

Trade Show Planning Flowchart

Set Goals – Annually (November)

Annual Planning Summit

- Budgets
- Show schedule
- Objectives
(For example: Number of booth attendees, sales impacted, Facebook fans added, Twitter followers added)

Design Your Booth – Annually (December)

Exhibit

- First build?
 - Consult exhibit house
- Existing inventory
 - Map out usage

Design & Messaging

- Key messages
- Consistent across all
- Unique by audience?

Demos & Attractions

- Product demo plan
- Staged/canned activities
- Design activity zones
- Giveaways? Promotions?

Key to Success: Standardize Processes

Strategic Plan – Annually (December)

1. Logistics Plan

- Create one overall logistics plan
- Identify & manage vendors (*exhibit house, shipper, etc.*)
- Assign a Logistics Coordinator

2. On-Site Experience Plan

- For largest show(s), develop a compelling activity
- Assign a Coordinator to execute on-site

3. Lead Handling Plan

- Identify the software used to warehouse leads/lists
- Organize database structure (*field labels, sources, etc.*)
- Develop one standard 'fulfillment' approach
- Develop one standard lead distribution strategy
- Determine metrics for measuring success
- Assign a Lead Management Coordinator

4. Outreach: Social Media & Marketing Plan

- Consider Email Marketing + Social Media + Phone
 - Develop a standard approach for invites & traffic
 - Select specific social media sites
 - Develop a messaging plan + editorial calendar
 - Assign a Community Manager
 - Connect Community Manager to writer/editor
 - *(If Facebook is planned, add "Like" button everywhere)*

5. Outreach: Press & Industry Plan

- Create a single, overall plan
 - Identify media/industry outlets + reporters to focus on
 - Create an outreach/pitch plan (*newsworthy topics*)
 - Anticipate/plan to create content, on-site
 - Assign a writer/editor (*w/ shooting & editing abilities*)

6. Outreach: Strategic Partners Plan

- Identify partners, develop a single, overall plan
- Assign a Strategic Partner Coordinator

Adjust Future Goals

Measure Results – 1 week after

- Budget Reconciliation
- Gather metrics (against goals)
- Insert details into Show Report
- Review results with your team
 - What worked? What didn't?
 - Recommendations for the next
- Review results with Exhibit House
 - What worked? What didn't?
 - Recommendations for the next

Note: Because sales cycles can be very long, sales metrics should be formally measured end-of-year.

Execute the Show

Pre-Show (start 3 mos. prior, per show)

- Fine tune floorplan, graphics, products
- Staff list + badges + attire
- Order show services
- Instruct staffers w/ necessary info
- Travel & hotel arrangements
- Arrange shipments
- Implement 3 Outreach Plans

On-Site (usually a total of one week)

- Exhibit installation + product setup
- Staff huddle (*before & after hours*)
- Engagement throughout
- Execute 'experience' (*party, dinner, etc.*)
- Capture the show – video & photos
- Competitive review & mystery shopping
- Implement 3 Outreach Plans

Post-Show

- Coordinate logistics
- Implement Lead Handling Plan
- Thank your staff
- Create a Show Report (*standard format*)
- Implement 3 Outreach Plans

