

Effective, efficient and exceptional trade show and event planning begins with knowing what you want to achieve and communicating that with your team and equally as important your exhibit partner.

Our checklist walks you through every step of the process, from ideation and final execution to post show measurement and ongoing program management.

We designed this checklist to guide direct conversation among internal stakeholders and to establish your needs, wants, and goals. It's not a flashy form, yet it will help you bring it all together, focus on the sections most relevant to your program.

What's Inside

- Section 1: Company Overview & Program Scope
- Section 2: Goals & Objectives
- Section 3: Functional Needs & Design Requirements
- Section 4: Budget

1. Company Overview & Program Scope

When we work together, we would start by gathering some of this information from a research online, yet it is far more productive when these details are articulated and contextualized within your brand guidelines, current campaigns, and stakeholder alignment.

Company Background

- What is the overview of your company and its overall business goals.
- Identify where, as an organization, you are looking to expand.
- Do you actively refer to your company vision and mission statements?
- Describe how your vision and mission come to life when working with customers.
- Provide context about your main competitors and the overall competitive landscape, if that is relevant to you.

Trade Show & Event Program History

- Outline your trade show presence, meetings and programs (current and past years if pertinent).
- Describe how your program has evolved.
- Indicate whether you are making a change in trade show schedule, program or size or location(s) this year.
- Why changes are being made and what is driving them?

Last Year's Results

- Identify what worked at your prior year's exhibits or events.
- Identify what did not work at your prior year's .
- Describe how you have measured success for your program in the past.

Target Show & Event Information

Complete the table below for your primary upcoming show. If you have a full show schedule, share it with us for informed program management and creative solutions.

Show/Event Name	Show Location	Show Dates	Exhibit Number	Exhibit Size

Services & Offerings Needed

Check each service that requires support for your trade show exhibit or overall program.

- Exhibit and or Event Design
- Experiential Marketing
- Production, Construction
- Sales Conversation Training- all levels
- Graphic Design & Production
- Show Services Management
- Installation & Dismantle Labor Management
- Inventory Management & Warehousing
- Lead Capture Software
- Audiovisual Services & Management
- Exhibit Staff Training
- Metrics & Post Show Evaluation
- Budget Consultation & Development
- Hospitality Management
- Other (note below)

2. Goals & Objectives

The solutions you'll receive will be driven by the goals and objectives identified for your program.

Program Goals

Which of these goals are relevant to your program.

- ROI and ROO defined and tracked
- Generate brand awareness
- Nurture relationships
- Scan leads
- Educate attendees
- Increase dwell time
- Generate sales
- Host meetings
- Other goal one (_____)
- Other goal two (_____)

Measurable Objectives

- Document specific targets (lead counts, meetings, demos, pipeline, etc.).
- Identify how each goal will be tracked during and after the show.

Target Audience

Identify and rank your target audiences in order of importance. For each audience, capture key attributes, reasons for attending, and the takeaway you want them to leave with.

Audience	Reason for Attending	Title	Key Takeaways You Want to Leave with	Follow-up Method

Target Audience, continued

- Describe the ideal attendee (title, personality, goals).
- Confirm whether attendees typically visit exhibits solo or in groups.
- Define what a successful interaction looks like between a staffer and an attendee.

Business Units, Divisions, and Product Lines

Percentage of space allotted is an important distinction for companies with multiple business units, divisions, or product lines exhibiting together. This translates to brand hierarchy and impacts creative and pricing strategy.

- Describe your divisions, business units, and product lines.
- Note how these units impact your exhibiting strategy.
- Confirm whether you plan to launch any products or services at the show.
- Product or service one documented (_____)
- Product or service two documented (_____)
- Product or service three documented (_____)

3. Functional Needs & Design Requirements

The design of your exhibit/event/space depends on how you need it to function, how you want to be perceived, and what success looks like to you. Here we capture your preferred styles, specific functional needs, and any inspiration that resonates with you.

