

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 REFERENCE DATA

Show name: _____

Show Web site: _____

User name: _____ Password: _____

Show producer: _____

Account number: _____

Contact name: _____

Address: _____

Phone: _____

Fax: _____

E-mail: _____

Show location: _____

City: _____ State: _____

Hall/Hotel: _____

Booth number(s): _____ **Booth size:** _____

Show dates: _____

Exhibit hours: _____

Setup dates/times: _____

Dismantle dates/times: _____

Number of meeting rooms: _____ **Meeting room locations:** _____

Show-appointed/general services contractor: _____

Contact name: _____

Address: _____

Phone: _____ Fax: _____

E-mail: _____

SHOW DATA

		Prior year	Anticipated	
Number of attendees:		_____	_____	
Number of exhibitors:		_____	_____	
Exhibit-hall admission:	Admission price:	Per day	Per show	Guest passes available:
<input type="checkbox"/> General public	Public \$	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Trade only	Trade \$	_____	_____	
<input type="checkbox"/> Restricted to members	Member \$	_____	_____	
	Conference pass \$	_____	_____	
	Exhibits only \$	_____	_____	

Audience profile/demographics:

1. _____
2. _____
3. _____

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.

Participation by competitors:

Company 1: _____

	Prior year	Anticipated
Booth size:	_____	_____
Booth location:	_____	_____
Key products displayed:	_____	_____
Key messages/promotions:	_____	_____
Strengths/weaknesses:	_____	_____

Company 2: _____

	Prior year	Anticipated
Booth size:	_____	_____
Booth location:	_____	_____
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 OBJECTIVES

Tip: Objectives must be realistic, specific, and quantifiable.

Objective	Tactics for Accomplishing	Measurement Techniques

PRE-SHOW LOGISTICS

Booth contract submitted (date): _____ **Booth number(s) assigned:** _____

Exhibitor manual received (date): _____ **Booth dimensions:** _____

Space cost: _____ **Cost:** Space only Package

Deposit \$ _____ due: _____ amount paid: \$ _____ date paid: _____

Remaining balance \$ _____ due: _____ amount paid: \$ _____ date paid: _____

\$ _____ due: _____ amount 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	DATE	Show services	DATE	DATE	
<input type="checkbox"/> Chairs	_____	<input type="checkbox"/> Accessible storage	_____	<input type="checkbox"/> I&D	_____
<input type="checkbox"/> Desks	_____	<input type="checkbox"/> Carpet	_____	<input type="checkbox"/> Internet	_____
<input type="checkbox"/> Tables	_____	<input type="checkbox"/> Catering	_____	<input type="checkbox"/> Lead retrieval	_____
<input type="checkbox"/> Wastebaskets	_____	<input type="checkbox"/> Cleaning	_____	<input type="checkbox"/> Lighting	_____
<input type="checkbox"/> Sofas	_____	<input type="checkbox"/> Compressed air	_____	<input type="checkbox"/> Material handling	_____
<input type="checkbox"/> Other	_____	<input type="checkbox"/> Drains	_____	<input type="checkbox"/> Photography	_____
Shipping		<input type="checkbox"/> Electrical	_____	<input type="checkbox"/> Rigging	_____
<input type="checkbox"/> Booth	_____	<input type="checkbox"/> Electrician	_____	<input type="checkbox"/> Running water	_____
<input type="checkbox"/> Giveaways/literature	_____	<input type="checkbox"/> Floral	_____	<input type="checkbox"/> Security	_____
<input type="checkbox"/> Products/equipment	_____	<input type="checkbox"/> Forklift	_____	<input type="checkbox"/> Signs	_____
<input type="checkbox"/> Computers/AV	_____	<input type="checkbox"/> Gas	_____	<input type="checkbox"/> Telephone	_____
<input type="checkbox"/> Other	_____	<input type="checkbox"/> Hosts	_____	<input type="checkbox"/> Other	_____

Co-op arrangements with other exhibitors (signage, equipment, etc.): _____

Meeting room reserved: _____

Hospitality suite reserved: _____

Dates: _____ Location: _____

Advance registration:

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: _____ Date reservation made: _____

Phone: _____ Cancellation penalty date: _____

Contact: _____ E-mail: _____

2. Hotel name: _____ Date reservation made: _____

Phone: _____ Cancellation penalty date: _____

Contact: _____ E-mail: _____

EXHIBIT PLANNING/PREPARATION

Use existing exhibit: _____ Necessary alterations (such as graphics): _____
Stored at: _____
Refurbishing necessary: Yes No _____

