

# Trade Show Checklist for Exhibitors

Preparing a detailed trade show checklist is an essential part of succeeding at your tradeshow, conference or event.

Print this PDF for a handy checklist to market your business at a trade show, conference or event cost effectively.

Entering the Tradeshow, Conference or Event	DEADLINE	DATE COMPLETED	<input checked="" type="checkbox"/>	NOTES
Request Information & Application Materials for Exhibitors.			<input type="checkbox"/>	
Discuss & Coordinate the Tradeshow, Conference or Event Outline and regulations with all involved company			<input type="checkbox"/>	
Make an overall budget calculation for the Tradeshow, Conference or Event, including costs from organizer (participation, Air/Electricity/water, Labor, Internet, Lead retrieval, Lighting, Rigging, etc.) handling of exhibits, travel & accommodation, costs for booth staff, Insurance, promotion and most important, design, planning and production of your trade show booth.			<input type="checkbox"/>	
Fill out application forms and pay the entry-fee early as discounts are usually provided if you sign up early. <ul style="list-style-type: none"> <li>• Confirm name badges</li> <li>• Guest passes</li> </ul>			<input type="checkbox"/>	

PRE-SHOW CHECKLIST AND TIMELINES	DEADLINE	DATE COMPLETED	<input checked="" type="checkbox"/>	NOTES
<ul style="list-style-type: none"> <li>• Select Booth Space</li> <li>• Determine exhibit objectives *establish metrics for post-show*</li> <li>• Set show budget</li> <li>• Set exhibit-design goals</li> <li>• Set exhibit budget</li> <li>• Evaluate promotion opportunities</li> <li>• Select exhibit designer &amp; builder</li> <li>• Select display products/items</li> <li>• Plan promotion strategy (direct mail, email, social media, advertising)</li> <li>• Select transportation/labor companies</li> <li>• Finalize exhibit design</li> <li>• Plan direct-mail promotion</li> <li>• Review exhibitor service kit</li> <li>• Select booth staffers</li> <li>• Reserve hotel rooms</li> <li>• Finalize lead-fulfillment plan</li> <li>• Finalize lead follow-up mailings</li> <li>• Order show services</li> <li>• Implement promotion strategy</li> <li>• Order badges</li> <li>• Notify show management if using exhibitor appointed contractor (EAC)</li> <li>• Preview new exhibit</li> <li>• Plan exhibit setup/dismantle</li> <li>• Finalize availability of display products and literature</li> <li>• Send direct mail promotion</li> <li>• Plan pre-show staff training session</li> <li>• Review display</li> <li>• Finalize graphics copy/art</li> <li>• Finalize shipping information</li> </ul>			<input type="checkbox"/>	

KEY ASPECTS OF YOUR TRADESHOW OR EVENT	DEADLINE	DATE COMPLETED	<input checked="" type="checkbox"/>	NOTES
<p>What are your main goals for this Tradeshow, Conference or Event?</p> <ul style="list-style-type: none"> <li>• Make new contacts</li> <li>• Maintain existing business relations</li> <li>• Brand &amp; Image cultivation &amp; representation</li> <li>• Market evaluation / find target audience</li> <li>• Presentation of new products</li> <li>• Sales</li> <li>• Public relations</li> </ul>			<input type="checkbox"/>	
<p>How do you want to exhibit?</p> <ul style="list-style-type: none"> <li>• Demonstration of sample products, innovations, market entry products</li> <li>• Ambient and booth environment, creating a relaxed atmosphere for business conversation with catering &amp; lounge, presentation of product mainly through print visuals</li> <li>• Outstanding design, maximum visibility and contrasting to competitors</li> <li>• Interact with Attendees to create an experience with a lasting impression</li> </ul>			<input type="checkbox"/>	
<p>Number and size of exhibits</p>			<input type="checkbox"/>	

