CTSM
CERTIFIED
TRADE SHOW MARKETER

Preparing, Developing & Submitting a Quality CTSM Portfolio (7010)

Presenter:
Chris Bruce, CTSM Gold
CTSM Portfolio Manager

Sponsored by EXHIBITOR GROUP

NORTHERN ILLINOIS UNIVERSITY
Continuing and Professional Education
Outreach, Engagement and Regional Development

PURPOSE OF THE CANDIDATE PORTFOLIO

Demonstrate application of required trade show/event manager skills: What are you doing better, smarter, more efficiently, effectively, and strategically?

Demonstrate improved trade show and event results due to knowledge gained and applied

Provide an EXCELLENT TOOL FOR CAREER ADVANCEMENT

- Most importantly- this is for YOU
- It’s a concise look at who you are, how you manage, and what you have accomplished

Most important tool for career advancement

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GETTING STARTED AND THE PORTFOLIO PROCESS

PREPLAN

- Begin pre-planning NOW!!
- Examples (https://www.exhibitoronline.com/ctsm/portfolio.asp)
  Read 4 or 5, get a feel for how they flow
- Get management buy-in
- Determine your show, event, virtual event or client event
- Collect your evidence – documents, photos, spreadsheets, etc.
- Save your evidence in folders

ORGANIZE YOUR THOUGHTS

- Basic linear outline
- Mind mapping (Miro, Canva, Sticky Notes)
- AI (Bard, ChatGPT, Perplexity)
- Bar napkin

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GETTING STARTED

- Schedule time to write – NOW!
  - A section at a time, a weekend, a few hours each week, on the plane…
- Register for your portfolio online- ‘My CTSM’
- Portfolio registration fee is $245
- Advisor assigned
- 1 year to complete the portfolio from **your registration date**

PRESENTATION ORDER

PORTFOLIO SECTIONS

1. You and Your Company
2. Show Schedule
3. Show of Focus + Objectives
4. Exhibit Design/Production
5. Integrated Marketing Communications (IMC)
6. Results Reporting
7. Conclusion

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PORTFOLIO CHECKLIST

CRITERIA #1 VITAL STATISTICS	X/ ✓	NOTES
Bio – help us get to know a little about you (not a resume)		Max of 2 pages on self; Can have more on company.
Educational background		
Industry career background		
Current job responsibilities		
Key staff with whom you interact		
Company – help us get to know your company		
History		
Size		
Location(s)		
Market(s)		
Competitors, showing market share		More than just a list
Products/services (photos help us understand)		
CRITERIA #2 OVERVIEW/SHOW SCHEDULE – a broad look at candidate's program and a look at a recent annual schedule of shows/events		
Basic introductory remarks about your program – size and scope – do you also do events, training, other activities? Are you responsible for many divisions?		

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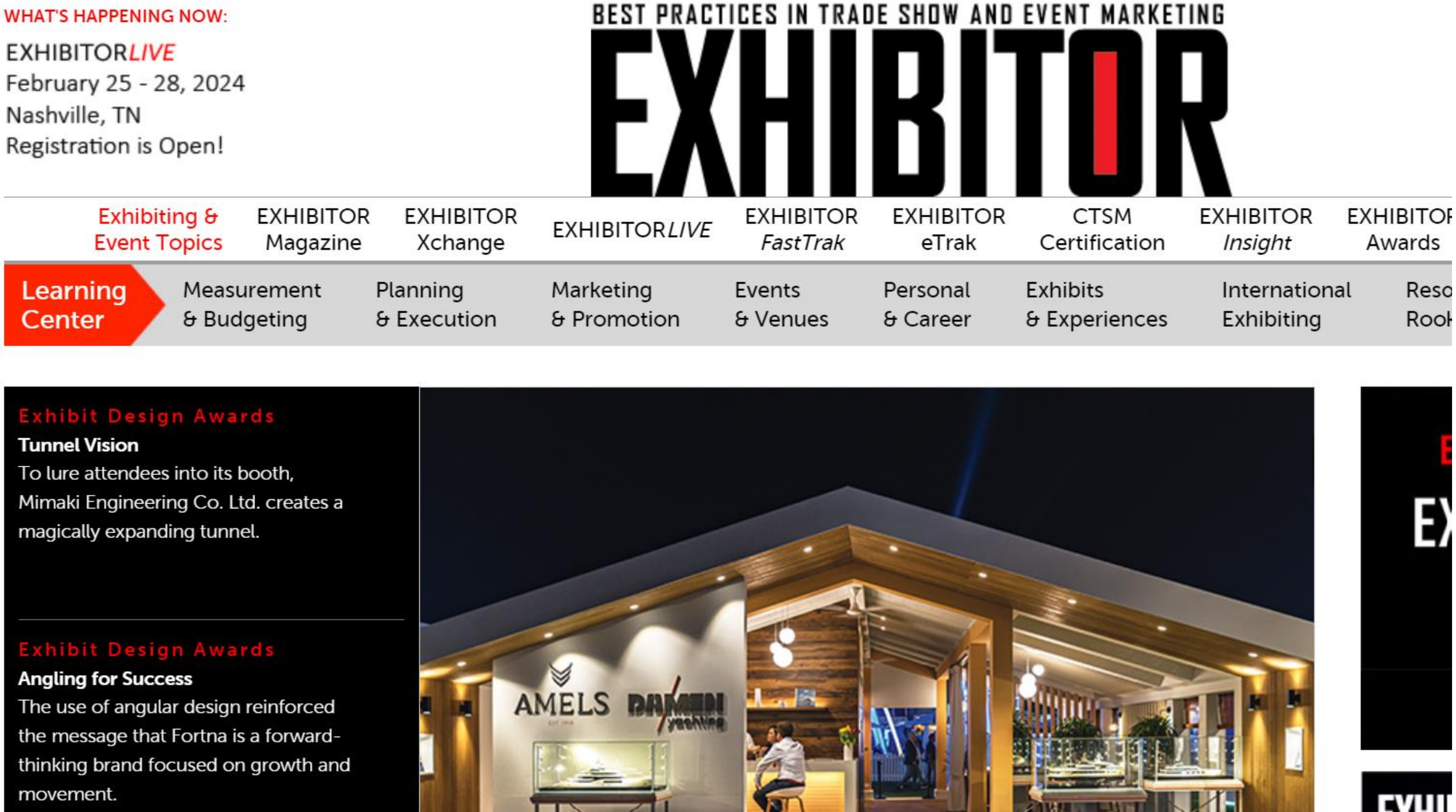
TOOLS AND RESOURCES FOR YOU

Exhibitor Learning Center



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TOOLS AND RESOURCES FOR YOU

Helpful Technology Tools:

- Smart Phone/Digital Camera
- Scanner
- Adobe Acrobat PDF Writer
- Frequent back-ups on external drive
- YouSendIT, DropBox, or other larger file transfer

Help is always available:

- Your advisor
- CTSM Office
- Your Company (Supervisor, Co-worker, IS/IT Department)
- Friend/Family Member
- Me!

