TRADE SHOW COLLECTIVE

The Ultimate Trade Show Playbook

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Introduction

Love them or loathe them, trade shows are an important part of the marketing mix and in many cases will represent a significant proportion of your annual marketing spend.

But trade shows can be unpredictable. Everything from the weather to world events can affect who shows up, or perhaps more importantly, who doesn't.

This playbook provides a practical guide to measuring and maximizing return on investment for the trade shows you participate in and all your activities around them.

Trade shows should always follow a path on continuous improvement, so whether a seasoned veteran or a trade show newbie, this playbook should provide ideas and inspiration for all.

A lot can happen in 12 months so the first steps in preparing for a trade show require some skill in using a crystal ball, reading tea leaves or, if you're lucky enough to have use of one, a time machine.

Jokes aside, with most trade shows starting their (re)booking process either at, or just before, the previous year's event, your trade show planning often needs to begin more than 12 months ahead of the event.

Define objectives and KPIs

The first question you're likely to face is "how" or indeed "whether" to attend a particular show. Given that booking often begins before or at the previous year's event, even if you have attended the show previously, it's unlikely you will have had the chance to evaluate your participation at the most recent event before re-booking.

Even if your organization is disciplined enough to set and monitor annual goals or objectives, it's unlikely that these will extend beyond 12 months in the future. We therefore need to look at longer term (growth) plans for the business and possibly mission and vision statements to understand how a specific trade show does, or doesn't, align with business needs. Your objectives and KPIs will no doubt need refining close to the trade show itself, but setting your objectives at this stage will guide the next steps on outlining budget and deciding how to attend.

Outline budget and allocate resources and how to participate?

Once you've set your objectives you can start to think about budget and how to participate. While separate questions these two are intertwined since your available budget may dictate the nature of your participation.

If you're reading this playbook, you're probably looking at exhibiting at a show, however even if you're only visiting, or participating in some way that sits between visitor and exhibitor, the guides and worksheets here are still relevant.

Options that sit "in between" visiting and exhibiting include options such as speaking opportunities, rented meeting rooms (onsite or off), sponsorship, off-site events (such as networking events or seminars). In all cases, the list below covers many of the items you should consider when budgeting.

- **Space Rental**
  - This may vary depending on whether you are renting a "shell scheme" or space only. Some exhibitions also charge a premium for certain areas in the exhibition.
- **Booth Design and Construction**
  - This cost can vary massively depending on the scale and quality of the build as well as what services are included – for example some contractors will include full project manage ment (booking services such as electricity, AV, drayage etc.) where others may not.
- **Services** (electricity wifi, water, drayage)
- **Audio Visual Requirements**
- **Temporary Staff**
- **Travel and Accommodation**
- **Daily allowances for meals and incidental expenses for staff.**
- **Promotional Materials, Giveaways and Swag**
- **Logistics and Shipping**
- **Entertainment and Hospitality** (on booth and off)

Booth Selection

Picking a "good" booth is never an easy task – even at shows where the layout changes little between years, predicting traffic flow can be tricky. There are some basics to stick to, or remember, when it comes to choosing a booth:

1. **Purpose:** Going back to the objectives, what are your goals for the show and how are you likely to achieve them. Plans will change and evolve over the next 12 months, but you may already know some basics. For example, if a typical booth visit with your clients is pre-arranged and involves a sit-down meeting, being in a quieter area of the exhibition, away from loud theatres etc. is probably a benefit. In contrast, if you are looking to attract lots of previously unknown visitors onto the booth, you might compromise on size or other aspects of the space to secure a high traffic area.
2. **Known Location:** If you've exhibited at the show several times before, you may want to stay in a similar area such that visitors know where to find you without referring to a floor plan. Equally, if you are rebranding or considerably shifting your brand positioning, you may want to find a new location that signifies a clear change from the past.
3. **Competition and Partners:** Being near the competition can be beneficial in attracting their clients, or potential clients, to view your products and services. How ever, being close by also gives them the opportunity to do the same too your clients. Equally, being close to partner vendors may make it easy for customers to find you if your products are typically used together. On the other hand, having an ally in a different area of the exhibition can also be useful, especially if your brand has a presence on their booth.

Top Tip:

Wherever you find a booth, it's well worth getting to know your account representative from the trade show organizer and discussing "better booth" programs if they have one. A lot can change in 12 months and often booths in more suitable locations become available as other exhibitors change their plans.

Hotels

It is never too early to secure accommodation for trade shows – prices are high, and availability is low. In many cases, groups will have block booked several years in advance. The impact that comfort and safety have on staff performance should not be underestimated, so finding a hotel in a good location within budget is well worth spending some time on.

Top Tip:

If you are a small group attending the show, consider booking your flight and hotel through a holiday/vacation company. Often, by booking early, you'll be able to get good fares and hotel rates, but only have to pay a small deposit to secure your seat/room. If you're plans change, you may lose that deposit if you're unable to change your booking, but it will likely still be significantly cheaper than booking flexible fares/rates.

Worksheet: Worksheet A – **Objectives & KPIs**

9–6 Months Before

Hopefully, with just under 9 months to go, you will by now have started to validate your organizations objectives for the show and have an outline understanding what the product/service highlights or themes for the show should be. These two elements will enable you to work on the next 3 critical items. Before you do, and if you did one, refer to your "postmortem" report from previous events so you have a reminder of what worked well and what didn't.

Booth Brief

If you're using an external booth design and/or build company, it's essential to give them an accurate brief in order that they create a design, or designs, that enable you to meet your objectives. If you're building the booth yourself (e.g. using a modular system), it's still worth considering the questions that would be answered by the brief.