EXHIBIT BOOTH AND SHIPPING INFORMATION	DEADLINE	DATE COMPLETED	<input checked="" type="checkbox"/>	NOTES
<p>Transport, packing, insurance, handling (inside US or customs):</p> <ul style="list-style-type: none"> <li>• Advance Warehouse Address</li> <li>• Dates Freight Accepted</li> <li>• Show-Site Address</li> <li>• Dates Freight Accepted</li> <li>• Target Date/Time</li> <li>• Off-target Penalty</li> <li>• Carrier Name</li> <li>• Carrier Address</li> <li>• 24-Hour Show Management Contact</li> <li>• Official Material-handling company</li> <li>• Scheduled Setup Dates</li> </ul>			<input type="checkbox"/>	
<p>Inbound Shipping Data:</p> <ul style="list-style-type: none"> <li>• Shipping date</li> <li>• Shipped From</li> <li>• Carrier</li> <li>• Carrier Type</li> <li>• Tracking Number</li> <li>• Bill of Lading/Air bill Number</li> <li>• Delivery date/time</li> <li>• Additional Insurance (if applicable)</li> </ul>			<input type="checkbox"/>	
<p>Booth Set up:</p> <ul style="list-style-type: none"> <li>• Exhibit Set up handled by</li> <li>• Company personnel</li> <li>• Official Show appointed Labor Contractor (Contact, Phone and Email)</li> <li>• Exhibitor-appointed Labor Contractor (EAC) (Contact, Phone and Email)</li> <li>• Exhibit Insurance Confirmed Date</li> <li>• Proof of Insurance Sent to Show Management Date</li> <li>• EAC Appointed form due date</li> </ul>			<input type="checkbox"/>	

CONTINUED	DEADLINE	DATE COMPLETED	<input checked="" type="checkbox"/>	NOTES
Booth Dismantle:  <ul style="list-style-type: none"> <li>• Booth dismantling handled by]</li> <li>• Supervisor</li> <li>• Schedule dismantle dates/times</li> </ul>			<input type="checkbox"/>	
Post Show Shipping  <ul style="list-style-type: none"> <li>• Supervised by</li> <li>• Date/time freight will be forced</li> <li>• Complete return shipping address</li> <li>• Carrier Name</li> <li>• Carrier address</li> <li>• Carrier Phone Number &amp; Email</li> <li>• Carrier Contact Info</li> </ul>			<input type="checkbox"/>	
Return Shipping Data (Ship date, Ship to, carrier Type, Number of Pieces, Waybill/Bill of lading number, Delivery date, Additional Insurance if Applicable.)				
Check Tradeshow, Conference or Event safety regulations, test run			<input type="checkbox"/>	
BOOTH STAFF	DEADLINE	DATE COMPLETED	<input checked="" type="checkbox"/>	NOTES
Appoint a person in charge for the exhibit project and staff assignments  <ul style="list-style-type: none"> <li>• Booth Staffers</li> <li>• Exhibit Hours</li> <li>• Special booth attire</li> <li>• Special hospitality-event attire</li> <li>• Temporary personnel needs</li> <li>• Pre-Show training Date/Location</li> <li>• Walk through date/time</li> <li>• Trainer:</li> <li>• Booth staff schedule</li> </ul>			<input type="checkbox"/>	

CONTINUED	DEADLINE	DATE COMPLETED	✓	NOTES
Arrangement of accommodation and flights, travel insurance, working mobile phones, technology needs (I.T., cables, iPads, Laptops): <ul style="list-style-type: none"> <li>• Hotel Name</li> <li>• Date Reservation Made</li> <li>• Cancellation Penalty Date</li> <li>• Hotel Location to Facility</li> </ul>			<input type="checkbox"/>	
Narrator for presentation and booth companions Dress code for consistent appearance and corporate branding			<input type="checkbox"/>	
Translator if applicable. (Foreign events often require translators with specific technical on-topic knowledge)			<input type="checkbox"/>	
Make a participation list with replacement staff in case of emergency or sickness *Bilingual business cards (if applicable)			<input type="checkbox"/>	
BOOTH EQUIPMENT	DEADLINE	DATE COMPLETED	✓	NOTES
Advertising material: <ul style="list-style-type: none"> <li>• Flyers, brochures, giveaways, pins, press-releases,</li> <li>• Exhibit Display materials</li> <li>• Technology Equipment (iPads, Laptops, TouchScreens)</li> </ul>			<input type="checkbox"/>	
Catering & kitchen equipment:  Easy to clean tableware (cups, plate, forks, picks) napkins, bottle opener, coffee maker, workspace drinks, snacks, regional products from your country catering staff, cleaning material, waste disposal			<input type="checkbox"/>	