ADVICE FROM A TOP ADVISOR

Use a spell check (Grammarly)

Do 3 separate reviews: form, flow, and final proof

You have worked hard, take one last run, go slow and methodical

Use active case – take credit for your work

Refer to the portfolio guidelines and other portfolios, and don't be afraid to call CTSM for help

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CHALLENGES

- Personal Dedication
- Supervisor Buy In
- Sales Support
- Cheerleader/ Advisor

CANDIDATE PRE-SUBMISSION CHECKLIST

CHECK & DOUBLE-CHECK BEFORE SUBMITTING TO CTSM

- Have someone proofread your document and make all corrections.
- Confirm the Table of Contents headers match the section headers.
- Be sure page numbers in the Table of Contents match up with actual pages on which each section starts.
- If your portfolio has an Appendix-reference page number.
  Example: For full show schedule see Appendix A, page 76
- If your table/chart extends to multiple pages-make sure table or chart header is on the top of every page.
- Verify you have included section header pages…

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SUBMITTING YOUR PORTFOLIO

- Once sections have been combined, send to advisor for final review
- Advisor will let you and CTSM office know that you are ready to submit
- Request login and password from the CTSM office ctsm@exhibitorgroup.com
- When receiving login and password, you will also receive a detailed document on how to upload your portfolio
- Be sure to email CTSM office when you have successfully uploaded your document

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SUBMITTING YOUR PORTFOLIO

Submit portfolio online in PDF or PowerPoint format

Submit within one year from date of registration and by the published deadline to be recognized at the next ExhibitorLive.

Personal digital photo uploading:

https://www.exhibitoronline.com/ctsm/PortfolioRequirements.pdf

Email your photo to: CTSM@exhibitorgroup.com

NOTE: IT SHOULD NOT TAKE A YEAR TO WRITE

EVALUATING THE PROJECT

- Review Team
- The portfolio is reviewed (independently)
- This process can take up to a month
- Reviewers combine their notes
- Summary is presented to the candidate
- Revisions are meant to help your portfolio!

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EVALUATING THE PROJECT

Evaluation Form

- Copy of form online at www.CTSM.com *(Exactly like yours)*
- Reviewed monthly, except month of EXHIBITORLIVE
- Reviewed section by section
- Results collected by CTSM Portfolio Manager & communicated to the candidate

The Heart of the Portfolio

- Measurable Marketing Communication goals/objectives
- Results tied to those goals in all sections
- Seminar references with application
- Who do you report your results to?

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WORKING WITH AN ADVISOR

WORKING WITH AN ADVISOR

Gold level graduate advisor is assigned when you register

- Communicate regularly
- Develop work in progress schedule
- Share your outline
- Write one section and send it to advisor…start on the next section…keep the cycle going
- Challenges?

Life happens; let your advisor and CTSM office know your situation

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FORMATTING

PORTFOLIO CHECKLIST

CRITERIA #8 OVERALL FORMAT AND CONTENTS		
All 7 key sections are present and well-organized and there's a title page, table of contents, session reference page, with optional appendix		
Portfolio is easy to read and free of typos, punctuation, and grammatical errors		
All visuals are labeled and are large enough to read text on them		
Sections are set apart by section header pages		Blank page with just text: Section number and title i.e. Section 1: Vital Statistics
Seminars are referenced throughout with clear application of what was learned		
At least 8 CTSM-required sessions and 2 elective sessions are referenced – may have more		
If appendix is used, it is referenced by page number or tab in the portfolio text		
Portfolio has been proofread by friend, family, or colleague who's very good at English grammar		
All sections have been combined into a single document, saved as a PDF, and verified that page references are accurate		Document name: Last Name, First Name CTSM Portfolio (i.e. Stewart, Martha CTSM Portfolio)
The combined sections are sent digitally to advisor for final review		
Notify ctsm@exhibitorgroup.com CTSM Portfolio is ready to upload. CTSM staff will add Portfolio section to NIU site		
Log onto portal and upload portfolio Click HERE for link		
Email ctsm@exhibitorgroup.com when upload is complete		
A digital professional head shot photo is ready to email to CTSM per requirements (on CTSM web site)		

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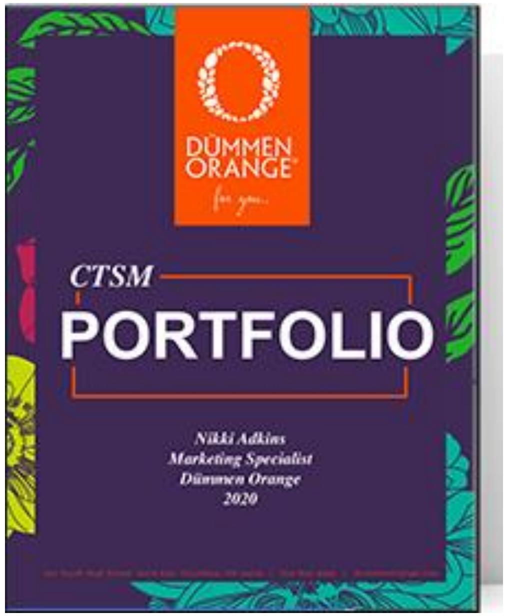
COVER PAGE

Cover Page

- Name/Title/Company
- Contact Information
- Submission Date (Month/Year)
- Photo (preferred)

Samantha Nelson



Nikki Adkins

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POWERPOINT EXAMPLE

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TABLE OF CONTENTS EXAMPLE

Table of Contents (Use These Headers)

SECTION HEADERS

Section Headers

- Sections are set apart by section header pages, using the headers provided
- Include only section number and title (may include corporate branding visual)
- Be consistent in font size and type (larger than story text font)

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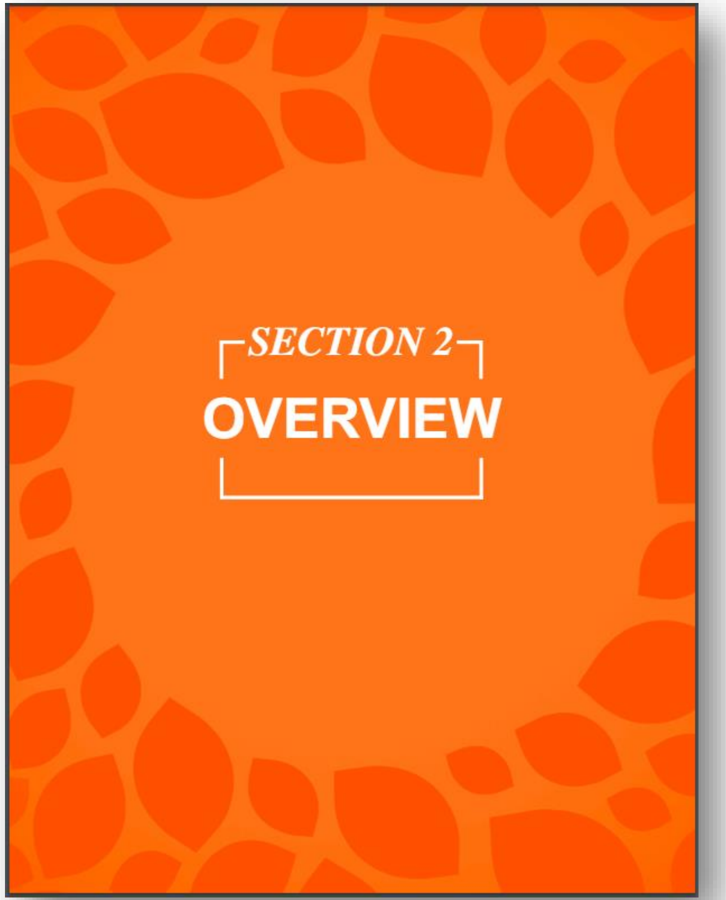
HEADER PAGE



EASY TO READ

- Use tables & bold or colored font to draw attention to key details
- Include explanation sentence or paragraph with tables and graphs
- Leave some white space
- Quality is better than quantity
- Readable length – average 25-45 pages
- Pages numbered (including appendix)
- Free from error – “second set of eyes”, Grammarly, ChatGPT and Gemini are helpful, but won't catch everything.

