



Exhibitors Service Network

Welcome to Exhibitors Service Network's Trade Show Planning Guide. These handywork sheets were designed with input from veteran exhibit managers to help you organize the details of your trade show-planning activities, from setting objectives to budgeting and measuring results.

## Quick Reference Data

**Show name:** \_\_\_\_\_

**Show Web site:** \_\_\_\_\_

User name: \_\_\_\_\_ Password: \_\_\_\_\_

**Show producer:** \_\_\_\_\_

Account number: \_\_\_\_\_

Contact name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

**Show location:** City: \_\_\_\_\_ State: \_\_\_\_\_

Facility & Convention Center/Hotel: \_\_\_\_\_

**Booth number(s):** \_\_\_\_\_ **Booth size:** \_\_\_\_\_

**Show dates:** \_\_\_\_\_

**Exhibit hours:** \_\_\_\_\_

**Setup dates/times:** \_\_\_\_\_

**Dismantle dates/times:** \_\_\_\_\_

**Number of meeting rooms:** \_\_\_\_\_ **Meeting room locations:** \_\_\_\_\_

**Show-appointed/general services contractor:** \_\_\_\_\_

Contact name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_ Website: \_\_\_\_\_

## Show Data

	Prior year	Anticipated
<b>Number of attendees:</b>	_____	_____
<b>Number of exhibitors:</b>	_____	_____
<b>Exhibit-hall admission:</b>	<b>Admission price:</b>	<b>Per show</b>
General public	Public \$ _____	_____
Trade only	Trade \$ _____	_____
Restricted to members	Member \$ _____	_____
	Conference pass \$ _____	_____
	Exhibits only \$ _____	_____

Audience profile/demographics:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Tip:** Competitive information is available from your account executive with show management. He or she can tell you which competitors are exhibiting and their location and booth size.

**Participation by competitors:**

**Company 1:** \_\_\_\_\_

	Prior year	Anticipated
Booth size:	_____	_____
Booth location:	_____	_____
Key products displayed:	_____	_____
	_____	_____
Key messages/promotions:	_____	_____
	_____	_____
	_____	_____
Strengths/weaknesses:	_____	_____
	_____	_____

**Company 2:** \_\_\_\_\_

	Prior year	Anticipated
Booth size:	_____	_____
Booth location:	_____	_____
Key products displayed:	_____	_____
	_____	_____
Key messages/promotions:	_____	_____
	_____	_____
	_____	_____
Strengths/weaknesses:	_____	_____
	_____	_____

## Show Plan

Why is our company exhibiting at this show? \_\_\_\_\_

Exhibit theme/focus: \_\_\_\_\_

Product lines/categories to be displayed: \_\_\_\_\_

Target audience: \_\_\_\_\_

Size of target audience: \_\_\_\_\_

How does the show fit with our company's overall marketing strategies? \_\_\_\_\_

How does the show fit with our company's sales targets/goals? \_\_\_\_\_

How does the show fit with our company's marketing objectives? \_\_\_\_\_

Internal show coordination team: \_\_\_\_\_

\_\_\_\_\_

## Show Objectives

**Tip:** Objectives must be realistic, specific, and quantifiable.

**Objective**

**Tactics for Accomplishing**

**Measurement Techniques**


## Pre-Show Data

**Booth contract submitted (date):** \_\_\_\_\_ **Booth number(s) assigned:** \_\_\_\_\_

**Exhibitor manual received (date):** \_\_\_\_\_ **Booth dimensions:** \_\_\_\_\_

**Space cost:** \_\_\_\_\_ **Cost:** \_\_\_\_\_ Space only \_\_\_\_\_ Package \_\_\_\_\_

Deposit \$ \_\_\_\_\_ due: \_\_\_\_\_ amount paid: \$ \_\_\_\_\_ date paid: \_\_\_\_\_

Remaining balance \$ \_\_\_\_\_ due: \_\_\_\_\_ amount paid: \$ \_\_\_\_\_ date paid: \_\_\_\_\_

\$ \_\_\_\_\_ due: \_\_\_\_\_ amount paid: \$ \_\_\_\_\_ date paid: \_\_\_\_\_

**Booth location:** \_\_\_\_\_

**Exhibit area obstructions/limitations (if applicable):** \_\_\_\_\_

Ceiling height/maximum overhead clearance: \_\_\_\_\_

Maximum floor loading: \_\_\_\_\_

Freight-elevator dimensions/capacity (lbs.): \_\_\_\_\_ Columns/ducts: \_\_\_\_\_