CONTINUED	DEADLINE	DATE COMPLETED	<input checked="" type="checkbox"/>	NOTES
Presentation material: Production and delivery of visual presentations and movies adjusted to the specifications of the booth's AV equipment, localized			<input type="checkbox"/>	
TRADE SHOW BOOTH PRODUCTION	DEADLINE	DATE COMPLETED	<input checked="" type="checkbox"/>	NOTES
STUDY the Tradeshow, Conference or Event Manual carefully!			<input type="checkbox"/>	
Request a booth layout / 3D design & a quotation based on these important factors: <ul style="list-style-type: none"> <li>• Budget</li> <li>• Booth area and surrounding exhibitors/competitors</li> <li>• Construction regulations, height limitations, etc.</li> <li>• Size and amount of your exhibits + connections</li> <li>• Company's Corporate Identity guidelines</li> <li>• Venue schedule for setup &amp; take-down</li> <li>• Signage: logos, fonts, pantone colors, graphic printing, etc.</li> <li>• Furniture: meeting area, Reception and Info-counter, stools, etc.</li> <li>• Decoration: plants, light-shows, accessories in booth space</li> </ul>			<input type="checkbox"/>	
Get approval for the booth design from the Show Organizer and place the order with your booth constructor. *Example: If you have a double deck display or an island booth and there are restrictions, learn about them early				
Fill out all the necessary order forms:  Electricity, Water, Labor, material & Handling, Show Rentals, Cleaning, etc. and submit them before the deadline!			<input type="checkbox"/>	

PROMOTION/ADVERTISING	DEADLINE	DATE COMPLETED	<input checked="" type="checkbox"/>	NOTES
<p>Promote your participation in a Tradeshow, Conference or Event on your homepage, through publications in professional journals press releases &amp; conference agendas. Send invitations to your clients and prospective clients and/or resellers:</p> <ul style="list-style-type: none"> <li>• Hospitality</li> <li>• Direct Mail</li> <li>• E-mail campaign</li> <li>• Social Media campaign</li> <li>• Tickets for Entertainment (if applicable)</li> <li>• PR information for Show Management</li> <li>• Web Page</li> <li>• Advertising Schedules (Key industry publications, show dailies, show directory)</li> <li>• Press Releases to Key Industry Publications (Name/Contact)</li> <li>• Banners/Signs (Airport, Show Hall, Taxicabs, Billboards, Shuttle buses)</li> <li>• Booth Promotions (Literature, Giveaways, Booth Photographer, Other)</li> </ul>			<input type="checkbox"/>	
<p>Evaluate your participation according to your target for this event through:</p> <ul style="list-style-type: none"> <li>• Number of visitors to your booth</li> <li>• Number of serious business conversations made</li> <li>• Amount of promotion and materials handed out</li> <li>• Number of achieved contracts or sales</li> <li>• Number of new established contacts</li> <li>• Appearance in press and media</li> <li>• Performance of booth staffers</li> <li>• Overall reception by visitors and your staff</li> </ul>			<input type="checkbox"/>	



CONTINUED	DEADLINE	DATE COMPLETED	<input checked="" type="checkbox"/>	NOTES
<p>Social Media Outreach metrics:</p> <p>Be sure to measure all outreach before, during and after the show and document the key metrics.</p>			<input type="checkbox"/>	
POST SHOW FOLLOW UP	DEADLINE	DATE COMPLETED	<input checked="" type="checkbox"/>	NOTES
<p>Exhibit Results:</p> <ul style="list-style-type: none"> <li>• Number of Booth visitors</li> <li>• Number of qualified leads</li> <li>• Orders/Sales</li> <li>• Cost-per-visitor reached (show cost/number of booth visitors)</li> <li>• Total trade show attendance</li> <li>• Media coverage</li> </ul>			<input type="checkbox"/>	
<p>Evaluation of Staff Performance &amp; Feedback:</p> <ul style="list-style-type: none"> <li>• Quality of show/booth attendance as related to objectives</li> <li>• Qualify of attendee traffic</li> <li>• Reaction to exhibit/graphics</li> <li>• Reaction to booth location</li> <li>• Recommendations</li> </ul>			<input type="checkbox"/>	
<p>Competitive Analysis:</p> <ul style="list-style-type: none"> <li>• Total number of Exhibitors</li> <li>• Number of direct competitors</li> </ul>			<input type="checkbox"/>	