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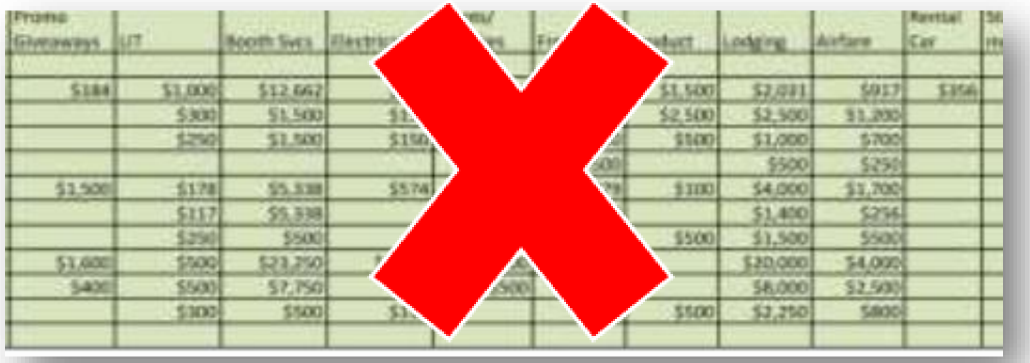
CHARTS & TABLES

Not Readable



Clear & Readable

Strategies	Tactics	Assessment Methods	Goals
Brand Awareness	Floor decals	total # attendees x # views average attendee over course of event	4000 impressions
	Escalator clings	total # attendees x # views average attendee over course of event	4000 impressions
	Lanyards	total # attendees	4000 impressions
	Misc. branding opportunities	total # attendees	2000 impressions
Leads	Lead scanners for all booth staff	Post-show report	75 leads 40 event attendees
	Photo-op engagement to drive traffic	attendee tracking in-booth	100 participants
	Off-site event for top ERP prospects	Track attendance with lead scanners	50 attendees
Product Education	In-booth demo theatre	Attendee tracking in-booth	8 session, 5 attendees each
	Ad-hoc demos & meetings	Attendee tracking in-booth	5 demos

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REFERENCES

References are vital to demonstrate application of learning

- Reference at least 8 required sessions and 2 electives
- Include them throughout your portfolio
- Explain how/what you applied from the session appropriately

Format:

- Elective sessions are four digits – example: 6041 Audience Engagement
- Required sessions are four digits + R example: 2003R The Nuts and Bolts

REFERENCE EXAMPLE

With all the action going on in the booth, we needed a way to drive interest for both the engagement and the demo theatre. From ELC 8 of Session 3015R: Integrated Marketing Communications I learned about leveraging our on-site environment. We used on-site signage including escalator clings and floor decals to promote the demo theatre schedule, and the pre-show communications had hints of the engagement and highlighted the Texas vibe.

Budget Planning

Criteria #4: Management of Design/Production

- I am heavily involved in our annual tradeshow budget planning
- I track our spending in google docs. I compare estimates to actual spend and illustrate how it compares to our overall show budget. I continue to use this method and provide the new budget estimate with a 10% increase to account for inflation and unplanned expenses
- The budget for the 2018 IFT Show was $12,000

Vendor/Service	Cost
10x10 Booth Space	$3,900
New Graphics	$1,000
Freeman Services and AV rental	$3,915.46
Experient	$710
Convention Services (Internet/Electrical)	$1,600
Fed Ex	$400
Total	**$11,525.46**

Session 20317:
The Nuts and Bolts of Budgeting for Results
by Kimberly Kee

One of USP's Core Values is "Fostering Stewardship". This core value guides me in all my tradeshow spending. Ways I will incorporate these learnings are: ordering show services before the discount deadline, bartering for additional complimentary badges, minimize soft costs, and leverage efforts by cross-promotion across business units

LISTING OF SESSION REFERENCES

- Using a header page after the Conclusion section
- List only those seminars referenced throughout your portfolio sections – not your entire CTSM curriculum
- Resources – Handouts, CTSM website, required curriculum insert
- Presentation Format- make hyper-links to reference

LIST OF SESSION REFERENCES

Sessions		Session Title	PG #
6017	R	"Graphics Boot Camp: The Basics Every Event Manager Should Know"	17
3050	R	Focus on Attention: How to Optimize your Messaging on the Trade Show Floor	17
3048	5	Sales and Marketing Alignment: How to Get — and Stay — on the Same Page	22
7021	R	Negotiating Skills to Win	28
3032	E	You Want Me to Pay for What? Adding Value to Your Sponsorship	30
2014	R	The Basics of Trade Show Project Management Part 1	32
3006	R	Navigating the Post-Pandemic World: A Foolproof Multi-Channel Marketing Strategy for Your Live Events and Trade Shows	47
6010	R	The Basics of Event Planning and Management – Part I	55
2003	R	The Nuts and Bolts of Budgeting for Results	55
1008	R	"How to Measure the Value of Trade Show Participation Part I: Basic Concepts"	55

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LABELING OF VISUALS

Visual evidence of application is important- “Show and Tell”, Not just "Show" or just “Tell”

- Photos
- Graphics
- Spreadsheets/Charts
- Examples of Integrated Marketing
- Booth Schematics

...and more

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EXAMPLE LABELING VISUALS

SPECIAL EVENT BOOTH EXAMPLE

Custom tickets created for CCC/MPLC private event

(Front & Back views)

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EFFECTIVE USE OF APPENDIX

Appendix

- Definition: supplementary material usually attached at the end of a piece of writing
- Required: No
- If included, it follows the seminar reference list. Use a header page to start it.
- Presentations afford an excellent way to link, expanding windows, etc. Use them!

What to include:

- Long support documents
- Examples: multi-page show schedule (3 page is kind of the cut off), multi-page RFP, Complete survey…

What NOT to include:

- Documents/information that are key to your story
- Examples: booth visuals or budget numbers that belong in Section 4

PROPERLY REFERENCE APPENDIX

Appendix references

- With online submission, it is possible to set your appendix references up as links, that when clicked on, the reader is taken directly to the appendix, and then back again to the section or Table of Contents

- Or reference by page number(s)
  - Example: “Following is a simplified budget for the conference. (The full budget can be seen in Appendix B on page 44.)”

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LIST OF SESSION REFERENCES

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VITAL STATISTICS

PORTFOLIO CHECKLIST

CRITERIA #1 VITAL STATISTICS	X/√	NOTES
Bio – help us get to know a little about you (not a resume)		Max of 2 pages on self; Can have more on company.
• Educational Background		
• Industry career background		
• Current job responsibilities		
• Key staff with whom you interact		
Company – help us get to know your company		
• History		
• Size		
• Location(s)		
• Market(s)		
• Competitors, showing market share		More than just a list
• Products/services (photos help us understand)		

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TELLING YOUR STORY

Your Unique Situation

Narrative – The connecting bond provides background, rationale behind choices, and explanation of processes and results.

Remember your Audience- they don’t know you, so introduce yourself to them.

