

# Exhibitor Success

## Guide



# Overview

**Section One** focuses on the Strategy of Success. We'll begin with the critical starting point of defining what success looks like and then focus on the three primary elements of a success-focused booth plan.

**Section Two** outlines the journey of a complete experience - one in which you create multiple touchpoints with the goal of moving qualified prospects along your sales continuum.

**Section Three** is a planning checklist to help ensure you have an airtight plan with all your bases covered.

**Section Four** will help you prepare your booth staff for a successful show.

**Section Five** contains a series of Tips & Tricks grouped by topical subjects.

In today's buyer-empowered world, marketers need to seize every opportunity to start a relationship, nurture an existing one, and earn the trust of prospective buyers.

Trade shows provide the unique ability to meet face-to-face with hundreds, if not thousands, of attendees who seek to gain a firsthand sense of a company's capabilities, perspective, and personality.

**There are three primary keys to success that every exhibitor must use to gain maximum ROI on their event marketing investment:**

1. Have a clearly defined picture of what success looks like for your organization
2. Ensure you have an understanding of the goals and needs of your target attendees
3. Create an experience and environment that aligns your needs and objectives with those of your customers and prospects attending the show

If your investments in trade shows are to yield measurable ROI, you must be strategic, creative, and disciplined in your planning, execution, and follow-up. This guide will provide a framework for success along with many suggestions.

**We hope you'll find useful and usable information to help grow the success of your face-to-face marketing programs. If you'd like further assistance, don't hesitate to reach out to your Shepard contact – they'll help connect you with one of our experts.**

# THE STRATEGY OF SUCCESS

At the risk of stating the obvious, you can't be successful without understanding what success looks like for your organization and for your target audience.

Developing an effective event marketing strategy and plan requires a thorough consideration of your sales, marketing and communication objectives. Discussions with key company stakeholders during the discovery phase will uncover critical information to inform the development of strategies and plans.

## EQUALLY IMPORTANT IS AN UNDERSTANDING OF THE NEEDS OF YOUR CUSTOMERS AND PROSPECTS.

These insights should include the information they are seeking as well as the types of experience that will increase their engagement with your company ambassadors. Today's attendees have an expectation of "personal experiences." They come to shows armed with an agenda and a plan for their own personal experience. To ensure you're on their radar, you must understand their needs.

You must also have a keen understanding of the show environment (marketplace) in which you'll be participating as well as available sponsorship opportunities. Gather all available information from the show organizer and conduct your own independent research as well.

Your key to success will be the alignment of your company's needs with those of your target audience so you can make the most of the opportunities provided by the show organizer.

1. **DEFINE SUCCESS (Objectives)**
2. **DEFINE SUCCESS METRICS**
3. **DEFINE YOUR STRATEGY**
4. **CREATE A MESSAGING PLAN**
5. **CREATE THE IN-BOOTH EXPERIENCE**



# THE STRATEGY OF SUCCESS

## 1. DEFINE SUCCESS

The Definition phase of the process seeks to answer the question, “We will be successful if...”

Set realistic and meaningful objectives. Be realistic - too many objectives will only complicate the booth experience and dilute your results.

In section four you'll find a list of 100 potential objectives to help you get started. Ensure you choose objectives that:

- Align with your business objectives
- Align with attendee's needs
- Are achievable
- Are measurable

## 2. DEFINE SUCCESS METRICS

Next step is to define the metrics by which you will measure your success. If the objectives you've defined are easily quantifiable, the metrics will be obvious. You should also consider the behaviors and actions of your prospects that are required to achieve your objectives.

*For example, lead generation is a common business objective for trade shows. In addition to counting the number (or \$ value) of the leads, determine what actionable experiences need to happen in the booth for that lead to be generated. A business card dropped in a fish bowl is a weak lead, but a lead generated by a meaningful problem-solving conversation or a hands-on demonstration is a strong lead.*

Add those kinds of actions to your measurement plan - this will ensure your booth ambassadors are creating strong engagement activities that lead to a valuable return.





# 1 THE STRATEGY OF SUCCESS

## 3. DEFINE YOUR STRATEGY

Once you've defined what success looks like, it's time to define a strategy for success.

Create a simple statement of strategy that articulates your experiential approach to achieve success.

***HERE'S A LINK TO HELP YOU GET STARTED:***  
[The Art of Crafting a 15 Word Strategy Statement](#)



## 4. CREATE A MESSAGING PLAN

Like all good campaigns, messaging needs to be succinct and compelling. It needs to connect with your audience by speaking to their needs, creating curiosity and a desire to visit with you.

Effective messaging transcends product attributes and features. Ideally, messages relate to users' needs and goals. Begin the process by asking, "How do we help our customers achieve success?" The messages you define will form the core of your communications before, during, and after the show.

- **Appeal to customer's needs while communicating relevant information about your brand and offerings**
- **Choose messages that motivate customers to action**
- **Customer-centric messages should drive all content**
- **Simple messages are more easily remembered**
- **Utilize customer testimonials to highlight solutions/results**
- **Ensure consistency in messaging and branding for all marketing elements**

# THE STRATEGY OF SUCCESS

## 5. CREATE THE IN-BOOTH EXPERIENCE

This is a simplified approach to creating your exhibit experience. A more detailed look at Experience Design is contained in *SECTION TWO: CREATING A COMPLETE EXPERIENCE*.

LET'S FOCUS ON THE THREE PRIMARY COMPONENTS OF THE IN-BOOTH EXPERIENCE:

**Content**

**Conversations**

**Connections**

### CONTENT

Like creating messaging, your content must bridge your needs with those of your target attendees. A qualified customer/prospect will see their needs reflected in your solutions if articulated and shared in meaningful ways.

Your content needs to be **informative** and **interactive**. It must also be **visual** so that they are attracted to your booth and seek to learn more. It should also be made **portable** in a way that your prospects can share it when they return home.

### CONNECTIONS

Connecting with people on multiple levels will help build and strengthen relationships.

Most people lead with how they “feel” about people, places, and situations. Do I feel welcome? Do I feel like I belong? Do the people seem to care about my needs? Don't underestimate the value of emotionally connecting with people so that they feel comfortable entering and engaging in your booth with your people.

People also connect cognitively. Is the right information available? Is it easy to access? Are the right people here to connect with – are they experts who will understand my needs and be able to solve them with the right solutions?

**BOTTOM-LINE... MEET YOUR CUSTOMER/PROSPECTS WHERE THEY ARE... WITH THE RIGHT CONTENT... FROM THE RIGHT PEOPLE... IN AN AUTHENTIC MANNER.**

### CONVERSATIONS

The ability to meet face-to-face in a controlled environment is a critical component of building a relationship. And relationships begin by having meaningful conversations that build understanding and trust. Ensure these conversations are two-way and not just used as an opportunity to broadcast everything you want them to know.

