



# CTSM Candidate Portfolio



**Amy L. Armstrong**

**Senior Marketing Specialist/Event Coordinator**

**IPS-Integrated Project Services, LLC**

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## FIXING SNAFUS

### Plan B

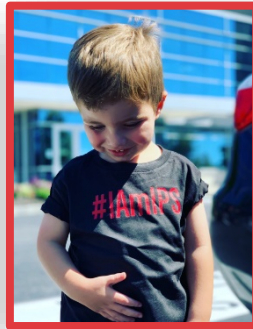


Amy and I realized we had been given one of those patented twists that “Project Runway” famously foists upon its harried contestants. Just when they think they’ve finished, there’s one more hurdle to clear.



## 1.1. Candidate Profile

I've always been a performer on a stage. From the time I was a young girl singing with the broom (my makeshift microphone) to singing in school, to majoring in music in college, and singing professionally now. That picture on the far right is my, now, husband and I falling in love as we starred together in *Guys and Dolls* with me as Sarah and him as Sky. I also had a son at the age of 44 due to the miracle and gift of embryo donation. Events and exhibits are a stage of sorts. Companies put their best face forward for their targeted audiences with a story to tell. In that vein, I've been a performer, director, scriptwriter, and ringleader (insert mental image of the person spinning the plates on many sticks).



But where did it all begin?

In 1999, only days after I was hired at a growing engineering firm (November of 1999 to be exact), my first trial-by-fire event coordination experience landed on my desk in the form of a large exhibitor manual for INTERPHEX. It would be a conference that I would go on to coordinate and exhibit with for over a decade. As I moved up through the ranks there, first as an office administrator, and later, as an event manager in their marketing department, I started handling all aspects of events for all divisions. At one point along the way, my colleague and I would submit [this article](#) for [Exhibitor Magazine](#), around the same time that I was first introduced to CTSM.

In my current position, I work with four others that encompass our marketing team. I report directly to the Marketing Manager and also work closely with the Director of Global Marketing and Communications. In this position, I handle all logistical aspects of conferences, trade shows, sponsorships, speaking engagements, corporate events, etc., as well as provide strategic research, feedback, and recommendations on industry conferences that would be of interest to us. I also continue to evaluate and calculate measurements and milestones for the conferences at which we currently participate. I interact with our management team, subject matter experts (SMEs), and my marketing team regularly.

Additionally, as Co-Chair of the Programming Committee for the [Women in Bio Philadelphia Chapter](#), in a voluntary role, I develop their program for the year, worked closely with the committee, and fully coordinate the sponsored event (once a year) for IPS.



I've also been a speaker at a past [SMPS](#) session on **Event Logistics 101**, and have applied for the opportunity to speak at [ExhibitorLive](#). Still hoping to do this one day!

## IPS Marketing Department



Organizational chart of IPS Marketing


## 1.2. Company Overview

IPS-Integrated Project Services, LLC is a global provider of technical consulting, architecture, engineering, project controls, construction management, and regulatory compliance services for technically complex pharmaceutical development and manufacturing facilities worldwide. Our work-class expertise, knowledge, and understanding of industry trends place importance on time-to-market, plant flexibility and cost control to avoid costly project delays and minimize risk while building, designing, constructing and qualifying CGMP (Current Good Manufacturing Practices) regulated facilities.


### THE HISTORY OF IPS

IPS started from a rich history. IPS was founded in 1989 by two college friends, both of whom were ex-pharma professionals, who had noticed a gap in the way projects were delivered in the biopharmaceutical industry. In fact, their graduate theses were based on a new concept of project delivery that had not yet been developed. At that time, traditional professional services firms were either a design/engineering firm, construction firm, or construction management firm, but not both.


Andy Signore and Joseph Blanchard created IPS and took the fragmented supply chain of engineers, architects, constructors, vendors and C&Q engineers, and developed an integrated project delivery process to help customers succeed with the CGMP regulated projects (hence the name Integrated Project Services). Andy's and Joe's vision for IPS was to provide clients with a single-source solution for their technically complex projects.




### Our Founders



**Andrew A. Signore, PE**  
*Co-Founder*



**1989**



**Joseph A. Blanchard, PE**  
*Co-Founder*

*Founders of IPS*

## ABOUT IPS

Founded in 1989	Biopharma Industry Focused	Internationally Known SMEs	Best-in-class Technical Expertise
Projects range from \$1,000 to \$1.5B	"A" safety conformance rating	Global regulatory knowledge	Many Employees Come from Client Sites
Nearly 1,000 Experienced Professionals	18 Offices Worldwide and Growing	8 Countries with local offices	Trained 400+ FDA Inspectors

## CORE SERVICES

<b>Technical Consulting</b>	<b>Design / Engineering</b>	<b>EPCMV</b>	<b>Project Controls</b>
<b>Construction Management</b>	<b>Compliance (CQV)</b>	<b>Regulatory Consulting</b>	<b>Technical Staffing</b>

## IPS AWARDS

IPS has been the recipient of several awards including *Facility of the Year* Awards highlighting award-winning project deliveries, 500/5000 List of the Fastest-Growing Private Companies in America in 2014 by *Inc. Magazine*, Company of the Year, and has been recognized by several publications including *Engineering News Record*, the *Philadelphia Business Journal*, *Building Design & Construction*, *Engineer Magazine*, *Architectural Record* and *Forbes* to name a few.



**IPS provides everything from concept through validation.**

### *Technical Consulting*

- Business Case Consulting
- Operations Strategies
- Regulatory Consulting
- Operational Excellence and Planning
- Strategic Master Planning
- Technology Transfer
- Lean Approaches to Capital Projects
- Calibration Program Management
- Energy Audits / Conservation/Management
- Environmental Impact Analysis / Assessment

### *Design / Engineering*

- Technology
- Process Engineering
- Process Architecture
- Automation
- Architectural
- Mechanical, Electrical, Plumbing
- Building Services
- Fire Protection / Life Safety
- Equipment
- Computer Process Simulation and Modeling
- Environmental
- BIM Technology / CAD
- 3D Simulation
- Conceptual Design / Engineering
- Detailed Engineering
- Energy / Sustainability / Conservation Management

### *Full Life Cycle CQV*

- CGMP Audits (Domestic/Int'l)
- Project Design Reviews (Design Qualification)
- Early Stage Planning
- Validation Master Planning
- ASTM E2500 Implementation
- Validation Program Development
- Project Management
- Quality System Implementation
- Risk Assessments / FMEA / HACCP / Other
- FDA 483/WL/Consent Decree Remediation
- Validation & CGMP Training
- Project Information Management
- FAT/SAT Support
- Facility, Equipment and System Qualification (IQ/OQ/PQ)
- Process Validation
- Cleaning Validation
- Automation and Computer Systems Validation
- Lab Equipment and Analytical Methods Validation
- Environmental Monitoring
- Specifications (URS/FRS/DDS)
- Bid Packages/Bid Evaluations
- Submittal Reviews
- Commissioning Documents (Pre-Functional/Functional Checklists)
- Risk/Impact Assessments
- Protocols/Test Plans/Test Scripts
- Summary Reports
- Turnover Packages
- Standard Operation Procedures (SOPs)

### *Construction Management*

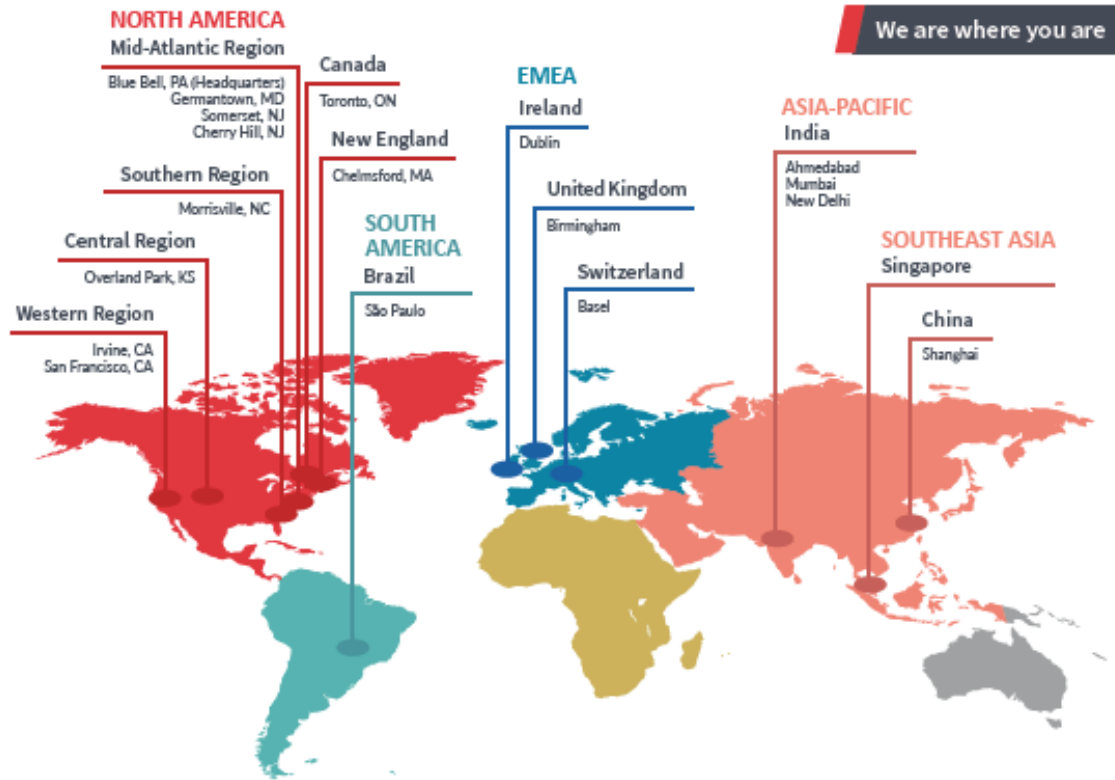
- EPCMV / Design-Build
- Program Management
- Construction Management
- Preconstruction
- Program Management
- Cost Management
- Estimating / Scheduling
- Target Costing
- Open Book \$GMP
- Risk Analysis
- Facility / Process Equipment Expediting
- Procurement Strategies
- Project Management
- Risk Analysis
- Turnover Packages
- Safety / Environmental Compliance