SECTION 1 REQUIREMENTS

First of Seven Key Sections

- Candidate Profile
- Company Profile

Candidate Profile

- Who you are
- Education
- Industry Experience
- Your role in the company and key players you work with
- One to two pages

NOTE: This is not a resume

POWERPOINT EXAMPLE

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SECTION 1 REQUIREMENTS

Company Profile

- Company Background
- Location
- Size
- Markets
- Products or Services
- Mission
- Competitors (market share or how you differentiate yourself from them)

COMPANY PROFILE – SUPPLIER SIDE

If focusing on a client's program, a second company profile must be added on your client.

- History
- Size
- Location(s)
- Market(s)
- Competition

EXAMPLE COMPANY PROFILE – SUPPLIER SIDE – CLIENTS COMPANY

About Samtec

- Leading manufacturer of custom electronic interconnect solutions
- Headquarters – New Albany, IN
- Differentiated from competitors by service
- Grown to over 40 international locations and 6000+ employees

RESOURCES FOR YOUR FOLDER

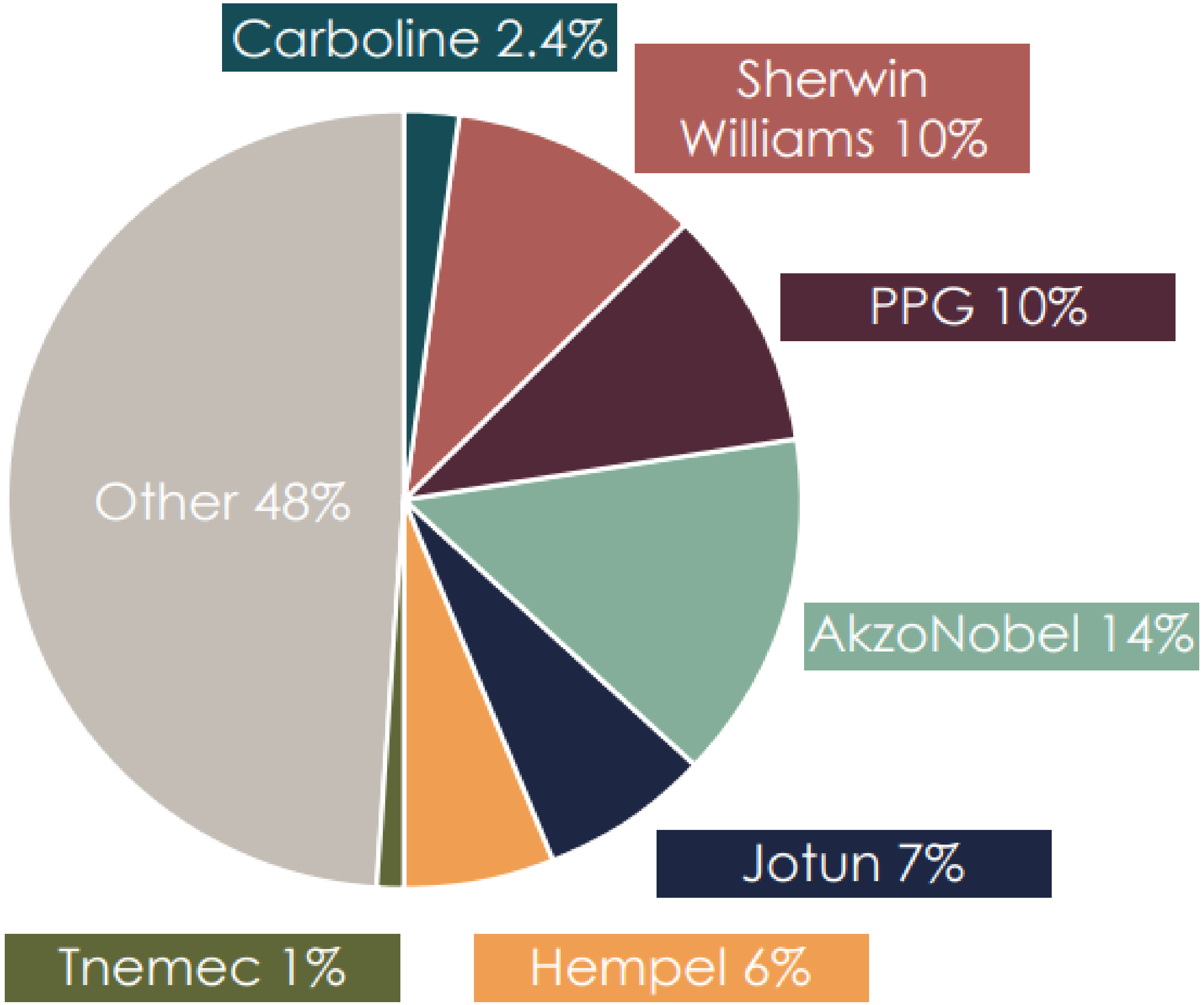
- Resume
- Company History
- Company Annual Report
- Product Brochures
- Company Website

  More…

EXAMPLE: YOUR ROLE IN COMPANY – TITLES/NOT PERSONAL NAMES

MARKETING DEPARTMENT ORGANIZATION CHART

EXAMPLE: COMPETITION



Credit: Samantha Nelson, CTSM

EVALUATION CHECKLIST

Have I:

- ✓Included educational background and career path
- ✓Listed my current job responsibilities and key staff with whom I interact
- ✓Presented company history, location(s), market, size
- ✓Demonstrated understanding of our competitors
- ✓Provided details on our products and/or services

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OVERVIEW/SHOW SCHEDULE

PORTFOLIO CHECKLIST

CRITERIA #2 OVERVIEW/SHOW SCHEDULE – a broad look at candidate's program & a look at a recent annual schedule of shows/events		
Basic introductory remarks about your program – size and scope – do you also do events, training, other activities? Are you responsible for many divisions?		
Have you made major changes since taking over?		
Annual schedule of major shows/events (no more than 1-2 pages, if larger put full schedule in appendix)		Show name with acronyms explained, dates, location, size of booth = minimal information
Identify any special circumstances		It's ok to not have any.

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SECTION 2 REQUIREMENTS

Second of Seven Key Sections (a broad look at your program as a whole)

- Basic introductory remarks about your program overall: size, scope, additional responsibilities
- Any major changes since you took over
- An annual show/event schedule for the year of your show focus (main shows here; if large, full schedule in appendix)
- Unique situations, if any

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BASIC INTRODUCTORY REMARKS - EXAMPLE

Currently I support 14 events including tradeshows, Human Resources (HR) supported job/career fairs and internal company events per year. The events dropped during COVID but are now rising.

Our tradeshow booths are 20’x20’, and sometimes larger when we are co-exhibiting with one of our parent company’s other brands. We normally have 6 people staffing our booth that include Sales, Engineering and Program Management.

PROGRAM IMPROVEMENTS MADE - EXAMPLE

I inherited a very mature program where very little was done to properly manage the program. It was very clear that I could use this as an opportunity to overhaul program management, introduce standard operating procedures (SOPs) and streamline the process. I adapted a phased approach to the improvements I wanted to make.

