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ULTIMATE TRADE SHOW PLANNING CHECKLIST

INTRODUCTION

Exhibiting at trade shows is an invaluable way to market your brand and build relationships, as it allows you to showcase products and services to highly-targeted individuals, learn about current trends in your industry, see what your competitors are doing and, of course, foster relationships with customers and prospects.



However, trade shows can be an expensive way to market. From booth space to drayage, rigging and shipping, trade shows can get expensive if you do not plan ahead. Taking the time to strategically plan and prepare for a show improves your chance at achieving your sales and marketing goals.

This checklist will help you prepare for a successful exhibiting experience at a trade show by outlining common “to-do” items in the months leading up to and after the show. Use this checklist as a general template for your event marketing program, but be sure to contact show management for each of your events for actual deadlines and important dates. Every trade show is different, but using a common checklist will help you standardize the way you plan, execute and measure your trade show program.

4 MONTHS OUT (OR PRIOR)

120 days before the show

While the show may be in the seemingly distant future, there are several important planning prerequisites to set your program up for success.

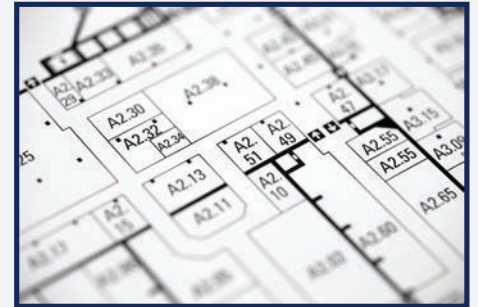
Contract your space at “early bird” rates

Early bird rates for exhibitors typically expire four to six months before the show. These rates are about 5-10% lower than standard rates.

Sometimes you also should consider signing up for “association memberships” in order to benefit from deep discounts provided to members-only on exhibit space.

Some shows assign seniority to incumbent exhibitors and encourage contracting a year in advance at a discounted rate. Make sure to book early, because space can fill up extremely fast.

Before contracting space in any show, be sure to evaluate the cost of the show with the potential return. Check out Nimlok’s [Trade Show ROI Playbook](#) for the winning formula in choosing the right events.



Outline your overall budget for participation

Project your costs in these categories of expenses:

- Booth space
- Drayage/material handling
- Electrical (if required)
- Lead machine
- Shipping to and from the show
- Carpet/flooring (if required)
- Rental furniture or A/V equipment
- Installation and dismantle (if required)
- Rigging for hanging structure(s) (if required)
- Booth costs (rent or purchase)
- Airfare for booth staff
- Lodging for booth staff
- Marketing campaign and sales expenses for dinners, pre- and post-show awareness campaigns

For greater guidance on budgeting for a trade show, download Nimlok’s [Trade Show Budget Worksheet](#), a free budget template that accounts for trade show expenses big and small.



4 MONTHS OUT (OR PRIOR)

120 days before the show (continued)

□ Connect with an exhibit solutions partner

To ensure that you have a rockstar exhibit in time for the event, be sure to connect with an exhibit solutions partner to discuss your exhibit and display needs and requirements. If you do not have an exhibit partner, meet with and interview two to three to determine which one best understands your goals and visions and who is also most capable of delivering the ideal exhibit solution for your needs.

□ Develop your marketing plan

Begin planning your marketing and promotional program for before, during and after your event. This plan will be your road map for driving qualified visitors to your booth and converting those visitors into new clients.

Not sure how to create a trade show marketing plan? Download Nimlok's [Smart Marketers' Guide for Trade Shows](#) e-book for guidance on effectively marketing your event.



3 MONTHS PRIOR

90 days before the show

This important period of time lays the groundwork for the months leading up to an event.