To give the designer as much creative freedom as possible, to create a booth with real presence and impact, it is necessary to provide ample context. If the designer is not already very familiar with your brand provide a detailed background of the company, including its history, vision, mission, and core values to ensure that the booth design reflects the company's identity. Clearly defining the goals and objectives for the event will help in creating a purpose-driven design that focuses on measurable results, such as increasing brand visibility, generating leads, and fostering relationships with partners and customers.

Consider the diverse needs of different visitors, including existing clients, potential new customers, partners and the press and share details of a "typical engagement" at the show with each of these.

Finally, differentiate between essential (hard) requirements, like meeting spaces and hospitality areas, and additional (soft) requirements – those that you can compromise on or may substitute for other ideas, like live demonstrations and interactive displays. This will ensure the designer is able to maximize the efficiency and impact of the space while meeting critical needs.

Sustainable Booths:

Exhibitions are, if we're honest, not the most sustainable of events, but there are actions we can take to make them more so. When creating your booth brief, here are some topics to consider:

Modular, Reusable Design:

- Use durable, modular components that can be easily reconfigured, reused, and refurbished for future events, avoiding one-off builds. Entering into a 2 or 3 show agreement with a booth builder can also offer significant cost savings.

Environmentally Friendly Materials:

- Opt for FSC-certified wood, low-VOC finishes, and recycled or PVC-free graphics. Choose metal frames that can be re-skinned to minimize material waste.

Energy Efficiency:

- Use LED lighting, sensors, and "day only" power or timers to cut energy use.

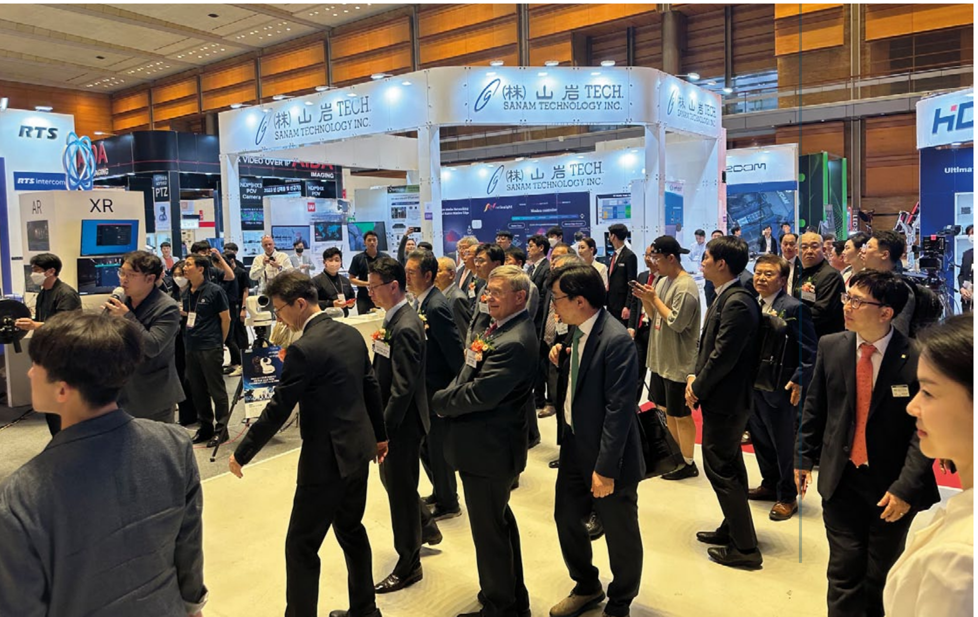
Recycling and End-of-Life Planning:

- Design for easy disassembly and select components that can be recycled or repaired.

Flexible Branding:

- Create neutral structures and simply update graphics. You can also consider digital signage which can easily be changed between, or even during, shows.

9–6 Months Before



The Messaging Doc

One of, if not THE most important components of a trade show presence is 'the messaging doc'. This document should be the single point of truth from which all other content is derived. It is likely to be a 'living' document, with regular updates, iterations and additions right up until a few weeks before the show.

The Messaging Doc should be a bible to the company messaging at, and beyond, the show, including aspects such as mission, vision and values; competitive positioning; details of company finances and other performance metrics that can be shared; positions on industry (and wider) trends and themes; other thought leadership positions; key recent customer wins and projects; product messaging and positioning and key messages for different audience segments.

This document not only serves as a cornerstone for all promotional materials, press releases, and presentations but also helps in training the staff, ensuring that every team member is aligned and confident in delivering the company's message. If you're working with a Content and/or PR agency, you should collaborate with them on this document to refine the messaging and ensure the key points are incorporated into other content.

Top Tip:

Starting a messaging doc from scratch can be daunting. Consider using the questions in the worksheet as an interview with the CEO or other senior staff and spokespeople. A transcription of the conversation will be a great starting point for the doc. If you can, video the interview(s) – if it looks good, you'll be able to extract soundbites and edit together a great video that can be used internally for training or even externally to promote your presence at the show.

9–6 Months Before

PR and Content Plan

Now you have the outline understanding what the product/service highlights or themes are, it is time to start mapping out what content you need to publish, when and where to maximize visibility and best support your trade show attendance.

If you're looking to drive a particular conversation during or around the show, creating "seed" content – content that leans into that discussion – and publishing that in the months and weeks before the show.

By starting this planning well ahead of the show, it is possible to work the show-related content into your overall marketing plan and make most of every opportunity whether that's for Paid, Earned, Shared or Owned media.

Top Tip:

Many vendors use tradeshows as a platform to issue press releases and make announcements about new products and other topics. However, with so many vendors making announcements in such a relatively small window of time, a lot of those announcements – whether via traditional press releases or through social media – simply get lost in the noise. It's worth considering saving your official announcement until after the show, instead offering customers an "exclusive preview" and use meetings with press to brief them on the upcoming announcement to secure favourable coverage. Alternatively, announce your new product 1-2 months before the show, ensuring there is enough publicity to entice show visitors to seek your stand out at the show and help your sales team book meetings with key clients at the show.

