

Welcome to EXHIBITOR magazine's Trade Show Planning Guide.

These handy work sheets were designed with input from veteran exhibit managers to help you organize the details of your show-planning activities, from setting objectives to budgeting and measuring results.

QUICK REFERENCE DATA

Show name: _____

Show Web site: _____

User name: _____ Password: _____

Show producer: _____

Account number: _____

Contact name: _____

Address: _____

Phone: _____

Fax: _____

E-mail: _____

Show location: _____

City: _____ State: _____

Hall/Hotel: _____

Booth number(s): _____ **Booth size:** _____

Show dates: _____

Exhibit hours: _____

Setup dates/times: _____

Dismantle dates/times: _____

Number of meeting rooms: _____ **Meeting room locations:** _____

Show-appointed/general services contractor: _____

Contact name: _____

Address: _____

Phone: _____ Fax: _____

E-mail: _____

SHOW DATA

	Prior year	Anticipated	
Number of attendees:			
Number of exhibitors:			
Exhibit-hall admission:	Admission price:		Guest passes available:
<input type="checkbox"/> General public	Public \$		<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Trade only	Trade \$		
<input type="checkbox"/> Restricted to members	Member \$		
	Conference pass \$		
	Exhibits only \$		

Audience profile/demographics:

1. _____

2. _____

3. _____

Tip: Competitive information is available from your account executive with show mangement. He or she can tell you which cometitors are exhibiting and their hall location and booth size.

Participation by competitors:

Company 1: _____

	Prior year	Anticipated
Booth size:		
Booth location:		
Key products displayed:		
Key messages/promotions:		
Strengths/weaknesses:		

Company 2: _____

	Prior year	Anticipated
Booth size:		
Booth location:		
Key products displayed:		
Key messages/promotions:		
Strengths/weaknesses:		

SHOW PLAN

Why is our company exhibiting at this show? _____

Exhibit theme/focus: _____

Product lines/categories to be displayed: _____

Target audience: _____

Size of target audience: _____

How does the show fit with our company’s overall marketing strategies? _____

How does the show fit with our company’s sales targets/goals? _____

How does the show fit with our company’s marketing objectives? _____

Internal show coordination team: _____

SHOW OBJECTIVES

Tip: Objectives must be realistic, specific and quantifiable.

Objective	Tactics for Accomplishing	Measurement Techniques

PRE-SHOW LOGISTICS

Booth contract submitted (date): _____ Booth number(s) assigned: _____

Exhibitor manual received (date): _____ Booth dimensions: _____

Space cost: _____ Cost: ☐ Space only ☐ Package

Deposit \$ _____ due: _____ amount paid: \$ _____ date paid: _____

Remaining balance \$ _____ due: _____ amount paid: \$ _____ date paid: _____

\$ _____ due: _____ amount paid: \$ _____ date paid: _____

Booth location: _____

Exhibit area obstructions/limitations (if applicable): _____

Ceiling height/maximum overhead clearance: _____

Maximum floor loading: _____

Freight-elevator dimensions/capacity (lbs.): _____ Columns/ducts: _____

Other obstructions: _____

Exhibit restrictions: _____

Maximum height of back wall: _____ Maximum height of equipment: _____

Applicable fire regulations: _____

Hanging-sign restrictions: _____

Booth equipment/services (record date ordered):

Furniture	DATE	Show services	DATE	DATE
<input type="checkbox"/> Chairs	_____	<input type="checkbox"/> Accessible storage	_____	<input type="checkbox"/> I&D
<input type="checkbox"/> Desks	_____	<input type="checkbox"/> Carpet	_____	<input type="checkbox"/> Internet
<input type="checkbox"/> Tables	_____	<input type="checkbox"/> Catering	_____	<input type="checkbox"/> Lead retrieval
<input type="checkbox"/> Wastebaskets	_____	<input type="checkbox"/> Cleaning	_____	<input type="checkbox"/> Lighting
<input type="checkbox"/> Sofas	_____	<input type="checkbox"/> Compressed air	_____	<input type="checkbox"/> Material handling
<input type="checkbox"/> Other	_____	<input type="checkbox"/> Drains	_____	<input type="checkbox"/> Photography
Shipping		<input type="checkbox"/> Electrical	_____	<input type="checkbox"/> Rigging
<input type="checkbox"/> Booth	_____	<input type="checkbox"/> Electrician	_____	<input type="checkbox"/> Running water
<input type="checkbox"/> Giveaways/literature	_____	<input type="checkbox"/> Floral	_____	<input type="checkbox"/> Security
<input type="checkbox"/> Products/equipment	_____	<input type="checkbox"/> Forklift	_____	<input type="checkbox"/> Signs
<input type="checkbox"/> Computers/AV	_____	<input type="checkbox"/> Gas	_____	<input type="checkbox"/> Telephone
<input type="checkbox"/> Other	_____	<input type="checkbox"/> Hosts	_____	<input type="checkbox"/> Other

