts etc. | | • | | | | | | |
| Reserve your Space | Set your requirements, size, location, etc | | • | | | | | | |
| Create Marketing Plan | Establish which methods, mediums, giveaway and swag. | | • | | | | | | |
| Design Layout & Lighting | Establish with products to showcase where as well as how to light your space. | | • | | | | | | |
| Craft Your Sales Message | What is your single statement to describe what you have to offer. | | | • | | | | | |
| Research and Decide on Giveaways and Swag | What items will have an impact and get the attendees excited about you. | | | • | | | | | |
| Order Swag and Promotional Items | Using your local vendors order your swag and other promotional items, | | | • | | | | | |
| Determine, Design, and Order Print Materials - Handouts | Most handouts require many proofs. Start the process now. Double check your pricing and text. | | | | • | | | | |
| Follow up with Vendors and confirm delivery of all items | Specifically with Swag items. | | | | • | | | | |
| Plan Staffing | You need staff for set-up and tear down as well as booth schedules. | | | | • | | | | |
| Prepare Technology | Website landing pages, tablets, email signups, TV's, charging stations, etc. | | | | • | | | | |
| Logistics | Create packing lists, review move-in move-out documents | | | | • | | | | |
| Make any Travel Arrangements | If you have staff traveling make lodging arrangements as well as vehicle rentals, etc. | | | | • | | | | |

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|---|---|---------|----------|---------|---------|---------|--------|-------------|--------------|
| Pre-Show Marketing | Announce your attendance at the event, handout tickets, sneak peeks, etc. Show your excitement. | | | | | • | • | • | • |
| Prepare Post-Show Materials & Logistics | Any materials, email messages, etc for post-show distribution. | | | | | • | | | |
| Confirm Travel Arrangements | Confirm lodging, meals, vehicles, etc. | | | | | • | | | |
| Schedule and Start Staff Training | You will want people in your booth that KNOW your products and services inside and out. Train them to do so. | | | | | • | | | |
| Finalize Booth Materials | Is your design/layout ready? Are your print materials going to be ready as planned? | | | | | • | | | |
| Finish Staff Training | Confirm that all of your staff is consistent with the message and knows the product. | | | | | | • | | |
| Verify All Steps | You can never go wrong by double checking. | | | | | | • | | |
| Confirm Staffing Calendar | Confirm all of your staffing. Put it on the company calendar and confirm with each person. | | | | | | • | | |
| Plans Meals & Beverages | Your team will be working hard. Do you have food and beverage available for them? | | | | | | • | | |
| Gather Show Materials | Collect handouts from the show, take photos of the layout, etc. | | | | | | | • | |
| Network | Connect with others who can offer you support, referrals, etc. | | | | | | | • | |
| Gather Info on Competitors | Take notes on their booths, staffing, products, marketing, etc. | | | | | | | • | |
| Lead Follow Up | Send notes, emails, call or text. | | | | | | | | • |
| Networking Follow Up | Send notes, emails, and connect on social media | | | | | | | | • |
| Compare Budget | Complete your budget worksheet, pay all bills, and review spending. | | | | | | | | • |
| AAR: After Action Report | Gather info from your team and review all notes for future implementation. | | | | | | | | • |
| Decide on Future Participation | Review all materials and decide if you would like to participate in the future. Ask organizers for headcounts, etc. | | | | | | | | • |

Instructions:

1. Turn the dots in an "X" when you have completed the task.

Trade Show Budget

by Cory Ann Ellis

| Budget |
|--------|
| |

| Category | Item | % of Spend | Budget | Actual Spend | Difference | Future Budget |
|-----------------------------|---------------------|------------|---------|--------------|------------|---------------|
| | | | \$ 0.00 | \$ 0.00 | \$ 0.00 | |
| Travel | | | | | | |
| | Gas | | | | \$ 0.00 | |
| | Vehicle Rental | | | | \$ 0.00 | |
| Meals & Beverage | | | | | \$ 0.00 | |
| | Food & Drink | | | | \$ 0.00 | |
| Wages | | | | | | |
| | Move-in Crew | | | | \$ 0.00 | |
| | Booth Attendants | | | | \$ 0.00 | |
| Show Fees | | | | | | |
| | Booth | | | | \$ 0.00 | |
| | Electricity | | | | \$ 0.00 | |
| | Phone Line | | | | \$ 0.00 | |
| | Internet | | | | \$ 0.00 | |
| | Tickets for Clients | | | | \$ 0.00 | |
| | Employee Access | | | | \$ 0.00 | |
| | Sponsorships | | | | \$ 0.00 | |
| Promotion | | | | | | |
| | Digital | | | | \$ 0.00 | |
| | Radio | | | | \$ 0.00 | |
| | Television | | | | \$ 0.00 | |
| | ROP | | | | \$ 0.00 | |
| | Glossy Print | | | | \$ 0.00 | |
| | Handouts | | | | \$ 0.00 | |
| | Giveaways | | | | \$ 0.00 | |
| | Promo Items/SWAG | | | | \$ 0.00 | |
| Booth | | | | | | |
| | Construction | | | | \$ 0.00 | |
| | Product Samples | | | | \$ 0.00 | |
| | Signage | | | | \$ 0.00 | |
| | Uniforms | | | | \$ 0.00 | |
| | Lighting | | | | \$ 0.00 | |
| Additional | | | | | | |
| | | | | | \$ 0.00 | |