A solid conversation will lead relationships which lead to next steps and, ultimately, a sale.

# THE STRATEGY OF SUCCESS

## STRATEGY TASK CHECKLIST

- Stakeholder interviews - identify sales, marketing and communications goals
- Customer interviews - determine needs and preferences related to trade show experience
- Review all available show information from Organizer - gain full understanding of the show, attendee demographics and sponsorship opportunities
- Conduct additional research, if needed
- Prepare a Discovery Brief to capture all gathered insights
- Identify team for remaining phases
- Define success with key objectives
- Create a statement of strategy
- Define metrics to determine ROI objectives
- Identify success metrics (actions)
- Set a budget
- Create messaging plan
- Create planning document:
  - Calendar/schedule
  - Tasks
  - Responsible persons
  - Organizer (show) deadlines



# CREATING A COMPLETE EXPERIENCE

Achieving success in a trade show depends on more than a well-designed booth and highly stylized product demos. If you're going to achieve your goals in a substantive manner, you need to consider your participation in an event not as a discrete activity, but as a tightly integrated journey in which you continuously communicate the value of your product and service offerings, industry knowledge, and experience in helping organizations fulfill business goals.

The attendee's experience with your organization begins with the first touch-point and continues through follow-up communications after the show.

While the story you need to tell is your own, you need to package it in a way that makes it compelling and attractive. Customers receive a daily barrage of ads, emails, phone calls, and direct mail. If you're going to cut through that clutter and successfully build meaningful relationships, you need to connect with them.

**At the end of the day, you're trying to build a relationship with someone. By nature, people need to have a few requirements fulfilled before they'll enter into a new relationship:**

- Feel, on a personal (emotional) level that there's a good fit. People do business with people they like, who are genuine and feel they can trust.
- Think (believe) that you have their best interest in mind and that you're willing to do whatever it takes to help them.
- Know that your product will help them solve a business need.





# CREATING A COMPLETE EXPERIENCE

## CREATE AN ATTENDEE PROFILE

The first step is to build an attendee profile from which you will base all design decisions. The profile contains the answers to two questions:

1. “What do the attendees need to feel, think, and know to act upon our objectives?”
2. “What do the attendees need to do (experience) so they can feel, think, and know?”

The answers to question #1 will help you determine the content of your messaging, communications, collateral, signage, presentations, and conversations.

The answers to question #2 will help you create the tactics the attendee must experience to receive and engage in.

*For example:*

***KNOW** - That our product has a series of new time-saving features that will increase efficiency and save costs.*

***FEEL** - That our staff genuinely understands and cares about helping customers be successful.*

***CONTENT** - Specific features and supporting data that illustrates how the product provides stated benefits. Side-by-side comparison of similar products.*

***DO** - Visualize the performance data in an impactful manner. Witness a live product demonstration. Hear testimonials from peers.*

**YOU CAN SEE HOW YOUR ATTENDEE EXPERIENCE IS STARTING TO TAKE SHAPE. IT'S IMPORTANT TO BEGIN YOUR DESIGN PHASE WITH THIS STRATEGIC APPROACH - IT WILL HELP YOU FOCUS ON CONSTRUCTING A FRAMEWORK FOR SUCCESS BEFORE BEGINNING THE CREATIVE WORK.**

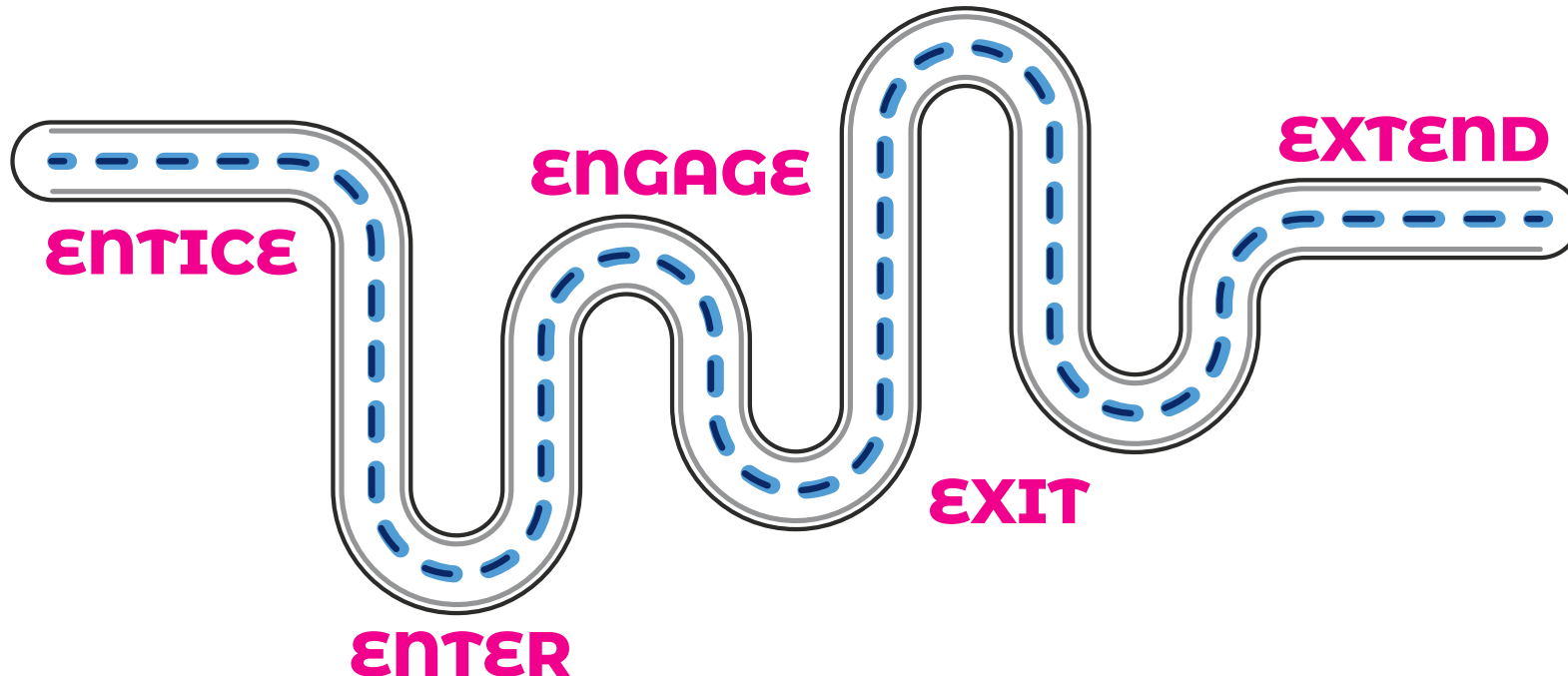
# CREATING A COMPLETE EXPERIENCE

## CUSTOMER JOURNEY FRAMEWORK

The next step is to determine how you package everything into a meaningful and impactful experience. To do this effectively, you must think of this as a campaign that transcends the in-booth experience.

