

Category Color Code

Exhibit	Pre-Show Promos	Lead Management	Technology	Booth Staff	At-Show Promos
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*Time until show date:	Category:	Who is involved**:	What needs to be done:	Custom Modular Exhibit	Portable Exhibit
6 Months	Kick Off Meeting	Marketing, Sales, Leadership	Establish objectives for exhibiting, budget for show. Be sure to understand your budget before you start planning. To understand Trade Show budgeting, view the budget info tab of this spreadsheet.	X	X
	Exhibit	Marketing	Evaluate your current exhibit. Will it help you achieve your new objectives? For a larger exhibit (over 10x10) start 6 months out. For a small display or banner stand, start 2 months before the show.	X	X
	Technology	Marketing	Evaluate what worked last year in your booth in terms of technology. Both technology used for lead retrieval and monitors within the exhibit.	X	X
	Pre-Show Promos	Marketing	Evaluate what worked last year. What attracted attendees to your booth and does it make sense to have the same messaging this year.	X	X
	Booth Staff	Marketing	If you know who you would like to staff your booth, contact their supervisors to see if there would be conflicts if they were to staff.	X	X
	Lead Management	Marketing & Sales	Agree with your sales leadership how leads will be tracked, assigned and followed up on.	X	X
	At-Show Promos	Marketing	Evaluate what worked in prior years to understand what you want to do differently or the same this year.	X	X

(continued)

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*Time until show date:	Category:	Who is involved**:	What needs to be done:	Custom Modular Exhibit	Portable Exhibit
5 Months	Exhibit	Marketing	Determine if you will need to purchase or rent any furniture, technology, or produce content.	X	X
	Technology	Marketing	How can you integrate technology into your exhibit to gain attention, tell your story, facilitate better conversations with clients? Technology can be used within the design of your exhibit, or as part of your lead capturing device. Your exhibit company provider will also be able to help you with this.	X	X
	Pre-Show Promos	Marketing	Think of developing a microsite that includes your show schedule.	X	X
	Booth Staff		Not applicable		
	Lead Management		Not applicable		
	At-Show Promos		Not applicable		
	Miscellaneous	Marketing	Evaluate your show schedule to determine which shows have the best match with your target market. Will your customers be at the show?	X	X

*Time until show date:	Category:	Who is involved**:	What needs to be done:	Custom Modular Exhibit	Portable Exhibit
4 Months	Exhibit	Marketing, Leadership	If you are building a new exhibit, set appointments to meet with 3 exhibit builders to discuss your objectives for the show. If you expect custom elements you may want to start sooner.	X	Start 2 months until show date
	Technology	Marketing	Select technology used, test, AV, presentation etc.	X	X
	Pre-Show Promos		Not applicable		
	Booth Staff	Marketing	If you have data on lead counts and leads per staffer from prior years, contact them to ask if they'd be willing to staff again. You want someone who is personable, friendly, wants to be at the show, and knowledgeable about the product and company. Finalize your list of staffers.	X	X
	Lead Management		Not applicable		
	At-Show Promos		Not applicable		
	Miscellaneous		Not applicable		

(continued)

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3 Months	Exhibit	Marketing	Provide any logos or art for graphics if needed.	X	X
	Technology		Not applicable		
	Pre-Show Promos	Marketing	Brainstorm ideas for pre-show and at-show Promos that will bring in a greater number of qualified leads at the show and will help booth staffers engage the attendee.	X	X
	Booth Staff		Not applicable	X	X
	Lead Management	Marketing	Determine system, app vs. paper, and follow up plan, lead scanner reserved from show.	X	X
	At-Show Promos	Marketing	Brainstorm ideas for pre-show and at-show Promos that will bring in a greater number of qualified leads at the show and will help booth staffers engage the attendee.	X	X
	Miscellaneous	Marketing	Review the show book to find the forms for services you need, and create a master list of all the deadlines to order and still get the discount rates.	X	X

*Time until show date:	Category:	Who is involved**:	What needs to be done:	Custom Modular Exhibit	Portable Exhibit
2 Months	Exhibit	Marketing	Select your Trade Show Exhibit company, keeping in mind their range of services, national and global presence. This is especially important if you are exhibiting in a new state or country. Continue to work with your provider closely so that your exhibit can be completed well before your show date.	X	X
	Technology		Not applicable		
	Pre-Show Promos	Marketing	Select and order your any promotional items you will be mailing pre-show. If you choose to send emails to prospects, these can be sent in the following timeline if using email: 1 month out, 2 weeks prior, day before.	X	X
	Booth Staff	Marketing	Finalize your list of staffers, fill in contact info on "Staffer List & Schedule" tab of this spreadsheet. Arrange travel, book flights. If you are providing shirts, pants and more for your booth staffers to wear, order them now.	X	X
	Lead Management		Not applicable		
	At-Show Promos	Marketing	Ensure all at-show promos are approved by your leadership team.	X	X