Exhibit Properties & Materials

- Identify any show regulations or restrictions you are aware of.
- Confirm whether you need a modular exhibit to accommodate multiple sizes.
- Note exhibit sizes the properties should be configured to.
- Identify additional uses for the exhibit after the show (proprietary event, showroom, etc.).
- Confirm interest in an aluminum and fabric build, or note an alternative.
- Note flooring preference (carpet, vinyl, other).
- Confirm whether you have existing properties to reuse.
- Note preference for custom or rental components for new properties.
- Are eco-friendly and sustainability initiatives part of your CSR?

Design Style & Inspiration

- Choose preferred architectural style: angular, rectilinear, or curvilinear.
- What examples have you seen that resonate with you?
- We will ask for your recent Brand Guidelines and all related digital assets; commercial, logos, etc.
- See section on *Supplemental resources to share* -
- Things you do not like or want to consider for this event or program.

Experiential Marketing

- In your opinion what describes experiential marketing or brand activation?
- Note whether you want a new experiential engagement or a redeployment of an existing one.
- Describe planned analog or digital engagement tactics.

Graphics

- Note any specific branding requirements.
- Identify content to be included in the graphics.
- Note preferred graphic design styles.
- Confirm whether graphics will be printed, digital, or both.
- Do you own existing digital assets, like videos that you would like to use?

Traffic Flow

- Define the journey you want attendees to take when entering the exhibit/event.
- How do you want them to feel and engage in this space.
- Identify products, experiences, or moments that should receive particular emphasis.
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Functional Needs

- Demo or sales stations needed (_____)
- Presentation or theater areas needed (_____)
- Reception counter needed, lockable, storage?(_____)
- Conference rooms ? (private or open, quantity, capacity, AV, HVAC) (_____)
- Hanging sign needed (_____)
- Double deck structure needed (specify purpose).
- Storage or technical equipment needs documented.
- Hospitality space and seating needs documented.
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Supplemental Resources to Share

Provide us with the following to deepen their understanding of your brand, products, and services:

- Website link
- Brand Guidelines and graphic standards manual
- Photos of existing exhibit or events
- Photos of exhibits you like
- Photos of competitor exhibits, if applicable
- Industry publications for reference
- Brochures, product literature, and product specifications
- Advertisements and catalogues

4. Budget

Budget information is essential to strategically partner with us. We know you need to know what it costs and we are experts at budget management.

Without clear parameters, expectations, and details on what your budget includes, we can best provide design renderings that meet and not exceed your budget.

Understand the Cost Types

- Professional services: account management, creative design, on site support, logistics.
- Production: physical properties and fabrication (raw materials, panels, graphics, signage, crates, flooring).
- Managed services: transportation, material handling, install, dismantle, AV, rigging, electrical, cleaning.
- Decide whether a turnkey or rental budget makes sense (covers everything start to finish).

Identify Cost Drivers

- Exhibit space: size and location within the convention center.
- Exhibit structure: panels, furnishings, flooring, technology, and fixtures (owned, rented, or hybrid).
- Logistics: transportation and material handling from warehouse to show floor.
- Show services: power, data, plumbing, refrigeration, food and beverage.
- Show fees like new post Covid fees, permits like required insurances and architectural stamps on drawings specific to city, state and convention center.
- Rigging: engineer approvals and additional planning time.
- Association deadlines: discounts, fees, and mandatory regulations in the Exhibitor Services Manual.
- Onsite labor: weekday, weekend, holiday, overtime, and double time implications.

Identify Cost Drivers, continued

- Geographic differences: taxes, services rates, and union regulations by city.
- Experiential marketing: activations, gamification, hospitality, premiums, and sampling

Total Cost of Ownership

- Account for purchase costs, and for storage costs.
- Account for multiple deployments and shipping.
- Account for upgrades, maintenance, and possible refurbishing over time.

Financial Planning & Transparency

- Establish financial accountability and reporting cadence.
- Who is accountable for the scope of work, who are approvals handled?
- Who are decision makers and key stakeholders and who do we need to wow?

Budget Details

- Total new properties budget defined.
- Total managed services budget defined.
- Additional details, constraints, or assumptions documented.
- Confirm whether you need help defining or projecting the budget.

Ready to plan your next show, meeting or event?

Let's get together and have a discovery or planning session.
Looking forward to it.

Best regards,

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