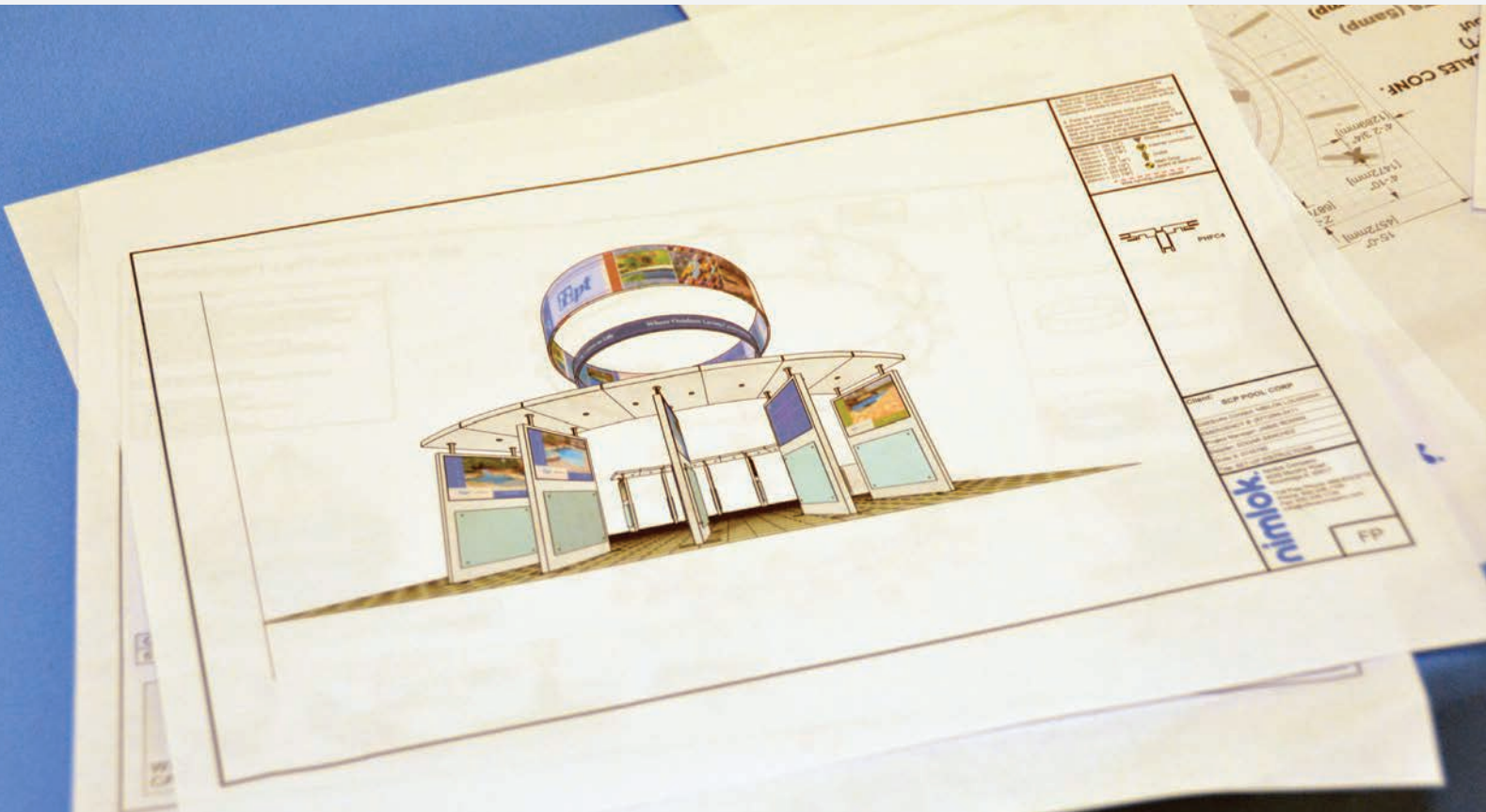
Carpet and flooring

If flooring is not included with your booth, plan on ordering flooring from show management or a flooring vendor 90 days prior to the event to take advantage of early bird rates. If ordering from a vendor and planning to ship to the advanced warehouse, you may need to order flooring sooner, or risk incurring a late fee if the advanced warehouse days have expired.