A well-crafted set of touchpoints creates an experience (journey) that guides your prospects/customers down a well-cultivated pathway, determining what you want them to feel, think, know, and ultimately do as a result of their engagement with your organization.

*There are (5) Key Touchpoints that comprise this journey:*



# CREATING A COMPLETE EXPERIENCE

## CUSTOMER JOURNEY FRAMEWORK ENTICE

How do you get people to come to your booth? You need to create pre-show communications that generates interest and provokes a desire to engage in conversation with you at the show.

This is where a well-engineered messaging plan is required – one that demonstrates a clear understanding of how you connect your products/services to the needs of your target attendees.

Your messaging will be used throughout the entire journey, so plan it like a campaign. In addition to connecting and enticing, it needs to help frame your content, so all touchpoints have consistency (connective tissue) between them.

### HERE ARE A FEW QUESTIONS TO HELP YOU GET STARTED WITH YOUR MESSAGING PLAN:

- What will motivate your customers/prospects to want to visit your booth and start a meaningful conversation with your team?
- Are you communicating your brand message in ways that will be perceived as relevant? It needs to communicate, “What’s in it for me,” “How will my business be helped,” “What’s the advantage over your competitors?”
- Are you communicating that doing business with you is easy?
- What specific offerings will you be showcasing?
- Are you communicating that your company has the right people and skills to help assure your targets that you’re the right company to do business with?
- People connect visually first. How will you make use of typography and graphics to make a meaningful first connection?

**ALL GOOD CAMPAIGNS USE A VARIETY OF MEDIA TO REACH THEIR PROSPECTS. EXHIBITOR DIRECTORY LISTING, SOCIAL MEDIA, VIDEO, EMAIL, MAIL, DIMENSIONAL MAILERS, AND TELEPHONE CALLS ARE ALL VALUABLE TACTICS IN ENTICING PEOPLE TO VISIT WITH YOU.**

# CREATING A COMPLETE EXPERIENCE

## CUSTOMER JOURNEY FRAMEWORK ENTER

What happens when they enter your space? What's the first impression? Are they greeted and made to feel welcome? Do they know where to go and who to ask for?

The first 10 feet and 30 seconds of one's entry experience will reflect greatly on your organization.

### HERE ARE A FEW SUGGESTIONS AND THINGS TO CONSIDER:

- How many ways are there to enter your booth? Is there a clear entry that ensures their in-booth experience begins in a controlled manner?
- Greeters are important, but do they need to sit behind a counter? Greeters who "float" are more mobile and approachable.
- Did you provide "What to expect when you come to our booth" information in your communication? Were they invited in a personal manner and know who to ask for?
- Is there clear messaging that attracts (qualified) people to enter your booth and seek information?



# CREATING A COMPLETE EXPERIENCE

## CUSTOMER JOURNEY FRAMEWORK ENGAGE

### A VARIETY OF PEOPLE WILL VISIT YOUR BOOTH. THEY INCLUDE:

- Customers and prospects with whom you've set appointments.
- Customers and prospects who are interested in learning more, but don't have appointments.
- Suspects (people who are not on your radar) who are interested in learning more.
- People who just happened to come by your (inviting and attractive) booth wondering who you are and what you do.
- And yes, there will be some who are just looking for free tchotchkes to fill their bag.

### SHOULD EVERYONE HAVE THE SAME EXPERIENCE?

#### DO YOUR GREETERS SERVE AS A "SORTING" MECHANISM TO DIRECT PEOPLE TO THE RIGHT INFORMATION?

- Appointments should be met by their "host."
- Non-appointments should be asked how they can be helped and then directed to the relevant staff and/or station.
- Suspects should also be asked how they can be helped, but also offered an opt-in for information that will be sent to them – it's important that you add them to your database.
- The passive visitors should also be offered an opt-in, but perhaps they are handed a piece of collateral as well.
- Tchotchke seekers should, of course, be made to feel welcome. Perhaps you have an inexpensive giveaway to acknowledge their visit and create a nice impression of your organization.

### HERE ARE A FEW MORE CONSIDERATIONS:

- How do you make your appointments feel like they are having a personal and curated experience based on their specific needs?
- The composition of your booth staff should reflect the needs of the show's audience. If people are interested in solving business problems, you'll need solutions experts. If this is a highly technical audience, you'll need to include technologists that speak their language. While your sales and marketing folks may be highly skilled, there are many attendees who wish to meet with peers and experts.
- How you showcase your products/services is an important consideration. Can it be interactive/hands-on? Can you use media? Theater with live polling?

AS YOU PLAN THE EXPERIENCE ASK THIS QUESTION: WHAT DOES YOUR AUDIENCE NEED TO FEEL, THINK, KNOW, AND DO DURING THE EXPERIENCE THAT WILL HELP CREATE A NEXT STEP IN THE BUYING PROCESS?

WHATEVER EXPERIENCE YOU CREATE, DO IT WITH POSITIVE ENERGY, APPROPRIATE PRODUCTION VALUE, CONTENT THAT IS RELEVANT, AND DELIVERED IN WAYS THAT ARE AUTHENTIC TO YOUR BRAND.



# CREATING A COMPLETE EXPERIENCE

## CUSTOMER JOURNEY FRAMEWORK

### EXIT

#### WHAT DO PEOPLE LEAVE WITH?

- Something tangible that can be shared with their team?
- Did they opt-in before they left?
- Meaningful giveaway for prospects/customers that participated in a meaningful conversation/demonstration?
- Are they leaving with the expectation of a next step?
- Was there a solution diagramed out with one of your experts? How is that made portable for them to leave with?
- Are they leaving with a positive impression of your people and organization?

### EXTEND

You've made a major investment in the show, now it's time to extend the engagement and create ROI by continuing the work of moving your prospects/customers along the sales continuum.

Each visitor group should have its own follow-up plan. The effectiveness of those follow-up plans is directly related to how thorough your documentation was during the show.

- **What commitments were made during your appointments?**
- **What follow-up needs to happen with the "suspects" who've had their first experience with your organization? What will they receive, and will they be assigned a sales contact?**
- **What about the new opt-ins?**

**SUSPECT »» PROSPECT »» CUSTOMER**

**CUSTOMER FOR LIFE**

# PLANNING CHECKLIST

There is a myriad of logistical details to plan and execute for a successful show. Here's a checklist and schedule to help you stay ahead of your deadlines. Keep in mind that the suggested timeframes are just that - suggestions. Your actual timetable may differ depending on the complexity of the project.