### *Project Controls*

- Cost Engineering
- Planning / Scheduling
- Critical Path Methodology
- Manpower Requirements
- Earned Value Management
- Change Management
- Risk Management Assessment
- Estimating
- Document Controls

### *Technical Staffing*

- Construction Managers / Field Engineers
- Project Managers
- Validation / Commissioning Engineers
- Project Controls Professionals
- Quality Systems Professionals
- Owners Representatives



We are where you are

**Pennsylvania (Headquarters)**

**Blue Bell**  
 P: 610.828.4090  
 F: 610.828.3656

**California**  
 Irvine & San Francisco  
 P: 949.679.4682  
 F: 949.679.4683

**Kansas**  
 Overland Park  
 P: 913.345.9084

**Maryland**  
 Germantown  
 P: 240.839.3620

**Massachusetts**  
 Chelmsford  
 P: 978.954.5450

**New Jersey**  
 Somerset & Cherry Hill  
 P: 732.748.1990  
 F: 732.748.1993

**North Carolina**  
 Morrisville  
 P: 919.460.6636  
 F: 919.460.6648

**Canada**  
 Vaughan, ON  
 P: +1.888.366.7660

**United Kingdom**  
 Birmingham  
 P: +44 121 289 3471

**Ireland**  
 Dublin  
 P: +353 1 4854246

**Switzerland**  
 Basel  
 P: +41 61 205 09 90

**Brazil**  
 São Paulo  
 P: +55 11 4118-3009

**Singapore**  
 P: +65 6662 9370  
 F: +65 6570 9221

**China**  
 Shanghai  
 P: +86 21 64821336

**India**  
 Ahmedabad  
 P: +91 079 2640 1711  
 +91 079 2640 1721  
 F: +91 079 2640 1731

**Mumbai**  
 P: +91 022 6720 9717  
 F: +91 022 2414 5185

**New Delhi**  
 P: +91 011 2577 7806  
 F: +91 011 2577 9152

IPS Locations. Source: Corporate Brochure

## 1.3. Top IPS Competitors

Our larger international competitors tend to view the pharmaceutical industry as just one of their business segments, while IPS focuses on only one sector – the international biopharmaceutical business. Around 25% of our staff has come to IPS from CGMP (Current Good Manufacturing Practice) manufacturing companies. IPS knowledge leaders know how to manufacture pharmaceutical products. This hands-on experience is a real benefit to our clients, who need that expertise to deploy new technologies or improve an existing operation. Additionally, we understand the business goals of our clients and can provide leadership and holistic support. We don't just design and build buildings – we deliver a facility or design a process that is cost-effective and compliant. ***That*** is the IPS difference that separates us from our competitors.

**ENR (Engineering News Record) rankings: Companies** are ranked according to revenue for design services performed. Some markets may not add up to 100% due to omission of "other" miscellaneous market category and rounding.

\*By Amanda Rozgus, Editor-in-Chief, and Amanda Pelliccione, Director of Research, August 9, 2018. \*\* ENR (Engineering News Record) rankings

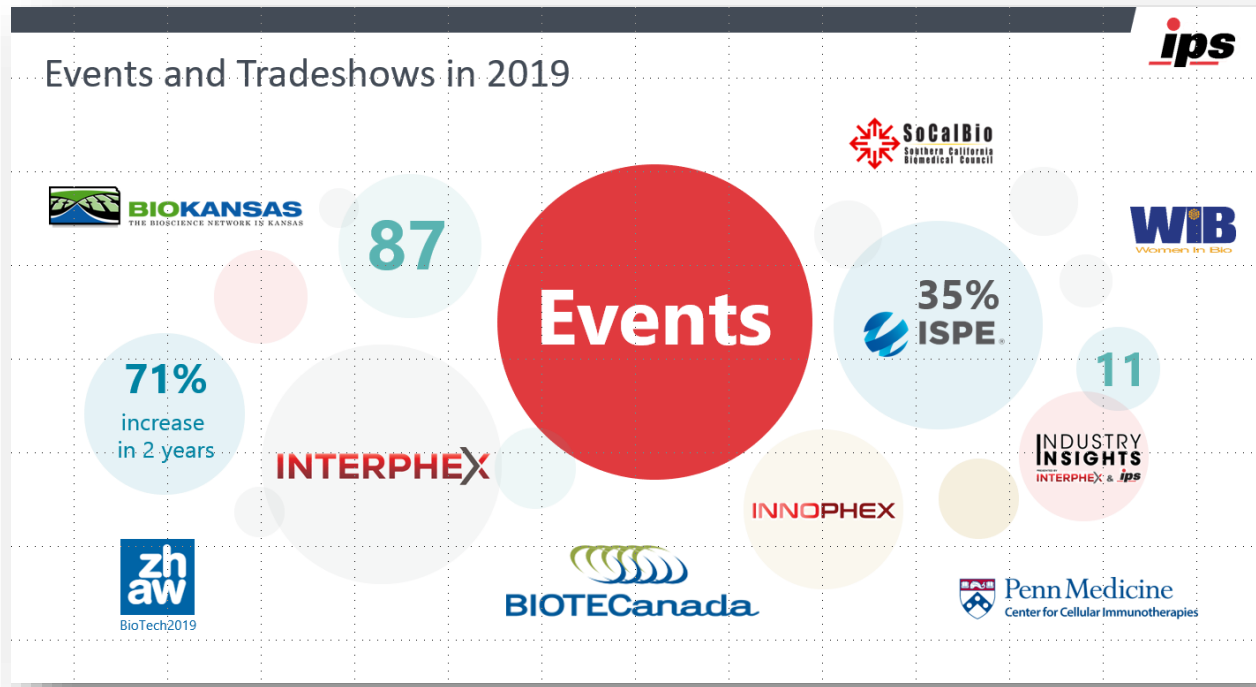
Top Competitors	Additional Information
CRB	*From 2017 to 2018 – Moved from No. 31 to No. 17. Their strong suit is that they are active in the industry with more social media, conferences, presentations, and IM model fluidity, but no validation experience.
DPS Group	**Ranked 98 <sup>th</sup> in 2017, ranked 87 <sup>th</sup> in 2018, and is among the top 225 International Design Firms. This company has a good recruiting package, has validation experience and workshare in Ireland, but with a weakness as they are not life-sciences focused.
Jacobs	**Jacobs is the top-ranked firm on ENR's list of the Top 500 Design Firms, reporting \$9.76 billion in 2017 revenue, about \$3.8 billion outside the U.S. About 31% of that is in the industrial and petroleum sector. It also ranks at No. 118 on the Top 250 Global Contractors list, reporting \$2.5 billion in construction revenue worldwide, 72% in industrial and petroleum markets. By shedding their energy sector, it reduced their overall rankings.
Fluor	**Ranked #2 top firms in 2019.
DPR	They have more construction management capabilities partnered with engineering. They have a strong presence on the West Coast and Southeast. Their use of technology is strong with a robust junior staff.
CAI	They are the largest C&Q provider with hands-on employee ESOP company.



# 2.0 Overview / Show Schedule



## 2.1. Event Marketing Strategy



2019 Event Activity Graphic

In 2019, IPS was involved, either through coordination, speaking, participation, or in some way, for 87 events (conferences, trade shows, corporate events, sponsored events, speaking engagements, etc.) as well as 11 industry career fairs. This represented an increase from 75 events in 2018 and 51 events in 2017. With our strong brand in the Americas (US, Canada, South America), our main objective is to expand our expertise and SME presentations as well as launch project delivery solutions.

**Top 5 IPS Benefits of Attending Tradeshows/Events:**

1. Raise Brand Awareness
2. Forge Business Relationships
3. Target Leads
4. Education
5. Analyze Competition

Events

Top 5 benefits of attending graphic

**Events: 2020 Plan**

Logos: WIB, IPX, ashp, nibrt, PDA, American Society of Gene & Cell Therapy, Jefferson, CURT, Bio, ISPE Europe, NJLT.

2020 Plan for future participation



As Senior Marketing Specialist/Event Coordinator, my responsibilities include:

- Coordinating logistics, sponsorships, networking events, ROI analysis, etc. for all Americas events and help support conferences and events from our other offices and regions globally
- Coordinating corporate events such as anniversary parties, holiday parties, etc. that include venue selection, budgets, contracts, coordination of F&B, entertainment, etc. **An illuminating experience from Session 61119: The Basics of Event Logistics and Implementation – Part II, was learning about coordination with the fire marshal, security, and timelines that I, even after years of experiences, had not used.**
- Coordinating article submissions, website and calendar updating for events, working with SME's on speaking engagements, and developing an SOP (Standard Operating Procedure) for event marketing, etc.
- In addition to coordinating the 10 x 30 exhibit at INTERPHEX, I handled the re-design, production, upkeep, and design coordination of several exhibit structures for our Americas and global offices.

### ROI and Post-Show Reporting

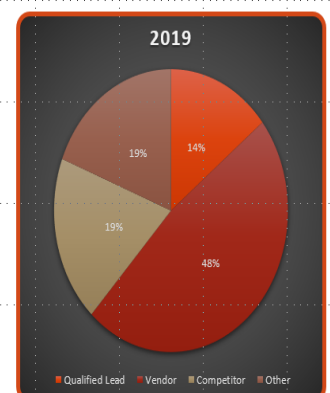
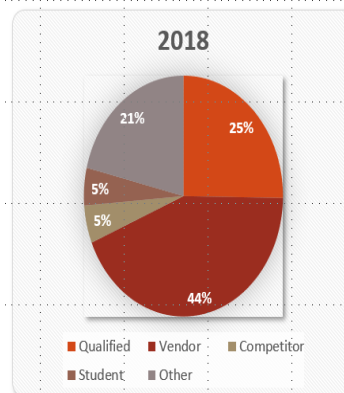
Three major changes that I'm implementing are pre-show analysis for new conferences, post-show ROI Analysis (reports as well as analysis over time), and lead follow-up. **In Session 10819: How to Measure the Value of Trade Show Participation – Part 1: Basic Concepts, I was given amazing insight into how to evaluate a conference with a quantitative method. I've begun to implement this very meticulous process with new conferences as well as conferences that are changing and may be of value.**

Item	Calculation
Number of qualified leads	3
Close Rate Project Awarded YTD (as of 10/25/19) was 513 (\$223,883,460). Hit ratio was 513:162 = 76%	76%
Average contract value Project Awarded YTD: 513 (\$222,883,460) Hit Ratio by Count: 76% (513 won: 162 lost) Hit Ratio by Volume: (\$223,883,460 won: \$199,234,890 lost) Pipeline Size: 404 (\$274,380,990) Opportunities created in last 60 days: 172 (\$51,825,206)	\$436,420
Potential Revenue Generation Qualified Leads X Hit Rate X Average Contract Value	\$995,037.60

Sample - Potential Review Generation Report

### 2018 / 2019 Comparison

Scanned Badge Comparison



Sample - Post-Show booth visitors over time



## 2.2. Other Areas in Development

IPS has a strong brand identity in the industry in the Americas. **As I learned in Session 31118: How to Grow Your Brand Incorporating Brand Marketing into Your Exhibit Programs, the most important concept was consistency, learning the brand association process of awareness, understanding, acceptance, and loyalty. It is something that needs attention in our European regions where we will be looking to increase our visibility.** I will be more prepared for this growth since taking **Session 52217: International Events: Expanding Your Global Reach, which provided a wealth of information on the different tradeshow and government organizations as well as the PCO (Professional Conference Organizers) and the DMC (Destination Management Companies) that will assist with the international process.** We look to broaden our scope in terms of how we contribute in the event industry and how we leverage our subject matter experts. We plan to do this with increased participation in panels, speaking engagements, and on advisory boards of more organizations. Below is a list of our top events that we exhibit at each year.