Finalize your exhibit purchase, booth design and graphics

Depending on the size and complexity of your exhibit, it can sometimes take more than 60 days to design, build and deliver a trade show display. If you need a new exhibit or need changes to an existing exhibit, be sure to begin the exhibit design process with your exhibit partner well in advance of your show date.

For more details on the process of creating a trade show exhibit, download Nimlok's [Exhibit Design to Show Floor](#) e-book.



3 MONTHS PRIOR

90 days before the show (continued)



Furnishings and exhibit accessories

From couches to garbage cans to floral arrangements, booth furnishings must typically be reserved at least two weeks before the show. Early bird discounts often provide savings to orders well in advance.

Begin pre-show marketing

While it may feel early to begin pre-show marketing, tactics, such as inviting prospective clients to the show or renting the show registration list to scout qualified visitors, are highly effective at attracting qualified persons to your booth. It will also ensure that booth staff can focus on qualified traffic who are already familiar with your brand.

Use emails, social media, website content, advertising in related publications and more to begin communicating your participation in the show. An integrated and multi-touch point marketing campaign is the best strategy for reaching your audience.

Special show events and programs

Determine if the show offers listings and ads in the show directory, special event sponsorships, product showcases, aisle banners, branding marketing sponsorships or awards. Many special programs have deadlines 60-90 days before an event, so evaluating these programs early will ensure that you maximize your exposure and participation benefits at the show.

2 MONTHS PRIOR

60 days before the show

With only two months before your event, this period of time is most critical for arranging your booth setup, show services and more. Planning ahead and using this checklist will reduce the chance of something being overlooked leading up to the show.

BOOTH LOGISTICS

Shipping

Shipping to the advanced warehouse is the most cost effective way to transport your exhibit. Advanced warehouse is an off-site warehouse where exhibitor freight is stored until show set-up begins. Shipping to the advanced warehouse ensures that your materials are secure and guarantees that the materials will be moved to your booth space before installation teams arrive. You also reduce costlier risks, such as marshalling yard fees and overtime installation charges if the booth materials are late. The window of time in which materials may arrive at the advanced warehouse is typically 45-60 days before a show.



Exhibit installation & dismantle

For larger booths that require professional installation and dismantling services, early bird deadlines typically expire 45-60 days before the show. Ask your exhibit solutions partner to provide you with setup instructions and line drawings of your exhibit so the installation and dismantle teams can effectively estimate the project and avoid unforeseen (and un-budgeted) costs at the show. Often, the exhibit partner will estimate this as a service offering, giving you one less item to coordinate.

2 MONTHS PRIOR

60 days before the show (continued)

□ Electrical services

If your booth requires any sort of electrical power, you must order electrical drops. If complex, electrical services may require an electrical drawing of your booth, which shows where the main electrical drop should be placed, the required wattage and the locations of needed outlets. Note that, for safety and insurance reasons, many shows will not let you use your own extension cords. Instead, these must be ordered through electrical services.

□ Rigging services

Some booths require that hanging signs or other exhibit elements are rigged to the event hall ceiling or ceiling beams. This includes hanging signs and sometimes tall or unsupported exhibit structures. Ask your exhibit partner for line drawings of any elements of your booth that require rigging, as this will need to be shared with the rigging contractor to receive an accurate estimate.



□ Requests for variance

Each show has specific rules or restrictions for exhibitors, such as booth height restrictions or maximum hanging sign height. If your exhibit breaks one of these rules, you can submit a request for variance to show management. These requests are typically due at least 60 days prior to the show start date.



2 MONTHS PRIOR

60 days before the show (continued)

MARKETING

Lead retrieval machines

These essential machines vary from show to show, but reservations must typically be made 45-60 days before the show to take advantage of lower “early bird” rates.

Giveaways

If in-booth giveaways are part of your marketing plan, be sure to order your giveaways well in advance to ship with the exhibit material, if possible.

Pre-show marketing

Continue following your pre-show marketing plan to build buzz and excitement around your presence in the show.

