

Tradeshow Planner

Category	Activity	Deadline	Responsibility	Completed
Annual Planning				
	Assess the results of previous tradeshows.			
	Review tradeshow opportunities and rank according to relevance and the potential strategic value to your business. Consider trade-shows you might not have attended in the past.			
	Determine specific goals and budget for each tradeshow			
Quarterly				
	Review the annual tradeshow plan and adjust accordingly			
Six Months Ahead*				
	Choose exhibit booth location and confirm what is included			
	Take advantage of early bird discounts			
	If you own an exhibit, determine whether it's appropriate for the show or if it needs to be modified or updated			
	If you don't own a exhibit, determine whether to rent, purchase, or develop one yourself; determine content and develop design			
	Talk to the tradeshow sponsor about free marketing opportunities			
	Develop show-specific marketing plan			
Monthly				
	Interact with the tradeshow sponsor and the management company responsible for the tradeshow			
Four Months Ahead				
	Determine staffing requirements and select booth staff			
	Reserve hotel rooms, air travel, and rental cars			
	Finalize exhibit design			
	Determine products/services to be exhibited as well as collateral and giveaways required			
	Provide basic show information to your transportation company and booth installation/dismantle service provider (show name, venue, dates, etc.)			
Three Months Ahead				
	Plan in-booth live demonstrations or presentations			
	Plan hospitality events and/or press conferences and reserve meeting rooms			
	Schedule first pre-show meeting and distribute show plan to staff			
	Begin work on pre-show and at-show promotions that will help bring qualified leads to your booth, and help your booth staffers to engage attendees			

Two Months Ahead				
	Finalize your booth staff choices and order staff badges			
	Submit show site service orders to take advantage of advance-order discount rates			
	Follow up on production of show-related promotional material			
	Prepare press kits			
	Develop custom lead-tracking forms and plan lead processing procedures			
	Confirm travel dates and hotel needs with staff; adjust reservations as needed			
	Develop booth staff briefing kit and schedule booth staff training			
	Arrange Travel: Book hotels and flights for booth staffers before rates go up.			
	Select and order pre-show promotional items			
	Order uniforms for tradeshow staffers			
One Month Ahead				
	Go through your checklist to make sure everything is on schedule			
	Confirm shipping arrangements for exhibit and promotional materials; ship materials by target ship dates; consolidate tradeshow materials whenever possible to avoid additional drayage costs at show site			
	Hold pre-show briefing meeting in the office			
	Schedule briefing meeting to be held in the booth at show site			
	Assemble your tradeshow kit to include:			
	Contact information for all vendors including emergency numbers			
	Shipping manifest and return shipping labels			
	Contact information and travel logistics for all booth staff			
	Digital versions of booth graphics for local reproduction, if needed			
	Send the first wave of your pre-show promotion campaign			
	Booth staff training session #1: client-profile and product reviews			
	Order any final show services you need from the show book			
	Ship your new exhibit to advanced warehouse, getting it out the door soon enough to save on shipping			
Two Weeks Ahead				
	Booth staff training session #2: review staffing schedule and information about the exhibit, promotions, technology, and venue			
	Send the second wave of pre-show promotion campaign. If sending via postal mail, use first class to ensure timely delivery.			
One Week Ahead				
	Ship supplies booth staffers will need (pens, clipboards, staplers, water bottles, snacks, mints, wipes, etc.)			
	Distribute and verify booth staffing schedule			
	Ensure that the exhibit has arrived at the tradeshow venue			
	Prepare and pack a master file with at-show contacts, including booth staffers, exhibit house. Include graphics files			
	Confirm hotel and meeting room reservations			
	Confirm catering orders			
	Prepare lead fulfillment packets for use by booth staff			

Upon Arrival				
	Supervise exhibit booth setup or check in with your booth setup supervisor			
	Hold pre-show briefing and final training for booth staff			
During Tradeshow				
	Conduct daily meetings with booth staff to collect relevant feedback and make adjustments as needed			
	Reserve booth space for next year's tradeshow, if appropriate			
	Confirm arrangement for booth dismantle and post-show shipping			
	Obtain outbound material handling forms			
	Review show-related site-service invoices			
	Plan post-show lead distribution			
At the Close of the Tradeshow				
	Supervise booth dismantling and packing or confirm post-show instructions and logistics with the dismantle supervisor			
Back at the Office				
	Debrief booth staff			
	Send thank-yous to booth staff and service providers			
	Distribute leads and monitor follow-up			
	Analyze show results			
	Compare actual versus estimated costs			
	Report results of the tradeshow to senior management			
* Note that timeframes will vary depending on requirements of a given trade show and your business' individual requirements				