Key Staff

Trade shows can be very emotive events for individuals and teams within an organization – attending a trade show can be seen as a "perk" or "reward". At the same time, human resource at a trade show can be your single biggest cost. Not only must you consider travel, hotel, subsistence and other individual expenses, but time away from desks and/or time of in lieu of working a weekend trade show have a cost to the business, even if that cost is often hidden.

Instead of starting by identifying individuals that should attend a show, start by defining the roles that you need to fulfil at the event. For example, you might require a spokesperson to talk to press and analysts, a salesperson able to represent a certain region, demonstrators for each demo and a C-level executive to meet with VIPs. Focusing on roles rather than individuals ensures that every necessary function is covered, leading to a more efficient and effective trade show presence.

Worksheet: Worksheet B – **Booth Design Brief Template**

Worksheet: Worksheet C – **Messaging Template**

Worksheet: Worksheet D – **Content Plan Template**

By now, your booth design should be set, staff attendee list agreed and content plan well underway. We are now moving into the execution phase of the show.

Test Build

Around this time, if you're contracting a stand builder, they will begin building out the components of the booth and potentially start a test build. If it's the first time you've worked with this builder, or the booth concept is entirely new, it's well worth planning a visit at this stage to see how the concept is turning into reality. While changes are best avoided where at all possible, at this point there is still time to adjust where needed to make the space function better.

If you're building the booth yourself with a kit system or some other means and have the luxury of space, now is also a great time to do your own test build. In this case you also have time to make any changes needed or purchase extra components etc. Ideally, you'll also be able to stage your demonstrations in the structure.

Demonstrations

It's very likely that you'll be demonstrating brand new features or even products at the show, and you may very well be beholden to development schedules when it comes to the scheduling of demonstrations. However, 3 months ahead of the show is an ideal time to start staging demonstrations. Over the next 3 months, you will need to establish the "flight envelope" for what it is possible to demonstrate on the trade show floor, train your demonstrators and train all the other staff to support those demonstrations.

Prepare the CRM

Preparing your CRM system (whether that's a standard CRM package such as SalesForce.com or HubSpot, or a collection of spreadsheets and other databases) before a trade show is crucial for maximizing interactions and follow-up efforts.

Start by making your existing database as "clean" and up to date as possible. Adding custom fields and tags, or using lists specifically related to the trade show, like booth visits and demo participation, allows for more targeted communication.

4–2 Months Before

Automated workflows can be hugely beneficial for managing pre-show and post-show communications. If your system allows, set up automated email workflows to send pre-show invitations, booth information, and meeting requests to your segmented lists. Draft personalized follow-up email templates for various interactions such as booth visits, demos, and meetings, and schedule these emails to be sent automatically after the trade show. Additionally, assign tasks and reminders for your sales and marketing teams to follow up with high priority leads promptly. Integrating event management tools with your CRM allows for seamless data transfer and tracking, providing real-time updates that ensure all interactions and engagements are logged promptly.

Finally, prepare custom reports and dashboards to track key metrics that match to your objectives and KPIs – this will be key to getting a clear picture of the ROI from the show.

Engage the Channel

If you use a reseller channel to go to market, and that channel will be present and active at the show, it is crucial to engage them in your trade show plans as early as possible. Start by sharing your overall trade show objectives and strategies with your resellers. At the same time, ask them to share their objectives and discuss how you can help them during the show.

Arrange joint planning sessions to coordinate efforts, ensuring that your booth activities and reseller activities complement each other. This collaboration can enhance the overall visitor experience, making it easier for attendees to engage with your brand through multiple touchpoints. By fostering a strong partnership with your resellers, you can significantly boost your trade show success and achieve a higher return on investment.

Top Tip: If you exhibit at several trade shows across the year, consider a contact (lead) capture solution that you can use at all (or most) the events you attend and that is integrated directly to your CRM. Rather than renting lead capture devices from each show, these solutions use API access (which you'll need to purchase). The advantage is that much of the set-up of, and data import to the CRM will be automated, reducing workload, and you will only need to train staff to use one capture system regardless of which event they are attending. Depending on the size of your team and number of events, these solutions can even offer a cost saving over renting individual devices or licenses.

Contingency Planning

Contingency planning for a trade show is essential to ensure that you can still achieve your objectives even if unforeseen challenges arise. The key to effective contingency planning is not necessarily replicating your original plan but having flexible strategies in place that allow you to adapt quickly and efficiently. With your objectives in mind, identify potential risks that could disrupt your plans, such as staff illness, shipment delays, or technical failures.

Next, develop alternative approaches to achieve your objectives if your primary plans are compromised. For instance, if key personnel fall ill, have backup team members who are cross-trained and ready to take on critical roles.

By focusing on your objectives and having adaptable strategies in place, you can confidently navigate any challenges that arise, make the most of your trade show opportunities and hopefully keep your blood pressure at a reasonable level in the run up to, and at, the show.

6–4 Weeks Before the Trade Show

Press Releases and Media Kits

Six weeks before the trade show is a critical point for finalizing your media kit and drafting your press releases. This timeline ensures that all your materials are ready for distribution and allows ample time for media outreach and coordination.

Preparing these elements at this stage provides several strategic advantages.

You will have already strategically timed your announcements to maximize media coverage in your content plan. By having your press releases ready, you can coordinate with key journalists and media outlets to ensure they have all the information they need such that if you need to adjust your plan, e.g. to align with a special feature or publication, you are able to do so. Additionally, with your press releases drafted, you can arrange pre-briefings with select media contacts, providing journalists with a deeper understanding of your news and enabling them to prepare more comprehensive and thoughtful coverage.