- Learned the industry
- Created new budget tracking spreadsheet
- Began new partnership with local display house
- Introduced Asana, a task management solution

SCHEDULE EXAMPLE - GOOD

2022 Annual Event Schedule

Industry Key: O&G = Oil & Gas; Multi = Multiple Industries; WWW = Water/Wastewater; Com FP = Commercial Fireproofing; Others are self-explanatory

EVENT	DATE	LOCATION	SIZE	INDUSTRY	CATEGORY
Midwest Association of Rail Shippers (MARS)	1/12-1/13	Lombard, IL	10x10	Rail	Regional
SPE Offshore Europe	2/1-2/4 (Postponed 2023)	Aberdeen, Scotland		O&G	International
Southern Gas Association	2/8-2/10	Oklahoma City, OK	Table	O&G	Regional (SPC)
Corrosion School	2/22-2/23	St. Louis, MO	N/A		Customer Event
Pipe Line Contractors Association (PCLA)	2/22-2/26	Phoenix, AZ	Table	O&G	Regional (SPC)
AMPP Annual Conference + Expo	3/6-3/10	San Antonio, TX	20x20	Multi	Corporate

Credit: Samantha Nelson, CTSM

TRADE SHOW ALPHABET SOUP

AED
JFPS
USSC
GIS
EAU
MVC
DSEi
QES
YPMNH

RRHA
CPGA
NAMS
OSACT
ZIIEZT
FHVCA
BTE
WIP
STMA

LAIF
TSA
KSCAHF
XIAC
PCBC
HCA
IBS
VSPP

Do you know which shows these are? Neither do we. Please explain acronyms.

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RESOURCES FOR YOUR FOLDER

Documents regarding scope of your exhibit program

- Regional shows/large industry ones/international shows/customer training/events/etc.
- Job description listing other responsibilities

Show schedule spreadsheet

EVALUATION CHECKLIST

Have I:

- ✓Included basic introductory remarks on the size and scope of my program and responsibilities
- ✓Shared program improvements I've made
- ✓Included annual show schedule
- ✓Identified any special circumstances

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INTRO TO SHOW OF FOCUS/MEASURABLE OBJECTIVES

PORTFOLIO CHECKLIST

CRITERIA #3 INTRODUCTION TO SHOW OF FOCUS & MEASURABLE OBJECTIVES FOR THE SHOW		
Introduction to show/event/client of focus		
• Why you chose this one as your focus		
• Demographics of the show/event		
• Who's your target audience		
Specifics about your participation at the show/event of focus – size; show-related activities; what is your role		
Detailed show/event strategies		
Objectives and measurable goals for show/event of focus – must have numbers		Use a table with four key column headers – Strategies, Tactics, Assessment Methods, Measurable goals. No results should be in this section
Explain process involved in preparing for this show/event to help readers understand		

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SECTION 3 REQUIREMENTS

3rd Key Section

- Introduction to the show of focus as well as the background, demographics and details of the show
- Corporate Exhibiting Objectives
- **MEASURABLE** Specific Show Objectives (with numbers)

EXAMPLE

Criteria #3 – VIVA Overview

Introduction to Show of Focus

VIVA (Vascular InterVentional Advances) is a global educational event for specialists caring for patients with vascular disease. VIVA brings together attendees and faculty specializing in vascular surgery, interventional cardiology, interventional radiology, vascular medicine, neurointervention/neurosurgery, and cardiothoracic surgery, offering a uniquely comprehensive educational experience with access to some of the best minds in endovascular care.

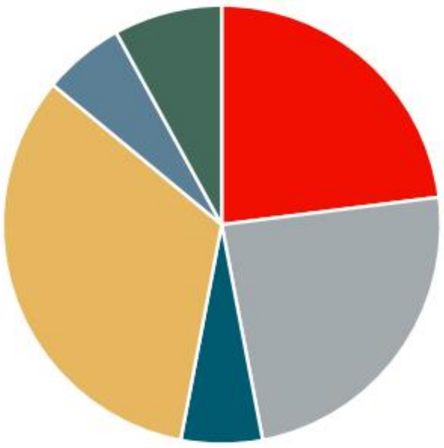
I chose this event for my portfolio because it is one of our largest vascular congresses and one of my most dynamic shows of the year. This event has many facets for consideration:

- Booth in the exhibit hall
- Premiere Suite
- Gore Sponsored Lunch Symposium
- Cadaver Lab
- Simulation Show Case

EXAMPLE

Criteria #3 – VIVA Demographics 2023

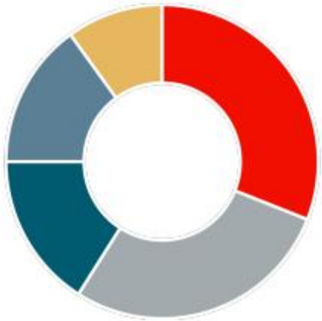
Demographics by Specialty
Physicians/Trainees Only



- Interventional Cardiology
- Interventional Radiology
- Vascular Medicine
- Vascular Surgery
- Cardiology
- Research other

Live Attendees: 450
Virtual: 43

Demographics by Time in Practice



- 20+ Years
- 11-20 Years
- 6-10 Years
- 1-5 Years
- I do not perform endovascular interventions

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EXAMPLE

Criteria #3 – VIVA Target Audience

Introduction to Show of Focus

- In Session 1008R: How to Measure the Value of Trade Show Participation – Part I: Basic Concepts, I learned how important it is to understand the "Target Marketing & Audience Identification". By understanding our key targets for each investment, we will be able to better understand ROI by reaching the right people, providing the right messaging, and understanding the expected action.

Symposium

- Established vascular surgeons

Booth/Premier Suites

- Interventional radiologists and Interventional cardiologists that may not be familiar with Gore's breadth of technology
- Early career physicians during the Physicians in-training reception and exhibit hall tour

Cadaver and Simulation

- Vascular Surgeons either fellows or early career

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GENERIC CORPORATE GOALS (NEED MORE…NEED NUMBERS)

Corporate Objectives for International Coatings Show (fuzzy, too broad, not specific, not measurable)

- Gather leads for future sales
- Launch new products
- Increase awareness and meet new prospective customers

ASK "HOW MANY?" "HOW MUCH?"

Make it Measurable

- Increase Leads?
  - Generate 150 level A leads
- Foster Existing Relationships?
  - Set meetings with 15 existing clients
- Write Orders?
  - Write 15 orders worth $5,000 or more
- Unveil New Product/Service?
  - Distribute at least 150 brochures on new product/service
- Brand Your Company in This Industry?
  - Achieve at least 1,000 impressions during the conference

Slide Credit: Ashley Backhus, CTSM

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HELPFUL CHART FOR OBJECTIVE SETTING

Overall Strategies	Tactics	Assessment Method	Measurable Goals (Include #s)

EXAMPLE: OBJECTIVES - MEASURABLE

Strategies	Tactics	Assessment Methods	Measurable Goals
Brand Awareness	10x10 Booth	Track number of customer touchpoints	**30** booth visits
Brand Awareness/ Relationship Building/ Conviction	Premiere Suite	Track number of customer meetings	**10** premiere suite meetings
Education	Lunch Symposium	Track number of attendees for our lunch symposium and understand customer NPS through post-event survey	**33** physician attendees Survey results (Survey questions in Appendix Slides 8-9)
Education	Simulation Showcase	Track number of physician participants in simulation showcase and understand customer NPS through post-event survey	**10** physician attendees Survey results (Survey questions in Appendix Slides 8-9)
Education	Cadaver Lab	Track number of physician participants in simulation showcase and understand customer NPS through post-event survey	**10** physician attendees Survey results (Survey questions in Appendix Slides 8-9)
Relationship Building	Dinners	Track dinners	**15** physician attendees

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EXAMPLE: PREPARING FOR THE SHOW

Criteria #3 – Preparing for the Show

Planning Team Meeting Schedule

Core Marketing Team:

Monthly from May-October
- Discuss marketing strategy
- Sponsorship opportunities
- Premier Suite design
- Booth Design

Broad planning Team

Monthly from May-October
- Report out on decisions and elicit feedback

Simulation & Cadaver Lab Team

Monthly from May-October
- Understand timelines, demo products, accessory devices and equipment needed to be successful

Attendees

All VIVA attendees were invited to our pre-show call that went over all logistics and Gore Happenings at VIVA. The slide deck has everything from where and when to pick up badges, the show schedule, and what to expect at each sponsored event. (Appendix: Slides 10-36).