\*ISPE (*International Society of Pharmaceutical Engineering*). [www.ispe.org](http://www.ispe.org)

Show Name	Dates	Location	Exhibit Size	Participation Level
ISPE* Facilities of the Future	February 7, 2019	Topeka, KS	Table Top	Exhibitor/Attendee
ISPE CaSA Chapter Technology Conference	March 12, 2019	Raleigh, NC	Table Top	Exhibitor and Lunch Sponsorship
ISPE Aseptic Conference	March 18-19, 2019	North Bethesda, MD	N/A	Speaking
ISPE San Francisco Bay Area Chapter Vendor Night	March 20, 2019	San Francisco, CA	Table Top	Exhibitor
ISPE Europe Annual Conference	April 1-3, 2019	Dublin, Ireland	Table Top	Exhibitor
INTERPHEX Conference	April 2-4, 2019	New York, NY	10 x 30	Exhibitor/Technologies Tours/Speakers/Sponsor
ISPE Canada Affiliate Annual Education and Product Symposium	May 5-6, 2019	Toronto, CA	Table Top	Exhibitor/Sponsor
ISPE LA Chapter Vendor Night	May 9, 2019	San Pedro, CA	Table Top	Exhibitor
ISPE Delaware Valley Annual Symposium & Exhibition	May 16, 2019	Philadelphia, PA	Table Top	Exhibitor/Sponsor





### 3.1. The INTERPHEX Conference



*IPS Exhibit Staff, Speakers, Leadership*

INTERPHEX, based in New York City, brings over 10,000 global industry professionals and 625+ leading suppliers together to “Learn It, Experience It, Procure It”, through a combination of a no-cost technical conference, exhibits, demonstrations, and networking events. A good portion of our year, budget, and time is dedicated to this conference spanning several months. *This conference is targeted as our most beneficial conference. It is where we invest the most time and resources with a demographic and target audience that is aligned with our key prospects and partners in the life sciences industry.*

In 2019, INTERPHEX hosted 150+ leading suppliers launching new technology along with 89 exhibiting companies. Attendees arrived from 46 states in the US as well as 65 countries from around the world. INTERPHEX saw an increase of VIP attendees and overall attendance of 16%.

Despite the pandemic canceling the 2020 conference (for which this portfolio was originally planned to target), and the move of the 2021 conference from its typical Spring date to October of 2021, it was still the most compelling, challenging, and all-encompassing conference for me to have as my target for this portfolio. Because of this, I decided to focus on our 2019 conference.



Although I love being a logistics tornado of sorts, I realized that I needed to do a better job in making sure that I was clearly and succinctly communicating expectations to my team. This was talked about in the *Know your Role* section of **Session 61118: The Basics of Event Logistics and Implementation**. This course also included great information about staff expectations and training.

My main outlying tasks for INTERPHEX included the following:

- All exhibit logistics for a 10 x 30 inline booth space
- IPS Technologies Tours in which we coordinate and host vendor exhibit visits on the show floor. We have pre-registered guests attend brief presentations and demos based on specific industries we are highlighting. The tours (typically 5 or 6) occurred on a rolling schedule over two days.
- Help oversee and schedule promotional items and collateral
- Coordinate speaking engagements and work with SMEs on preparation
- Secure IPS sponsorships as well as vendor sponsorships for the Tours



*Inside of Booth Storage Closet*



*Labor Team Begins the installation process*



*Full Installation Complete!*

### The Process of Preparation

Preparation for this conference begins five months in advance and included the following elements in more detail:

- Coordination of abstract submissions for speaking engagements on the INTERPHEX agenda. IPS has always been heavily involved with several of our experts giving sessions, workshops, and live speaking on the show floor.
- Identify the executive committees' main objectives and goals and communicate those with the marketing and the management teams
- Begin initial meetings with tour leaders to assess objectives and goals specific to the tours
  - Beginning in December, bi-weekly meetings were held and then increasing to weekly meetings the month of the conference. These meetings were held in order to brainstorm the theme, description, and to identify vendors
- Create an overall timeline for all deliverables and assign those responsible
- Schedule meeting with website developers to establish a timeline for the registration site
- Hold promo schedule meetings with the social media and graphics media teams
- Contact all partners and vendors to assess exhibit house, booth labor, services, transportation, printer, etc.
- Submit payments for invoices and formulate a budget
- Assess available promotional inventory, collateral materials, etc.
- Inventory packing checklist, the staging of the booth, and shipping
- Provide staff training and schedule

## 3.2. Measurable Objectives

During Elective Session 103: Authors Executive Series: Trade Show Objectives and Performance Management, I was not surprised to learn that only one-third of all exhibiting companies measure their ROI. Although the course gave 100 reasons to exhibit, upper management still feels the financial pinch of a trade show program that, because of the long-lead nature, doesn't show a return for months or even years after the conference has concluded. One can still calculate the anticipated return despite this challenge. It was also helpful to learn the importance of quantified objectives or ones that can be measured. Measuring ROI and also showing benchmarking over time is the final piece to the puzzle of trade show value and how management sees what we do.