Your media kit should be comprehensive and professionally designed to provide journalists and media representatives with all the essential information about your company and its offerings. It should include:

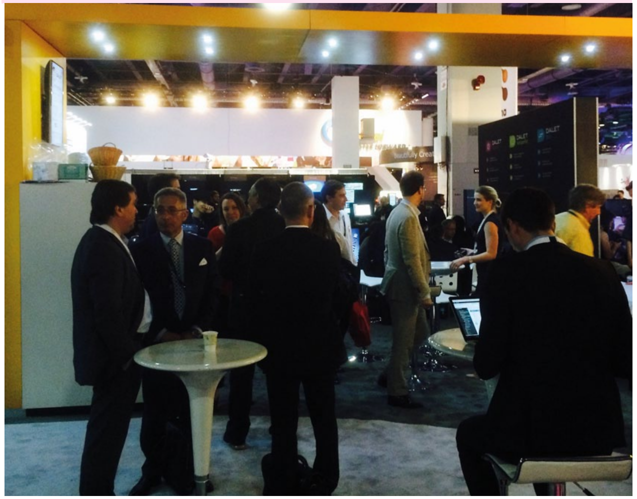
- **Company Overview:** A brief description of your company's history, mission, and vision.
- **Product Information:** Detailed information about the products or services you will be showcasing at the trade show, including key features, benefits, and any new launches.
- **Press Releases:** Include copies of any press releases that will be issued before, during, and after the trade show.
- **White papers:** If you have recently published any white papers on specific products or initiatives relevant to the show, consider including these in here as background information
- **Key Personnel Bios:** Short biographies and contact information for key executives and spokespersons who will be available for interviews.
- **High-Resolution Images:** Professional photos of your products, booth design, and key personnel.
- **Contact Information:** Clear details on how media representatives can reach your PR team or designated contact persons.

Staff Training

6 weeks before the show is a perfect time to start training your trade show staff. There's a lot to cover and it can be worth breaking this into separate meetings or sessions to ensure your team have time to ask questions and absorb all the information.

Top Tip:

Consider arranging formal Media Training for all spokespeople and sales leaders. Professional Media Training will ensure that your message is communicated effectively and consistently. Media Training is often offered by PR Agencies as a specialized service, or as part of a trade show package.



6–4 Weeks Before the Trade Show

Messaging

Training your staff on the company's messaging is essential to ensure consistent and accurate communication throughout the trade show. Begin by reviewing the Messaging Doc, which serves as the single point of truth for all content. Ensure that every team member understands the key messages, including the company's mission, vision, values, competitive positioning, and product highlights. Conduct role-playing exercises where staff practice delivering these messages in various scenarios, such as talking to potential customers, media representatives, and partners. This practice will help them become comfortable and confident in articulating the company's story and value propositions.

Demonstrations

Product demonstrations are a critical component of your trade show strategy. Make sure your staff understand their roles in each demo such that the products, focusing on key features, benefits, and use cases that resonate with your target audience.

Wherever possible, conduct hands-on training sessions where staff can practice setting up and running the demos. Ensure they are equipped to handle technical issues and answer detailed questions.

Additionally, train them on how to engage the audience during demos, using clear, concise, and compelling language. Emphasize the importance of tailoring demonstrations to the needs and interests of the attendees to maximize impact.

Etiquette & Housekeeping

Proper etiquette is vital for creating a professional and welcoming environment at your booth. Ensure all staff are familiar with the "house rules" when working on the booth, covering topics such as dress code, food and drink, greeting visitors, use of smart phones and laptops, time keeping and guidelines for time spent off-booth.

Introduce all staff to the facilities of the booth that are available to guests and themselves, such as catering, meeting areas, etc.

CRM

Train your staff on how to use the CRM effectively during the trade show as this may be different from their day-to-day use of the CRM. Ensure they know how to log interactions, update contact details, and use custom fields, tags and/or lists you've created for the event. Provide them with a "quick reference guide" that outline CRM processes and emphasize the importance of accurate data entry.

Conduct a dry run of your CRM setup to ensure all integrations and automations are working correctly, identifying and fixing any issues before the actual event.

4–2 Weeks Before the Trade Show

Channel Training

You will have already been in contact with your channel well ahead of this point, but in the same way as you're training your sales team you should equip your resellers with the necessary tools and resources to represent your brand effectively. This includes providing them with marketing materials, product brochures, and a relevant subset of the information given in the staff training.

Checklist Checks

As the trade show approaches, it is time to revisit your checklists to ensure that all preparations are on track, and nothing has been forgotten. Begin by reviewing your master checklist, which should include every task that needs to be completed before the event. This checklist will cover logistics, such as booth setup and shipping, as well as marketing materials, travel arrangements, and staff schedules. Regularly update this list and schedule frequent but brief team meetings to discuss progress, address any issues, and reassign tasks if necessary. Ensuring that every detail is accounted for will help prevent last-minute surprises and allow for a smoother setup at the trade show.

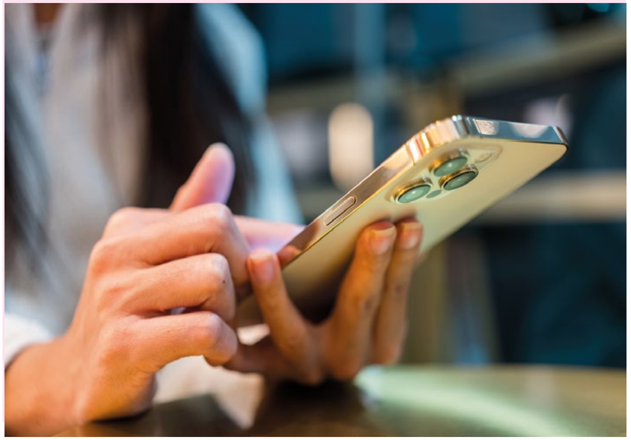
Off-booth Activities

While, if you're exhibiting, your booth may be the center of your activity at a trade show, there will be plenty to do away from your booth as well. As well as seminars, networking events and cocktail parties trade shows offer a unique opportunity to explore the exhibits and collect valuable insights about competitors' offerings, market trends, and potential partnerships. To make the most of these activities, develop a targeted list of competitors, partners, and key individuals your team should meet. Clearly define the data and insights you aim to capture, such as product features, pricing strategies, and technological advancements.

