

# Trade Show Planning

Planning a successful trade show requires organization, creativity and resilience. While most business-to-business (B2B) organizations measure trade show success by the number of leads, opportunities and return on investment (ROI) that come out of an event, the level of effort that goes into it ultimately determines its success rate. Trade shows are a huge investment for a company. So, you need the metrics to prove why it is an effective tactic in your marketing wheelhouse.

Here are seven tips to ensure your trade show is a success:

## 1. Plan far in advance.

One of the most important things you can do before a trade show is to plan well ahead of the scheduled time. It is never too early to start. Inform your team of travel dates so they can book flights before the cost goes up. Secure room blocks before the hotel sells out.

In addition to event logistics, pre-show campaign planning is key. Are you launching a new product around the same time as the event? Do you have big news to share during the week of the show? Do you need to print product sheets and order giveaways? Start preparing emails for the trade show at least four to six weeks before the event. You will want to inform your audience of your presence at the trade show and use email as a platform to announce any important news, teasers and opportunities to meet the team.

## 2. Prepare the sales and executive teams.

An effective tool in trade show preparation is communication. Various teams typically attend trade shows, including marketing, sales and the executive team. Make sure everyone is on the same page and has all of the relevant information leading up to the event.

Include meetings and booth hours on everyone's calendars (and in the correct time zone!). Create a logistics document to ensure nothing is left out and expectations are communicated. The document should include phone numbers for everyone on your team in case you need to contact them while on site. Print out a few copies and make it easily accessible on a mobile device for travel.

Invite everyone who will be attending the trade show to participate in a "prep call" the week before the trade show is scheduled. Prepare a slide deck and include housekeeping items such as the hotel, venue, booth hours, dress code, etc., as well as an overview of scheduled booth meetings and networking events.

### 3. Schedule pre-show booth meetings.

The most successful trade shows I have executed and attended were the ones where sales and marketing worked together to pre-schedule booth meetings with prospects, customers and partners. Set a realistic goal for your team (e.g., use last year's pre-scheduled meeting number as your benchmark and increase it by 25%).

In addition, create a shared calendar to give the sales team visibility into the booth schedule so they can see which executives will be available during each day of the trade show.

### 4. Be active on social media.

Post photos from the event to your social channels before, during and after the event. Invite attendees to stop by your booth to enter a contest, pick up a giveaway or watch a demo. Make sure to include your booth number and event hashtag so attendees can easily find you.

### 5. Provide giveaways.

Remember, fun giveaways equal more traffic. Invest extra money in a giveaway or activity to attract attendees. Get creative in your offerings. I have seen everything from slot machines with cash prizes to frozen margaritas. Everyone loves food. Rent an espresso machine or ice cream truck and invite

attendees to come and hang out in your booth. This will help break the ice, opening up conversations and, hopefully, qualified opportunities.

#### 6. Scan, scan, scan!

During the opening day of the trade show, meet with your onsite team 30 minutes before the doors open. Make sure they know the layout of the booth, giveaways and activities to promote. Demonstrate how to use the badge scanner and let them try it. You will be surprised at how many badge scanners vary from show to show. It is also important to take advantage of the scanners that allow you to type in notes after your conversation. This will help your team with post-show follow-up.

Scan the badge of everyone that stops by your booth. It would be a shame to miss passing a quality lead on to your sales team because they were not scanned.

#### 7. Debrief and follow up.

Schedule a debrief call with your team after the trade show. Take notes on what worked well and opportunities for improvement. Did you have a good booth location and enough traffic? Did your messaging resonate with attendees? These notes will be helpful when determining what to change as you begin planning for the next trade show.

Post-show follow-up is crucial. Make sure all leads are uploaded into your customer relationship management (CRM) system and shared with your sales team within 48 hours of the conclusion of the event. This data provides insight into booth traffic, number of qualified leads and potential opportunities for your business. This action can be used to build historical data related to trade shows and provide justification for attendance at future events.

Now you know the seven steps to a successful trade show. Good luck!

[Forbes](#)

# 1. Set Goals

It probably goes without saying, but we'll say it anyway: You need to set goals. Before you even begin to plan your event, you must outline your end objectives.

**Ask yourself and your event team these questions:**

- Why are you planning on attending? To generate brand awareness? To generate new leads? To educate prospects?
- Will our buyers be there?
- What differentiates us from the competition?
- Are we offering something that attendees will find worthwhile?