*Technologies Tours Waiting Area*



*Dave Goswami, CEO talks with booth staff*



*Tour Leaders Greet Tour Participants*

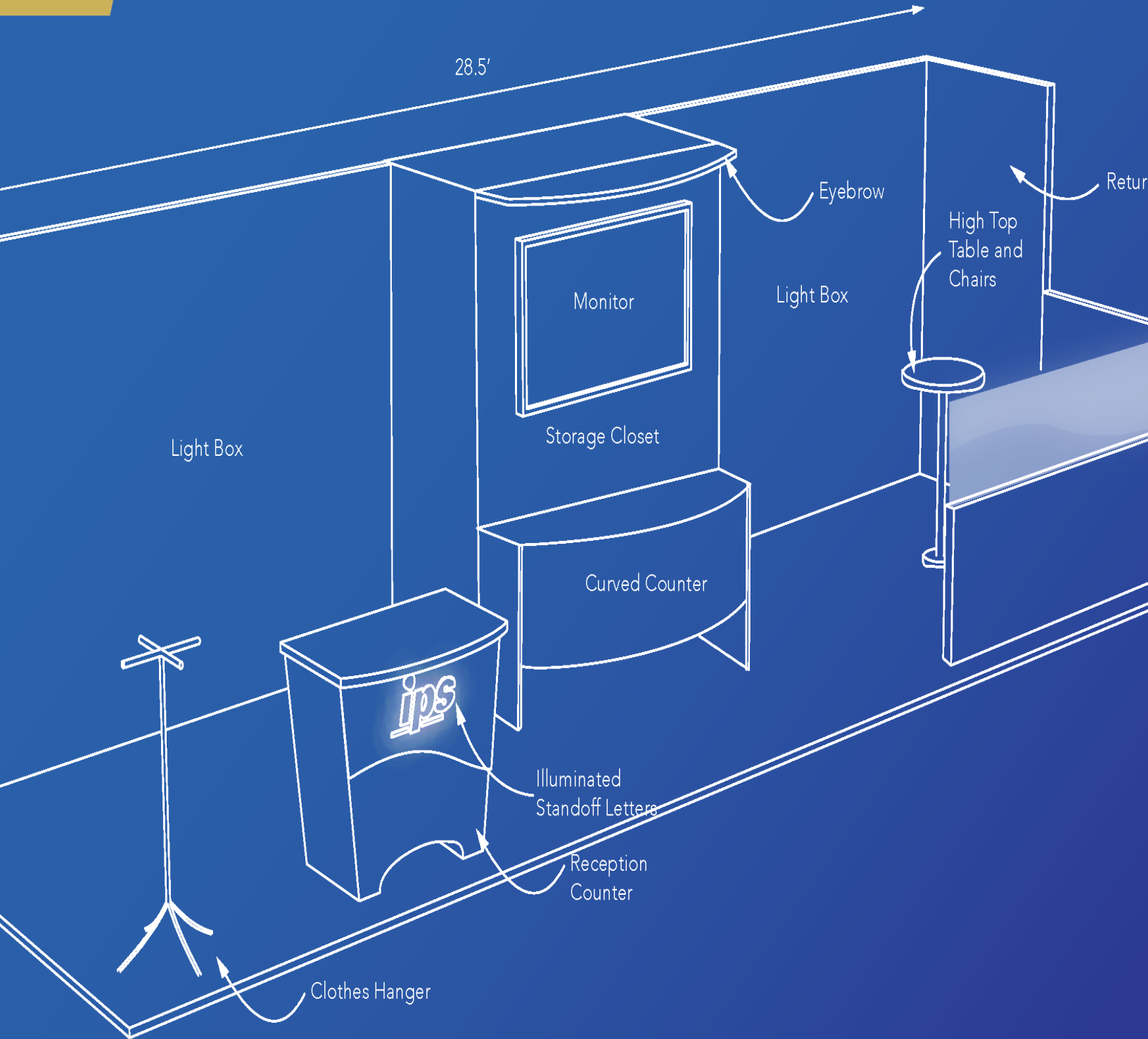


*Technologies Tour in progress*

Strategies	Tactics	Assessment Methods	Measurable Goals
Lead Generation	Post-Show ROI Report on qualified lead generation	Scanner Device Business Cards	<p>50 leads per day over a three-day period for the course of the conference.</p> <p>60% qualified leads percentage of total scanned leads for duration of the conference</p> <p>2:1 ratio of prospects over clients of total qualified leads scanned</p> <p>20% in the Final Decision Maker or Significant Influencer Categories of ALL qualified leads generated at the booth</p> <p>Of <b>non-client</b> qualified leads, 20% in the Final Decision Maker or Significant Influencer of qualified leads obtained in the booth.</p> <p>Obtain at least 20% of job categories for <b>all</b> leads be in the areas of CEO, CTO, CFO, CMO, etc.</p> <p>Obtain at least 20% of job categories for <b>non-client</b> leads be in the area of CEO, CTO, CFO, CMO, etc.</p> <p>Obtain at least 50% of business categories for <b>all</b> leads be Pharma or Bio/Pharma</p>
Trade Show Value and Return on Investment	Potential Revenue Generation	Calculations based on qualified leads, close rate, and average weighted value of project	Potential revenue generated above \$20MM
	Potential orders expected	Calculations based on qualified leads and close rate	Above 100
	Potential Rate of Return	Calculations based on qualified leads, average value per sale, and close rate	A rate of return for every dollar spent that exceeds the show investment



# 4.0 Management of Design and Production



1 10' x 30' booth - Perspective View

### 4.1. Exhibit Design and Production Coordination

#### List of Needs – Exhibit House

When beginning the design process with Studio ETC, our exhibit-house, I created a list of needs based on our marketing objectives and branding guidelines for the conference. This was to be the largest exhibit in our inventory with several elements needing to be incorporated. We discussed these needs during several coordination calls with the exhibit house leading up to the conference.

- A 10x30 exhibit for our inline space
- An open and inviting area for gathering and networking that would include tables and chairs, as well as room to give away our IPS bags, a very popular item on the show floor
- A mid-area that would support a monitor to showcase our capabilities videos
- A lockable closet to store all of the bags and other giveaway products during the duration of the conference
- A branded counter for greeting, additional storage, and promotional item display space
- Graphics that would list our services and showcase the new branding elements with our logo placed high and above eye level to not be blocked by chairs, tables, and counters
- Provide storage, staging, packing, and shipping for our exhibit assets
- Provide storage tracking of our IPS bags

#### List of Needs – IPS Technologies Tours – Jacob Javits Convention Center

- Private room and space close to our booth to take registrants, distribute badges and hold until launching the tours
- Reception area for our tour attendee registration
- Dedicated area on the show floor for our private reception
- Limited catering and drinks provided and sponsored by expo.
- Bistro table and serving table set up by expo staff
- Roped off area for the private and invite-only entrance

#### List of Needs Labor Team

- Supervised installment and dismantle with some coordination with Freeman if staff needed to leave

#### List of Needs – Shipping Company

- Preparation of Bills of Lading
- Pick up/return to exhibit house

I worked closely with our internal design team far in advance of the conference when we were in the planning, messaging, and strategy stages and kept them apprised of any upcoming deadlines that they needed to be aware of.

The most overlooked area, in my opinion, was doing more to train and incentivize my booth staff. I was reminded of this when taking **Session 20418: Skip the Meetings Pre-, At-, and Post-: Guideposts to Success. I had a good handle on preparing the show briefing and reviewing objectives for the conference. However, I didn't do the most efficient job in preparing, training, running scenarios, and incentivizing my booth staff pre-show, along with post-show follow-up and lessons-learned. Although I have a very knowledgeable and skilled team, I needed to do more.**

### Overall Planning Timeline and Budget – INTERPHEX

Task	Timeline	Items Discussed	Action Items
Kick-off Meeting with Exhibit House	4 months	Overall Conference Information Discussion of Lessons Learned from Prior Conferences Discussion of any Punch List Items (repairs, etc.) Booth Elements to be used Graphics Art Deadline Discuss Exhibit Staging Schedule	Quote for repairs Quote for Staging Quote for Graphics
Exhibit Order	3-2 months	Receipt and Review of Exhibitor Manual Share Advanced Warehouse Deadline Share Show Site Deadline Share Labor Order and Contacts Complete Order (ExhibitForce Software) for conference, inventory requests, etc.	Staging Date Shipping Date Shipping BOL Shipping Manifest Order Confirmation
Labor Order	3-2 months	Contact Labor Team Submit EAC Form to Show Management Share Exhibit House Info/Contacts	Labor Estimate Labor Order
Exhibit Staging	1 month	Pull and Prep of Booth Elements Staging and Review Review any issues/corrections	Corrections Pull/prep/pack Set Up Instructions
Shipping	2 weeks	Receive BOL from Shipper	Shipping Estimate
Shipping	Ship Out	Receive Confirmation	Receive Confirmation

### Budget

Our marketing group was assigned a total trade show budget for the year but not a per show or line item budget. In 2018, IPS' actual budget for tradeshow was \$66,032 (I don't have record of what was originally budgeted for 2018, which was prior to my hiring). In 2019, the budget was \$61,391.56 with an actual spend of \$62,628. Moving forward, I'll be able to establish benchmarks for subsequent years. Although our trade show budget had been significantly increased in 2020, my goal was to keep the total spending under \$50K for INTERPHEX.

Category	Item	Notes	Actual
<b>Booth Costs</b>	Graphics/Design/Production	Booth Graphics and Booth Production 2017	Existing Graphics Used
	Booth Space at INTERPHEX		\$9,951.00
<b>Booth Logistics</b>	Carpet and Padding		\$3,553.68
	Porter and Cleaning		\$396.81
	Materials Handling		\$4,356.25
	Wastebaskets		\$74.14
	Electricity		\$849.71
<b>Exhibit House Costs</b>	Set Up - File Prep/Set Up instructions	Prep and Printing	\$380.00
	Warehouse Handling – Pull and Prep	\$78/00/crate each way, pull containers from inventory, ship out prep, return inspection and check in	\$312.00
	Staging	Set and Install of 10 x 30 preview, Labor (2 men, 6 hours @ \$75/hr.), Inventory Fulfillment of IPS bags (stored at facility)	\$900.00
	Shipping Coordination		\$225.00
	Replacement of Black Door Panel		\$355.00
	Replacement of LED Lights		\$888.00
	Replacement of Bar Stools (2)		\$190.00
	<b>Shipping</b>	Shipping In-Bound	
Shipping Out-Bound			\$1,637.23



Category	Item	Notes	Actual
<b>Labor</b>	Installation		\$2,782.00
	Dismantle		\$2,140.00
	Electrical		\$394.30
<b>Tours Networking Reception</b> (Hosted and paid for by INTERPHEX on our Behalf)	Coaster Invite Printing	200	\$379.48
	Raffle Prize – Echo Spot		\$129.00
	Raffle Prize – JBL Flip 4 Bluetooth Portable Stereo Speaker		\$74.94
<b>Collateral</b>	Tri-Fold Brochure Reprint	250	\$540.00
	iCON Brochures	150 @ \$2.25	\$337.50
<b>Promotional Items</b>	IPS Black and Red Bags	600 @ \$13.69	\$8,214
	IPS Lanyards	20 (for booth staff and Tour Leaders) @ \$2.87	\$57.40
	IPS Tape Measures	250 @ \$3.49	\$872.50
	IPS Pens	Pulled from available inventory	\$0.00
	IPS Hand Sanitizers	200 @ \$1.02	\$204.00
<b>Transportation</b>	IPS Technologies Tours Bus Charter – Charter Booking		\$1,514.00
	DVD Movie for Bus Ride to New York, Raffle Prizes for reception		\$225.69
<b>Badge Registrations</b>	We received unlimited, free registrations for all employees and client invites		\$0.00
<b>Travel/Expenses for Employees</b>	Not part of Global Marketing Budget		\$0.00
		<b>TOTAL</b>	<b>\$43,162.59</b>

### Graphic Applications

I'm lucky to have great in-house designers but it was still enlightening to take **Session 61718: Graphics Boot Camp: The Basics Every Event Manager Should Know**. I learned some of the things that our designers look for when preparing art for our booth graphics. This being an area that I had less knowledge in, I found the course very helpful in determining the most effective site lines for predominant graphics placement and the power of graphics to forward our brand.

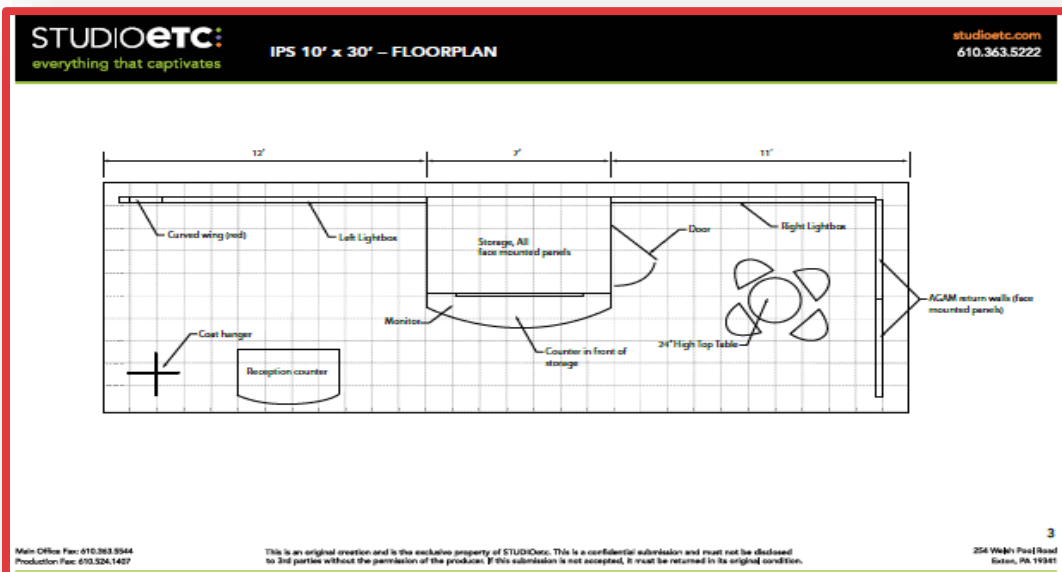


Main Office Fax: 610.363.9344  
Production Fax: 610.326.1457

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254 Wayne Pkwy Road  
Bristol, PA 19001

Studio ETC Staging Photo



Main Office Fax: 610.363.9344  
Production Fax: 610.326.1457

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Bristol, PA 19001

Studio ETC Graphic Schematic

### Graphics Production Timeline

Task	Timeline	Items Discussed	Action Items
<b>Conference Strategy Meeting</b>	6 months	Discuss overall objectives or messaging/branding that would affect graphics reproduction.	Graphic design concept
<b>Deadline/Calendar</b>	3-2 months	Communicate Exhibit House Graphic art deadlines and graphics turn-around times to the team.	In-hands deadline for art to Exhibit House prior to staging deadline
<b>Graphics Production</b>	2 months	Production of graphics in time for staging	Art proof review
<b>Exhibit Staging</b>	1 month	Review of graphics on exhibit frame, discuss any issues	Corrections Pull/prep/pack







### 5.1. IPS Social Media Campaign

IPS had extensive participation in INTERPHEX including our booth presence, the IPS Technologies Tours, speaking sessions, and blog posts. We scheduled an extensive social media campaign utilizing LinkedIn, Facebook, Twitter, as well as blogs on our website. The many elements of our social media objectives are summarized below and detailed in a social media timeline after the sample sections.