Instructions:

1. Type amount of budget into box on right
2. Type amounts for each category into "Budget" column grey box.
3. The percentages will automatically fill
4. Fill in the amounts for each of the sub categories in the Budget column.
5. As you spend fill in the actual spend.
6. All other cells should fill based on formulas.

Trade Show Sample Budget

by Cory Ann Ellis

| Budget | |
|--------|-----------|
| \$ | 30,000.00 |

| Category | Item | % of Spend | Budget | Actual Spend | Difference | Future Budget |
|-----------------------------|---------------------|------------|--------------|--------------|---------------|---------------|
| | | 100% | \$ 30,000.00 | \$ 27,500.00 | \$ (2,550.00) | |
| Travel | | 3.33% | \$ 1,000.00 | | | |
| | Gas | | \$ 200.00 | \$ 100.00 | \$ (100.00) | |
| | Vehicle Rental | | \$ 800.00 | \$ 300.00 | \$ (500.00) | |
| Meals & Beverage | | 0.50% | \$ 150.00 | \$ 100.00 | \$ 50.00 | |
| | Food & Drink | | \$ 150.00 | \$ 100.00 | \$ (50.00) | |
| Wages | | 12.50% | \$ 3,750.00 | | | |
| | Move-in Crew | | \$ 1,000.00 | \$ 1,000.00 | \$ 0.00 | |
| | Booth Attendants | | \$ 2,750.00 | \$ 2,750.00 | \$ 0.00 | |
| Show Fees | | 18.67% | \$ 5,600.00 | | | |
| | Booth | | \$ 4,500.00 | \$ 3,500.00 | \$ (1,000.00) | |
| | Electricity | | \$ 100.00 | \$ 50.00 | \$ (50.00) | |
| | Phone Line | | \$ 100.00 | \$ 40.00 | \$ (60.00) | |
| | Internet | | \$ 100.00 | \$ 60.00 | \$ (40.00) | |
| | Tickets for Clients | | \$ 200.00 | \$ 100.00 | \$ (100.00) | |
| | Employee Access | | \$ 100.00 | \$ 150.00 | \$ 50.00 | |
| | Sponsorships | | \$ 500.00 | \$ 250.00 | \$ (250.00) | |
| Promotion | | 16.67% | \$ 5,000.00 | | | |
| | Digital | | \$ 500.00 | \$ 400.00 | \$ (100.00) | |
| | Radio | | \$ 500.00 | \$ 0.00 | \$ (500.00) | |
| | Television | | \$ 0.00 | \$ 0.00 | \$ 0.00 | |
| | ROP | | \$ 0.00 | \$ 0.00 | \$ 0.00 | |
| | Glossy Print | | \$ 750.00 | \$ 750.00 | \$ 0.00 | |
| | Handouts | | \$ 1,250.00 | \$ 1,250.00 | \$ 0.00 | |
| | Giveaways | | \$ 500.00 | \$ 500.00 | \$ 0.00 | |
| | Promo Items/SWAG | | \$ 1,500.00 | \$ 2,100.00 | \$ 600.00 | |
| Booth | | 45.00% | \$ 13,500.00 | | | |
| | Construction | | \$ 4,500.00 | \$ 6,000.00 | \$ 1,500.00 | |
| | Product Samples | | \$ 3,500.00 | \$ 3,500.00 | \$ 0.00 | |
| | Signage | | \$ 2,000.00 | \$ 1,500.00 | \$ (500.00) | |
| | Uniforms | | \$ 1,500.00 | \$ 1,000.00 | \$ (500.00) | |
| | Lighting | | \$ 2,000.00 | \$ 1,500.00 | \$ (500.00) | |
| Additional | | 3.33% | \$ 1,000.00 | | | |
| | | | \$ 1,000.00 | \$ 500.00 | \$ (500.00) | |