Other obstructions: \_\_\_\_\_

**Exhibit restrictions:** \_\_\_\_\_

Maximum height of back wall: \_\_\_\_\_ Maximum height of equipment: \_\_\_\_\_

Applicable fire regulations: \_\_\_\_\_

Hanging-sign restrictions: \_\_\_\_\_

**Booth equipment/services (record date ordered):**

<b>Furniture</b>	<b>DATE</b>	<b>Show services</b>	<b>DATE</b>		<b>DATE</b>
<input type="checkbox"/> Chairs	_____	<input type="checkbox"/> Accessible storage	_____	<input type="checkbox"/> I&D	_____
<input type="checkbox"/> Desks	_____	<input type="checkbox"/> Carpet	_____	<input type="checkbox"/> Internet	_____
<input type="checkbox"/> Tables	_____	<input type="checkbox"/> Catering	_____	<input type="checkbox"/> Lead retrieval	_____
<input type="checkbox"/> Waste baskets	_____	<input type="checkbox"/> Cleaning	_____	<input type="checkbox"/> Lighting	_____
<input type="checkbox"/> Sofas	_____	<input type="checkbox"/> Compressed air	_____	<input type="checkbox"/> Material handling	_____
<input type="checkbox"/> Other	_____	<input type="checkbox"/> Drains	_____	<input type="checkbox"/> Photography	_____
<b>Shipping</b>		<input type="checkbox"/> Electrical	_____	<input type="checkbox"/> Rigging	_____
<input type="checkbox"/> Booth	_____	<input type="checkbox"/> Electrician	_____	<input type="checkbox"/> Running water	_____
<input type="checkbox"/> Giveaways/literature	_____	<input type="checkbox"/> Floral	_____	<input type="checkbox"/> Security	_____
<input type="checkbox"/> Products/equipment	_____	<input type="checkbox"/> Forklift	_____	<input type="checkbox"/> Signs	_____
<input type="checkbox"/> Computers/AV	_____	<input type="checkbox"/> Gas	_____	<input type="checkbox"/> Telephone	_____
<input type="checkbox"/> Other	_____	<input type="checkbox"/> Hosts	_____	<input type="checkbox"/> Other	_____

**Co-op arrangements with other exhibitors (signage, equipment, etc.):** \_\_\_\_\_

**Meeting room reserved:** \_\_\_\_\_

**Hospitality suite reserved:** \_\_\_\_\_

Dates: \_\_\_\_\_ Location: \_\_\_\_\_

**Advance registration:**

Guest passes: (Make a separate list of names.) Date ordered: \_\_\_\_\_ Qty: \_\_\_\_\_

Shipping addresses: \_\_\_\_\_

Exhibitor badges: (Make a separate list of names.) Date ordered: \_\_\_\_\_ Qty: \_\_\_\_\_

Number of badges provided free with booth space: \_\_\_\_\_

**Hotel reservations:**

1. Hotel name: \_\_\_\_\_ Date reservation made: \_\_\_\_\_

Phone: \_\_\_\_\_ Cancellation penalty date: \_\_\_\_\_

Contact: \_\_\_\_\_ E-mail: \_\_\_\_\_

2. Hotel name: \_\_\_\_\_ Date reservation made: \_\_\_\_\_

Phone: \_\_\_\_\_ Cancellation penalty date: \_\_\_\_\_

Contact: \_\_\_\_\_ E-mail: \_\_\_\_\_

## Exhibit Planning/Preparation

**Use existing exhibit:** \_\_\_\_\_ Necessary alterations (such as graphics): \_\_\_\_\_  
Stored at: \_\_\_\_\_  
Refurbishing necessary:  Yes  No \_\_\_\_\_

**Construct new booth:**  
Exhibit builder selected: \_\_\_\_\_  
Account manager: \_\_\_\_\_ Phone: \_\_\_\_\_  
Final design approved date: \_\_\_\_\_ Pre-show setup/inspection date: \_\_\_\_\_ E-mail: \_\_\_\_\_

**Rent booth properties:**  
Supplier: \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone: \_\_\_\_\_  
Final design approved date: \_\_\_\_\_ Pre-show setup/inspection date: \_\_\_\_\_ E-mail: \_\_\_\_\_