- Booth Visit Invites
- VIP Registration Link Invites to clients, VIPs, Tour Attendees, etc.
- IPS Technologies Tours Initial Registration Launch
- IPS Technologies Tours Subsequent Meet the Vendors
- INTERPHEX Twitter Takeover Campaign
- Meet the Speakers Posts
- INTERPHEX Blog Posts

The IPS Technologies Tours at INTERPHEX are highly anticipated and well known. Tour guests are able to access material through our speaking engagements, general presentations, and blog posts. Our social media campaign informs the public about the specifics of our participation and what the tours will include.

**When I took Session 31519 Integrated Marketing Communications, I was exposed to the importance of tracking social media information over time. The most impressive part of the course was the ROI reporting that can be gleaned from the social media campaigns such as calculating impressions and return on investment for impressions. Also, it was encouraging to see the different communications ideas that I hadn't thought of that I would like to incorporate into future campaigns.**

## Marketing Communications Campaign Synopsis

Our social media campaign needed to be broad, frequent, and balanced between Facebook, Twitter, and LinkedIn to reach our audience. In tandem with this were blog posts highlighting our expertise in the form of knowledge sharing. Our goal was to alert, inform, inspire and direct attendees to our exhibit and to our tours. Even though social media campaigns had been done for prior INTERPHEX conferences and data collected, analysis and benchmarking, which brought about the opportunity for me to include it in my goals.

Although we tracked items such as impressions, details expanded, likes, profile clicks, media engagement, link clicks, comments, and total engagements, we found that the most important were **impressions** and **total engagements**. For blog posts, **link clicks** back to our website were the most important in that segment.

The campaign kicked off in late February and continued up to and including the days of the conference, which began the first week of April. We highlighted our tours, exhibit presence, blog posts, and session speakers. We included campaigns on Twitter, Facebook, and LinkedIn. Some examples are highlighted below.

Social Media	Rationale for Choice	Targeted Audience	How it will be measured	Measurable Objectives	Results	Recommendations for Future
"Tours are Open!" (1 post)	Link clicks to have people register or learn more about presentations.	Full client list, US and International	#IPSTours #Pharma4 #INNOPHEX #pharma	500 impressions 10 engagements 15-20 registrants per tour	Impressions: 574 Total Engagement: 3	Successful launch post. Next time create enticing ways for people to "engage" such as asking for comments, etc.
"Registration is Open!" (1 post)	Link clicks to have people register or learn more about presentations.	Full client list, US and International	#INNOPHEX, @INTERPHEX , #Aseptic, #Biotech, #OSD, #Pharma4 #iCONReady, #IPSTours	500 impressions 10 engagements 15-20 registrants per tour	Impressions: 1834 Engagement: 1	Met registration goal for one tour. Incentive campaign for registering might be effective.
VIP Link for Registration (5 posts).	VIP Link for guests for special guests	Full client list, US and International	#INTERPHEX	500 impressions 10 Engagements	Impressions: 500+ Highest engagement was 9	Provide SME-driven invite campaign.

Social Media	Rationale for Choice	Targeted Audience	How it will be measured	Measurable Objectives	Results	Recommendations for Future
Tour-Launch Posts (6 posts)	Primary goal was link clicks to have people register or learn more about presentations.	Full client list, US and International	#biomanufacturing #IPSTours #INTERPHEX #continuous #biopharma #automation #OSD #IoT	500 impressions 10 Engagements 15-20 Registrants per tour	Impressions ranged from 546 – 1,443 Total Engagement ranged from 3-6	Met registration goal for one tour. SME-driven invite campaign.
INTERPHEX Twitter Takeover (6 posts)	A sponsored package offered by INTERPHEX for two weeks (Feb 25 – March 9), 3 posts per week.	Entire INTERPHEX Database of contacts	#INNOPHEX, #Aseptic, #Biotech, #OSD #Pharma4.0 & #iCONReady. Register for the #IPSTours: <a href="http://INTERPHEX.ipsdb.com">http://INTERPHEX.ipsdb.com</a> .	500 impressions 10 engagements 15-20 Registrants per tour	Impressions ranged from 333-1,003. No engagements	First-time sponsorship offering – will not renew in the future based on level of investment and results generated Met registration goal for one tour.
IPS Technologies Tours (6 posts) Meet the Tour Vendors	2 <sup>nd</sup> touchpoint, to enhance interest in each tour and meeting the specific vendors on the tours.	Full client list, US and International	#Aseptic @AvidSolutions @groningerUSA @imalifena #IPSTours #INTERPHEX	500 impressions 10 Engagements 15-20 Registrants per tour	Impressions ranged from 605 – 5,120 Engagements ranged from 6-35	Successful campaign as we got closer to the event. No changes here.
Blog post articles post (5 posts)	Client exposure to our experts on IPS website and INTERPHEX website – also to enhance Tour interest	Full client list, US and International	#CGMP, #celltherapy, #aseptic #OSD @Lonna_Gordon #pharma4.0	500 impressions 10 Engagements Link clicks to website 5 or more per post	Impressions ranged from 455-1324 Total engagements ranged from 3-8	Develop a speaker spotlight series in tandem with promotion.
Meet the session speaker posts (9 posts)	Client exposure to our experts via industry-driven presentations at INTERPHEX	Full client list, US and International	#SingleUse, #cellculture, @INTERPHEX #IPS Tours #aseptic #advanced #pharma4.0	500 impressions 10 Engagements	Impressions ranged from 548 – 1307 Total Engagements ranged from 0-29.	Develop a speaker spotlight series in tandem with promotion. Successful campaign as we

Social Media	Rationale for Choice	Targeted Audience	How it will be measured	Measurable Objectives	Results	Recommendations for Future
			#data@csvsme, #GXP, @US_FDA@csvsme, #GXP, @US_FDA #CAR-T			got closer to the event.
Booth Visit Invite Post (3 total)	Alerting clients, vendors, full contact list to presence on the show floor at INTERPHEX	Full Client and vendor partnership database, US, EMEA, International	#INTERPHEX, @INTERPHEX	Impressions over 500 per post Total engagements: 10 per post	Total impressions ranged from 733 – 1821 Total engagements ranged from 2-6	Offering daily or weekly incentive that would be presented at the booth and advertise as such during this campaign.
Tours Are Starting Twitter (2 posts)	Live alert to all contacts of happenings during the show	Full Client and vendor partnership database, US, EMEA, International	#IPSTours, @INTERPHEX	500 impressions 10 engagements	Impressions ranged 950 and 1091 Engagements were 7 and 10	Successful campaign. No changes here.
Tours Live Tweet Image (2 posts)	Live alert to all contacts of happenings during the show	Full Client and vendor partnership database, US, EMEA, International	#IPSTours	500 impressions 10 engagements	Impressions were 1033 and 1211 Engagements were 7 and 14	Successful campaign. No changes here.



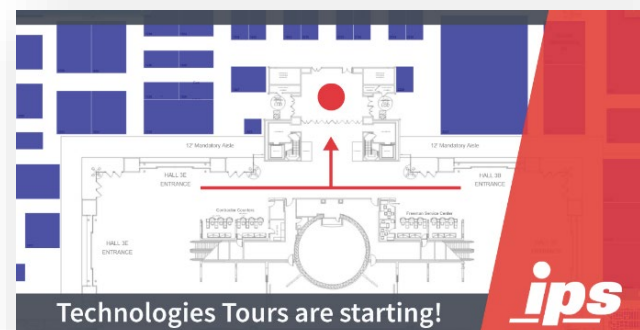
## 5.2. Graphic Samples

Our graphics were consistent with our branding. They were easy to read, concise, and frequently attracted people to our content, exhibit, and tours. Samples below reflect our campaign.

### General Booth Visit Social Media Samples



### INTERPHEX Website Button Banner, VIP Invite, and Tours Day-of Post



## Call for Registrations Samples – IPS Technologies Tours Sample Social Media

**ips Technologies Tours**  
hosted at **INTERPHEX**

**Continuous Improvement in Continuous Biomanufacturing**

Register for the 2019 IPS Technologies Tours at INTERPHEX today at [interphex.ipsdb.com](http://interphex.ipsdb.com)

**ips Technologies Tours**  
hosted at **INTERPHEX**

**Advancing OSD Manufacturing with Dynamic Automation**

Register for the 2019 IPS Technologies Tours at INTERPHEX today at [interphex.ipsdb.com](http://interphex.ipsdb.com)

## IPS Technologies Tours “Meet the Vendors” Social Media Samples

**ips iCON™ Tour**  
**Mission Driven Architecture**

**aes** Clean Technology  
**AST** Trusted partner for aseptic processing solutions  
**G-CON** MANUFACTURING Inc.  
**ips**

Register for the IPS Technologies Tours at INTERPHEX today at <http://interphex.ipsdb.com>

**ips INNOPHEX Tour and Reception**

**G-CON** MANUFACTURING Inc. **ASEPTIC** TECHNOLOGIES **ESCO** TECHNOLOGIES **BioSpherix**  
**sartorius stedim** **integritybio** **TERUMOBCT** **NanoCool**  
**ALS** ANGELANTONI EXPERIENCE **SPAN** CONSTRUCTION ENGINEERING INC. **msi** SINGLE USE SUPPORT.™

Register for the IPS Technologies Tours at INTERPHEX today at <http://interphex.ipsdb.com>

## Samples of Twitter Takeover Sponsorship with INTERPHEX

**IPX** INTERPHEX @INTERPHEX Following

Take your **#aseptic** processing to the next level with case studies in integrated equipment & analytical data systems during the **#IPSTours** at **#INTERPHEX**.