## 12 MONTHS OUT

- ❑ Determine purpose for participating in show.
- ❑ Select space: Study floor plans, traffic patterns, services, competitor booth locations, and lounge/theatre locations.
- ❑ Read contract carefully: Understand terms, show rules, payment schedule, and space assignment method.
- ❑ Send in space application and first payment.
- ❑ Prepare budget.

## SIX MONTHS OUT

- ❑ Determine exhibit objectives.
- ❑ Select primary vendors (exhibit house, transportation company, installation/dismantle supplier).
- ❑ Decide if new exhibit is needed. If so, begin design process. (If using a portable, the design process may not require this much lead time.)
- ❑ Plan show advertising.
- ❑ Submit Block Housing Request

# PLANNING CHECKLIST

## FOUR MONTHS OUT

- Select staff.
- Make airline and car reservations.
- Determine exhibit needs (if using existing properties): refurbishments, additions, changes. Select display products.
- Communicate with primary vendors (exhibit house, shipping, installation/ dismantle) regarding services needed and dates. Develop floor plan for exhibit.
- Finalize new exhibit design.
- Execute show-related marketing plan.
- Meet deadlines for free publicity in the exhibitor guide/preview.

## THREE MONTHS OUT

- Carefully read and review exhibitor manual. Select portable exhibit supplier.
- Review exhibit floor plan and note target dates and restrictions. Plan any in- booth presentations/ demonstrations.
- Create list of required services, noting deadlines for “early-bird” discounts. Distribute show plan to staff.
- Reserve any additional meeting rooms (hospitality events, press conferences, etc.)
- Select catering menus (for hospitality events, press events, etc.)
- Submit authorization form if you are using an exhibitor-appointed contractor.
- Plan pre-show meeting.

# PLANNING CHECKLIST

## TWO MONTHS OUT

- Preview new custom exhibit. Finalize graphics art/copy. Order staff badges.
- Send information to other departments exhibiting in booth.
- Create and order lead forms. Finalize inquiry processing procedures.
- Prepare orders for: drayage, electrical, cleaning, floral, etc. Take advantage of any pre-pay discounts. Follow up on all promotions, making sure everything is ready to ship by target date.
- Prepare press kits.
- Check with staff on airline and hotel reservations and travel dates. Make needed changes. Develop briefing packet for booth staff.
- Schedule training for booth staff at show.
- Send reminder to upper management about briefing meetings (in office and at show); include agenda.

## ONE MONTH OUT

- Follow up on shipping orders.
- Follow up on installation/dismantle schedule; get an estimate on costs.
- Call to reconfirm airline, hotel and car reservations. Make needed changes. Follow up on target dates with all vendors.
- Confirm availability of display products/literature. Preview new portable display.
- Send all needed materials by target shipping date to avoid express mail shipments. Distribute briefing packet, including training materials, to all booth staffers.
- Set up and hold pre-show briefing meeting in office.
- Set up in-booth conference room schedule for pre-arranged meetings at show.
- Send follow-up reminder to upper management about briefing meeting, include agenda.
- Determine date and time for briefing staff at the exhibit. Review agenda, purpose of show, demonstrations, rehearsals, show specials, etc.
- Ensure that you have the following items before leaving for the show: important phone/cell numbers, credit cards, copies of all orders and checks for services paid in advance, phone numbers and addresses of all vendors, engineering certificate for exhibit, shipping manifest, and return shipping labels.

# PLANNING CHECKLIST

## UPON ARRIVAL

- Check on freight arrival.
- Check with hotel about reservations for staff, as well as any meeting rooms and catering orders.
- Find service area. Meet electrician and confirm date and time for electrical installation.
- Supervise booth setup.
- Hold pre-show briefing and training for staff the day before the show.

## DURING SHOW

- Reserve next year's space. Conduct daily meetings with staff.
- Make arrangements for booth dismantle and shipping.
- Arrange for lead forms to be shipped back to office daily for processing.

## AFTER SHOW

- Supervise booth dismantle. Handle leads.
- Debrief staff.
- Send thank-you notes.





# EXHIBIT STAFF TRAINING CHECKLIST

## ACCORDING TO A REPORT FROM THE CENTER FOR EXHIBITION INDUSTRY RESEARCH,

The Role and Value of Face-to-Face Interaction, only 26 percent of exhibitors conduct training for all or most events. This lack of training can severely impact an exhibit staff's effectiveness and visitors' perception of their professionalism.

As exhibit managers who need to prove the ROI for an exhibit marketing program, they cannot afford to forget that exhibit staff needs at least a “refresher course” before every exhibition.

Even though they may be well-versed on the products they represent, they do not know everything about the exhibition, the attendees, the exhibit hall, the target market, and the finer points of the exhibit layout.

Again, it is critical to not lose sight of the target audience's expectations. When attendees visit exhibits, they expect to find a friendly, professional staff that is well-versed in all aspects of the company's products. They expect to have the ability to have a one-on-one conversation and get answers to their questions, and do not expect to be limited in the time of this engagement.

According to a CEIR Report, the two top preferred methods of obtaining information from exhibitors are face-to-face conversations with exhibit personnel (56%) and one-on-one demonstrations with exhibit personnel (20%). Especially effective in meeting attendees' information needs is pairing knowledgeable marketing or sales staff with technical product personnel who can provide a wide range of product information and hands-on product interaction.

This comprehensive checklist should be considered when reviewing the pre-show orientation that will help staff members get acclimated to their role. Hopefully, feeling more of an insider to the trade show team will improve exhibit staff members' morale and their personal interactions with the audience, which should, in turn, improve ROI.

# EXHIBIT STAFF TRAINING CHECKLIST

## A KICK-OFF BY HIGHEST MANAGEMENT STAFF MEMBERS ATTENDING THE SHOW, HIGHLIGHTING:

- ❑ Measurable corporate and individual staff goals and objectives
- ❑ Key corporate message(s)
- ❑ Reinforcement of management's commitment and support of the trade show program
- ❑ Preparation time and the corporate financial investment to participate in the show
- ❑ The concept that all staff are ambassadors representing the entire company so professional behavior is always expected
- ❑ Appreciation for staff members' efforts, long hours, sore feet, and being away from home/family and office guide/preview.

## INTRODUCTION OF ALL EXHIBIT STAFF:

- ❑ For large or new staff, allow time for each person to answer a few key questions about themselves (name, office location or territory, length of time with company or division, product specialties, languages spoken, etc.)
- ❑ Assignment of tasks (daily booth captain, press and media contacts, technical staff for demos, competitive intelligence, attendance at educational seminars or sponsored events, etc.)