**Booth theme:** \_\_\_\_\_

**Product displays:**  
Products to be highlighted: \_\_\_\_\_  
Other products to be displayed: \_\_\_\_\_

**Live presentations/demos:**  
Supplier: \_\_\_\_\_  Internal  External Phone: \_\_\_\_\_  
Contact: \_\_\_\_\_ E-mail: \_\_\_\_\_  
Script(s) approved (date): \_\_\_\_\_

**Audiovisual presentations:**  
Type: \_\_\_\_\_  
Supplier: \_\_\_\_\_  Internal  External Phone: \_\_\_\_\_  
Contact: \_\_\_\_\_ E-mail: \_\_\_\_\_

**Graphics:**  
Supplier: \_\_\_\_\_ E-mail: \_\_\_\_\_  
Producer:  Internal  Exhibit house  Graphics producer  Ad agency  
Contact: \_\_\_\_\_ Phone: \_\_\_\_\_  
Final copy/art approved: \_\_\_\_\_ Date due: \_\_\_\_\_

## Staff

Total exhibit hours: \_\_\_\_\_ Number of staffers needed for booth: \_\_\_\_\_  
Special booth attire: \_\_\_\_\_  
Number of staffers needed for hospitality event: \_\_\_\_\_  
Special hospitality-event attire: \_\_\_\_\_  
Temporary personnel needed:  Yes  No  
Pre-show training (date, location): \_\_\_\_\_  
Walk through (date, time): \_\_\_\_\_  
Trainer: \_\_\_\_\_ Booth-staff schedule created: \_\_\_\_\_

**Tip:** As a rule of thumb, you need two booth staffers per 100 square feet of open booth space.

## Promotion/Publicity

### Pre- and at-show promotions:

List rental from show management (date available): \_\_\_\_\_

Internal memos/sales letters: \_\_\_\_\_

Hospitality: \_\_\_\_\_

Direct mail: \_\_\_\_\_

E-mail campaign: \_\_\_\_\_

Tickets for entertainment: \_\_\_\_\_

PR information to show management: \_\_\_\_\_

Web page: \_\_\_\_\_

Advertising schedules for:

Key industry publications: \_\_\_\_\_

Show dailies: \_\_\_\_\_

Show directory: \_\_\_\_\_

Press releases to key industry publications: \_\_\_\_\_

1. \_\_\_\_\_ Contact: \_\_\_\_\_

2. \_\_\_\_\_ Contact: \_\_\_\_\_

3. \_\_\_\_\_ Contact: \_\_\_\_\_

4. \_\_\_\_\_ Contact: \_\_\_\_\_

5. \_\_\_\_\_ Contact: \_\_\_\_\_

Banners/signs:

Airport: \_\_\_\_\_

Show hall: \_\_\_\_\_

Taxicabs: \_\_\_\_\_

Billboards: \_\_\_\_\_

Shuttle buses: \_\_\_\_\_

Other: \_\_\_\_\_

### Booth promotions:

Literature: \_\_\_\_\_

General handout    Selective handout    Booth-reference only

Giveaways: \_\_\_\_\_

Booth photographer: \_\_\_\_\_ Date scheduled: \_\_\_\_\_

Other: \_\_\_\_\_

Post-show promotions:

Literature request/inquiry fulfillment: \_\_\_\_\_

Follow-up mailings/phone calls/e-mails: \_\_\_\_\_

Internal promotion (company newsletter, memo, etc.): \_\_\_\_\_

Other: \_\_\_\_\_

## Pre-show Shipping/Booth Setup

Advance warehouse address: \_\_\_\_\_  
Dates freight accepted: \_\_\_\_\_ to \_\_\_\_\_  
Show-site address: \_\_\_\_\_  
Dates freight accepted: \_\_\_\_\_ to \_\_\_\_\_  
Target date/time: \_\_\_\_\_ Times freight accepted: \_\_\_\_\_  
Off-target penalty: \_\_\_\_\_  
Carrier name: \_\_\_\_\_  
Carrier address: \_\_\_\_\_  
Carrier phone number: \_\_\_\_\_ E-mail: \_\_\_\_\_  
24-hour contact: \_\_\_\_\_  
Official material handling company: \_\_\_\_\_

