

Trade Show Planning Checklist



12 Months Prior

- What is your purpose for attending the show
- Evaluate the floor plan, services and traffic patterns to select a space to rent
- Read through the contract, making sure you understand the payment schedule, terms, rules and space assignment methods.
- Apply for your space and make your deposit
- Budget for the show

Six Months Prior

- What do you want to accomplish with your exhibit
- Choose vendors for your booth, including suppliers and a transportation company
- Design a new exhibit if you need a new one
- Plan out your advertising

Four Months Prior

- Choose who will staff your booth
- Make any reservations, including car, flight and hotel
- Determine what your old exhibit needs for upgrading
- Choose products to display in your booth
- How will you handle inquiries
- Speak with the vendors you have chosen about your needs, including when you need their services
- Create a floor plan for your exhibit
- Finalize your exhibit design for a new exhibit
- Begin your trade show advertising plan

Three Months Prior

- Review the exhibitor manual so you are fully prepared
- Choose your exhibit supplier
- Go over your floor plan. Make note of any restrictions and target dates
- Plan your presentations or demonstrations you will use within the booth
- Make a list of any services you need. Note any discount dates

Trade Show Planning Checklist



Three Months Prior ...continued

- Give copies of the plan to your staff
- Reserve the extra space you need for your hospitality suite or press conference
- Choose your catering options
- Submit your free advertising to the venue for the exhibitor guide or preview
- Turn in your authorization form for your exhibitor-appointed contractor
- Plan your pre-show meeting

Two Months Prior

- Preview your new exhibit
- Finalize your graphics
- Order badges for your staff
- Provide information to other departments that may use the same booth
- Order your lead forms and finalize the procedures for inquiries
- Prepare the orders for all the services you need, placing your orders with enough time to benefit from pre-pay discounts
- Check on all your promotions to ensure they are on target
- Prepare the press kits
- Verify reservations for your entire staff, making any necessary changes
- Create a briefing packet for those who will staff your booth
- Schedule the training for your staff
- Remind management of briefing meetings with their agenda

One Month Prior

- Check on your shipments
- Check the schedule for installation and dismantling of your booth, including an estimate of cost
- Confirm all travel reservations
- Follow up with vendors on the dates
- Confirm display literature availability
- Preview your portable display
- Send out all materials to ensure they arrive on time
- Distribute briefing and training materials to your staff

Trade Show Planning Checklist



One Month Prior ...continued

- Hold the pre-show briefing at the office
- Arrange any meetings you will need to hold while at the show
- Send second reminder of meetings with their agenda to management
- Determine when you will brief staff at the show on the purpose of attendance, demonstrations, agenda and show specials
- Make sure you have copies of your orders with proof of payment, credit cards, contact information for all vendors, shipping manifest, shipping labels for return shipping, traveler's checks and engineering certificate for your exhibit

When You Arrive

- Check for the arrival of all shipments
- Check on reservations for hotel rooms and meeting rooms, as well as catering orders
- Locate the electrician and service area and confirm installation date and time
- Supervise the setup of the booth
- Brief and train your staff one day prior to the start of the trade show

During The Show

- Reserve a space for the following year
- Meet with your staff daily
- Arrange for booth dismantling and return shipping
- Send lead forms back to the office every day to be processed

After The Show

- Supervise dismantling of the booth
- Work with the leads you generated
- Debrief your staff
- Compose thank-you notes to those who took the time to visit your booth and send them