



# Trade Show Planning Timeline

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Planning and executing a successful trade show exhibition takes a lot of work. From choosing the right show and designing your booth to booking travel arrangements and following up with leads, there are dozens of steps along the way – each one equally as important as the last.

Feeling overwhelmed? Just want to make sure you're on track for a productive exhibit? This checklist can guide the way.

## 9+ Months Out

- **Discuss strategy and sales messaging.** How will you sell your product or services to attendees? What tactics will you use to collect leads? What materials will you hand out to visitors?
- **Read through the contract and exhibitor's manual.** Go over any materials the trade show has provided you, and be sure you understand your rights and responsibilities.
- **Get the specs.** How much space do you have to work with? What will your access to electricity, Wi-Fi and other amenities be like? These are all important details to know while designing your booth.
- **Select an exhibit house and design your booth.** Provide any requirements for functionality and/or design, such as demo or meeting space, lighting, graphics, flooring, signage, displays, etc.

## 3 Months Out

- **Build the hype.** Let your existing fans know where you'll be and what you'll be doing. Develop a social media and email strategy for existing customers and leads.
- **Make travel arrangements.** Book the airfare, ground travel and hotel accommodations for your team. Make sure to coordinate transport for your exhibits if you haven't already done so.
- **Check in with vendors and verify dates/times.** Check in with your exhibit vendors and promo suppliers for status updates. Verify final delivery dates.

## Final Week

- **Test and confirm your lead capturing process.** Ensure that the form or webpage you'll use to capture leads during the show is set up correctly and that everyone on team knows how to use it.
- **Double-check your exhibits and booth materials.** Go over your materials, set up a mock demo table, and make sure you have all the pieces you need.
- **Verify your travel arrangements.** Confirm any and all travel details for you, your team and your exhibits.
- **Create an emergency backup kit.** Include duct tape, markers, extension cords, etc.

## After The Show

- **Make sure all materials are shipped off safely and properly stored.** See that your booth and exhibits are torn down, packed up and loaded in their transport vehicles safely.
- **Hold a show retrospective with your team and document the discussion.** Refer to your original goals. Was it a success? Why or why not? What would you do differently next time? What worked well?
- **Retrieve any leads you've captured.** Gather any forms or business cards, and hand them off to the appropriate team members for follow up.

## 12+ Months Out

- **Set your goals.** What is your purpose for attending a trade show? To promote or sell a specific product? To gather leads? To network? Let your goal drive every decision.
- **Determine your budget.** Set an overall budget for the entire show, as well as smaller budgets for individual pieces of the puzzle, such as marketing materials, promos, booth design, etc.
- **Know your prospects.** Who are you trying to target at the show? What do they like/dislike? What are they looking for that you can provide them? This should determine where you exhibit and guide your marketing strategy.
- **Research and register for the show.** Don't choose your show blindly. Find one that caters to your target audience, fits within your budget, and aligns with your goals.

## 6 Months Out

- **Choose your on-site staff.** Who will you take to the show? Who will be your best advocates and networkers? Determine a team of at least 2 to 4 people who can support you.
- **Brainstorm promo and giveaway ideas.** Determine what promos, giveaways and freebies you will offer attendees.
- **Confirm all other vendors and their timelines.** This includes print marketing materials, promotional giveaways, booth storage (if not renting), etc. Check with your exhibit house, as they may provide most or all of these services.

## 1 Month Out

- **Train your staff.** Make sure everyone knows their own responsibility, as well as the strategies and talking points they'll be expected to use at the booth.
- **Outline your follow-up plan.** How will you follow up with leads you cultivate at the show? Will you send them an email? Call them up by phone? Send them a coupon code? What is the timeline and who will be in charge of getting this done?
- **Finalize logistics.** Make sure your transportation, storage and set-up services are all arranged and confirmed.
- **Print marketing materials.** Send your brochures, handouts and other printed materials to a professional printer for production. Assign a team member to follow up and monitor progress.
- **Meet with your team.** Reaffirm roles and responsibilities, and add additional support if needed. Outline your travel itinerary and go over the timeline for each day of the show.

## At The Event

- **Confirm shipment and staff arrivals.** Take stock of your supplies and booth materials. Make sure everything has arrived unscathed.
- **Have a brief meeting with your staff.** Go over expectations and responsibilities, and reaffirm your sales messages.
- **Set up your booth.** Make sure you consult the on-site electrician if necessary.



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