Scheduled setup dates: \_\_\_\_\_ Times: \_\_\_\_\_ to \_\_\_\_\_ Overtime: Yes No

### Inbound shipping data:

#### Exhibit

#### Products/Equipment

#### Literature/Giveaways

Shipping date:	_____	_____	_____
Shipped from:	_____	_____	_____
Carrier:	_____	_____	_____
Carrier type:	_____	_____	_____
Tracking number:	_____	_____	_____
Number of pieces:	_____	_____	_____
Bill of lading/airbill number:	_____	_____	_____
Delivery date/time:	_____	_____	_____
Additional insurance:	_____	_____	_____

## Booth Setup

### Exhibit setup handled by:

- Company personnel: \_\_\_\_\_
- Official/show-appointed I&D contractor: \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone number: \_\_\_\_\_  
E-mail: \_\_\_\_\_
- Exhibitor-appointed I&D contractor (EAC): \_\_\_\_\_  
Contact: \_\_\_\_\_ Phone number: \_\_\_\_\_  
E-mail: \_\_\_\_\_

Exhibit insurance confirmed (date): \_\_\_\_\_

Proof of insurance sent to show management (date): \_\_\_\_\_

EAC appointment form due date: \_\_\_\_\_

## Booth Dismantle

Booth dismantling handled by: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Scheduled dismantle dates: \_\_\_\_\_ Times: \_\_\_\_\_ to \_\_\_\_\_ Overtime: Yes No

## Post-show Shipping

Supervised by: \_\_\_\_\_

Date/time freight will be forced: \_\_\_\_\_

Complete return shipping address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Carrier name: \_\_\_\_\_

Carrier address: \_\_\_\_\_

Carrier phone number: \_\_\_\_\_ E-mail: \_\_\_\_\_

Carrier contact: \_\_\_\_\_

Tracking number: \_\_\_\_\_

### Return shipping data:

	Booth	Products/Equipment	Literature/Giveaways
Shipping date:	_____	_____	_____
Shipped to:	_____	_____	_____
Carrier type:	_____	_____	_____
Number of pieces:	_____	_____	_____
Waybill/bill of lading number:	_____	_____	_____
Delivery date:	_____	_____	_____
Additional insurance:	_____	_____	_____



## Exhibit Results

### Results:

Number of booth visitors: \_\_\_\_\_

Number of qualified leads: \_\_\_\_\_

Orders/sales: \_\_\_\_\_

Cost-per-visitor reached (show cost/number of booth visitors): \_\_\_\_\_

Total trade show attendance: \_\_\_\_\_

Media coverage: \_\_\_\_\_

**Evaluation of staff performance:** \_\_\_\_\_

### Staff feedback:

Quality of show/booth attendance as related to objectives: \_\_\_\_\_

Quantity of attendee traffic: \_\_\_\_\_

Reaction to exhibit/graphics: \_\_\_\_\_

Reaction to booth location: \_\_\_\_\_

Recommendations: \_\_\_\_\_

### Competitive analysis:

Total number of exhibitors: \_\_\_\_\_

Number of direct competitors: \_\_\_\_\_

**Tip:** Create a separate sheet with results of competitive analysis. Include the following information: company name, booth size, booth location, key products displayed, key promotions/messages, and strengths/weaknesses.

### Analysis of return on objectives:

*(Refer to Show Objectives on p. 5.)*

Objective 1: \_\_\_\_\_

Methods of measurement: \_\_\_\_\_

Results: \_\_\_\_\_

Objective 2: \_\_\_\_\_

Methods of measurement: \_\_\_\_\_

Results: \_\_\_\_\_

Objective 3: \_\_\_\_\_

Methods of measurement: \_\_\_\_\_

Results: \_\_\_\_\_

# Budgeting

## Budget item

Pre-show  
estimate

Actual cost

Invoice paid  
date

Variance

Notes

### SPACE RENTAL

Booth space

Meeting room space

Deposits

Other

SUBTOTAL — \$  — \$  — \$

### EXHIBIT STRUCTURE

Design

Building/refurbishing

Tool box supplies

Graphics design/production

Drayage outbound

Drayage inbound

Tax on materials

Storage (prorated)

Insurance (prorated)

