Welcome to EXHIBITOR magazine’s Trade Show Planning Guide.

These handy work sheets were designed with input from veteran exhibit managers to help you organize the details of your show-planning activities, from setting objectives to budgeting and measuring results.

[**Quick**](mailto:HL@:B) **Reference Data**

**Show name: Show Web site:**

User name:

Password:

**Show producer:** Account number: Contact name:

Address:

Phone: Fax:

E-mail:

**Show location:**

City: Hall/Hotel:

State:

**Booth number(s): Show dates: Exhibit hours: Setup dates/times:**

**Dismantle dates/times:**

**Number of meeting rooms:**

**Booth size:**

**Meeting room locations:**

**Show-appointed/general services contractor:**

Contact name: Address:

Phone:

E-mail:

Fax:

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EXHIBITOR MAGAZINE’S TRADE SHOW PLANNING GUIDE **\***

**Show Data**

**Number of attendees: Number of exhibitors:**

**Prior year Anticipated**

**Exhibit-hall admission: Admission price: Per day Per show**

General public Public $

**Guest passes available:**

Yes No

Trade only Trade $

Restricted to members Member $ Conference pass $ Exhibits only $

Audience proﬁle/demographics:

1.

2.

3.

**Participation by competitors:**

**Tip: Competitive information is available from your**

**account executive with show management. He or she can tell you which competitors are exhibiting and their hall location and booth size.**

**Company 1: Prior year Anticipated**

Booth size: Booth location:

Key products displayed:

Key messages/promotions:

Strengths/weaknesses:

**Company 2:**

Booth size: Booth location:

**Prior year Anticipated**

Key products displayed:

Key messages/promotions:

Strengths/weaknesses:

**Show Plan**

Why is our company exhibiting at this show? Exhibit theme/focus: Product lines/categories to be displayed: Target audience: Size of target audience: How does the show ﬁt with our company’s overall marketing strategies? How does the show ﬁt with our company’s sales targets/goals? How does the show ﬁt with our company’s marketing objectives? Internal show coordination team:

**Show ObjectivesObjectives must be realistic, specific, and quantifiable.**

Objective Tactics for Accomplishing Measurement Techniques

[**Pre-show**](mailto:@:J) **Logistics**

**Booth contract submitted (date): Exhibitor manual received (date):**

**Space cost:**

**Booth number(s) assigned: Booth dimensions: Cost:** Space only Package

Deposit $ Remaining balance $

$

due: due: due:

amount paid: $ amount paid: $ amount paid: $

date paid: date paid: date paid:

**Booth location: Exhibit area obstructions/limitations (if applicable):** Ceiling height/maximum overhead clearance: Maximum ﬂoor loading:

Freight-elevator dimensions/capacity (lbs.):

Columns/ducts:

Other obstructions:

**Exhibit restrictions:**

Maximum height of back wall:

Maximum height of equipment:

Applicable ﬁre regulations: Hanging-sign restrictions:

**Booth equipment/services (record date ordered):**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Furniture**  Chairs |  | **DATE** |  | **Show services**  Accessible storage |  | **DATE** |  | I&D | **DATE** |
| Desks |  |  |  | Carpet |  |  |  | Internet |  |
| Tables |  |  |  | Catering |  |  |  | Lead retrieval |  |
| Wastebaskets |  |  |  | Cleaning |  |  |  | Lighting |  |
| Sofas |  |  |  | Compressed air |  |  |  | Material handling |  |
| Other |  |  |  | Drains |  |  |  | Photography |  |
| **Shipping** |  |  |  | Electrical |  |  |  | Rigging |  |
| Booth |  |  |  | Electrician |  |  |  | Running water |  |
| Giveaways/literature |  |  |  | Floral |  |  |  | Security |  |
| Products/equipment |  |  |  | Forklift |  |  |  | Signs |  |
| Computers/AV |  |  |  | Gas |  |  |  | Telephone |  |
| Other |  |  |  | Hosts |  |  |  | Other |  |

**Co-op arrangements with other exhibitors (signage, equipment, etc.): Meeting room reserved:**

**Hospitality suite reserved:**

Dates:

**Advance registration:**

Location:

Guest passes: (Make a separate list of names.) Date ordered:

Qty:

Shipping addresses:

Exhibitor badges: (Make a separate list of names.) Date ordered:

Qty:

Number of badges provided free with booth space:

**Hotel reservations:**

1. Hotel name: Phone: Contact:

2. Hotel name: Phone: Contact:

Date reservation made: Cancellation penalty date: E-mail: Date reservation made: Cancellation penalty date: E-mail:

**Planning/Prep**

**Use existing exhibit:** Stored at: Refurbishing necessary: Yes No

**Construct new booth:**

Necessary alterations (such as graphics):

Exhibit builder selected:

Account manager:

Phone:

Final design approved date:

**Rent booth properties:**

Pre-show setup/inspection date:

E-mail:

Supplier:

Contact:

Phone:

Final design approved date:

Pre-show setup/inspection date:

E-mail:

**Booth theme: Product displays:**

Products to be highlighted: Other products to be displayed:

**Live presentations/demos:**

Supplier:

Internal External Phone:

Contact: Script(s) approved (date):

**Audiovisual presentations:**

E-mail:

Type:

Supplier:

Internal External Phone:

Contact:

**Graphics:**

E-mail:

Supplier:

E-mail:

Producer: Internal Exhibit house Graphics producer Ad agency

Contact:

Phone:

Final copy/art approved:

Date due:

**Staff**

Total exhibit hours:

Number of staffers needed for booth:

Special booth attire: Number of staffers needed for hospitality event: Special hospitality-event attire: Temporary personnel needed: Yes No

Pre-show training (date, location):

**Tip: As a rule of thumb, you need two booth staffers per 100 sq. ft. of open booth space**

Walk through (date, time):

Trainer:

Booth-staff schedule created:

[**Promotion/Publicity**](mailto:@KP)

**Pre- and at-show promotions:**

List rental from show management (date available): Internal memos/sales letters: Hospitality: Direct mail: E-mail campaign:

Tickets for entertainment:

PR information to show management: Web page: Advertising schedules for:

Key industry publications: Show dailies: Show directory:

Press releases to key industry publications:

1.

2.

3.

4.

5. Banners/signs:

Contact: Contact: Contact: Contact: Contact:

Airport: Show hall: Taxicabs: Billboards: Shuttle buses:

Other:

**Booth promotions:**

Literature:

General handout Selective handout Booth-reference only

Giveaways:

Booth photographer:

Date scheduled:

Other: Post-show promotions:

Literature request/inquiry fulﬁllment:

Follow-up mailings/phone calls/e-mails: Internal promotion (company newsletter, memo, etc.): Other:

[**Pre-show Shipping/Booth Setup**](mailto:@E)

Advance-warehouse address: Dates freight accepted: to Show-site address: Dates freight accepted: to Target date/time: Times freight accepted: Off-target penalty: Carrier name: Carrier address:

Carrier phone number:

E-mail:

24-hour contact: Ofﬁcial material-handling company:

Scheduled setup dates:

Times: to

Overtime: Yes No

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Inbound shipping data:**  Shipping date: | **Exhibit** |  |  | **Products/Equipment** |  | **Literature/Giveaways** |
| Shipped from: |  |  |  |  |  |  |
| Carrier: |  |  |  |  |  |  |
| Carrier type: |  |  |  |  |  |  |
| Tracking number: |  |  |  |  |  |  |
| Number of pieces: |  |  |  |  |  |  |
| Bill of lading/airbill number: |  |  |  |  |  |  |
| Delivery date/time: |  |  |  |  |  |  |
| Additional insurance: |  |  |  |  |  |  |

**Booth Setup**

**Exhibit setup handled by:**

Company personnel: Ofﬁcial/show-appointed I&D contractor:

Contact: E-mail:

Phone number:

Exhibitor-appointed I&D contractor (EAC):

Contact:

Phone number:

E-mail:

**Exhibit insurance conﬁrmed (date): Proof of insurance sent to show management (date): EAC appointment form due date:**

[**Booth**](mailto:@JD8EKC) **Dismantle**

**Booth dismantling handled by:**

**Supervisor:**

**Scheduled dismantle dates:** Times: to

Overtime: Yes No

**Post-show Shipping**

**Supervised by:**

**Date/time freight will be forced:**

**Complete return shipping address:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Carrier name:** |  |  | | |
| **Carrier address:** |  |
| **Carrier phone number:** | **E-mail:** |
| **Carrier contact:** |  |
| **Tracking number:** |  |
| **Return shipping data:**  Shipping date: | **Booth** | **Products/Equipment** |  | **Literature/Giveaways** |
| Shipped to: |  |  | | |
| Carrier type: |  |
| Number of pieces: |  |
| Waybill/bill of lading number: |  |
| Delivery date: |  |
| Additional insurance: |  |

[**Exhibit Results**](mailto:@K)