Trade Show Marketing Timeline

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| | Cost | ≥6 Month | 3 Month | 2 Month | 1 Month | 3 Weeks | 2 Weeks | 1 Week | At Show | Follow Up |
|---|------|----------|---------|---------|---------|---------|---------|--------|---------|-----------|
| Create Marketing Plan | | • | | | | | | | | |
| Review Past Objectives | | • | | | | | | | | |
| Set New Objectives | | • | | | | | | | | |
| Set Budget | | • | | | | | | | | |
| Plan Message | | • | | | | | | | | |
| Plan Print Materials | | • | | | | | | | | |
| Plan, Design, & Order Swag | | • | | | | | | | | |
| Decide on trade show offer | | • | | | | | | | | |
| Place on Website Events | | | • | | | | | | | |
| Design & Order Print Materials | | | • | | | | | | | |
| Follow up on swag materials | | | • | | | | | | | |
| Introduce into email campaign | | | • | | | | | | | |
| Design and submit ROP and Glossy ads | | | | • | | | | | | |
| Create & Test email signup | | | | • | | | | | | |
| Create Digital Campaign | | | | • | | | | | | |
| Share Organization FB Event | | | | | • | | | | | |
| Create Facebook Event - other | | | | | • | | | | | |
| Prepare Post-Show Materials & Logistics | | | | | • | | | | | |
| Post on to outdoor displays | | | | | • | | | | | |
| Giveaway tickets to customers | | | | | • | | | | | |
| Launch Digital Campaign | | | | | • | | | | | |
| Craft and Send Press Release | | | | | • | | | | | |
| Facebook Posts | | | | • | • | • | • | • | • | • |
| Twitter Post | | | | • | • | • | • | • | • | • |
| Instagram Post | | | | • | • | • | • | • | • | • |
| Linkedin | | | | | | | • | | | • |
| Facebook Live | | | | | | | | | • | |
| Instagram Story | | | | | | | | | • | |
| SnapChat | | | | | | | | | • | |
| Collect email signups | | | | | | | | | • | |
| Follow up with Leads | | | | | | | | | | • |
| Follow up with networking contacts | | | | | | | | | | • |
| Follow on emails | | | | | | | | | | • |
| Blog | | | | | | | | | | • |
| AAR: After Action Report | | | | | | | | | | • |

Instructions:

1. Turn the dots in an "X" when you have completed the task.

Trade Show Booth Layout Checklist

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| | Plan | Setup | Execution | Notes |
|--------------------------------|------|-------|-----------|----------------------------------|
| Free flow of Traffic | • | • | • | |
| Comfortable for Attendee | • | • | • | |
| Product/Content | • | • | • | |
| Handouts in multiple locations | • | • | • | |
| Meeting Area | • | • | • | |
| Interactive Area | • | • | • | |
| Data Capture | • | • | • | |
| Staff Positioning | • | • | • | |
| Branding Consistent | • | • | • | |
| Clear Signage | • | • | • | |
| Swag Ready | • | • | • | |
| Storage | • | • | • | |
| Clean | • | • | • | Have cleaning supplies available |
| Remove all extra items | • | • | • | |

Trade Show Booth Staff Training Checklist

by Cory Ann Ellis

| | Plan | Teach | Practice | Execute | Notes |
|----------------------------------|------|-------|----------|---------|---|
| Hours Scheduled | . | . | . | . | |
| Eating & Drinking | . | . | . | . | |
| Dress Code | . | . | . | . | |
| Hair & Makeup | . | . | . | . | |
| Posture / Expression | . | . | . | . | Where to place hands, stand up straight |
| Cell Phone Use | | | | | |
| Name Tags | . | . | . | . | Name Tags easily visible or names on shirts |
| Company Message | . | . | . | . | Elevator speech, Thank you for your time |
| Marketing and Promotion | | | | | Live posting, Radio Call-in, etc |
| No Gum | . | . | . | . | |
| Positions in booth | . | . | . | . | Do not block entrances |
| How to Engage | . | . | . | . | Verbage, Eye contact, 80/20 listen/talk |
| Product Knowledge | . | . | . | . | |
| Technology Training | | | | | |
| Prepared to schedule a follow up | . | . | . | . | |
| Data Collection Method | . | . | . | . | Analog or digital, what items. get name and preferred method of contact |
| Logistics | . | . | . | . | Directions, Lodging, Parking, Wifi Login |
| Day of walk through | . | . | . | . | |
| Research | | | | | Competition and Event Success |