CTSM Portfolio Evaluation Form

CANDIDATE NAME: _____   **ADVISOR NAME:** _____

COMMITTEE REVIEW DATE: _____   **REVIEWER:** _____

CRITERIA #1 – VITAL STATISTICS

PAGES:	APPROVED	NOT APPROVED	NOTES
Bio including education & career background			
Current job responsibilities (noting key staff you interact with)			
Company history, size, location(s), market(s), competitors (mkt. shares)			
Details on products/services			
SECTION – OVERALL			

CRITERIA #2 – OVERVIEW/SHOW SCHEDULE – a broad look at candidate's program & look at a recent annual schedule of shows/events

PAGES:	APPROVED	NOT APPROVED	NOTES
Basic introductory remarks about your program included –			**Example: size/ scope – other areas of responsibility (events training, etc.)**
Have you made major changes since taking over?			
Annual schedule of major shows/events (no more than 1-2 pages, if large put full schedule in appendix)			**Show name with acronyms explained, dates, location, size of booth = minimal information**
Identifies any special circumstances			**It's ok not to have any.**
SECTION – OVERALL			

**CRITERIA #3 – INTRODUCTION TO SHOW OF FOCUS & MEASURABLE OBJECTIVES
FOR THE SHOW – a narrow look at the show of focus**

PAGES:	APPROVED	NOT APPROVED	NOTES
Introduction to show/event/client of Focus			
Why you chose this one			
Demographics of your show & target audience			
Detailed show/event strategies			
Objectives & 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			
SECTION - OVERALL			

CRITERIA #4 – MANAGEMENT OF EXHIBIT DESIGN/PRODUCTION

PAGES	APPROVED	NOT APPROVED	NOTES
Management planning for your booth/space/presence			
RFP/Final selection process (if no RFP, a needs list for design requirements)			
Production strategies			
Budget Plan/Actuals by numbers (exhibit build/show)			If budget is company confidential, you may use percentages.
Visual evidence with captions included			Be sure visuals and captions are easy to read.
SECTION - OVERALL			

CRITERIA #5 MANAGEMENT OF INTEGRATED MARKETING COMMUNICATIONS (IMC)

PAGES:	APPROVED	NOT APPROVED	NOTES
Planning/Goals			
Selection rationale for each media source used			
Measurable objectives/strategies for each marketing communication effort			
Visuals with captions demonstrate message integration (easy to read)			
Assessment measures for marketing goals clearly identified			
IMC results with recommendations for improved marketing in the future			
SECTION - OVERALL			

CRITERIA #6 – MANAGEMENT OF RESULUTS REPORTING

PAGES:	APPROVED	NOT APPROVED	NOTES
Assessment measures to obtain show/event results explained			
Overall show results tied back to original objectives in III (may include IMC results)			
Recommendations of each show goal/objective for the next year			
Review results (+ or -) & measurable strategies			
Reporting measures – to whom and how			
SECTION – OVERALL			

CRITERIA #7 – CONCLUSION

PAGES:	APPROVED	NOT APPROVED	NOTES
Assessment (wrap-up of program)			
Recommendations for overall change/improvement			
Strategy plans to support recommended changes			
Review learning experiences from EXHIBITOR Learning Events, CTSM and writing your portfolio			
SECTION - OVERALL			

CRITERIA #8 – OVERALL FORMAT AND CONTENTS

	APPROVED	NOT APPROVED	NOTES
All key sections are present & well organized (incl. cover page, table of contents, seminar reference page (appendix optional)			
Ease of reading; free from typos & grammatical errors; visuals & labels are large enough to read			
Sections set apart by section header pages			
Seminars are references throughout with application (at least 8 required & 2 electives)			
Session reference list is included after section 7, (session #, title, page referenced (ELC optional)			
If appendix is used, it's referenced by pg. # in text			
FORMAT – OVERALL			

Review Determination: As a member of the CTSM Portfolio Review Committee for EXHIBITOR's CTSM program, I recommend the following for this portfolio submission:

_____ Approved portfolio for certification requirements.

_____Portfolio not approved. Revisions required as noted.

SIGNATURE _____

DATE   _____