(continued)

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*Time until show date:	Category:	Who is involved**:	What needs to be done:	Custom Modular Exhibit	Portable Exhibit
1 Month	Exhibit	Marketing & Exhibit Company Provider	Ship exhibit to either advance warehouse or show.	X	Potentially bring in your carry on!
	Technology		Not applicable		
	Pre-Show Promos	Marketing	Send your 1 st pre show promotion email or direct mail campaign.	X	X
	Booth Staff	Marketing	Have the first booth staff training meeting.	X	X
	Lead Management	Marketing	Purchase API (rights to use show list) for attendee list.	X	X
	At-Show Promos	Marketing	Select and order at-show promotional items you will be giving away at the show, and have the items shipped to the trade show.	X	X
	Miscellaneous	Marketing	Order any show services you need according to your list from the show book.	X	X

*Time until show date:	Category:	Who is involved**:	What needs to be done:	Custom Modular Exhibit	Portable Exhibit
2 Weeks	Exhibit	Marketing & Exhibit Company Provider	Ship miscellaneous exhibit items, marketing literature.	X	Potentially bring in your carry on!
	Technology	Marketing	Test technology if using lead management system or app.	X	X
	Pre-Show Promos	Marketing	Send the second wave of your pre-show promotion campaign. Give them a reason to stop by your booth and, of course, include your booth number and maybe even a picture of staffers or your booth to identify yourself.	X	X
	Booth Staff	Marketing	Hold the second booth staff training meeting to review objectives and any technology used in your booth. Review travel schedules and booth attire.	X	X
	Lead Management	Marketing	Train your staff on how to use your chosen lead capturing tools.	X	X
	At-Show Promos	Marketing	Ensure at-show giveaways will be available at the show (ship or pack).	X	X
	Miscellaneous	Marketing	Ship all of the supplies you'll need in your booth for staffers. Pens, clipboards, staplers, staples, water bottles, wipes and don't forget snacks and breath mints! If you are doing lead intake by tablet, ensure this technology works and can scan a badge. Ship these items as well.	X	X

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(continued)

*Time until show date:	Category:	Who is involved**:	What needs to be done:	Custom Modular Exhibit	Portable Exhibit
1 Week	Exhibit	Marketing & Exhibit Company Provider	Verify Exhibit arrived at the show or advance warehouse.	X	X
	Technology	Marketing	Prepare and pack a master book or data file with all your at-show contacts including your booth staffers, exhibit house, and local show city vendors such as I&D (Install & Dismantle) to have with you at the show. Include art files for your graphics as a plan B!	X	X
	Pre-Show Promos	Marketing	You may want to share your upcoming presence at the show on social media. Send more Promos.	X	X
	Booth Staff	Marketing	Check in with all booth staffers and confirm that they are still able to attend the show; have backups if needed. Remind them the importance of the company presence at the trade show! You have invested time and money, and your booth staffers are the "face" of your company. Also remind them of the importance of comfortable shoes.	X	X
	Lead Management	Marketing	Create and gather your post-show lead fulfillment packets, and assign the team that will process the leads. This includes any marketing materials you may offer to attendees dependent on their interest.	X	X
	At-Show Promos		Not applicable.		
	Miscellaneous	Marketing	Prepare and pack a master book or data file with all your at-show contacts including your booth staffers, exhibit house, and local show city vendors such as I&D to carry with you to the show. Include art files for your graphics.	X	X

(continued)

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At the Show	Exhibit	Marketing & Exhibit Company Provider	Your exhibit company partner should be able to provide I&D (Install & Dismantle) services so that your booth is up and running by the time the show lights turn on!	X	Not needed for portable displays.
	Technology	Marketing	Ensure your technology has been tested and works properly.	X	X
	Pre-Show Promos	Marketing & Booth Staffers	Be prepared to discuss pre-show Promos that have gone out.	X	X
	Booth Staff	Marketing & Booth Staffers	Be a welcoming, knowledgeable and friendly booth staffer. Listen to your customer and help identify their needs.	X	X
	Lead Management	Marketing & Booth Staffers	Properly qualify attendees at your booth, ensure your lead capturing system is working correctly.	X	X
	At-Show Promos	Marketing & Booth Staffers	Give your Promos out to qualified attendees, but not as a hand out! Talk with your attendees and listen to their needs.	X	X