During the planning for VIVA, crucial meetings aimed at enhancing our strategy for the upcoming event. Firstly, I met with our strategic marketers and marketing communication strategists to align our goals and objectives for our participation in VIVA. That session ensured that everyone was on the same page regarding our messaging and approach. Following that, I dove into establishing swim lanes and deliverables to streamline our efforts and ensure smooth execution. Then, in another meeting, I included our sales team to gain insights into how our tactics would resonate with our target audience. This collaborative effort enhanced our overall strategy and maximized our impact at VIVA.

RESOURCES FOR YOUR FOLDER

- Show audit/prospectus/directory
- Show website
- Show/event planning document
- Corporate exhibiting goals and strategies
- Show/event specific objectives – numbers to measure against

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MANAGEMENT OF EXHIBIT/EVENT/DESIGN/PRODUCTION

SECTION 4 REQUIREMENTS: PORTFOLIO CHECKLIST

CRITERIA #4 MANAGEMENT OF EXHIBIT DESIGN/PRODUCTION		
Management planning for your booth/space		
RFP/Final selection process		
• How you chose your design partner		
• How you interact with them		
• If no RFP, then needs list to meet design requirements		
Production Strategies		
Budget Plan/Actuals/Variances for exhibit build and overall show – by numbers (chart works best)		If budget is company confidential, you may use percentages
Visual evidence with captions included (graphics/design/photos) – large enough to read		

- This is your story, how you do what you do
- Review other portfolio examples
- If you aren't doing something dramatic or new, explain why or why not.

EXAMPLE: EXISTING BOOTH

- **Strategy:** Introduce Bader U portal and new innovations coming
- **Goal:** Show Bader U video to at least 20 attendees
- **Tactic:** Set up school room area
- **Challenges:** Re-configuring the booth, adding presentation area and AV; very low budget - $2900
- **Promotion:** Email blast to pre-registered attendees
- **Results:** Very good; 31 attended class, watched video, took quiz

NEEDS LIST EXAMPLE (IF NO RFP)

- Flexible to allow options for different setups, with ease of flow throughout booth without obstacles
- Storage space which we can lock
- Custom product tables in the shape of company logo
- Lighting to showcase the product; add backlit projection screen/projector

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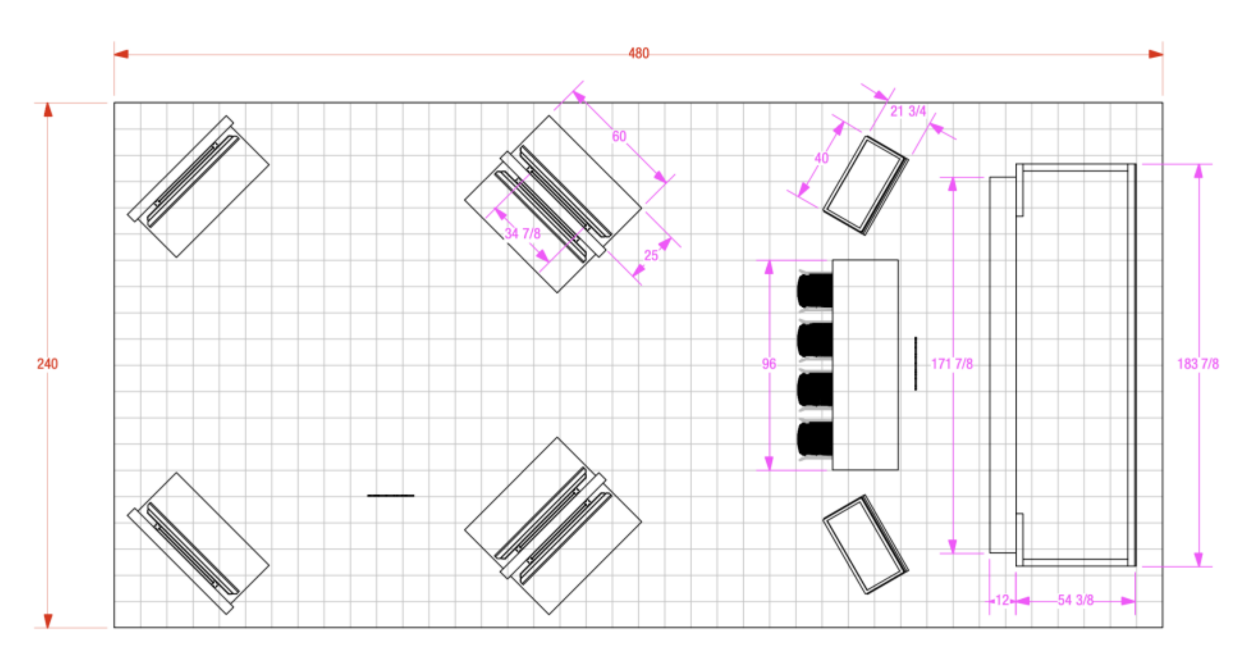
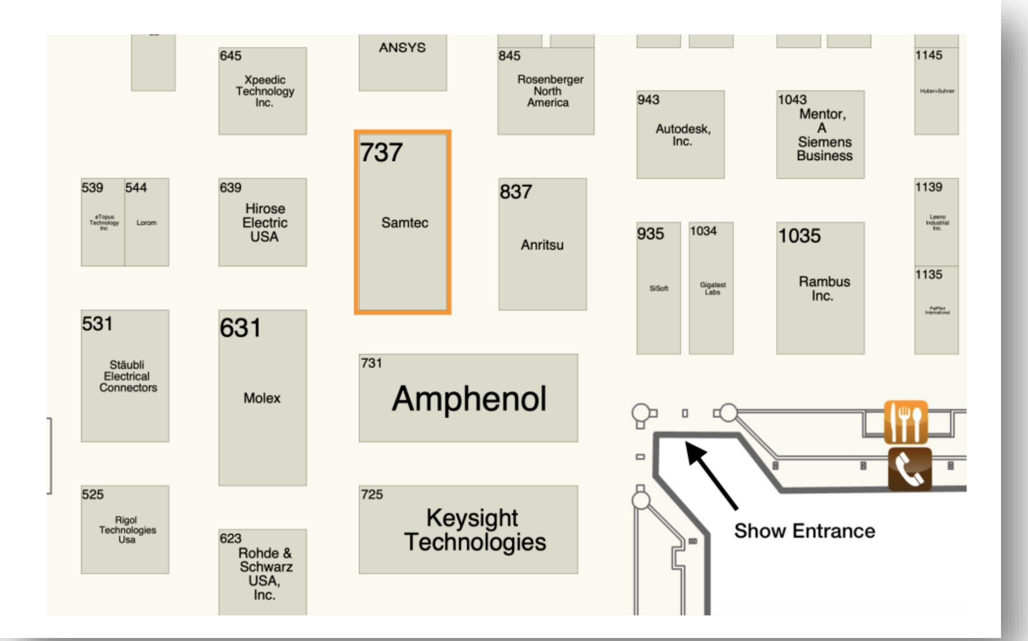
LAYOUT/DESIGN (ROOM SELECTIONS/LAYOUTS)