With just a couple of weeks until the show, calendars will be firming up and it should be possible to ensure that these tasks are delegated and balanced with booth duties. Assign specific team members to visit competitors' booths, attend relevant sessions, and engage with potential and existing technology partners. Provide them with detailed instructions on what information to gather and how to report it. This strategic approach ensures that your team maximizes the benefits of the trade show, gaining a comprehensive understanding of the competitive landscape and identifying new collaboration opportunities.

Top Tip:

A trade show is a fast-paced environment so having critical information and prompts at hand, without the need to boot a laptop or search your phone can be invaluable. It is well worth creating a cheat sheet – a simple booklet on a single page or paper folded into 3 or 4 to make it pocket-sized – with your elevator pitch, key points for the trade show, details of the hotel and other important venues, dates and times for any company events during the show, details of any partner booths you might direct visitors to and names and phone numbers of the key people at the show.



4–2 Weeks Before the Trade Show

The Post-show Survey

Conducting a post-show survey is crucial for evaluating the success of your trade show participation and gathering valuable feedback for future improvements. Whether you're 3 people attending or 300, documenting feedback from the show, and being able to refer to it for future shows can be invaluable.

Design the survey to capture insights from various stakeholders, including attendees, booth staff, and partners. Ask questions about what worked well, what could be improved, and specific aspects such as booth layout, product interest, accommodation, logistics and staff interactions.

To distribute the post-show survey promptly after the event while the experience is still fresh in participants' minds it is important to prepare the survey in the weeks before the event such that it can be distributed immediately after the show finishes.

Worksheet: Worksheet E – **Post-show Survey Questions**

Build-up and Show Days

After months of preparation, you're finally onsite at the show. If you are well prepared and things (mostly) go to plan, the last few days before a show often present an opportunity to slow down a little and catch a breath before the exhibition opens.

Snagging

Snagging is a critical phase during the booth build where you identify and rectify any issues or imperfections in the booth setup. As your booth construction nears completion, conduct a thorough inspection to ensure everything is in place and up to standard. Look for any visible defects, such as misaligned graphics, poor-quality finishes, or missing components.

Rather than tackle each issue individually, agree a time with the lead from your booth construction team to go through the "snag list" ensuring that there is sufficient time for corrections to be made before the trade show begins.

Booth Walkthrough

Conducting a booth walkthrough enables staff to familiarize themselves with the features and functions of the booth. This walkthrough ensures that everyone on the team is comfortable with the layout and knows where everything is located. Start by guiding the staff through the main areas of the booth, such as the entrance, product demonstration stations, meeting areas, and information counters. Revisit the training that staff were given earlier in the show preparation, reiterating each point on messaging, demos and etiquette within the context of the booth itself.

This is also the time to go over any safety protocols and logistical details, such as the location of storage areas for promotional materials and personal belongings. The booth walkthrough should take place after the booth construction is complete and all demos are working but well ahead of the opening of the exhibit floor – if possible, the day before.

Daily Sync

Daily sync meetings are crucial for maintaining alignment and addressing any issues that arise during the trade show. Each morning, gather your team for a brief meeting to review the previous day's performance and set priorities for the day ahead. Discuss key takeaways from interactions with attendees, feedback received, and any operational challenges encountered. This is also an opportunity to adjust strategies based on what's working well and what needs improvement.
In these sync meetings, reaffirm each team member's responsibilities and schedule for the day. Ensure everyone is aware of any important meetings, demonstrations, or events taking place.

4–2 Weeks Before the Trade Show

Encourage open communication and problem-solving, allowing team members to share their insights and suggest improvements. Regular daily syncs keep the team focused, motivated, and responsive, enhancing overall performance and coordination throughout the trade show.

Top Tip:

Mornings at trade shows can be tough. With long days at the show itself followed by dinners and networking events, the daily sync meetings can be a bit slow to start. A great way to bring some energy to these meetings is to ask a handful of people (or everybody if you're a small group) to share their highlight from the previous

Capture Everything

"We took way too many photos at that trade show!" Said no one! Ever Capturing as much video, audio and image at a trade show is crucial for creating a rich archive of content that can be utilized long after the event concludes. Photos and videos are invaluable assets that can be used for various marketing and promotional purposes. From documenting booth setup and the bustling activity of the event floor to capturing key moments like product demonstrations, speaker sessions, and interactions with attendees, having a comprehensive visual record allows you to tell a compelling story about your trade show experience and a reference to look back at for future years. Encourage your team to take an abundance of photos and videos, focusing on different aspects and perspectives of the event, including candid shots of team members engaging with visitors, detailed images of your booth display, and wide-angle shots that capture the overall atmosphere.

In addition to being useful for immediate social media updates and blog posts, these visuals can be repurposed for future marketing campaigns, newsletters, and presentations. High-quality photos and videos can enhance your website, create engaging content for your email marketing, and serve as compelling visuals in post-show reports and presentations. They also provide a valuable resource for your sales team, who can use them to highlight your trade show presence and successes during client meetings. By capturing everything, you ensure that you have a wealth of material to draw from, helping to maximize your return on investment in the trade show and keeping the momentum going long after the event has ended.