Construct new booth:
Exhibit builder selected: _____
Account manager: _____ Phone: _____
Final design approved date: _____ Pre-show setup/inspection date: _____ E-mail: _____

Rent booth properties:
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: _____ E-mail: _____
Script(s) approved (date): _____

Audiovisual presentations:
Type: _____
Supplier: _____ Internal External Phone: _____
Contact: _____ E-mail: _____

Graphics:
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): _____
Walk through (date, time): _____
Trainer: _____ Booth-staff schedule created: _____

Tip: As a rule of thumb, you need two booth staffers per 100 square feet of open booth space.

PROMOTION/PUBLICITY

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. _____ Contact: _____

2. _____ Contact: _____

3. _____ Contact: _____

4. _____ Contact: _____

5. _____ Contact: _____

Banners/signs:

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

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:

Exhibit

Products/Equipment

Literature/Giveaways

Shipping date:	_____	_____	_____
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: _____ Phone number: _____

E-mail: _____

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 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:	Booth	Products/Equipment	Literature/Giveaways
Shipping date:	_____	_____	_____
Shipped to:	_____	_____	_____
Carrier type:	_____	_____	_____
Number of pieces:	_____	_____	_____
Waybill/bill of lading number:	_____	_____	_____
Delivery date:	_____	_____	_____
Additional insurance:	_____	_____	_____

EXHIBIT RESULTS

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: _____

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.

Analysis of return on objectives:

(Refer to Show Objectives on p. 5.)

Objective 1: _____

Methods of measurement: _____

Results: _____

Objective 2: _____

Methods of measurement: _____

Results: _____

Objective 3: _____

Methods of measurement: _____

Results: _____

BUDGETING

Budget item	Pre-show estimate	Actual cost	Invoice paid date	Variance
SPACE RENTAL				
Booth space	_____	_____	_____	_____
Meeting-room space	_____	_____	_____	_____
Deposits	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
EXHIBIT STRUCTURE				
Design	_____	_____	_____	_____
Building/refurbishing	_____	_____	_____	_____
Tool-box supplies	_____	_____	_____	_____
Graphics design/production	_____	_____	_____	_____
Drayage outbound	_____	_____	_____	_____
Drayage inbound	_____	_____	_____	_____
Tax on materials	_____	_____	_____	_____
Storage (prorated)	_____	_____	_____	_____
Insurance (prorated)	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
SHIPPING				
Ground transport to show	_____	_____	_____	_____
Ground transport from show	_____	_____	_____	_____
Air/sea freight to show	_____	_____	_____	_____
Air/sea freight from show	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
ON-SITE SERVICES				
Audiovisual	_____	_____	_____	_____
Carpet rental	_____	_____	_____	_____
Cleaning	_____	_____	_____	_____
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	_____	_____	_____	_____

Budget item	Pre-show estimate	Actual cost	Invoice paid date	Variance
Telephone	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
PROMOTION				
Advertising	_____	_____	_____	_____
Customer hospitality	_____	_____	_____	_____
Direct mail	_____	_____	_____	_____
Kiosk space	_____	_____	_____	_____
Incentives/premiums	_____	_____	_____	_____
Literature	_____	_____	_____	_____
Mailing-list rental	_____	_____	_____	_____
Presentation (production costs)	_____	_____	_____	_____
Presenter/talent	_____	_____	_____	_____
Press kits/materials	_____	_____	_____	_____
Press conference/reception	_____	_____	_____	_____
Sponsorships	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
PERSONNEL EXPENSES				
Salaries	_____	_____	_____	_____
Staff training	_____	_____	_____	_____
Pre-show dinner	_____	_____	_____	_____
Special attire for booth staffers	_____	_____	_____	_____
Transportation	_____	_____	_____	_____
Hotel	_____	_____	_____	_____
Food/entertainment	_____	_____	_____	_____
Temporary personnel	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
LEAD GATHERING/FULFILLMENT				
Printing lead forms	_____	_____	_____	_____
Printing cover letter	_____	_____	_____	_____
On-site equipment rental	_____	_____	_____	_____
Postage	_____	_____	_____	_____
Labor	_____	_____	_____	_____
Other	_____	_____	_____	_____
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>
MISCELLANEOUS (add 10 percent)	_____	_____	_____	_____
GRAND TOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>

EXHIBIT 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.