Register at [fal.cn/iXPP](http://fal.cn/iXPP) then Register for **#IPSTours** at [fal.cn/iXPT](http://fal.cn/iXPT)

@Tweet\_IPS #spon #IPTakesOverIPX

**ips 2019 Technologies Tours**

**Integrating Predictive Automation in the Aseptic World**

005 32 views now, space is limited! [interphex.ipsdb.com](http://interphex.ipsdb.com) **#IPSTours**

9:00 AM - 26 Feb 2019

**IPX** INTERPHEX @INTERPHEX Following

Learn how products get to patients quickly and safely with mission driven **#architecture** on the **#IPSTours**. Get **#iCONReady** for flexible & predictable **#EPCMV** results.

INTERPHEX 2019: [fal.cn/IJMc](http://fal.cn/IJMc)  
IPS Tours: [fal.cn/IJMc](http://fal.cn/IJMc)

@Tweet\_IPS #spon #IPTakesOverIPX

**ips 2019 Technologies Tours**

**iCON™ - Mission Driven Architecture**

005 5 views now, space is limited! [interphex.ipsdb.com](http://interphex.ipsdb.com) **#IPSTours**

9:00 AM - 5 Mar 2019

## IPS Speakers Social Media Campaign Samples

**ips** Speaker Session during INTERPHEX

**CAR-T Facility Design, Startup, and CQV**

**Aaron Weinstein**  
April 2, 10:30 - 11:15 a.m.  
INTERPHEX Live • Crystal Palace Lobby

Visit [www.ipsdb.com](http://www.ipsdb.com) for more information about this and the other speakers during INTERPHEX

**ips** Speaker Session during INTERPHEX

**An Innovative Approach to Cell/Gene Therapy Facility Design**

**Tom Piombino**  
April 2, 1:15 - 2:00 p.m.  
INTERPHEX Live • Crystal Palace Lobby

Visit [www.ipsdb.com](http://www.ipsdb.com) for more information about this and the other speakers during INTERPHEX

## Blog Posts Social Media Post Samples

**IPXBLOG**

**Pharma 4.0 - Will you Embrace it?**

**John Lyons**  
Senior Process Engineer

**IPXBLOG**

**“Top Ten” CGMP Compliance Implications for Cell Therapy & ATMPs**

**Vince Cebular**  
Senior VP, Compliance

### 5.3. Booth Collateral and Promotional Items

Although we had decided to forgo a direct mail campaign, we provided printed material in our booth space regarding our speaking engagements, tours, etc., during the duration of the conference.

#### Meet the Speakers Sheet



The banner features the ips logo on the left and the text "Speaker Sessions during INTERPHEX" on the right. Below this, there are four speaker cards, each with a portrait of the speaker on the left and their details on the right. The background of the banner has a repeating pattern of the words "PASSION", "KNOWLEDGE", "SKILL", and "PASSION".

Speaker	Title	Date & Time	Location
	<b>CAR-T Facility Design, Startup, and CQV</b> Aaron Weinstein • Sr. Director, Validation Services	April 2   10:30 - 11:15 a.m.	INTERPHEX Live • Crystal Palace Lobby
	<b>An Innovative Approach to Cell/ Gene Therapy Facility Design</b> Tom Piombino • VP, Biotechnology Process Architect	April 2   1:15 - 2:00 p.m.	INTERPHEX Live • Crystal Palace Lobby
	<b>Aseptic Processing: Achieving Advanced While Staying Flexible</b> John Lyons • Sr. Process Engineer	April 2   3:15 - 4:00 p.m.	Stage 2 • Booth 1577
	<b>Grade B or not to B: Starting Vial Break and Other Open Cell Culture Processes</b> Erich Bozenhardt, P.E. • Process Manager	April 3   3:15 - 4:00 p.m.	Stage 1 • Booth 1076



## Company Overview Tri-Fold

**Advanced Aseptic Filling / Barrier Technologies**

**API / Small Molecule Manufacturing**

**Biomanufacturing / Vaccines**

**Oral Solid Dosage**

**Potent Compounds / Containment**

**Integrated by Name, Designed and Constructed for Compliant Product Delivery**

IPS' primary focus is in life sciences, including pharmaceuticals, biomanufacturing, animal health, medical devices, science and technology, and the consumer goods industry. Focusing on these few select industries allows us to hone our technical expertise. We have the largest number of industry-recognized Subject Matter Experts (SMEs), many with on-site operational experience, in various fields of the life sciences industry.

Knowing the underlying technology, industry trends, regulatory environment, and manufacturing processes enables our experts to identify opportunities to streamline production and maximize efficiency. Our experts provide knowledge-driven solutions that utilize cutting-edge technologies and applications.

**Agile to Deliver Your Projects How and Where You Need Them to be Delivered**

We are a pioneer in the application of single-source, integrated EPCMV services for technically complex facilities. We have developed, implemented, and refined a lean delivery model that addresses the entire project life cycle that focuses on design quality and effectively controls costs and schedule. We add value by minimizing risk, reducing the duration from decision to delivery, and streamlining activities from concept through design, construction, and commissioning and qualification.

While our projects vary in size and scope, from concept studies through world-scale manufacturing campuses, our team of technical experts and seasoned design, engineering, compliance, and construction professionals devote the same high level of knowledge, skill & passion to each project.

**A Depth of Services for All Your Project Needs from Concept through Validation**

**Consulting**

Our technical and SMEs review and analyze your needs, offering effective business solutions to help deliver your project and achieve your business objectives.

**Engineering / Architecture**

Our engineers and architects have the depth of experience and knowledge across a broad spectrum of industry trends to deliver optimal project outcomes.

**Project Controls**

We integrate the people, business processes, systems, and tools used to effectively plan the project, forecast the cost, understand and execute the schedule, minimize risk, and exceed the client's expectations.

**Construction Management**

As technical builders with experience spanning the entire project execution life cycle, we specialize in complex facilities in hi-tech and highly regulated industries.

**Commissioning, Qualification & Validation**

We offer a comprehensive approach to understanding the regulations and requirements of working within the CCQ life cycle to ensure the consistency and quality of the manufactured product.

**Staffing Services**

We offer cost-effective staffing solutions for capital projects and staff augmentation focused on industry professionals including engineers, project managers, construction managers, and compliance professionals.

**Scale-up / Tech Transfer**

**Critical Utilities**

**Utilities Design**

**Laboratories / Vivariums**

**Risk-based Commissioning & Qualification**

**ISPE Awards**

- 2017 ISPE FOYA Equipment Innovation**  
Cosh Pharma - Flexible Filling Line (Bloomington, IN)
- 2015 ISPE FOYA Biotech Innovation**  
Pharmaceuticals - Aseptic Fill/Finish Facility (Spartanburg, SC)
- 2012 ISPE FOYA Project Execution**  
Dart - Knowledge Centre (Vizag AP, India)
- 2011 ISPE FOYA Facility Innovation**  
Merk - Global Clinical Supplies Manufacturing, Packaging and Warehouse Expansion (Summit, NJ)
- 2010 ISPE FOYA Operational Excellence**  
Regen Bio - LDM Facility Upgrade, Phase II (Research Triangle Park, NC)
- 2008 ISPE FOYA Equipment Innovation**  
Sino - Clinical Supplies Manufacturing and Drug Product Technology Expansion (New Britain, CT)
- 2005 ISPE Company of the Year**  
IPS received recognition for our contribution to the industry.

*We enable our clients to create and manufacture life-impacting products around the world.*

**Local & Global Locations**

<b>Pennsylvania</b> (Pittsburgh) Blue Bell 481.828.6090	<b>United Kingdom</b> Birmingham +44 121 789 3471
<b>California</b> Irvine & San Francisco 949.679.6682	<b>Ireland</b> Dublin +353 1 4854246
<b>Kansas</b> Overland Park 913.245.9084	<b>Switzerland</b> Basel +41 61 205 04 90
<b>Maryland</b> Germantown 888.366.7660	<b>Brazil</b> Sao Paulo +55 11 4119 3009
<b>Massachusetts</b> Chelmsford 978.954.5150	<b>Singapore</b> Singapore +65 6662 9270
<b>New Jersey</b> Somerset & Cherry Hill 732.748.1990	<b>China</b> Shanghai +86 21 64821336
<b>North Carolina</b> Montville 919.460.6636	<b>India</b> Mumbai +91 922 6730 9737
<b>Canada</b> Vaughan 888.366.7660	<b>Abu Dhabi</b> Abu Dhabi +91 011 2577 7906
	<b>New Delhi</b> New Delhi +91 011 2577 7906
	<b>Hyderabad</b> Hyderabad +91 040 6356 6673

*IPS is right where you need us, with global a global presence for local execution.*

**Delivering Technically Complex Facilities on a Global Platform**

**About IPS**

IPS-Integrated Project Services, LLC is a global provider of business solutions, professional services, and operational expertise for complex development and manufacturing facilities worldwide. Our world-class expertise, knowledge, and understanding of industry trends places importance on time-to-market, plant flexibility and cost control to avoid costly project delays and minimize risk while designing, engineering, constructing and qualifying CGMP regulated facilities.