In addition to these questions, set specific, measurable goals. Work backwards, in terms of setting a number. How many prospects or meetings lead to a profit of \$10,000?

**Once you have those numbers, set goals like:**

- Gain 50 leads by the end of the rally
- Schedule 5 meetings..
- Hand out 100 demo products or white papers,
- And so on...

# 2. Make a Game Plan

You can never plan enough for a rally.. More planning ahead of time equals less stress in the long run. As a general rule of thumb, make a point to plan at least 6 months ahead of your trade show date.

To begin creating your game plan, decide on your main message or theme for the event. What are you going to sell? What main service are you going to pitch? What do you want people to know about your brand?

Once you have answers to these questions, make sure you delegate tasks so that everyone on your team understands the goals of the trade show. Often this comes in the form of an Event Strategy Brief or Event Marketing Strategy. The gist of these strategy plans are to outline what needs to be done when and by whom.

With a strategy in place, you'll then want to focus a good chunk of your time on your booth design. Standing out from the crowd is key.

When it comes to booth design, your goal is to grab people's attention. The best way to do this is to hire a branding designer or marketer. Sorry, no you can't just pick up a corrugated display board from Staples. You'll need to create something memorable; something that will attract attendees and draw them in from across the room. Working with a professional designer can not only boost your perceived value but also help you think outside of the box when it comes to promoting your business.

Some attention-grabbing examples for trade show booths include art shows like showcases of products, lounge-like areas for attendees to sit down and chat, interactive displays and much more.

Along with making your trade show booth stand out, you'll need to emphasize your message. Like your other company branded material make sure your message is clear, concise and recognizable. Also think of the main function of your booth. Will you be doing a presentation? Are you mainly displaying products? Are you more service oriented, therefore will you have more information to display? Etc.

Another thing to keep in mind is your location of your booth. How close are you to high foot traffic or a stage? Do you have high visibility? Bathrooms? Entrances? Lounge areas? Main aisles? Etc. While you may not have too much control over where your booth is located, strive to find a location on or

near the center aisle (if there is one,) near the entrance of the venue. While there are no hard rules to finding the best booth location, **attendees tend to turn to their right when entering a venue** and tend to show more interest in booths when he or she first enters vs. booths that he or she experiences farther into the venue.

Last, but not least, think about your staffing for the event. Who are your best salespeople? Who will represent your company? In general, think in terms of who would be a good host. While yes, one of your main priorities during a trade show is to gather leads, it's important to approach attendees as guests rather than numbers. Lastly, don't forget your support staff, those who will help you set up and tear down, handle technology or run errands if need be.

## 3. Promote, Promote, Promote

Think of the rally as your own event. Don't rely on rally production to promote itself. **Your overall trade show experience will be more successful if you promote before, during and after the event.**

In essence, simply let people know you'll be there. Utilize all your marketing channels.

### Social Media

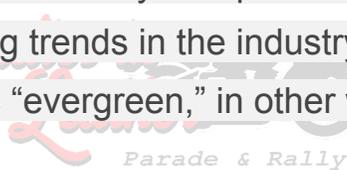
Whether you choose to spend money on social media to promote your trade show booth is up to you, but no matter what, don't neglect it. **Make an event on Facebook, post about the who, what, why and where, share exciting previews of the trade show and encourage your friends and colleges to share the news.**

## Email

Send out an email campaign a couple weeks before your event, then the week of your event to remind people where you'll be and what exactly you'll be presenting at the trade show. Offer special deals or enticing swag to further encourage attendance. This is also a great way to track who actually comes to your event from your current leads.

## Blog

Why not write a quick article based on your upcoming event? Why not write an article about upcoming trends in the industry? Whatever you write about, make sure the article is "evergreen," in other words an article that's relevant for some time.



## Flyers (and other old school methods)

While it is the age of technology, you might as well check all your p's and q's and tape up some flyers as well. These can be the actual event itself, but make sure to include a note detailing where you'll be at the trade show. Place these flyers where you know your specific audience will see them.

Mention the event to everyone you know and meet with. Again, if you know they're interested in your products or services, mention you'll have an exclusive deal at the event.