Advertising in show book/directory

Many shows produce special booklets for the event, featuring the event schedule, highlighting keynote or noteworthy speakers and listing exhibitors. Exhibitors oftentimes can advertise in this book. Material close is typically 60 days before the show, so – if this is part of your marketing plan – be sure to place your ad space order and submit materials before the deadline.



STAFF

Booth attire

If you plan for your staff to have matching attire, place this order at least 60 days in advance. This will allow time to distribute attire to staff and handle any re-orders for different sizes.

Hotel and flight reservations

If you have not done so already, be sure to book hotel and flight reservations for your booth staff. It is ideal to book at least 60 days in advance in order to secure the lowest rates.

Staff transportation, events and entertainment

Make reservations ahead of time for any staff events and transportation. Even securing a transportation service from the airport to the hotel will save on costs and make life easier for your booth staff.



1 MONTH PRIOR

30 days before the show

The month leading up to an event is always busy, but staying organized and using your predefined goals, budget and marketing plan will help focus your planning efforts.

BOOTH ACCENTS

Wi-Fi and internet

These services are typically purchased through the show site. There may be early bird deadlines, so be sure to check with show management.

A/V equipment

If you need to rent A/V equipment for the show, the deadline to do so is typically two weeks before the event to avoid premium charges. Purchasing is, at times, less costly, but remember – if you buy – test the equipment and ensure it ships with the booth to the advanced warehouse.

MARKETING

In-booth materials

Ship your in-booth materials – such as brochures, catalogs and giveaways – to the show site or to your booth staff's hotel. These items, if included with your exhibit materials, may be damaged or lost, so shipping them separately will allow for more peace of mind.

Pre-show marketing

Don't stop now! Keep following your pre-show marketing plan in the days leading up to the show.



1 MONTH PRIOR

30 days before the show (continued)

SERVICES

Drayage (material handling)

Every exhibitor's favorite expense - drayage - is the cost of moving your booth materials from the advanced warehouse or ship-to-show site to your actual booth space. Fees are based on weight of the packaging of your exhibit materials. Ask your exhibit solutions partner for the weight of your exhibit's shipping containers, as this will be needed when ordering drayage. Ordering ahead of time can sometimes save on cost.

Storage

Many exhibitors need more secure storage space than what their exhibit allows. Shows often offer storage services that are secure, but do come at an additional cost.

Security

For exhibitors with valuable, unmovable exhibit elements (such as large machinery), it may be wise to order security services so as to avoid any theft or damage to your exhibit or products.

Booth cleaning

Booth cleaning services help refresh your exhibit after a long day of visitors. If you do not plan on ordering booth cleaning services, be sure to provide your booth staff with basic cleaning products and a vacuum/Swiffer in the event of spills or dirt.



1 WEEK AFTER

5-7 days after the show

After the lights in the exhibit hall dim, your work is far from done. The days following a show are critical for following up with leads, evaluating your program and planning for changes at upcoming shows.

Follow-up with collected leads

Ensure your sales staff follows up with collected leads in the week following the show. It is important to strike while the iron is hot!

Survey your staff

Ask your booth staff what went well and what could be improved for future events. Be sure to do this when the event is fresh in their memories and incorporate key takeaways and reinforcing messages into post-show marketing.

Begin post-show marketing

Follow your plan to incorporate new leads into a targeted post-show marketing program to ensure they continue having a positive experience with your brand.

Measure the results

Determine the number of sales, leads and brand exposure value gained from the event and compare to overall cost. For detailed steps on calculating return on investment, download Nimlok's [Trade Show ROI Playbook](#).

Take inventory of your returned exhibit

This may be something that you choose to delegate to your exhibit partner, but it is important to inspect your returned booth for missing or damaged components.



Planning for a trade show does not have to be overwhelming. This checklist is designed to help any exhibitor – big or small – effectively plan successful events.

Additionally, expert Nimlok exhibit and display solution providers have been helping exhibitors plan, execute and measure their trade show marketing programs since 1970. From designing and producing an exhibit around your goals, to coordinating event services, Nimlok experts make exhibiting easy. Learn more and connect with your local partner at www.nimlok.com.



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