Internal Communications

Unless you're a very small team, it's unlikely that all employees at a company will attend a trade show. However, milestone events such as the larger shows tend to impact the company as a whole. Whether you're launching a new product, or demonstrating new features, trade shows often represents the first time that the work of your development teams is shown in public; as a significant spend, finance teams may have seen a spike in invoices due; with the sales team looking to book future-focused meetings, support staff will have been under pressure to resolve any open issues. Even those not directly or indirectly involved with your trade show presence are likely to share interest in the large shows – at the same time, not everyone will want to be bombarded with updates.

Consider an "opt in" news feed using a specific channel/team/group on Slack/Teams/WhatsApp where you can post photos and anecdotes from the show floor while limiting email updates, or post to "General" channels/teams, to one summary per day.

In the aftermath of the show, the team should be busy following up on the contacts met at the show (either by email and/or phone or in person) and documenting all the engagements that occurred during the show period. Immediately after the show, you will have also distributed the post-show survey – you'll want to encourage the team to respond to this within the first week to ensure the show is still fresh in the mind.

The Postmortem

Conducting a "postmortem" after a trade show is a valuable process that goes beyond simply gathering feedback in the post-show survey; it involves a comprehensive analysis and reflection on all aspects of the event. The postmortem allows your team to systematically review what worked well and identify areas for improvement. This reflective process is crucial for learning and growth, ensuring that each subsequent trade show benefits from the insights gained. By carefully examining the feedback from the post-show survey, along with available performance metrics and anecdotal experiences, you can develop a clear understanding of your successes and, of course, failures. This, in turn, helps in refining your strategies, optimizing resource allocation, and enhancing overall effectiveness for future events.

To ensure a productive postmortem, schedule a dedicated meeting within a few weeks of the trade show when the experiences are still in recent memory. This meeting should include all key team members who were involved in the planning and execution of the event, not just those who attended. Start by reviewing the feedback collected from the post-show survey, discussing key takeaways, and analyzing performance against the set objectives. Encourage open and honest discussions to identify specific issues and brainstorm solutions. Document all findings and insights in a detailed postmortem report, which should include actionable recommendations and a plan for implementing improvements. The outcome of the postmortem should be 4 lists:

- Things we will keep doing:
- Things we will start doing:
- Things we will stop doing:
- Idea bucket:

These lists will provide a clear roadmap for future trade show planning, helping to maintain successful practices, implement new strategies, and discontinue ineffective ones. The "Idea bucket" allows for creative suggestions that might not fit into immediate actions but can be revisited and potentially incorporated into long-term planning. This structured approach ensures continuous improvement and a higher return on investment for your trade show efforts.

Worksheet: Worksheet F –
The "Postmortem" Agenda

The timing of when you are able to wrap up your show evaluation will depend on the objectives you set for the show and the time it takes to measure those objectives. For example, if your objective was to generate $10m in sales, and your average sales cycle is 6 months, it's likely you won't know if you met your objectives for at least 6 months after the show. However, there may be times when you need to estimate or make assumptions on the achievement of goals and complete your evaluation of the show earlier if, for example, you need to make a go/no-go decision on a following event – the timing of which may be triggered by payment schedules or budgeting cycles.

ROI Evaluation

A proper ROI evaluation following a trade show is crucial for understanding the financial and strategic impact of your participation. By systematically analyzing the performance metrics and financial outcomes, you gain a clear picture of how well your investment translated into tangible results. This includes assessing the number of leads generated, immediate and projected sales revenue, and overall engagement with attendees. Such an evaluation helps justify the expenses incurred and provides concrete data to support decisions about future trade show investments. Without a thorough ROI evaluation, it is challenging to measure success or identify areas that need improvement.

As mentioned previously, trade shows can be hugely emotive. The key benefit of a detailed ROI evaluation is the ability to remove emotion and make data-driven decisions – or at least make it clear that we are not. By comparing actual performance against set objectives and KPIs, you can determine which strategies and activities were most effective and which fell short.

Another significant advantage of conducting an ROI evaluation is, combined with your postmortem report, the insight it provides for continuous improvement.

Lastly, a thorough ROI evaluation fosters accountability and transparency within your organization. By clearly documenting the outcomes and learnings from the trade show, you ensure that all stakeholders, from the marketing team to senior management, have a shared understanding of the event's impact. This transparency builds trust and supports a culture of continuous learning and improvement. Moreover, having a well-documented ROI evaluation makes it easier to communicate the value of trade show participation, or not, to external partners, investors, and other key stakeholders, thereby reinforcing the strategic importance of these events in achieving your business goals.

Worksheet: Worksheet G –
ROI Evaluation Template

Worksheets

Worksheet A — Objectives & KPIs

Here are some questions you could use as prompts to help define the objectives and KPIs for attending a trade show:

Defining Objectives

1. **Lead Generation:**
   - How many new leads do you aim to generate from this trade show?
   - What qualifies as a high-quality lead for your business?
2. **Brand Awareness:**
   - What is your primary message or value proposition for this trade show?
   - How do you plan to measure increased brand awareness?
   - Are there specific segments or demographics you are targeting to increase brand recognition?
3. **Networking:**
   - What type of industry connections are you looking to make?
   - Are there key industry influencers or companies you aim to connect with?
4. **Product Launch:**
   - Are you planning to launch a new product or service at the trade show?
   - What are the key features or benefits you want to highlight?
5. **Market Research:**
   - What specific market information or insights are you seeking?
   - How do you plan to collect this information (surveys, direct feedback)?
   - How many customer feedback interactions are you aiming for?
6. **Sales:**
   - What is your sales (pipeline) target for the trade show?
   - How will you track and measure sales closed (during and) after the event?
7. **Customer Engagement:**
   - How many existing customers do you plan to engage with at the trade show?
   - What are your goals for these engagements (upselling, feedback)?
   - How will you measure the success of customer engagement activities?