# EXHIBIT STAFF TRAINING CHECKLIST

## STRATEGY REVIEW:

- Review of show, attendee profile and anticipated total number of attendees
- Brief review of the profile of target audience
- VIP customers/prospects who may visit exhibit
- Overall measurable goals and objectives for entire exhibit and individualized goals
- Show/exhibit theme
- Review of corporate pre-show, in-booth, and post-show promotions
- Two to three key corporate messages (takeaways) to deliver to all visitors
- Review last show's 10 most frequently asked questions (FAQ's)
- Determine consistent answers to any difficult or sensitive issues (cost, quality, production, etc.)

## PRE-PRINTED PRODUCT OVERVIEWS INCLUDING SMALL, LAMINATED "CHEAT SHEETS" INCLUDING:

- Benefits for this target audience
- Features
- Applications
- Specifications
- Availability
- Pricing (with any show specials being offered)
- Competitive product review (models/features and benefits/costs)

# EXHIBIT STAFF TRAINING CHECKLIST

## BOOTHMANSHIP AND BOOTH ETIQUETTE:

- ❑ Review differences in selling on the show floor vs. conventional sales encounters (i.e. time allotted per interaction, immediate comparison to competitors and access to business partners, sensory overload, access to diversified staff knowledge, etc.)
- ❑ Review staff's role as booth "host" and emphasize that they are being "graded" by attendees on several criteria: enthusiasm, friendliness, company and product knowledge, active listening, consultative selling skills, and overall professionalism
- ❑ Review successful verbal and non-verbal communication with attendees including engaging, qualifying, presenting, gaining commitment for a follow-up action, recording information, and disengaging
- ❑ Review consultative/relationship selling and active listening skills
- ❑ Discuss identifying attendees by badge or ribbon color
- ❑ Compile three to four most effective qualifying questions
- ❑ Compose a three- to four-line elevator speech
- ❑ Review of positive and negative body language
- ❑ Engaging multiple attendees in the same conversation
- ❑ Handling the press, industry analysts, VIP's, international prospects, key accounts, and current clients
- ❑ Handling angry customers, unqualified prospects, "booth beggars" and competitors
- ❑ Review booth etiquette (no eating, drinking [unless bottled water is allowed], chewing gum, talking on cells phones, checking emails on laptops or PDA/smartphones, reading the newspaper, talking with other exhibit staff in closed circles, etc.)
- ❑ Role playing using elevator speech, qualifying questions, and hone critical listening skills

# EXHIBIT STAFF TRAINING CHECKLIST

## HOUSEKEEPING DETAILS:

- ❑ Picking up badges at exhibitor registration
- ❑ Ground transportation (shuttles, taxis, directions if walking, etc.) and timing from hotel to convention center on show days
- ❑ Show dates and hours when staff need to be at their stations
- ❑ Review of staff schedule and how to change it (if necessary) with booth captain
- ❑ Dress code (and distribution of show shirts)
- ❑ Storage room in exhibit for laptops, coats, suitcases, or on-site alternative
- ❑ Special events schedule (mandatory vs. optional)
- ❑ Scheduling and location of debriefing at the end of each shift or day
- ❑ Tear-down schedule and staffing





# EXHIBIT STAFF TRAINING CHECKLIST

## ON-SITE BOOTH ORIENTATION:

- ❑ Location of exhibit in relationship to exhibitor registration, hall entrances/exits, business partners, competitors, restaurants and fast food, exhibitor lounge, restrooms, fire and emergency apparatus, coat check, shuttles and taxis, show office, press room, etc.
- ❑ Overall booth layout including information counter, product areas, demonstrations, theaters, meeting rooms, storage, etc.
- ❑ Activities at information/reception counter including staff schedule with cell phone numbers, message center, product documentation, press kits, staff business cards, office supplies, fire extinguisher, lead retrieval equipment, etc.
- ❑ Review of badge scanning/lead retrieval system or lead forms including hands-on testing by each staff member using their own badge, lead grading criteria, importance of completeness and accuracy, notes, etc.; inform of “Plan B” in case of electronic system failure
- ❑ Preview of demonstrations
- ❑ Preview of live presentation(s)
- ❑ Review collateral literature available (data sheets, brochures, white papers) and location (on memory stick, URL or QR Code to online access or hard copy, etc.)
- ❑ Review promotional programs and social media, giveaway items and qualification procedure
- ❑ Keepers of the keys to locked areas and/or in-booth hiding places
- ❑ Emergency procedures and show floor fire apparatus
- ❑ Storage space contents (water, snacks, first-aid kit, toolbox, storage for coats or laptops, charging station for personal electronics, etc.) and security of that area

# TIPS & TRICKS

We gathered a variety of our staff's favorite exhibit tips to help you create success. If you ever need help or advice, don't hesitate to reach out to our staff and they'll connect you with someone from our team who can best assist.

## SET GOALS FOR BETTER RESULTS

Get the most out of your exhibiting experience by starting with the right agenda. Know what you want to accomplish. Tell the staff what's expected of them.

### SELECT FROM THE FOLLOWING GOALS TO SET YOUR AGENDA:

1. Sell something
2. Get leads
3. Investigate the competition
4. Network with other exhibitors
5. Build your company image
6. Gather market research
7. Introduce important people
8. Reinforce existing client relationships
9. Feature something new
10. Prepare to get publicity

Note: The above list is some of the most common objectives used by exhibitors.

# 5 TIPS & TRICKS

## SET GOALS FOR BETTER RESULTS

### BELOW IS A LIST OF 100 OTHER OPTIONS FOR YOU TO CONSIDER:

1. Sell products and services on the show floor
2. Gather qualified leads for post-show company follow-up
3. Introduce new products or services to a market
4. Demonstrate new products or services
5. Open new markets
6. See buyers who are not usually accessible to sales personnel
7. Find the decision makers
8. Understand prospects decision-making process
9. Support the decision influencers
10. Be compared to the competition
11. Solve customer's problems
12. Find dealers, reps and agents
13. Develop leads for dealers, reps and agents
14. Create customer lists
15. Reach your customers at a low cost per call
16. Distribute product samples to your market
17. Reinforce your marketing plans
18. Distribute product or service information
19. Introduce a new service
20. Showcase new products and services
21. Establish business relationships with international buyers
22. Calendar commitment from prospect for a follow-up conversation/presentation
23. Support dealers, reps and agents
24. Influence customer attitudes
25. Create high R.O.I. opportunities
26. Find new business location possibilities
27. Host special industry hospitality events
28. Market research for future product developments
29. Introduce new production methods
30. Direct influence on decision makers
31. Reduce sales costs
32. Entertain special customers
33. Distribute promotional tools
34. Have a portable showroom
35. Introduce product uses through audio or video programs
36. Interact with a highly targeted audience
37. Give your prospect an opportunity to experience your product/service
38. Open doors for future sales calls
39. Present live product demonstrations
40. Introduce support services
41. Create a three-dimensional sales presentation
42. Open foreign markets quickly
43. Demonstrate non-portable equipment
44. Shorten the buying cycle
45. Relate to the competition
46. Generate excitement for new products/services
47. Enhance word-of-mouth market
48. Find other exhibiting opportunities
49. Overcome unfavorable publicity
50. Demonstrate new usages of existing products or services