EXAMPLE: BOOTH REDESIGN TO MEET GOALS

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EXAMPLE: NEW BOOTH
RFP (REQUEST FOR PROPOSAL)

RFP TABLE OF CONTENTS

(Full RFP document included in Appendix)

OLD VS. NEW BOOTH PICTURES

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BUDGET EXAMPLE

Below is the budget plan for the costs paid by XALT

Category	Budget	Actual	Variance
Booth Space	$15,600	$15,600	$0
Freight	$2,800	$1,000	$1,800
Parking Passes	$100	$84	$16
Lunch Passes	$800	$775	$25
Staff Polo Shirts	$550	$529	$21
Total Amount Under Budget			**$1862**

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BUDGET USING PERCENTAGES

BUDGET CATEGORY	TOTAL SPEND	% OF TOTAL	BUDGETED	BUDGET DELTA
Booth Space Reservation	$8,325.00	25.14%	$4,100.00	103.05%
Show Service	$2,460.00	7.43%	$3,450.00	-28.70%
Materials S&H	$6,351.61	19.18%	$5,000.00	27.03%
Travel	$3,958.00	11.95%	$5,000.00	-20.84%
New Rentals & Booth I&D	$11,618.00	35.08%	$7,000.00	65.97%
Marketing & Sponsorships	0	0.00%	$3,500.00	-100.00%
Other	$406.00	1.23%	$450.00	-9.78%
Spending Totals	$33,118.61	100%	$28,500.00	16.21%

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RESOURCES FOR YOUR FOLDER

- Design approval team members
- Copy of RFP or list of needs
- Concept design
- Proposed budget and actuals
- Visuals, including before and after pics

...and more

EVALUATION CHECKLIST

Have I:

- ✓Demonstrated how I manage the process
- ✓Included RFP or needs and final supplier selection process
- ✓Included production strategies
- ✓Included budget, actuals, and variance
- ✓Included visual evidence
- ✓Tied my strategies/tactics back to objectives set in Section 3

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MANAGEMENT OF INTEGRATED MARKETING COMMUNICATIONS (IMC)

SECTION 5 REQUIREMENTS

CRITERIA #5 MANAGEMENT OF INTEGRATED MARKETING COMMUNICATIONS (IMC)		
Planning/Goals for each method		
Selection rationale for each media source used		
Measurable objectives/strategies for each method of communication used		
Visuals with captions demonstrate message integration (easily readable)		
Assessment measures for each marketing goal clearly identified		Using a table with the following headers works best: method of communication, rationale, results
IMC results for each method with recommendations for improved marketing efforts in the future		target audience, measurable goals, assessment method, recommendations

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SECTION 5 REQUIREMENTS

How are you communicating with customers, prospects, and internal stakeholders to help meet your goals set in Section 3?

- **Pre-Show:** Direct Mail, Advertising, Web, Invitations, Evites, Social Media…
- **At-Show:** Presentations/Speakers, Drawings, Sponsorships, Events…
- **Post-Show:** Thank You Notes, Phone Calls, Sales Calls…

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WHAT TO INCLUDE

- Methods of communication used
- Rationale for each
- Goals tied back to overall objectives in Section 3
- Results and recommendations for next year
- Effective and creative message integration
- Visual evidence
- Primarily external, but can include internal communication

RESOURCES TO DETERMINE INTEGRATED MARKETING COMMUNICATIONS

WHAT'S HAPPENING NOW:

EXHIBITOR eTrak

University-Affiliated Online Learning

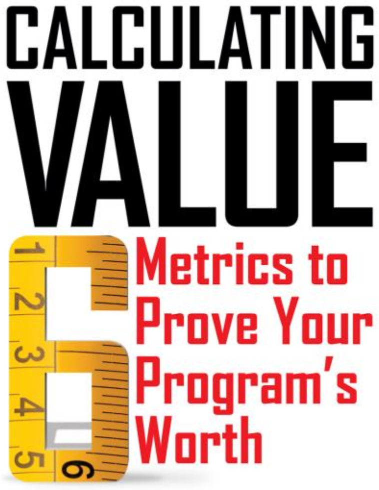
Registration is Open!

BEST PRACTICES IN TRADE SHOW AND EVENT MARKETING

EXHIBITOR

Exhibiting & Event Topics | EXHIBITOR Magazine | EXHIBITOR Xchange | EXHIBITOR*LIVE* | EXHIBITOR *FastTrak* | EXHIBITOR eTrak | CTSM Certification | EXHIBITOR *Insight*

Learning Center | Measurement & Budgeting | Measuring Performance | Lead Management | Budget Management | Cost Cutting | Low-Budget Strategies | Case Studies



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EXAMPLE INTEGRATED MARKETING COMMUNICATIONS TARGETED AUDIENCES

- **Target Market One:** Current MCR prospects and clients
- **Target Market Two:** Current prospectus and clients of other Harris Interactive groups
- **Target Market Three:** Pre-registered ARF attendees (who were not 1 or 2 targets)
- **Target Market Four:** Media covering the event
- **Target Market Five:** Harris Interactive booth and support staff

EXAMPLE AT-SHOW MARKETING

Marketing Efforts

Pre-Show

- Three pre-show emails sent out
  - 30 days prior to event with registration code
  - 10 days prior with PTL blurb
  - 1 day prior with teaser about cannabis workshop
- Profile on floor plan

Registration Page

Email Blast #2

At Show

- Profile on Map Your Show App
- PhytoAx and Media Optimization flyers on app
- Linked In, Twitter & Facebook post from the show floor
- 10'h x 3'w Column banner

Twitter Post

Column Banner

calibre SCIENTIFIC

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EXAMPLE: MESSAGE IN BOOTH

EXAMPLE: MEASURING INTEGRATED MARKETING COMMUNICATIONS (IMC)

Pre-Plan, Estimate Costs, What #’s Needed for Success?

Press Conference Measurements

- Invite 30 Media Contacts
- Have 15 Media Contacts Attend
- Generate 5 Mentions in Print Publications
- Generate 10 Mentions in Online Publications
- Get Published in Show Daily

Slide Credit: Ashley Backhus, CTSM

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Recommended Chart - IMC

Communication Method Chosen	Rationale For Choice	Targeted Audience	How Will You Measure	Measurable Objective	Results	Recommendations For Future
Show Directory	Attendees read to select booths to visit	All Attendees	Lead count compared to last year	Increase visitors to our booth by **4%**	Visitors to our booth was up 6%	Continue to place ad in Show Directory
Website	Non costly reach of target audience	Customer base and inquiries	First time tried; calculate % of hits down - loaded	Get **6%** of site visitors to download free ticket	Only 4% of site visitors down – loaded ticket	Think goal too high – set at 4-5% for next year
Direct Mail Invitation	Drive traffic to booth	Customer base & registered attendees	Number of gifts given	Get **10%** of invites returned for gift		

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VERTICAL LAYOUT OF IMC CHART

Pre-Event Communication #1: VIP Cocktail Invitations

- **Rationale**
  - Direct mail to specific list of invitees, special prospects
- **Target Audience**
  - 50 housing giants from Professional Builder magazine
  - US Apartment Owners from National Multifamily Housing Council
- **Measurable Goal** – Receive 50 RSVP’s
- **Results** – 105 invites sent; 10 RSVP’s; very poor
- **Recommendations** – Invites sent too late; mail much earlier next year

Pre-Event Communication #2: ….