Defining KPIs

1. **Sales Revenue:**
   - What are your target sales (pipeline or revenue) from the trade show?
   - How will you track sales attributed to the event?
2. **Brand Awareness Metrics:**
   - What specific metrics will you use to measure brand awareness (e.g., social media mentions, website traffic spikes)?
   - What are your target numbers for these metrics?
3. **Engagement Metrics:**
   - How many visitors do you aim to engage with?
   - What metrics will you use to measure engagement?
4. **Customer Feedback:**
   - How many customer feedback surveys or interviews do you aim to complete?
   - What specific feedback are you looking to collect?
5. **Networking Goals:**
   - How many new industry contacts do you aim to establish?
   - What is the target number of follow-up meetings or calls post-show?
6. **Media Coverage:**
   - How many press mentions or media coverages are you targeting?
   - How will you measure the quality and reach of the media coverage received?
7. **Product Demos:**
   - How many product demonstrations do you plan to conduct?
   - What is the target conversion rate from demo to lead or sale?
8. **Social Media Engagement:**
   - What are your goals for social media engagement during the trade show?
   - How will you measure the success of your social media activities?

Using these questions as prompts, you can develop clear, measurable objectives and KPIs that align with your overall trade show strategy and business goals.

Worksheet B – Booth Design Brief Template

Event Information

- **Event Name:** [Event Name]
- **Booth Number:** [Booth Number]
- **Date:** [Date]

Background Information

About [Company Name]

Provide a brief description of the company, its history, and core mission. Include key values and how these influence the design and functionality of the booth.

Example:

[Company Name] aims to revolutionize [industry] by combining innovative technology with user-centric design. Founded in [year], we have consistently delivered cutting-edge solutions that enhance user experiences and foster creative freedom.

Vision & Mission

Outline the company's vision and mission.

Example:

Our vision is to [vision statement]. Our mission is to provide [mission statement], ensuring that our clients can [key mission objectives].

Values

List the core values of the company that should be reflected in the booth design.

Example:

- **Trust:** Foster open and honest relationships.
- **Courage:** Embrace change and lead the industry.
- **Fun:** Create a positive and enthusiastic work environment.
- **Curiosity:** Push boundaries and continuously improve.
- **Dedication:** Commit to delivering high-quality results.

Goals & Objectives

Overall Goals

Define the overarching goals for the booth at the event.

Example:

- Increase brand visibility and establish thought leadership.
- Expand lead and opportunity pipeline.
- Improve lead qualification and conversion rates.
- Create urgency and decision-making pressure among potential clients.

Specific Objectives

Detail the specific objectives for the booth, along with suggested methods to achieve them.

Example:

- **Create an Impression of Vitality and Strength:** Design the booth to be big, loud, impressive, and busy.
- **Strengthen Relationships:** Provide hospitality infrastructure for meaningful conversations with existing clients and partners.
- **Foster New Relationships:** Ensure the booth facilitates discussions with new prospects and partners.
- **Media Engagement:** Have a compelling story and visually interesting elements for the press.
- **Channel Partner Collaboration:** Coordinate with channel partners to enhance their and their customers' experience at the booth.
- **Awareness Among Attendees:** Offer easy ways for passersby to engage with the brand.
- **Product Demonstrations:** Allow visitors to see and interact with products.

Booth Specifications

Location and Orientation

Describe the booth's location within the event venue and any strategic considerations for its orientation and design.

Example:

The booth is located in [Hall/Area] with dimensions of [Dimensions]. Given the high traffic area, the design should balance exclusivity with visibility.

Product Launches/News

List the key products or announcements to be highlighted at the booth.

Example:

- **Product 1:** [Description and key features]
- **Product 2:** [Description and key features]
- **Product 3:** [Description and key features]

Requirements

Hard Requirements

Specify the essential elements needed in the booth.

Example:

- **Meeting Spaces**
  - **Private Meeting Spaces:** At least 1 space for 4-6 people with a large display.
  - **Small Group Meeting Tables:** Minimum 4 spaces for 2-4 people, each with a medium-sized display.
  - **Ad Hoc Meeting Space:** Flexible area for informal meetings, such as a bar or lounge with movable seating.
- **Hospitality**
  - Counter or bar for serving drinks (coffee in the morning, beer/wine in the afternoon).

Soft Requirements/Ideas

Suggest additional features or creative ideas to enhance the booth experience.

Contacts

Key Contacts

Provide a list of key contacts for the booth design and event coordination.

Example:

- **Project Manager:** [Name, Email, Phone]
- **Design Lead:** [Name, Email, Phone]
- **Marketing Lead:** [Name, Email, Phone]

Worksheet C — Messaging Doc Headings

Company Snapshot
- Overview
- Size
- Number of Employees
- Locations
- Growth Metrics

Company Core Messaging
- Mission Statement
- Vision Statement
- Core Values

Trade Show Highlights
- Main Show Highlight (if product launch, add specific section)
- Special Events or Presentations

Product Highlights
- New Product Launches
- Key Product Features and Benefits

Positioning
- Market Position
- Target Audience
- Unique Selling Propositions (USPs)

Competitive Differentiation
- Key Differentiators
- Comparison with Competitors

Key Partners
- Strategic Partnerships
- Technology Partners
- Collaboration Highlights

Key Customers
- Major Clients
- Customer Success Stories
- Testimonials

Industry Trends and Insights
- Market Analysis
- Future Outlook.

Thought Leadership
- Company's Stance on Industry Issues
- Whitepapers and Research Publications
- Notable Speaking Engagements

Media and Press Information
- Recent Press Releases
- Media Coverage
- Press Contact Information

FAQs
- Commonly Asked Questions
- Prepared Responses
- Points of Contact for Further Information

Worksheet D — Content Plan Template

<<insert here>>

Worksheet E — Post-show Survey Questions

Booth and Exhibit Experience

1. How would you rate the overall design and layout of our booth?
2. How effective were our product demonstrations in conveying the value of our offerings?
3. How would you rate the friendliness and knowledge of our booth staff?
4. Were there any issues or challenges you faced while interacting at our booth? If yes, please describe.
5. What aspects of our booth did you find most appealing or engaging?