<b>Founded in 1999</b>	<b>27 Offices in 9 Countries and Counting</b>
<b>Biotech and Pharma Industry Focused</b>	<b>Projects range from \$1,000 to \$1.5B</b>
<b>Over 1,200 Experienced Professionals</b>	<b>Internationally Known Subject Matter Experts</b>
<b>Many Employees Come from Client Sites</b>	<b>Best in class Technical Expertise</b>
<b>Global Regulatory Knowledge</b>	<b>Trained 650+ FDA Inspectors</b>
<b>Incident and Non-compliance Safety Culture</b>	<b>ISIRI Safety Conformance Rating</b>

**Knowledge, Skill & Passion**

www.ipsdb.com | 888.366.7660

Promotional Items



Business card size hand sanitizer spray



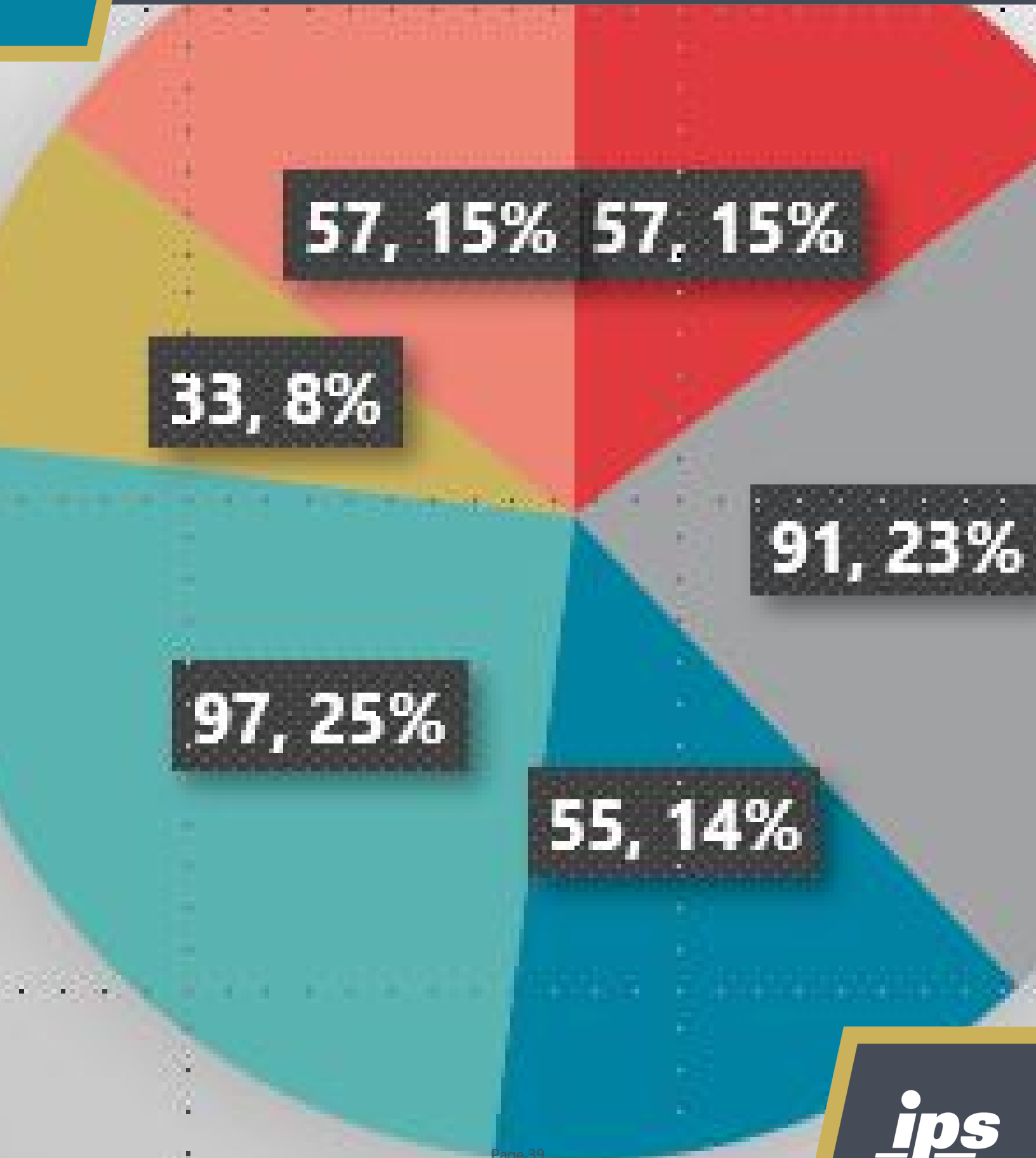
Tape Measure/Level/Post-it

Networking Reception Coaster (Ticket)

Two-hundred coasters were printed and handed out to our Tour participants, leaders, executive committee and VIPs during the conference. Because this was an exclusive event, attendees were required to bring the coaster as their ticket for admission. At the conclusion of the conference, I counted 79 coasters reflecting the number of attendees.



## 6.0 Management of Results Reporting



### 6.1. Participation Value

My goal after a conference is to provide results to management within 2 weeks. **Taking Elective Session 101: Half-Day Workshop: Overcoming the Fear of ROI was the most extensive, fearful, yet illuminating portion of my entire CTSM journey. Working with numbers is not my strong suit but feeling the empowerment of being able to quantify what is normally perceived as the un-quantifiable field of our industry, was very effective. This helped me become a more strategic player. It was wonderful to receive calculation formula templates for all kinds of aspects of marketing that I didn't realize existed such as impressions in publications and speaking engagements.**

This is important because:

- Data doesn't matter if it isn't used to show trends, milestones, benchmarks, results, and **value**. One of my major goals when arriving at IPS was to develop the final piece of the puzzle with our event management process.

That goal was to begin doing the following:

- Show analysis before participating to show the viability and advantages of investing
- Once a show is complete, to show analysis of the conference reflecting our value in our investment
- Show milestones over time to analyze our continued investment and participation (still in progress for INTERPHEX)

After the conference, results are ideally presented within 2 weeks of the conference to management. It is my professional goal to be the one to present these analytics for future conferences.

Some of my post-show analysis included:

- Scanned Leads Data (Qualified vs. Total Scanned Leads)
- A Breakdown of Qualified Leads (Prospects vs. Clients)
- A breakdown of Qualified Leads (non-clients) and their buying influence
- Categories of Qualified Leads
- Potential Revenue Generation



## 6.2. Results on Objectives

Strategies	Tactics	Assessment Methods	Measurable Goals	Results	Recommendations
Lead Generation	Post-Show ROI Report on qualified lead generation	Scanner Device Business Cards	Obtain at least 50 leads per day over a three-day period for the course of the conference.	395 Total Leads Scanned	Met goals of 50 per day for a 3-day conference. Would like to add a more regimented scanning and qualifying procedure while in the booth – dedicating one person to perform this task.
	Post-Show ROI Report on qualified lead generation	Scanner Device Business Cards	Obtain at least 60% qualified scanned leads.	51% qualified 49% un-qualified	We are nearly 50/50 qualified versus non-qualified preferring a qualified leads, of course. Need to have more creative marketing methods to bring people into the booth.
	Post-Show ROI Report on qualified lead generation	Scanner Device Business Cards	Obtain a 2:1 ratio of prospects over clients of total qualified leads scanned	113 prospects 89 clients	Almost met this objective and, while fostering existing client relationships and repeat business is important, we have a goal to generate new clients and new business.
	Post-Show ROI Report on qualified lead generation	Registration Surveys Attendee List Scanner Device	Obtain at least 20% from the Final Decision Maker or Significant Influencer Categories of ALL qualified leads	Contributing Recommendation – 25% Significant Influencer – 23% Final Decision Maker – 15% Non-Specified – 15%	We are not getting who we need inside the booth space that are the final decision makers and need to increase that number with more targeted

