

CANDIDATE NAME: _____

ADVISOR NAME: _____

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

CRITERIA #1 VITAL STATISTICS	X/ \sqrt	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 & 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.
CRITERIA #3 INTRODUCTION TO SHOW OF FOCUS & MEASURABLE OBJECTIVES FOR THE SHOW		

Introduction to show/event/client of focus		
<ul style="list-style-type: none"> Why you chose this one as your focus 		
<ul style="list-style-type: none"> Demographics of the show/event 		
<ul style="list-style-type: none"> 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		
CRITERIA #4 MANAGEMENT OF EXHIBIT DESIGN/PRODUCTION		
Management planning for your booth/space		
RFP/Final selection process		
<ul style="list-style-type: none"> How you chose your design partner 		
<ul style="list-style-type: none"> How you interact with them 		
<ul style="list-style-type: none"> 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		
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
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?		
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		
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		
Email your completed portfolio along with a professional head shot to ctsm@exhibitorgroup.com		

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