Catering and Hospitality

6. How would you rate the quality of the catering provided at the booth?
7. Was the variety of food and beverages offered sufficient to meet your needs?
8. How would you rate the hospitality services provided by our team (e.g., refreshments, seating area)?
9. Do you have any suggestions for improving our catering and hospitality services?

Accommodation and Travel Logistics

10. How would you rate the arrangements made for your accommodation?
11. How was your overall experience with the travel logistics arranged for the event?
12. Were there any issues with your travel or accommodation arrangements? If yes, please describe.
13. How satisfied were you with the location and convenience of your accommodation in relation to the event venue?

Event Logistics and Coordination

14. How would you rate the overall organization and coordination of our participation in the trade show?
15. Were all necessary materials and resources available when needed?
16. How effective was the communication from the planning team before and during the event?
17. Do you have any suggestions for improving the logistical aspects of our trade show participation?

General Impression of the Broader Show

18. How would you rate the overall quality of the trade show?
19. How relevant were the attendees and exhibitors to our industry and business goals?
20. What were the most valuable aspects of the trade show for you (e.g., networking, learning, lead generation)?
21. Were there any notable challenges or drawbacks you experienced at the trade show? If yes, please describe.
22. Based on your experience, how likely are you to recommend our participation in this trade show next year?

Additional Feedback

23. Do you have any additional comments or suggestions to help us improve our participation in future trade shows?
24. What was your overall impression of our brand's presence and activities at the trade show?

Worksheet F — The 'Postmortem' Agenda

Date: [Insert Date]
Time: [Insert Time]
Location: [Insert Location or Virtual Meeting Link]
Attendees: [List of Key Team Members]

Welcome and Introduction (10 minutes)

- Opening remarks by the meeting facilitator
- Overview of the meeting agenda and objectives
- Importance of the postmortem in continuous improvement

Review of Trade Show Objectives and KPIs (15 minutes)

- Recap of the objectives set before the trade show
- Summary of the Key Performance Indicators (KPIs) established
- Brief discussion on whether the objectives were met

Analysis of Performance Metrics (20 minutes)

- Presentation of quantitative data:
- Leads generated
- Sales revenue (immediate and projected)
- Engagement metrics (social media, booth visitors)
- Customer and partner interactions
- Comparison of actual performance against KPIs
- Discussion on what the data indicates about overall performance

Team Feedback and Insights (25 minutes)

- Review of feedback from the post-show survey
- Open discussion with team members about their experiences:
- What worked well
- Challenges faced
- Anecdotal experiences and insights
- Identification of specific issues and potential solutions

Qualitative Feedback and Customer Insights (15 minutes)

- Summary of customer and partner feedback
- Discussion on key positive feedback points and areas for improvement
- Exploration of any trends or recurring themes in the feedback

Actionable Recommendations (20 minutes)

- Development of actionable recommendations based on the findings
- Creation of four lists:
- Things we will keep doing
- Things we will start doing
- Things we will stop doing
- Idea bucket for future consideration
- Assigning responsibilities for implementing the recommendations

Documentation and Next Steps (10 minutes)

- Review of the process for documenting the postmortem findings
- Outline of the next steps to be taken, including timelines and responsible parties
- Confirmation of follow-up meetings or check-ins to review progress

Conclusion and Q&A (10 minutes)

- Summary of key takeaways from the meeting
- Open floor for any final questions or comments
- Closing remarks and thanks from the meeting facilitator

Total Duration: 2 hours

Worksheet G — ROI Evaluation Template

Trade Show Overview:

- Event Name: [Name of the Trade Show]
- Location: [Venue/City]
- Date: [Start Date - End Date]
- Booth Number: [Booth Number]

Objectives and KPIs:

- Primary Objectives:
- Key Performance Indicators (KPIs):

Financial Overview:

- Total Budget: [Total Budget Allocated]
- Total Spend: [Actual Spend]
- Space Rental: [Cost]
- Booth Design and Construction: [Cost]
- Accommodation: [Cost]
- T&E: [Cost]
- Promotional Materials and Giveaways: [Cost]
- Staffing: [Cost]
- Miscellaneous Expenses: [Cost]

Performance Metrics:

- Leads Generated:
  - Total Number of Leads: [Number]
  - Qualified Leads: [Number]
  - Follow-Up Actions Scheduled: [Number]
- Sales:
  - (Projected) Sales Revenue: [Amount]
  - Sales Pipeline Value: [Amount]
- Engagement:
  - Number of Booth Visitors: [Number]
  - Social Media Mentions and Engagements: [Number]
  - Press Coverage: [Number of Articles/Posts]
- Customer and Partner Interactions:
  - Meetings with Existing Customers: [Number]
  - Meetings with New Prospects: [Number]
  - Partnerships Formed: [Number]

Qualitative Feedback:

- Customer Feedback:
  - Key positive feedback points
  - Key areas for improvement
- Team Feedback:
  - What worked well
  - Challenges faced
  - Suggestions for future improvements

ROI Calculation:

- Projected ROI: (Projected Sales Revenue / Total Spend) 100 = [ROI Percentage]%
- Pipeline ROI: (Sales Pipeline Value / Total Spend) 100 = [ROI Percentage]%

Key Learnings and Recommendations:

- Things we will keep doing:
- Things we will start doing:
- Things we will stop doing:
- Idea bucket:

Conclusion:

- Overall Assessment: [Summary of the overall performance and outcomes]
- Next Steps: [Actionable steps for post-show follow-up and future trade show planning]

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