



# CTSM Portfolio Checklist

CANDIDATE NAME: \_\_\_\_\_

ADVISOR NAME: \_\_\_\_\_

Insert an X or √ in the center column if you have included that specific required information.

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)		
<b>CRITERIA #2 OVERVIEW/SHOW SCHEDULE – a broad look at candidate’s program &amp; a look at a recent annual schedule of shows/events</b>		
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.

<b>CRITERIA #3 INTRODUCTION TO SHOW OF FOCUS &amp; MEASURABLE OBJECTIVES FOR THE SHOW</b>		
<b>Introduction to show/event/client of focus</b>		
<ul style="list-style-type: none"> <li>• Why you chose this one as your focus</li> </ul>		
<ul style="list-style-type: none"> <li>• Demographics of the show/event</li> </ul>		
<ul style="list-style-type: none"> <li>• Who's your target audience</li> </ul>		
<b>Specifics about your participation at the show/event of focus – size; show-related activities; what is your role</b>		
<b>Detailed show/event strategies</b>		
<b>Objectives and measurable goals for show/event of focus – must have numbers</b>		<b>Use a table with four key column headers – Strategies, Tactics, Assessment Methods, Measurable goals. No results should be in this section</b>
<b>Explain process involved in preparing for this show/event to help readers understand</b>		
<b>CRITERIA #4 MANAGEMENT OF EXHIBIT DESIGN/PRODUCTION</b>		
<b>Management planning for your booth/space</b>		
<b>RFP/Final selection process</b>		
<ul style="list-style-type: none"> <li>• How you chose your design partner</li> </ul>		
<ul style="list-style-type: none"> <li>• How you interact with them</li> </ul>		
<ul style="list-style-type: none"> <li>• If no RFP, then needs list to meet design requirements</li> </ul>		
<b>Production Strategies</b>		
<b>Budget Plan/Actuals/Variations for exhibit build and overall show – by numbers (chart works best)</b>		<b>If budget is company confidential, you may use percentages</b>
<b>Visual evidence with captions included (graphics/design/photos) – large enough to read</b>		
<b>CRITERIA #5 MANAGEMENT OF INTEGRATED MARKETING COMMUNICATIONS (IMC)</b>		
<b>Planning/Goals for each method</b>		

<b>Selection rationale for each media source used</b>		
<b>Measurable objectives/strategies for each method of communication used</b>		
<b>Visuals with captions demonstrate message integration (easily readable)</b>		
<b>Assessment measures for each marketing goal clearly identified</b>		<b>Using a table with the following headers works best: method of communication, rationale, results</b>
<b>IMC results for each method with recommendations for improved marketing efforts in the future</b>		<b>target audience, measurable goals, assessment method, recommendations</b>
<b>CRITERIA #6 MANAGEMENT OF RESULTS REPORTING</b>		
<b>Assessment measured for obtaining show/event</b>		
<b>Results are explained</b>		
<b>Overall show results tied back to original objectives set in Criteria #3 (may include IMC results)</b>		<b>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 &amp; best way to show this.</b>
<b>Review results (+ or -) and measurable strategies and objectives</b>		
<b>How do you report your show/event results &amp; with whom do you share?</b>		
<b>CRITERIA #7 CONCLUSION</b>		
<b>Assessment, wrap-up, of your program/show/event or client (if supplier)</b>		
<b>Recommendations for change/ improvement for future shows or program overall</b>		<b>(Recommendations in Section VI are specific to your goals set for this specific show/event)</b>
<b>Strategy plan in place to support the recommended changes</b>		
<b>Review learning experiences from EXHIBITOR Learning Events, CTSM and writing your portfolio</b>		

<b>CRITERIA #8 OVERALL FORMAT AND CONTENTS</b>		
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		<b>Blank page with just text: Section number and title i.e. Section 1: Vital Statistics</b>
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		<b>Document name: Last Name, First Name CTSM Portfolio (i.e. Stewart, Martha CTSM Portfolio)</b>
The combined sections are sent digitally to advisor for final review		
Notify <a href="mailto:ctsm@exhibitorgroup.com">ctsm@exhibitorgroup.com</a> CTSM Portfolio is ready to upload. CTSM staff will add Portfolio section to NIU site		
Log onto portal and upload portfolio Click <a href="#">HERE</a> for link		
Email <a href="mailto:ctsm@exhibitorgroup.com">ctsm@exhibitorgroup.com</a> when upload is complete		
A digital professional head shot photo is ready to email to CTSM per requirements (on CTSM web site)		