# 5 TIPS & TRICKS

## SET GOALS FOR BETTER RESULTS

BELOW IS THE SECOND HALF OF A LIST OF 100 OTHER OPTIONS FOR YOU TO CONSIDER:

- |   |  |  |
|---|--|--|
| 51. Give your audience an opportunity to meet the experts | 68. Support corporate theme programs                                 | 86. Have company experts showcased at seminars and work- shops           |
| 52. Give your CEO an opportunity to meet your customers   | 69. Introduce a new promotional program                              | 87. Influence industry trends  |
| 53. Meet your buyers face to face                         | 70. Educate your customers   | 88. Build sales force morale   |
| 54. Learn about your competition                          | 71. Introduce new techniques   | 89. Understand / uncover your customer attitudes                         |
| 55. Obtain feedback on new products                       | 72. Re-position your company in a market                             | 90. Give the “behind the scenes” personnel a chance to meet the customer |
| 56. Obtain feedback on existing products                  | 73. Change the perception of your company in a market                | 91. Introduce community awareness initiatives                            |
| 57. Conduct market research                               | 74. Expose new employees to an industry                              | 92. Find ways of reducing exhibiting costs                               |
| 58. Educate dealers, reps and agents                      | 75. Learn new industry trends  | 93. Developing new marketing techniques                                  |
| 59. Find personnel  | 76. Network with colleagues  | 94. Creating an image for your company                                   |
| 60. Educate personnel                                     | 77. Network with industry professionals                              | 95. Publicize company associations                                       |
| 61. Reinforce company image to a market                   | 78. Demonstrate your commitment to a market                          | 96. Explain the effects of corporate changes                             |
| 62. Establish a new company image with a market           | 79. Gather competitive intelligence                                  | 97. Bring your senior management closer to your customer                 |
| 63. Support your industry                                 | 80. Attend the show functions  | 98. Increase corporate profitability                                     |
| 64. Highlight new products and services to the media      | 81. Develop strategic relationships                                  | 99. Explain new programs   |
| 65. Highlight new company initiatives to the media        | 82. Find new business opportunities                                  | 100. Round out corporate marketing mix                                   |
| 66. Diffuse customer complaints                           | 83. Uncover joint venture opportunities                              |  |
| 67. Conduct a sales meeting                               | 84. Unveil licensing opportunities                                   |  |
|   | 85. Determine the effectiveness of marketing and promotion campaigns |  |

# 5 TIPS & TRICKS

## SHARPEN YOUR PRESENTATION STRATEGY

80% of show attendees base their opinion on employees at the booth. A well-trained staff is a critical requirement for success.

- 1. PREPARE A BENEFIT LIST**
- 2. ANTICIPATE OBJECTIONS**
- 3. REHEARSE WITH YOUR BOOTH STAFF**
- 4. USE THE PRESENTATION CONSISTENTLY**

EQUALLY IMPORTANT AS KNOW WHAT YOU'RE GOING TO SAY IS TO BUILD IN LISTENING BREAKS, SO YOUR PROSPECTS HAVE AN OPPORTUNITY TO EXPRESS THEIR NEEDS AND FOR YOU TO OFFER INFORMED RECOMMENDATIONS.

# 5 TIPS & TRICKS

## SALES PRESENTATION WORKSHEET

### ENGAGE

Your first goal is to get someone to stop and talk to you. Be proactive. Don't wait for someone to ask a question. Smile, make eye contact, grab their attention and draw them over by speaking to them first.

Write down several simple statements or questions that will compel a customer to stop and talk to you.

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### EXCITE

After you've captured their interest and they are listening, you must excite them about the benefits you offer. Benefits are what they get from using what you've got. The pitch should be about them and their needs. Benefits touch a nerve, feed an emotion, reduce fear, remove pain or solve a problem.

Write down examples of success other customers have experienced based on the benefits.

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### EDUCATE

Educate them about the features you offer. How it works, what it does, why it's great. Tell them why your company is the best choice. Linking your story to the customer's needs will make it more impactful.

Write down examples of the qualifying questions you would ask to reveal their needs.

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# 5 TIPS & TRICKS

## SALES PRESENTATION WORKSHEET

### ENCOURAGE

If they are interested and qualified now is the time to ask for action. What is your objective? Sell them something, sign them up for a free check-up, ask them to watch a demonstration, a video, fill out a survey card, schedule an appointment, whatever it may be. Do not let them leave without getting their contact information.

Write down the benefits they will receive by taking a next step with you.

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### EXIT

Remember that selling is a numbers game. If you're not selling, you need a lead. You must talk to a lot of people. Those not interested must be released. Avoid unproductive chitchat. While you spend ten minutes talking shop to a customer you are not going to close, ten hot prospects have walked past your booth. You could be missing the most valuable lead of the day. Have an escape plan. Thank the person for their time, shake hands, give them a brochure, say goodbye, disengage move to the next prospect.

Write down a few examples of how to gracefully exit a non-productive conversation.

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# 5 TIPS & TRICKS

## INCREASE PROFITS WITH PROMOTIONS

When your display is complete, add promotions to your plan that build excitement, draw attention, and increase traffic to your booth

1. Use a pre-show program
2. Offer samples
3. Hold a demonstration
4. Hold a drawing
5. Feature a personality
6. Offer a giveaway
7. Get interactive
8. Customize a flyer for the show

## DEVELOP AN EFFECTIVE FOLLOW-UP PLAN

When the show is over, your work is just beginning. 73% of companies collect leads, but 80% of all leads are never followed up. Don't wait too long to contact your prospects.

1. Say thank you
2. Make an announcement
3. Take a survey
4. Ask for referrals
5. Share positive press
6. Include a call to action

## 20 BOOTH TIPS

1. **Exude Professionalism:** Image is everything. Don't go cheap on any element of design.
2. **Project a Personality:** Conservative, trendy, cutting edge? Show off your style in your space.
3. **Make It Memorable:** Be clever, funny, bold or intriguing in your design and in your message.
4. **Capture Attention with Color:** Don't be afraid to go bright and bold. Accent the décor with the corporate colors. Contrast colors, use light text on dark backgrounds or go monochrome for impact.
5. **Incorporate a Theme:** Create a clever, memorable theme to reinforce your marketing message, company slogan or tagline. Tie into a current event or holiday. Have fun with sports, movies, music themes.
6. **Get Your Name Noticed:** It should only take seconds to understand who you are and what you do.
7. **Give Graphics the "Wow" Factor:** Use large, attention grabbing photos and striking images.
8. **Make the Message Clear:** Keep signs simple. More pictures – less text. Say it succinctly.
9. **Give Benefits First:** Feel their pain. Make the message about benefits to them and less about the features you offer. How you will solve their most pressing problems is the most important message.
10. **Light Things Up:** Lighting techniques can illuminate, spotlight, highlight or add motion to your display.