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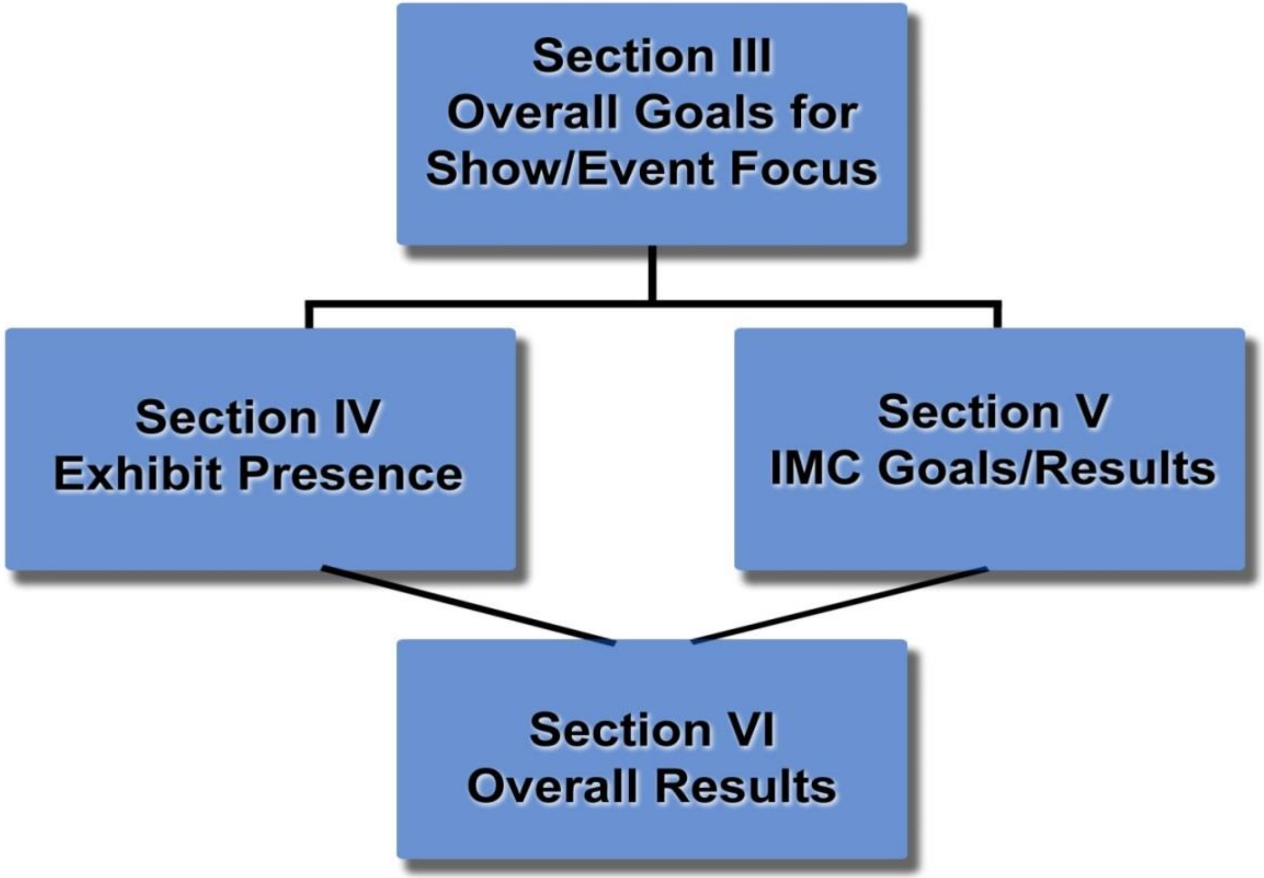
EXAMPLE: IMC STRATEGY – HOW DOES IT FIT WITH THE PLAN



RESOURCES FOR YOUR FOLDER

- Marcom team members
- Media plan or creative brief
- Examples of your communication media
- Tracking documents of goals/results

More…

EVALUATION CHECKLIST

Have I:

- ✓Included communication planning and measurable goals for each method
- ✓Provided rationale for choices of media used
- ✓Included visuals (labeled) to demonstrate message integration
- ✓Tied my communication plans back to objectives set in Section 3
- ✓Provided assessment measures, results and recommendations

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MANAGEMENT OF RESULTS REPORTING

SECTION 6 REQUIREMENTS

CRITERIA #6 MANAGEMENT OF RESULTS REPORTING		
Assessment measured for obtaining show/event		
Results are explained		
Overall show results tied back to original objectives set in Criteria #3 (may include IMC results)		Copying your table from Criteria III here and adding 2 more columns to the right for Results and Recommendations to Improve Marketing is the easiest & best way to show this.
Review results (+ or -) and measurable strategies and objectives		
How do you report your show/event results & with whom do you share?		

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SECTION 6 REQUIREMENTS

- Recap what you measured and how you measured
- What were the results?
- Were these results tied back to objectives?
- Easiest way: copy table from section 3 and add two columns to right – Results and Recommendations
- Include words explaining, not just the charts
- **To whom and how did you report your results?**

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SECTION 6 REQUIREMENTS

Copy Section III table here + 2 columns

Overall Strategies	Tactics	Assessment Method	Measurable Goals (Include #’s)	Results	Recommendations for the Future

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EXAMPLE: RESULTS REPORTING

“The **post show report** was sent to each of the business managers, marketing managers, and the staff working the booth.”

“The information gathered on leads was tracked and will be included in my **year-end report** sent to our Executive Management team, Marketing and Sales Managers.”

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RESOURCES FOR YOUR FOLDER

- Copies of your original goals from Section 3 for comparison
- Documents showing results
- Copies of team reports and survey results
- Count tabulations, measurement charts
- Number of new sales
- Management reports
- More…

EVALUATION CHECKLIST

Have I:

- ✓Have I tracked my measurements and tied them back to the goals in Section 3?
- ✓What were the results?
- ✓Did I review the +'s and –'s of my strategies, goals and results?
- ✓To whom and how did I report the results?

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CONCLUSION

SECTION 7 REQUIREMENTS

CRITERIA #7 CONCLUSION		
Assessment, wrap-up, of your program/show/event or client (if supplier)		
Recommendations for change/ improvement for future shows or program overall		(Recommendations in Section VI are specific to your goals set for this specific show/event)
Strategy plan in place to support the recommended changes		
Review learning experiences from EXHIBITOR Learning Events, CTSM and writing your portfolio		

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SECTION 7 REQUIREMENTS

Give a closing assessment of your program or show

What recommendations do you have for future improvement of your program and what strategies are in place to accomplish them?

What have you learned through the portfolio process and CTSM program?

CONCLUSION EXAMPLE

Recommendations for Improvement

- Take advantage of more show site marketing opportunities…Work with show management
- Develop a system of tracking historical data for each show to improve overall time efficiencies
- Develop a one-page events debrief document to present show results to executives…template already set

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