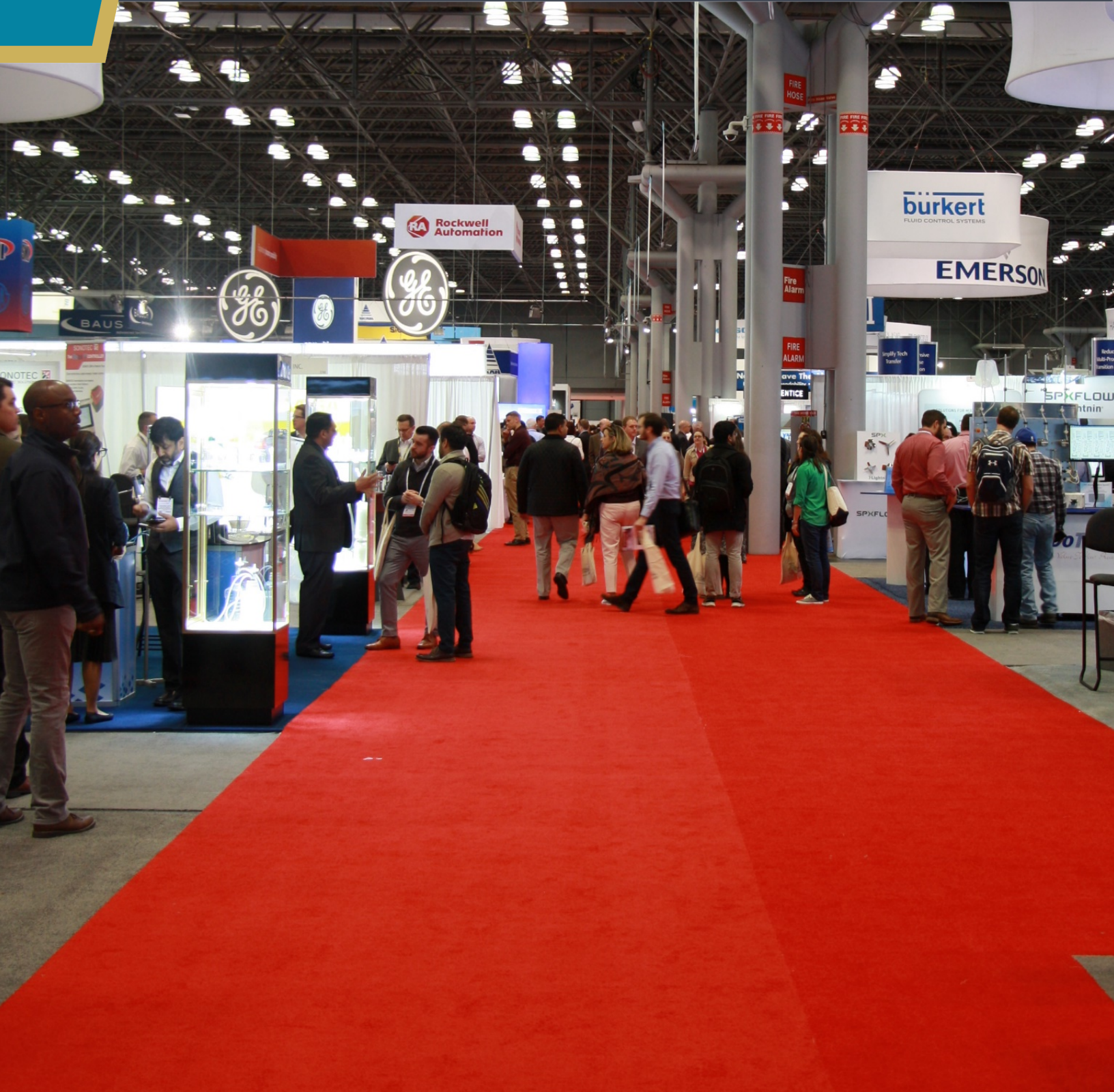
Strategies	Tactics	Assessment Methods	Measurable Goals	Results	Recommendations
		Business Cards	generated at the booth	Initial recommendations – 15% No Decision Influence – 8%	booth invite promotion. We do always schedule dinners and our Tours that bring more of these people to us.
	Post-Show ROI Report on qualified lead generation	Registration Surveys Attendee List Scanner Device Business Cards	Of <b>non-client</b> qualified leads, obtain at least 20% in the Final Decision Maker or Significant Influencer of qualified leads obtained in the booth.	Contributing Recommendation – 27% Significant Influencer – 25% Initial recommendations – 21% Final Decision Maker – 16% No Decision Influence – 7% Non-Specified – 4%	We are not getting who we need inside the booth space that are the final decision makers and need to increase that number with more targeted booth invite promotion. We do always schedule dinners and our Tours that bring more of these people to us.
	Post-show ROI Report on qualified lead generation	Registration Surveys Attendee List Scanner Device Business Cards	Obtain at least 20% of job categories for <b>all</b> leads be in the areas of CEO, CTO, CFO, CMO, etc.	Engineering – 37 Other – 31 BD – 23 CEO, CTO, CFO, CMO – 22 PM – 22 Marketing – 14 BIO Mfg. – 13 Process Develop – 12 Scientist – 12 QA/QC - 11	Did not reach objective of bringing in the decision-makers as the majority of leads. Need to improve booth pre-promotion
	Post-show ROI Report on qualified lead generation	Registration Surveys Attendee List Scanner Device Business Cards	Obtain at least 20% of job categories for <b>non-client</b> leads be in the area of CEO, CTO, CFO, CMO, etc.	Other – 31 BD – 23 Engineering – 21 Marketing – 14 Process Develop – 12 Scientist – 9 CEO, CTO, CFO, CMO – 7 BIO Mfg. – 6 QA/QC – 5 PM – 4 Executive Management – 4	Did not reach objective of bringing in the decision-makers as the majority of leads. Need to improve booth pre-promotion

Strategies	Tactics	Assessment Methods	Measurable Goals	Results	Recommendations
				Other – 4 Production 4 Formulation Develop - 3	
	Post-show ROI Report on qualified lead generation	Registration Surveys Attendee List Scanner Device Business Cards	Obtain at least 50% of business categories for <b>all</b> leads be Pharma or Bio/Pharma	Pharma – 110 Attendee/Exhibitor – 48 Biotech/Pharma – 41 Biologics/Biotech – 34 Manufacturing – 23 CMO/CDMO – 17 Consult/Tech – 12 AE – 8 Other – 8 Medical Device - 7	We did a good job of attracting visitors from the relevant categories in our industry due to the success and relevance of this conference.
	Post-show ROI Report on qualified lead generation	Registration Surveys Attendee List Scanner Device Business Cards	Obtain at least 20% of job categories for <b>all</b> leads be in the area of CEO, CTO, CFO, CMO, etc.	Pharma – 37 Biologics/Biotech – 16 AE – 8 Other – 8 Biotech/Pharma – 7 CMO/CDMO – 6 Nutraceuticals/Vits- 3 OTC – 3 Generics – 3 Manufacturing – 2 Medical Device – 2 Bioscience – 2 Consult/Tech – 1 Packaging – 1 Project Mgmt. – 1 Research Formulation – 1 Technical 1 Attendee/Exhibitor – 1	We did a good job of attracting visitors from the relevant categories in our industry due to the success and relevance of this conference
<b>Return on Investment</b>	Potential Revenue Generation	Calculations based on: Qualified Leads Close Rate Average	Potential revenue generated above \$20MM	\$39,920.00 potential revenue	Objective met with the challenge of needing to develop a more robust tracking plan to

Strategies	Tactics	Assessment Methods	Measurable Goals	Results	Recommendations
		Weighted Value of project			follow leads until they become projects.
	Potential orders expected	Calculations based on: Qualified leads Close rate	Above 100	161.60 total orders expected	Objective met with the challenge of needing to develop a more robust tracking plan to follow leads until they become projects.
	Potential Rate of Return	Calculations based on: Qualified leads Average Value Per sale Close rate	A rate of return for every dollar spent that exceeds the show investment	For every \$1 invested in the conference (which was \$25,717.22), potential ROI was \$1,531.34	Objective met with the challenge of needing to develop a more robust tracking plan to follow leads until they become projects.



# 7.0 Conclusion



### Final Assessment of INTERPHEX

- While we had a great deal of participation at this conference and met our expectations with engagement at our tours and speaking sessions, we could have done a better job of attracting the most qualified leads.
- We have a long-standing relationship and partnership with Reed Expo (the organization that runs INTERPHEX) and it is in our best interest to continue to exhibit each year. *At the time of this writing, INTERPHEX was delayed again in 2021 and moved to October, the first time that INTERPHEX has been held in the fall.*
- With the pandemic, we are currently researching ways to continue to bring the tours to our audience in a digital format, or at least to offer a hybrid approach where people can access the content in a manner they choose. Although we derive the most benefit from in-person tours and a booth, we need to address lingering challenges in 2021 that preclude dynamics forced upon us by the pandemic. The silver lining is that this provides us a greater audience reach than ever achieved with in-person tours.

### Initiatives Moving Forward

- I would like to develop a webinar series that is administered and hosted by IPS that would reflect our INTERPHEX Technologies Tours, targeted client case studies, as well as other webinar series ideas such as a CQV (Commissioning/Qualification/Validation) Summit, as an example. This would entail a larger upfront investment, but hopefully result in ROI value calculations to management.
- Develop a more robust booth staff training and incentive program for our larger conferences
- Develop a more effective system for reaching out to our Global Strategies Team for leadership in the areas of Call for Proposal submissions and article creation.
- Continue to provide a more extensive ROI and milestone measurement system to qualify and quantify our trade show participation.
- Develop a formal event marketing communications plan that would encompass these goals.
- A complete re-invention of our trade show graphics/messaging that focuses on our story and the end-result of what we do – helping people get the life-enhancing and life-saving drugs that they need. **In taking Session 62018: the @Show Experience: Understanding the Essentials of Exhibit Design, I found it extremely helpful since I work with exhibit and graphic designers all of the time who likely know these graphical elements. This course brought me to a better understanding of those elements so that I would know where they were coming from in their expertise. I found it interesting to learn about where the eye leads in the triangle and where the most predominant graphical focuses should be. It was also rewarding to see some fun examples of design done well!**

### Bridging the Gap with CTSM Courses

- Although I had over 20 years of experience at the time of this portfolio submission, after taking the CTSM courses in my certification journey, I was amazed at the information that I received to propel me further in my career and to bridge the gap between being a logistics coordinator to someone who strategizes and reports to the upper management, thus taking ownership and responsibility towards furthering my career path.
- As a Certified Trade Show Marketer, I will be viewed as a knowledgeable person on the management team with expertise in my field. *Instead of waiting to be empowered, I will have empowered myself.*

### The Portfolio Process: A Look Inward

- The process of writing this portfolio and the entire journey of certification has clarified my professional career goals. I was able to see the gaps and areas of improvement, which I will work on to further my career in this industry.
- I think we can change the landscape and perception of the Trade Show Marketer. If we are able to have a more strategic vision towards projects and conferences, we can become more valuable to our teams and forge new creative ways to enhance the vision of our companies.
- I started in the trade show business in 1999, started my certification journey in 2007, and will strive to use this certification towards a better future.

### A final Thank You!

My CTSM journey started more than thirteen years ago with the journey to get to this point. It was one that took a village to see me through. I paid my way for travel and courses, had help from employers, and a scholarship from CTSM (thank you!). I've learned a lot along the way to enhance my career and empower myself. I've met some extraordinary people along the way and bonded with my study group colleagues during the final stretch in preparing for the exam. To complete this more than six-month process during a pandemic required will and determination I knew I had in order to see it through.

When it was hardest, I remember taking Jan's portfolio class how she said that she knew people that got this far; completed all of the courses, took that monster exam, but never crossed the finish line with the portfolio. I remember her wise words in the same email when she notified me about passing my exam and to "get started on that portfolio as soon as possible!" That kept me going. It is my pleasure to cross my finish line and, when I hopefully receive final approval, I will happily see you all at ExhibitorLive in October to stand with you!



# 8.0 CTSM Course References





## 8.1. CTSM Course References

### Session 61119

*The Basics of Event Logistics and Implementation – Part II*  
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### Session 10819

*How to Measure the Value of Trade Show Participation – Part 1: Basic Concepts*  
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### Session 31118

*How to Grow Your Brand: Incorporating Brand Marketing into Your Exhibit Program*  
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### Session 52217

*International Events: Expanding Your Global Reach*  
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### Session 61118

*The Basics of Event Logistics and Implementation*  
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### Elective Session 103

*Authors Executive Series: Trade Show Objectives and Performance Management*  
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### Session 20418

*Don't Skip the Meetings Pre-, At-, and Post-: Guideposts to Success*  
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### Session 61718

*Graphics Boot Camp: The Basics Every Event Manager Should Know*  
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### Session 31519

*Integrated Marketing Communications*  
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### Elective Session 101

*Half-Day Workshop: Overcoming the Fear of ROI*  
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### Session 62018

*The @Show Experience: Understand the Essentials of Exhibit Design*  
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