# 5 TIPS & TRICKS

## 20 BOOTH TIPS

11. **Master Effective Merchandising:** Showcase an impressive variety of colors, sizes, prices, qualities and styles of your product. Less is more. Keep excess stock out of sight.
12. **Cut the Clutter:** Keep it clean and simple. There's no need to show everything you sell.
13. **Elevate Your Offerings:** Use decorative containers, risers, boxes or unusual props to bring products and literature closer to eye level and add three dimensional impact to your space.
14. **Add Punch With Props:** Illustrate an intangible service or promote your product line with a variety of creative and interesting items that help to decorate, illustrate the message and bring your booth to life.
15. **Dress Up the Staff:** Whether it's a costume, company uniform or casual clothes, wear something that makes your team stand out from attendees or enhance your theme. If it works, wear what you sell.
16. **Build Your Image:** Display awards, community connections and company spirit. Share your company's personal side in order to connect with attendees and help them find a common bond.
17. **Make Sure It Matches:** Every element of the display should be cohesive, coordinated and complementary. That includes the carpet, counters, backdrop, graphics, props colors and theme.
18. **Look Over Your Layout:** Step back and observe your display like a customer. Would you do business with your company? Does the display match the hype and exemplify the company image?
19. **Train the Staff:** Brainstorm with the team to script a sales presentation that will accomplish your goals. Memorize the presentation, use it consistently and reward positive results.
20. **Project Professionalism:** People will be watching. Be approachable. Practice good exhibitor etiquette. Take out the chairs, no eating at the booth, put away the cell phone and greet everyone with a smile. Exude enthusiasm for your company.

# 5 TIPS & TRICKS

## DESIGN A DYNAMIC DISPLAY

As you know, tradeshow are often an overwhelming assault on one's senses. The atmosphere is hectic, filled with an array of activities and solicitations from every angle.

As an exhibitor, you have the difficult task of capturing the attention of a few qualified prospects from the hundreds that will stroll past your booth. You must deal with enormous competition, not only from rival companies, but from every other exhibitor around you. The most important thing to remember is that **your biggest competitor is time**. You have only seconds to attract a prospect. A well-designed display in your booth is your key to getting noticed.

Your display is your traveling store, your portable office, your mobile showroom. At-a-glance, attendees must quickly comprehend who you are, what you do, and why they should do business with you. There are three elements that compose your display. They are the hardware, the merchandising method and the marketing message.

When selecting your **display hardware**, consider the needs of your sales staff. Items such as counters with storage, podiums for computers, or demonstration areas might be needed to facilitate a sale or presentation.

Make the purchase even more practical and cost effective by selecting a display you can use beyond the tradeshow. An attractive exhibit looks great in the lobby of your office or a conference room. Use it for recruiting or set it up at a seminar, fundraiser or sales meeting.

The next consideration is the **merchandising method**. How should you showcase your products or service? The common mistake many exhibitors make is filling the booth with too much product. You can't show it all or say it all so go with the theory of less is more. Include an assortment of styles, colors, flavors, sizes and prices a prospect can examine for quality and workmanship. Consider selecting a clever theme that will coordinate all aspects of your exhibit together. Themes can come from your tag line, marketing slogan or from current events like a blockbuster movie or holiday. They can reinforce your sales statements and create a humorous or memorable way to get your messages across.

Add unusual props to enhance the theme and create three-dimensional impact. Unique items can be used to elevate your products at various heights or hold your company brochures. Coordinate all aspects of your booth to reinforce your corporate colors and enhance your corporate branding and important marketing messages.

# 5 TIPS & TRICKS

## DESIGN A DYNAMIC DISPLAY

**THE FINAL AND MOST CRITICAL ELEMENT OF YOUR DISPLAY IS THE MARKETING MESSAGE.**

Attendees pass by each exhibit so quickly; they have very little time to absorb what you must tell them. The graphics, which are your pictures and text messages, must succinctly communicate your ideas and visually explain your intent. Remember, the primary purpose of your display is to catch the prospect's attention so they will pause long enough for the sales staff to engage them.

Design your artwork using large, eye-catching visuals and composite your messages within them. Many exhibitors make the mistake of listing all the features and services they provide instead of concentrating the message on **customer benefits**. You want to touch an emotion that will prompt them to stop and inquire about what you do. Tell them how you will solve their problem, remove their pain, or reduce their fear.

No one will read your long, wordy text messages so concentrate on **short statements** that declare how you can make them healthier, safer, happier, richer or save them money or time. Show with pictures and tell them with words how different you are from the competition.

Before the day of the show, set up your display and ask the staff to take a critical look at it.

- **Is the message you wish to convey immediately clear?**
- **Does everything come together in a cohesive manner?**
- **Can attendees tell who you are and what you do, at-a-glance?**
- **Is the display as professional as your company claims to be?**

You will have succeeded in creating a dynamic display when every element exemplifies your company image and offers value to attendees.



# 5 TIPS & TRICKS

## ENSURING YOUR OWN BOOTH TRAFFIC WITH QUALIFIED VISITORS

Most exhibitors believe that it is the show organizers responsibility to attract attendees to the venue with marketing and advertising to assure the event is packed with potential customers. Any successful producer will have a game plan for doing so. There is also an obligation on the part of every exhibitor to share in that responsibility.

Exhibitors can contribute to their own successful show results by taking an active part in driving target customers to their company's booth. One of the easiest ways to do that is by taking advantage of the complimentary list of attendees that show producers often provide exhibitors. Funny thing is many producers complain that exhibitors don't use the lists they so generously offer free of charge.

If you are given permission to use the contact information of thousands of prospects that are already familiar with the event, know where it is located, and have experienced its offerings, you have a potential gold mine at your fingertips. Lists like that can sell for hundreds of dollars, so don't squander this valuable marketing opportunity. Plan with your sales team and tradeshow departments to use the list for pre-show marketing.

There are many ways you can invite or entice customers to visit your booth at the show and having a list of people who already love to attend is a great place to start. The most time-consuming option is also the most effective – making a personal connection through a phone call. If you have the staff available to make the calls, you will establish rapport and familiarity with the prospect before they even get to the show.

The most economical way to reach everyone on the list is via email. You can also make a good impression and put something physical in their hand by mailing something out.