Co-op arrangements with other exhibitors (signage, equipment, etc.): _____

Meeting room reserved: _____

Hospitality suite reserved: _____

Dates: _____ Location: _____

Advance registration:

Guest passes: (Make a separate list of names.) Date ordered: _____ Qty: _____

Shipping addresses: _____

Exhibitor badges: (Make a separate list of names.) Date ordered: _____ Qty: _____

Number of badges provided free with booth space: _____

Hotel reservations:

1. Hotel name: _____ Date reservation made: _____

Phone: _____ Cancellation penalty date: _____

Contact: _____ E-mail: _____

2. Hotel name: _____ Date reservation made: _____

Phone: _____ Cancellation penalty date: _____

Contact: _____ E-mail: _____

EXHIBIT PLANNING/PREPARATION

☐ **Use existing exhibit:** _____ Necessary alterations (such as graphics): _____
Stored at: _____
Refurbishing necessary: ☐ Yes ☐ No _____

☐ **Construct new booth:**
Exhibit builder selected: _____
Account manager: _____ Phone: _____
Final design approved date: _____ Pre-show setup/inspection date: _____ E-mail: _____

☐ **Rent booth properties:**
Supplier: _____
Contact: _____ Phone: _____
Final design approved date: _____ Pre-show setup/inspection date: _____ E-mail: _____

Booth theme: _____

Product displays:

Products to be highlighted: _____
Other products to be displayed: _____

Live presentations/demos:

Supplier: _____ ☐ Internal ☐ External Phone: _____
Contact: _____ E-mail: _____
Script(s) approved (date): _____

Audiovisual presentations:

Type: _____
Supplier: _____ ☐ Internal ☐ External Phone: _____
Contact: _____ E-mail: _____

Graphics:

Supplier: _____ E-mail: _____
Producer: ☐ Internal ☐ Exhibit house ☐ Graphics producer ☐ Ad agency
Contact: _____ Phone: _____
Final copy/art approved: _____ Date due: _____

STAFF

Total exhibit hours: _____ Number of staffers needed for booth: _____
Special booth attire: _____
Number of staffers needed for hospitality event: _____
Special hospitality-event attire: _____
Temporary personnel needed: ☐ Yes ☐ No
Pre-show training (date, location): _____
Walk through (date, time): _____
Trainer: _____ Booth-staff schedule created: _____

Tip: As a rule of thumb, you need two booth staffers per 100 square feet of open booth space.

PROMOTION/PUBLICITY

Pre- and at-show promotions:

List rental from show management (date available): _____

Internal memos/sales letters: _____

Hospitality: _____

Direct mail: _____

E-mail campaign: _____

Tickets for entertainment: _____

PR information to show management: _____

Web page: _____

Advertising schedules for:

Key industry publications: _____

Show dailies: _____

Show directory: _____

Press releases to key industry publications: _____

1. _____ Contact: _____

2. _____ Contact: _____

3. _____ Contact: _____

4. _____ Contact: _____

5. _____ Contact: _____

Banners/signs:

Airport: _____

Show hall: _____

Taxicabs: _____

Billboards: _____

Shuttle buses: _____

Other: _____

Booth promotions:

Literature: _____

☐ General handout ☐ Selective handout ☐ Booth-reference only

Giveaways: _____

Booth photographer: _____ Date scheduled: _____

Other: _____

Post-show promotions:

Literature request/inquiry fulfillment: _____

Follow-up mailings/phone calls/e-mails: _____

Internal promotion (company newsletter, memo, etc.): _____

Other: _____

PRE-SHOW SHIPPING/BOOTH SETUP

Advance-warehouse address: _____

Dates freight accepted: _____ to _____

Show-site address: _____

Dates freight accepted: _____ to _____

Target date/time: _____ Times freight accepted: _____

Off-target penalty: _____

Carrier name: _____

Carrier address: _____

Carrier phone number: _____ E-mail: _____

24-hour contact: _____

Official material-handling company: _____

Scheduled setup dates: _____ Times: _____ to _____ Overtime: ☐ Yes ☐ No

Inbound shipping data:

Exhibit

Products/Equipment

Literature/Giveaways

Shipping date:	_____	_____	_____
Shipped from:	_____	_____	_____
Carrier:	_____	_____	_____
Carrier type:	_____	_____	_____
Tracking number:	_____	_____	_____
Number of pieces:	_____	_____	_____
Bill of lading/airbill number:	_____	_____	_____
Delivery date/time:	_____	_____	_____
Additional insurance:	_____	_____	_____

BOOTH SETUP

Exhibit setup handled by:

☐ Company personnel: _____

☐ Official/show-appointed I&D contractor: _____

Contact: _____ Phone number: _____

E-mail: _____

☐ Exhibitor-appointed I&D contractor (EAC): _____

Contact: _____ Phone number: _____

E-mail: _____

Exhibit insurance confirmed (date): _____

Proof of insurance sent to show management (date): _____

EAC appointment form due date: _____

BOOTH DISMANTLE

Booth dismantling handled by: _____

Supervisor: _____

Scheduled dismantle dates: _____ Times: _____ to _____ Overtime: ☐ Yes ☐ No

POST-SHOW SHIPPING

Supervised by: _____

Date/time freight will be forced: _____

Complete return shipping address: _____

Carrier name: _____

Carrier address: _____

Carrier phone number: _____ E-mail: _____

Carrier contact: _____

Tracking number: _____

Return shipping data:

Shipping date:

Shipped to:

Carrier type:

Number of pieces:

Waybill/bill of lading number:

Delivery date:

Additional insurance:

Booth

Products/Equipment

Literature/Giveaways

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

EXHIBIT RESULTS

Results:

Number of booth visitors: _____

Number of qualified leads: _____

Orders/sales: _____

Cost-per-visitor reached (show cost/number of booth visitors): _____

Total trade show attendance: _____

Media coverage: _____

Evaluation of staff performance: _____

Staff feedback:

Quality of show/booth attendance as related to objectives: _____

Quantity of attendee traffic: _____

Reaction to exhibit/graphics: _____

Reaction to booth location: _____

Recommendations: _____

Competitive analysis:

Total number of exhibitors: _____

Number of direct competitors: _____

Tip: Create a separate sheet with results of competitive analysis. Include the following information: company name, booth size, booth location, key products displayed, key promotions/messages and strengths/weaknesses.

Analysis of return on objectives:

(Refer to Show Objectives on p. 5.)

Objective 1: _____

Methods of measurement: _____

Results: _____

Objective 2: _____

Methods of measurement: _____

Results: _____

Objective 3: _____

Methods of measurement: _____

Results: _____

BUDGETING

Budget item	Pre-show estimate	Actual cost	Invoice paid date	Variance
SPACE RENTAL				
Booth space				
Meeting-room				
space Deposits				
Other				
SUBTOTAL	\$	\$		\$
EXHIBIT STRUCTURE				
Design				
Building/refurbishing				
Tool-box supplies				
Graphics design/production				
Drayage outbound				
Drayage inbound				
Tax on materials				
Storage (prorated)				
Insurance (prorated)				
Other				
SUBTOTAL	\$	\$		\$
SHIPPING				
Ground transport to show				
Ground transport from show				
Air/sea freight to show				
Air/sea freight from show				
Other				
SUBTOTAL	\$	\$		\$
ON-SITE SERVICES				
Audiovisual				
Carpet rental				
Cleaning				
Computer-equipment rental				
Custom signage				
Drayage				
Electrical				
Exhibitor badges				
Floral rental				
Furniture rental				
Setup/dismantle labor				
Lead-gathering system				
Photography				
Plumbing/compressed air				
Riggers				
Security				

Notes

Budget item	Pre-show estimate	Actual cost	Invoice paid date	Variance
Telephone				
Other				
SUBTOTAL	\$	\$		\$
PROMOTION				
Advertising				
Customer hospitality				
Direct mail				
Kiosk space				
Incentives/premiums				
Literature				
Mailing-list rental				
Presentation (production costs)				
Presenter/talent				
Press kits/materials				
Press conference/reception				
Sponsorships				
Other				
SUBTOTAL	\$	\$		\$
PERSONNEL EXPENSES				
Salaries				
Staff training				
Pre-show dinner				
Special attire for booth staffers				
Transportation				
Hotel				
Food/entertainment				
Temporary personnel				
Other				
SUBTOTAL	\$	\$		\$
LEAD GATHERING/FULFILLMENT				
Printing lead forms				
Printing cover letter				
On-site equipment rental				
Postage				
Labor				
Other				
SUBTOTAL	\$	\$		\$
MISCELLANEOUS (add 10 percent)				
GRAND TOTAL	\$	\$		\$

Notes

EXHIBIT TIMETABLE

PRE-SHOW

Scheduled date

Date completed

Select booth space

Determine exhibit objectives

Set show budget

Set exhibit-design goals

Set exhibit budget

Evaluate promotion opportunities

Select exhibit designer/builder

Select display products

Plan promotion strategy

Select transportation/I&D companies

Finalize exhibit design

Plan direct-mail promotion

Review exhibitor service kit

Select booth staffers

Reserve hotel rooms

Finalize lead-fulfillment plan

Finalize lead follow-up mailings

Order show services

Implement promotion strategy

Order badges

Notify show management if using exhibitor-appointed contractor

Preview new exhibit

Plan exhibit setup/dismantle

Finalize availability of display products/literature

Send direct-mail promotion

Plan pre-show staff-training session

Preview portable display

Finalize graphics copy/art

Finalize shipping information

POST-SHOW

Fulfill show inquiries/requests

Write thank-you notes to booth staffers, vendors

Audit invoices/finalize show budget

Measure/analyze results

Tip: If you plan to use exhibitor-appointed contractors (EACs), be sure to check the exhibitor service manual for the deadline for notifying show management. Most shows require at least 30 days advance notice, but some require as much as 90 days. Keep in mind that if you miss the deadline the job automatically goes to the show-appointed contractor.