Trade Show Planning Checklist

Planning ahead for your trade shows is critical to your success. Use this exhibitor task checklist to stay ahead of important deadlines. Need assistance? Give Captivate Exhibits a call at (877) 252-5065 for help with your exhibit needs, installation/dismantle services or warehousing between shows.

12 Months Out

- ☐ Determine show participation
- ☐ Decide how trade shows fit into your marketing strategy
- ☐ Select space, determine size of footprint
- ☐ Read contract carefully, taking note of due dates, payment terms, etc.
- ☐ Send in space application and first payment
- ☐ Prepare your budget

6 Months Out

- ☐ Determine exhibit needs and objectives
- ☐ Select primary vendors (exhibit house, transportation company, installation/dismantle supplier)
- ☐ Review existing exhibit, design new or upgrade

Four Months Out

- ☐ Develop your sales plan
- ☐ Identify promotions and/or giveaway items
- ☐ Produce show literature and marketing materials
- ☐ Develop exhibit floor plan
- ☐ Produce exhibit needs, refurbishments, additions
- ☐ Finalize new exhibit design

Two Months Out

- ☐ Carefully read exhibitor manual
- ☐ Plan in-booth audio visual programs and presentations/demonstrations
- ☐ Make airline, hotel and car reservations
- ☐ Reserve any additional meeting rooms (hospitality events, press conferences, etc.)
- ☐ Select catering menus (for hospitality events, press events, etc.)
- ☐ Submit authorization form if you are using an exhibitor-appointed contractor
- ☐ Plan in-office pre-show meeting
- ☐ Produce new graphics
- ☐ Order staff badges
- ☐ Prepare paperwork and submit orders for
  - ❍ Carpet and padding
  - ❍ Furnishings, tables, chairs
  - ❍ Drayage
  - ❍ Electrical
  - ❍ Audio Visual
  - ❍ Security
  - ❍ Wi-Fi
  - ❍ Booth cleaning
  - ❍ Shipping
  - ❍ Floral, etc.
  - ❍ Take advantage of any pre-pay discounts
- ☐ Develop booth staff briefing packet
- ☐ Send reminder to upper management about briefing meetings, include agenda.

One Month Out

- ☐ Review final booth design
- ☐ Confirm installation/dismantle schedule
- ☐ Gather display products and literature
- ☐ Prepare materials for shipping
- ☐ Set up and hold pre-show briefing meeting to discuss:
  - ❍ Agenda
  - ❍ Show purpose/goals
  - ❍ Demonstrations
  - ❍ Rehearsals
  - ❍ Show specials, etc.
- ☐ Create binder with:
  - ❍ Copies of all orders and checks for services paid in advance
  - ❍ Phone numbers of all vendors
  - ❍ Insurance documents
  - ❍ Engineering certificate for exhibit
  - ❍ Shipping manifest
  - ❍ Return shipping labels
  - ❍ Additional badge forms

Upon Arrival

- ☐ Check on freight arrival
- ☐ Check with hotel about staff reservations, meeting rooms and catering
- ☐ Find service area, meet electrician and confirm date and time for electrical installation
- ☐ Supervise booth setup
- ☐ Hold staff pre-show briefing

During Show

- ☐ Reserve next year's space
- ☐ Conduct daily staff meetings
- ☐ Make arrangements for booth dismantle and shipping
- ☐ Supervise booth dismantle
- ☐ Hold staff pre-show briefing

After the Show

- ☐ Follow up on leads
- ☐ Send thank-you emails
- ☐ Start planning the next show

Between shows is a great time to review your face-to-face marketing needs. Our industry experts can help you create and execute the right trade show strategy to reach the goals you've set. Give us a call to get the conversation started or drop us an email at info@captivateexhibits.com

Best wishes for a successful show!