Before you do anything, you must create the offer. Encouraging attendees to stop by your booth is the goal, but what you ask them to do when they get there will determine the success of the program. Have a clear plan with objectives that are understood by your entire booth staff. If you are going to spend the time and money to develop a pre-show marketing campaign, you want to make sure you get the best results.

Start by determining what you want the visitors to do when they get to your booth. Rewarding their participation with a gift or a chance to win a prize will increase the possibility they will stop by. Here are a few ways to use that attendee list.

**DON'T FORGET TO ADD YOUR OWN PERSONAL PROSPECT & CLIENT LISTS TO THE EFFORT SO YOU GENERATE EVEN MORE TRAFFIC TO YOUR BOOTH.**

# 5 TIPS & TRICKS

## PROFESSIONAL BOOTH ETIQUETTE

Sometimes we must go back to the basics and take inventory of our presentation and attitude when we exhibit. Adhering to these simple dos and don'ts will result in a better impression of your exhibit staff by the attendees. Statistics show that 80% of attendees base their opinion of your company on the actions of your employees at the booth.

Upon reviewing this list of suggestions, they may seem like common sense considerations everyone should be familiar with. Unfortunately, you will find numerous infractions at every event. Think about how many times you have witnessed them. The overall image of your company and staff will benefit greatly if you avoid these infractions at your next tradeshow, consumer show or event.

Share these suggestions with your booth staff and use them as a guide for making the best possible impression.

**DON'T SIT DOWN.** Be approachable, alert and ready to greet every prospect. Take the chairs out of the booth altogether. Plan your staff schedule to allow for occasional breaks away from the booth.

**DON'T LEAVE THE BOOTH UNATTENDED.** If you must leave on a break and you are alone at the exhibit, put a note on the table stating the exact time you will return.

**DON'T TALK EXCESSIVELY TO COLLEAGUES.** A prospect is not likely to interrupt your conversation to ask for information. Stop talking to your booth mates when prospects are in view.

**DON'T EAT OR DRINK AT THE BOOTH.** Cans of soda and plates of food on the front counter look tacky and unprofessional. Munching on food, chewing gum or drinking in the booth is worse. Step away for a few minutes to enjoy your snack and hide drinks from customers.

**DON'T GET CAUGHT ON YOUR CELL PHONE.** Cell phones are a business necessity but talking on them while in the booth is a guaranteed turn-off to customers. Move out of the booth to make or answer calls.

**DON'T KNOCK THE COMPETITION.** Refrain from making negative comments about other companies in the show. Always sell your product or service on its own merits. Today's savvy consumers resent negative attacks on competition and want you to sell them on your benefits.

# 5 TIPS & TRICKS

## COMMON BOOTH BLUNDERS

**There is a fine line between what makes one exhibit good and another exhibit great. Either something is missing, or something is added that takes away from your staff's productivity or your exhibit's effectiveness and professionalism. A lack of attention to detail can really mess up a good company image.**

- 1. GET RID OF THE CANDY BOWL.** What is the purpose of having candy at your booth if you are not selling candy or using the candy to reinforce your theme or marketing message? You might think that it draws prospects to your booth. Yes, it does. They come by, grab a handful of chocolate and rush off. What good is that? Save the candy for Halloween.
- 2. IS THAT TABLE NECESSARY?** Your booth space may include a 6' table, but do you really need it? If you do need it, do you have to place it like a barrier across the front of your booth space? If you are spreading out your five stacks of brochures and one stack of business cards across the tabletop trying to fill that space, you don't need the table. Purchase a freestanding literature rack and a small podium counter instead.

Keep your booth space open and inviting. Draw attendees into your space. If you have lots of samples to show or need the table for a demonstration or other important items, then think twice whether you want it positioned across the opening to your display as a barrier between you and your customers. Sometimes that configuration works perfectly, but it's more likely not necessary and more importantly it usually blocks the attendee's view of your marketing message and

beautiful graphics on your display that you spent a ton of money on. Consider placing the table perpendicular to your back wall or you can just put the table in the aisle during set up and they will take it away.

- 3. CAN YOU SPRING FOR A CUSTOM TABLE COVER?** If you plan to keep the table in your space, consider purchasing an imprinted table cover that coordinates with your other display elements. When you have a gorgeously designed display in your booth, nothing stands out like a sore thumb more than a table covered in the drape that the show provided. It's a simple fix that will provide a more cohesive look to your company image.
- 4. DO YOU NEED ALL THOSE CHAIRS?** Are you really going to let your employees sit down in the booth? Do you want your exhibit to be a rest stop for attendees or encourage them to sit for twenty minutes and chat with your team? If you are not hosting a demonstration or consultations at your booth, please remove those chairs. Not only are they taking up valuable space in your booth, but most of the time they are blocking your graphics from the customer's view.

# 5 TIPS & TRICKS

## COMMON BOOTH BLUNDERS

- 5. MESSY LITERATURE.** Stacks of flyers and brochures spread across your counter look sloppy and detract from your professionalism. Spend a few bucks on a couple acrylic tiered literature holders or a collapsible literature rack. Elevate your important information, keep your display counter tidy and minimize the time it takes to straighten stacks of paper.
- 6. THREE'S A CROWD?** As you are planning your exhibit space a 10x10 booth seems big, but in reality, by the time you put your display, a table, products, literature, banners, and people inside there really isn't that much room. Three or more people in a 10x10 booth is way too many. Not only is it intimidating to attendees, but you are blocking out the view of the display that you spent a fortune creating. A good rule of thumb is two people maximum per 10x10 space.
- 7. ARE YOUR GRAPHICS CAUSING EYESTRAIN?** Less is more when it comes to the messages printed on your signs and display graphics. You do not have to tell people about everything you do or everything you sell. Attendees walk past your booth in about 6 seconds. If what they can read in that short time period does not resonate with their needs, then they will not stop to talk to you. Keep your statements short and powerful. Succinct messages that connect with attendee's needs, few words, short sentences, large font size.
- 8. WHAT'S WITH ALL THE FREE STUFF?** A clever giveaway can be effective, and a game or contest will attract attendees, but at least get something in return. So many exhibitors seem to think their job is to hand out free stuff. They have pyramids of post-it notes, rows of water bottles or mounds of mouse pads strewn across their table. That's great if you have a bottomless budget, but if you don't then use the gift as a reward for playing the game, taking the survey or providing contact information. Display a few then keep the rest out of sight.
- 9. IF YOU ARE TIRED, TAKE A NAP.** Schedule the staff on 4 hour shifts to reduce fatigue. If someone needs to sit then let them leave and take a break. Sitting down at a tradeshow is not acceptable, unless you are having a consultation with clients, which also should be reconsidered. Your staff will look more approachable and refreshed.