

## 12-month Trade Show Event Planning Checklist

---

### 12 Months Before:

- Determine participation** – Decide whether attending the trade show is beneficial for your business, and do a cost benefit analysis to determine whether the benefit is worth the cost
- Develop your trade show marketing strategy** – Understand who you are targeting at the tradeshow. Is your current audience attending, or are you seeking new business?
- Select booth size and space** – Choose an appropriately-sized space. Don't choose something too small that will get lost in the crowd of displays, but don't go so big that the size overwhelms your exhibits.
- Read show manual and contract thoroughly, making notes of all important information and dates** – Make sure you have a full grasp on the dates. Timing is everything when it comes to successful trade show event planning.
- Send in an application, along with payment** – Spaces run out pretty quickly, especially at large and popular trade show events.
- Develop your budget** – Consider all costs and expenses, and be sure to leave room for incidentals. You don't want to go over budget because of improper budgeting.

### 6 Months Before:

- Determine layout design** – Design a layout that tells your brand's story to visitors. Keep your layout open, flowing and inviting. Use visual cues to draw customers to and through your display.
- Explore exhibit options** – Consult with your [exhibit display provider](#) to go over options. Experts can help you determine the best options for communicating your brand's message.
- Determine exhibit vendors, transportation company and set-up/take-down vendor** – You'll want to have all of these things lined up for a smooth start and finish. Confirming the details the day of the trade show event will decrease your chances of miscommunication or problems.
- Book hotel rooms for traveling staff** – You don't want the headache of not being able to find hotel rooms by waiting too close to the event date. If it is an especially large event, book as soon as you've decided you want to go.



### 4 Months Before:

- Develop a sales plan** – Think about what strategies you will use to make sales. Are you looking for sales at the event? Do you want to capture leads and gauge interest?

- Order promotional and giveaway items** – Visitors to your booth will almost expect some kind of promotional item to take with them. Promotional items are also a great way to get your brand's name imprinted in potential clients' minds.
- Finalize exhibit floor plan** – Confirm all the details, look at blueprints of the layout and make any necessary changes.
- Print marketing materials and literature** – Make sure all of your marketing materials and literature are written, designed and ready for printing. Printing them now will save you the last minute hassle of doing it too close to the show.

## 2 Months Before:

- Reread exhibitor manual** – Make sure you comb through every detail. Don't miss anything!
- Plan and finalize all audio-visuals, presentations and demonstrations** – Make sure you know all the equipment you'll need for any audio-visuals, and be sure you and your trade show staff have presentations and demonstrations down to a science. The last thing you want is to look unprofessional in front of your audience.
- Reserve any additional needed space** – If you need meeting space for your team or for clients who are ready to consult with you during the event, go ahead and reserve it now.
- Select catering menus, if necessary** – If you will serve your visitors any goodies, like baked goods or light refreshments, arrange for that now.
- Submit any necessary authorization forms** – If any details about your event are being handled by third parties, get those forms in, so all you'll have to do later is confirm.
- Plan pre-show meeting with trade show team** – Set a date for the meeting you'll have with staff involved with the trade show to go over the details of the event. You'll also want to go over what is expected of each of them.
- Order staff badges and uniforms** – Do these things now, so that any errors can be corrected in time.
- Submit orders for equipment vendors** – This is another task to do in advance to avoid last-minute issues.
- Prepare all staff and manager information packets, memos, briefings, etc.** – You'll want to distribute these as soon as possible. Encourage your staff to go over the information thoroughly, so there is no confusion.

## One Month Before:

- Review final layout and exhibits** – At this point there shouldn't be any major changes. Just make sure everything is in place and lined up for installation, and maybe make very minor tweaks as necessary.
- Make follow-up packets** – Make sure you are prepared to follow up with your leads soon after the show, while your brand is fresh in their minds.
- Confirm install and takedown schedule with responsible parties.**

- Gather all materials for shipping*** – Make sure to confirm delivery dates and times. Sign up for email and text notifications from the shipping companies, so you can stay up to date on tracking and delivery confirmations.
- Hold in-office meeting and discuss:***
  - Agenda/Schedule
  - Purpose and goals
  - Demonstrations/Presentations
  - Rehearsals
- Create a binder to hold:***
  - Copies of all orders and receipts
  - Vendor contact information
  - Engineering certificate
  - Shipping manifests
  - Return labels
  - Additional forms

#### Day of Trade Show:

- Pick up freight arrivals
- Confirm all room reservations, catering and meeting reservations
- Confirm date and time for electrical installations
- Supervise the booth setup*** – You’ll want to be around to give direction and make sure everything is running smoothly.
- Hold pre-show briefing*** – Create an air of excitement, but also make sure your team understands the importance of the event and knows their responsibilities.

#### During the Trade Show Event:

- Reserve your space for next year*** – Get a jumpstart on planning if you plan to return the following year.
- Conduct daily staff meetings and daily briefings*** – Regroup after a long day, and keep everyone in the loop about the next day’s happenings.
- Arrange takedown and shipping of items*** – Confirm, again, all takedown arrangement. Ship all items back to your home office location.
- Supervise takedown of booth and exhibits***

#### After the Show:

- Transfer leads to database and follow up*** –That’s why you prepared the follow up packets in advance. Go ahead and get your packet sent out in the first week after the show.
- Send out thank you notes as necessary***

- Determine if goals were accomplished*** – Develop a system of measurement for success. Maybe getting 100 leads means you accomplished your goals. Come up with a measurement tactic that fits your business and your objectives.
- Determine improvements*** – Look back to see what could have been done better, or if everything was perfect, brainstorm how you can outdo yourself the next year.
- Begin planning process for next year's event*** – After all, your next tradeshow is right around the corner!

We're here to help you with your tradeshow and event needs. Download our free eBook for more great tips: [Trade Show Secrets for Event Marketers](#).