# 4. Be Present

**Just because you made it to the rally, doesn't mean you can just sit back and wait for others to approach you. This is the time for action and activity.**

## **Network**

Start conversations. As mentioned before, don't just sell your products/services or immediately ask for contact information. Ask why they're there, if they have a booth at the event as well or what problems they are looking to solve. Simply by striking up a conversation you can begin to learn their priorities, strengths and weaknesses, and what you could possibly provide for them. Set up meetings at later dates if they want more specific information. At the very least, you can exchange business cards (better have them on hand!)

## **Present Yourself Well**

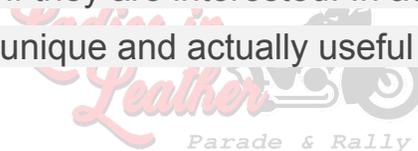
Make sure to wear the appropriate attire and always appear approachable. This means smiling, standing up vs hiding behind a table and making yourself unavailable. If you are preoccupied with one interested attendee but see another waiting, be sure to acknowledge them. Basic customer service rules apply here.

## **Give Demonstrations/Presentations**

Give demonstrations of your product regularly throughout the rally. If you don't have a physical product, perhaps set up a slideshow showing attendees what you do. Offer case examples and pictures and videos of past projects. If you're giving a presentation (whether at your own booth or at a stage within the conference) be sure to let attendees know throughout the day, reminding them to come back.

### **Offer Exclusive Deals and/or Swag**

Give attendees a special deal when they choose to buy a product or service during the event. As mentioned before, offer to set up meetings at later dates, free of charge if they are interested. In addition to offering exclusive deals, hand out unique and actually useful giveaway items.



### **Talk to Other Exhibitors**

Do some exploring of the event yourself. Get to know who will be there and make an effort to talk to those you wish to get to know or potentially do business with. If both parties are alright with it, be sure to exchange information and leads you've gathered. You never know what you may be able to learn from your fellow trade show professionals.

## **5. Measure Your Results**

Phew! You made it! You've promoted your brand and products/services superbly and now have a nice new list of leads. But, before you start sending out a mass email or immediately calling those you met, take an appropriate amount of time to make a plan.

## **BEFORE THE EVENT**

Yes, we know we're kind of taking a back step here, but hear us out. It's important to follow up on leads soon, so you need to plan ample time to reach out to those leads you met during the event **BEFORE** the event itself. For example, if the event runs Thursday through Friday, make sure the following week you have scheduled out a few hours exclusively for meetings. If you wait any longer than two weeks after an event, the momentum you created during the trade show can lose its effect.

Speaking of momentum, make sure people have a reason to want to get back in touch with you. That's where your special discount, promise of an exclusive product or a free meeting comes into play. Be sure to put a due date on your specials too to encourage people to check in sooner, rather than later.

Once you have plans like these in place, organize a system to categorize leads. Tag them according to industry, job title, interest, etc. in your CRM (if you have one) or simply on paper. You could also categorize leads according to importance, for example those that explicitly had a conversation with you, those that stopped by just for a short look, and those that simply left their name on a list. Ultimately, organize your leads in whatever way makes sense to you.

## **AFTER THE EVENT**

Once you have a nice list of contacts and have them organized, consider starting an email campaign. This is a great way to keep you in the mind of all

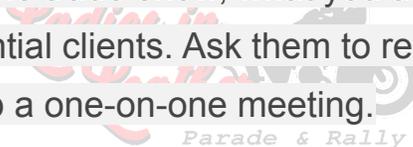
your contacts and to remind them you valued meeting them. An example of an after trade show email campaign might include:

### **A thank you email**

Quickly thank attendees for visiting your booth. Clearly state that you wish to hear from them if they have any questions or comments about your services or products.

### **Review email**

Restate why you were at the trade show, what you are offering and how exactly you can help potential clients. Ask them to reach out to you if they are interested in setting up a one-on-one meeting.



Along with this email campaign, make sure you are following up with those that explicitly asked for a meeting with you. Those that you listed as “hot” leads, or those that seemed interested in your service but didn’t ask for a meeting, make sure to send them a more personalized message.

At some point shortly after the event, be sure to review what went well, what didn’t and what you should try next time, whether for the next rally or for your business in general. Sit down with the team that worked with you at the event and review, making sure to get everyone’s perspective. What you may have thought as working well may not have looked as great to another on the team and vice versa.

Last, but not least, plan for the next event! Try different trade shows, or other industry events. Experiment with booth designs, demonstrations, networking

tactics and more. Ask other professionals where they find success in events and where you could improve.