CONTINUED	DEADLINE	DATE COMPLETED	<input checked="" type="checkbox"/>	NOTES
<p>Analysis for Return on Objectives:</p> <p>Objective 1: (List from Preshow Planning)</p> <ul style="list-style-type: none"> <li>• Methods of measurement</li> <li>• Results</li> </ul> <p>Objective 2: (List from Preshow Planning)</p> <ul style="list-style-type: none"> <li>• Methods of measurement</li> <li>• Results</li> </ul> <p>Objective 3: (List from Preshow Planning)</p> <ul style="list-style-type: none"> <li>• Methods of measurement</li> <li>• Results</li> </ul>			<input type="checkbox"/>	
<p>Post Show Follow up:</p> <ul style="list-style-type: none"> <li>• Literature Request/Inquiry fulfillment</li> <li>• Follow-up mailings/phone calls/emails</li> <li>• Internal promotion (company newsletter, memo, etc.)</li> <li>• Leads qualified</li> <li>• Leads distributed</li> <li>• Leads Followed up on</li> </ul>			<input type="checkbox"/>	
<p>Post Show Wrap up:</p> <ul style="list-style-type: none"> <li>• Audit Invoices/Finalize Show Budget</li> <li>• Measure/Analyze Results</li> <li>• Archive Show Information for next year</li> <li>• Decide if you want to exhibit in same industry show</li> </ul>			<input type="checkbox"/>	

**We wish you a successful show!**  
**Your Friends at EXHIB-IT!**  
**www.EXHIB-IT.com**

# BUDGETING CHECKLIST



## VENUE/SPACE:

	Pre-show Estimate	Actual Cost	Invoice Paid Date	Variance
• Booth Space Rental				
• Meeting Room Space Rental				
• Hospitality Space Rental				
• Deposits				
• Other				
<b>SUBTOTAL</b>	\$	\$		\$

## EXHIBIT STRUCTURE:

• Design				
• Building/Refurbishment				
• Tool-Box & Show Supplies				
• Graphics Design/Production				
• Drayage Outbound				
• Drayage Inbound				
• Storage (prorated)				
• Insurance (prorated)				
• Other				
<b>SUBTOTAL</b>	\$	\$		\$

## SHIPPING:

• Ground Transportation to show				
• Ground Transportation from show				
• Air/sea freight to show				
• Air/sea freight from show				
• Other				
<b>SUBTOTAL</b>	\$	\$		\$

## ON-SITE SERVICES:

- Audiovisual
- Carpet rental
- Cleaning
- Computer-equipment rental
- Custom signage
- Drayage
- Electrical
- Exhibitor badges
- Floral rental
- Furniture rental
- Information Technology
- Lead-gathering system
- Photography
- Plumbing/compressed air
- Riggers
- Security
- Setup/Dismantle


**SUBTOTAL** \$  \$  \$

## TECHNOLOGY ITEMS:

- Telephone
- Technology Equipment
- Other


**SUBTOTAL** \$  \$  \$



**PROMOTION:**

- Advertising
- Customer hospitality
- Direct Mail
- E-Mail Campaign
- Kiosk Space
- Incentives/premiums
- Literature
- Mailing-list rental
- Presentation (Production costs)
- Presenter/talent
- Press kits/materials
- Press conference/reception
- Social Media Campaign
- Sponsorships
- Other

[illegible]

**SUBTOTAL**

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

### PERSONAL EXPENSES:

- Staff Training
- Salaries
- Temporary personnel
- Special dress attire for Staffers
- Pre-show dinner
- Transportation
- Hotel
- Food/entertainment
- Other

[illegible]

**SUBTOTAL**

\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

## LEAD GATHERING FULFILLMENT:

- Printing lead forms
- Printing cover letter
- On-site equipment lead retrieval rental
- Postage
- Labor
- Other


**SUBTOTAL** \$  \$  \$

## MISCELLANEOUS EXPENSES (Add 10%):

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**GRAND TOTAL** \$  \$  \$