**Results:**

Number of booth visitors: Number of qualiﬁed leads: Orders/sales: Cost-per-visitor reached (show cost/number of booth visitors): Total trade show attendance: Media coverage:

**Evaluation of staff performance:**

**Staff feedback:**

Quality of show/booth attendance as related to objectives: Quantity of attendee trafﬁc:

Reaction to exhibit/graphics: Reaction to booth location: Recommendations:

**Competitive analysis:**

Total number of exhibitors: Number of direct competitors:

**Analysis of return on objectives:**

*(Refer to Show Objectives on p. 5.)*

I**Tip: Create a separate sheet with results of competitive analysis. Include the following information: company name, booth size, booth location, key products displayed, key promotions/messages, and strengths/weaknesses.**

Objective 1: Methods of measurement:

Results:

Objective 2:

Methods of measurement:

Results:

Objective 3:

Methods of measurement:

Results:

[**Budgeting**](mailto:K@E)

**Budget item Pre-show Actual cost Invoice paid Variance Notes estimate date**

**SPACE RENTAL**

Booth space

Meeting-room space

Deposits

Other

SUBTOTAL

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **$** |  | **$** |  | **$** |
|  |  |  |

**EXHIBIT STRUCTURE**

Design

Building/refurbishing Tool-box supplies

Graphics design/production Drayage outbound

Drayage inbound Tax on materials Storage (prorated) Insurance (prorated)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **$** |  | **$** |  | **$** |
|  |  |  |

Other

**SHIPPING**

SUBTOTAL

Ground transport to show Ground transport from show Air/sea freight to show Air/sea freight from show Other

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **$** |  | **$** |  | **$** |
|  |  |  |

**ON-SITE SERVICES**

Audiovisual Carpet rental Cleaning

SUBTOTAL

Computer-equipment rental Custom signage

Drayage Electrical Exhibitor badges Floral rental Furniture rental

Setup/dismantle labor Lead-gathering system Photography

Plumbing/compressed air Riggers

Security

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**Budget item Pre-show Actual cost Invoice paid Variance Notes estimate date**

Telephone

Other

**PROMOTION** Advertising Customer hospitality Direct mail

Kiosk space Incentives/premiums Literature

Mailing-list rental

SUBTOTAL

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **$** |  | **$** |  | **$** |
|  |  |  |

Presentation (production costs) Presenter/talent

Press kits/materials

Press conference/reception Sponsorships

Other

SUBTOTAL

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **$** |  | **$** |  | **$** |
|  |  |  |

|  |  |
| --- | --- |
| **PERSONNEL EXPENSES**  Salaries |  |
| Staff training |
| Pre-show dinner |
| Special attire for booth staffers  Transportation |  |
| Hotel |  |
| Food/entertainment |  |
| Temporary personnel |  |
| Other |  |

SUBTOTAL

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **$** |  | **$** |  | **$** |
|  |  |  |

**LEAD GATHERING/FULFILLMENT**

Printing lead forms

Printing cover letter

On-site equipment rental Postage

Labor

Other

SUBTOTAL

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **$** |  | **$** |  | **$** |
|  |  |  |

**MISCELLANEOUS** (add 10 percent)

**GRAND TOTAL**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **$** |  | **$** |  | **$** |
|  |  |  |

[**Ecxhibit**](mailto:K@D) **Timetable**

**PRE-SHOW Scheduled date Date completed**

Select booth space Determine exhibit objectives Set show budget

Set exhibit-design goals

Set exhibit budget

Evaluate promotion opportunities Select exhibit designer/builder Select display products

Plan promotion strategy

Select transportation/I&D companies

Finalize exhibit design

Plan direct-mail promotion Review exhibitor service kit Select booth staffers Reserve hotel rooms

Finalize lead-fulﬁllment plan Finalize lead follow-up mailings Order show services

Implement promotion strategy

Order badges

Notify show management if using exhibitor-appointed contractor Preview new exhibit

Plan exhibit setup/dismantle

Finalize availability of display products/literature

Send direct-mail promotion

Plan pre-show staff-training session

Preview portable display Finalize graphics copy/art Finalize shipping information

**POST-SHOW**

Fulﬁll show inquires/requests

Write thank-you notes to booth staffers, vendors Audit invoices/ﬁnalize show budget Measure/analyze results

**Tip: If you plan to use exhibitor-appointed contractors (EACs), be sure to check the exhibitor service manual for the deadline for notifying show management. Most shows require at least 30 days advance notice, but some require as much as 90 days. Keep in mind that if you miss the deadline, the job automatically goes to the show-appointed contractor.**

**%**