Other

SUBTOTAL — \$  — \$  — \$

### SHIPPING

Ground transport to show

Ground transport from show

Air/sea freight to show

Air/sea freight from show

Other

SUBTOTAL — \$  — \$  — \$

### ON-SITE SERVICES

Audiovisual

Carpet rental

Cleaning

Computer-equipment rental

Custom signage

Drayage

Electrical

Exhibitor badges

Floral rental

Furniture rental

Setup/dismantle labor

Lead-gathering system

Photography

Plumbing/compressed air

Riggers

Security

Budget item	Pre-show estimate	Actual cost	Invoice paid date	Variance	Notes	
Telephone	_____	_____	_____	_____	<div style="border: 1px solid black; height: 800px; width: 100%;"></div>	
Other	_____	_____	_____	_____		
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>		
<b>PROMOTION</b>						
Advertising	_____	_____	_____	_____		
Customer hospitality	_____	_____	_____	_____		
Direct mail	_____	_____	_____	_____		
Kiosk space	_____	_____	_____	_____		
Incentives/premiums	_____	_____	_____	_____		
Literature	_____	_____	_____	_____		
Mailing-list rental	_____	_____	_____	_____		
Presentation (production costs)	_____	_____	_____	_____		
Presenter/talent	_____	_____	_____	_____		
Press kits/materials	_____	_____	_____	_____		
Press conference/reception	_____	_____	_____	_____		
Sponsorships	_____	_____	_____	_____		
Other	_____	_____	_____	_____		
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>		
<b>PERSONNEL EXPENSES</b>						
Salaries	_____	_____	_____	_____		
Staff training	_____	_____	_____	_____		
Pre-show dinner	_____	_____	_____	_____		
Special attire for booth staffers	_____	_____	_____	_____		
Transportation	_____	_____	_____	_____		
Hotel	_____	_____	_____	_____		
Food/entertainment	_____	_____	_____	_____		
Temporary personnel	_____	_____	_____	_____		
Other	_____	_____	_____	_____		
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>		
<b>LEAD GATHERING/FULFILLMENT</b>						
Printing lead forms	_____	_____	_____	_____		
Printing cover letter	_____	_____	_____	_____		
On-site equipment rental	_____	_____	_____	_____		
Postage	_____	_____	_____	_____		
Labor	_____	_____	_____	_____		
Other	_____	_____	_____	_____		
SUBTOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>		
<b>MISCELLANEOUS (add 10 percent)</b>						
GRAND TOTAL	\$ <input type="text"/>	\$ <input type="text"/>		\$ <input type="text"/>		

## Exhibit Timetable

### PRE-SHOW

	Scheduled date	Date completed
Select booth space	_____	_____
Determine exhibit objectives	_____	_____
Set show budget	_____	_____
Set exhibit-design goals	_____	_____
Set exhibit budget	_____	_____
Evaluate promotion opportunities	_____	_____
Select exhibit designer/builder	_____	_____
Select display products	_____	_____
Plan promotion strategy	_____	_____
Select transportation/I&D companies	_____	_____
Finalize exhibit design	_____	_____
Plan direct-mail promotion	_____	_____
Review exhibitor service kit	_____	_____
Select booth staffers	_____	_____
Reserve hotel rooms	_____	_____
Finalize lead-fulfillment plan	_____	_____
Finalize lead follow-up mailings	_____	_____
Order show services	_____	_____
Implement promotion strategy	_____	_____
Order badges	_____	_____
Notify show management if using exhibitor-appointed contractor	_____	_____
Preview new exhibit	_____	_____
Plan exhibit setup/dismantle	_____	_____
Finalize availability of display products/literature	_____	_____
Send direct-mail promotion	_____	_____
Plan pre-show staff-training session	_____	_____
Preview portable display	_____	_____
Finalize graphics copy/art	_____	_____
Finalize shipping information	_____	_____
_____	_____	_____
_____	_____	_____

### POST-SHOW

Fulfill show inquires/requests	_____	_____
Write thank-you notes to booth staffers, vendors	_____	_____
Audit invoices/finalize show budget	_____	_____
Measure/analyze results	_____	_____
_____	_____	_____
_____	_____	_____

**Tip:** If you plan to use exhibitor-appointed contractors (EACs), be sure to check the exhibitor service manual for the deadline for notifying show management. Most shows require at least 30 days advanced notice, but some require as much as 90 days. Keep in mind that if you miss the deadline, the job automatically goes to the show-appointed contractor.