*Time until show date:	Category:	Who is involved**:	What needs to be done:	Custom Modular Exhibit	Portable Exhibit
After the Show	Exhibit	Marketing	Review your actual expenditures against your planned costs to see if you are still on budget and reasons if not on budget.	X	X
	Technology	Marketing	Ensure all rented technology is returned to the vendor on time.	X	X
	Pre-Show Promos		Not applicable.		
	Booth Staff	Marketing & Booth Staffers	Thank your booth staffers & vendors, they worked hard!	X	X
	Lead Management	Marketing & Booth Staffers	Fulfill your leads. Get promised packets out, and the leads into the hands of your sales force. Continually check on these leads to track the customer cycle, ultimately showing you a positive ROI from the show to justify your investment.	X	X
	At-Show Promos		Not applicable.		
	Miscellaneous	Marketing & Decision Makers	Measure if you met your objectives set prior to the show, and figure out what went right and what could be improved. Report on those results to leadership or decision makers and let them know how well you met your show objectives, what worked, what could be improved upon for next time!	X	X

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BUDGET INFORMATION

In a 2015 Forrester Research Survey, trade shows and events were on average **14%** of a B2B company's marketing budget.

On average, the cost of booth space is about **1/3rd** of an exhibitor's **overall cost**.

For example, if your booth space cost at a show is **\$10,000**, then your estimated trade show budget would be **\$30,000**.

STAFFER ROSTER

Staffer's Name	% Time Staffing	Manager Name	Manager Approval?	Staffer Accepts?	Arrival Date	Depart Date	# Nights in Hotel	Flight Info	Hotel Info

STAFFER SCHEDULE

Arrive Early for Set-Up
 Exhibit Staff Scheduled Hours
 Clean-Up/Debrief

DAY 1	9:00 AM				10:00 AM				11:00 AM				12:00 PM				1:00 PM				2:00 PM				3:00 PM				4:00 PM							
Booth Staffer Name	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45

DAY 2	9:00 AM				10:00 AM				11:00 AM				12:00 PM				1:00 PM				2:00 PM				3:00 PM				4:00 PM							
Booth Staffer Name	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45

Arrive Early for Set-Up

Exhibit Staff Scheduled Hours

Clean-Up/Debrief

DAY 3	9:00 AM				10:00 AM				11:00 AM				12:00 PM				1:00 PM				2:00 PM				3:00 PM				4:00 PM							
Booth Staffer Name	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45

DAY 4	9:00 AM				10:00 AM				11:00 AM				12:00 PM				1:00 PM				2:00 PM				3:00 PM				4:00 PM							
Booth Staffer Name	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45	:00	:15	:30	:45

STAFFER CONTACT LIST

Include a list of all contact information related to your show.

Staffer Name	Cell Phone	Hotel Name	Hotel Address	Room #	Hotel Phone	Email Address

Show Manager:	
Exhibit Company Provider:	

SHOW SERVICES DEADLINE LIST

Review the show book to find the forms for services you need, and create a master list of all the deadlines to order and still get the discount rates.

Examples of what to include in this section:

- Electric
- Flooring
- Furniture Rental
- Porter Service (vacuuming, shampooing, mopping & waxing, trash removal at your exhibit space)
- Lighting
- Rigging

BUDGET CALCULATOR

Trade Show Name	
Trade Show Date	
Trade Show City	
Trade Show Hall / Booth Number	
Booth Size	

Trade Show Expenses

Expense Type	Notes	Account #	Plan	Actual	Variance
Booth space	About 1/3 entire budget usually.				

Exhibit-related costs:					
Exhibit use at show	Pro-rated for each show use, or expense at major show. Add show-specific graphics.				
Exhibit storage					
Subtotal					

Promotions:					
Pre-Show Promo	Printing, postage, mail house, list rental.				
At-Show Promo	Ads, press kits, sponsorships, giveaways, at-show events, or professional talent at show.				
Post-Show Promo	Follow-up and lead fulfillment.				
Measurement of ROI & ROO	Reinvest 1 to 3% of show budget to prove and improve.				
Subtotal					

At-Show Services:	Notes	Account #	Plan	Actual	Variance
Freight	Exhibit, product, literature, giveaways.				
Drayage	Cost to bring the exhibit and crates from storage into the hall and back.				
Electric	Lights, computers, refrigerators, installation.				
AV & Technology @ Show	Internet connection, computers, monitors, flatscreen rental?				
Show I&D	Supervision, labor, rigging, forklifts.				
Carpet or Flooring	Rental or purchase cost prorated per show.				
Booth Cleaning	Cleaning exhibit, carpet, trash removal.				
Card Readers	Machine rental, forms.				
Floral	Mum's the word.				
Furniture Rental					
Security					
Subtotal					

Staffer Costs:					
Travel					
Hotel					
Meals					
Booth Staffer Attire	Have an extra set or wash every day.				
Taxi, Ground Transport, Parking	Sometimes limos cost less for a group.				
Staffer Show Registration	Some shows require registration for staffers.				
Training	Trained booth staffers pull in more leads.				
Subtotal					

Miscellaneous:					
Subtotal					

Grand Total					
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