

Trade Show & Event Planning Guide

Design + Execution: Your Complete Program Blueprint

Welcome to Your D3 Planning Guide

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

This guide walks you through every step of the process, from ideation and strategy through final execution, post-show measurement, and ongoing program management. It is designed to guide direct conversation among internal stakeholders and to establish your needs, wants, and goals.

Read through the sections most relevant to your program. When we meet, we'll bring fresh eyes, and the right questions to help you move forward with precision.

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1. Company Overview & Program Scope

When we work together, we begin by researching your organization. Yet, it can be more productive when these details are articulated and contextualized within your brand guidelines, current campaigns, and stakeholder alignment. The more you share, the sharper our strategy.

Company Background

- Provide an overview of your company and its overall business goals.
- Identify where, as an organization, you are looking to expand, geographically, by audience, or by product line.
- Do you actively reference your company vision and mission statements in your marketing?
- Describe how your vision and mission come to life when working with customers and at live events.
- Provide context about your main competitors and the overall competitive landscape, if relevant.
- Are there any brand perception challenges you are working to overcome?

Trade Show & Event Program History

- Outline your current and past trade show presence, meetings, and event programs.
- Describe how your program has evolved over the past 1–3 years.
- Are you making any changes to your trade show schedule, program scope, booth size, or show locations this year? If so, why?
- What is driving any changes — strategic pivot, budget shift, new leadership, or brand refresh?

Last Year's Results

- Identify what worked well at your prior year's exhibits or events.
- Identify what did not work or fell short of expectations.
- Describe how you have measured success for your program in the past (leads, meetings, pipeline, brand awareness).
- What is the single most important improvement you want to make this year?

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 coordinated creative solutions.

Show / Event Name	Location	Show Dates	Exhibit #	Booth Size	Priority Level

Key Stakeholders & Decision Makers

Understanding who is involved early prevents delays and ensures the right people are aligned from the start.

- Who is the primary contact and day-to-day project lead?
- Who has final approval authority on design, budget, and scope of work?
- Who are the internal stakeholders we should be aware of (marketing, sales, C-suite)?
- What is your internal approval process and typical decision timeline?

Services & Offerings Needed

Support for your trade show exhibit or overall program.

- Exhibit and / or Event Design
- Experiential Marketing & Brand Activations
- Production & Construction Management
- Sales Conversation Training; all levels
- Graphic Design & Production
- Show Services Management
- Installation & Dismantle Labor Management
- Inventory Management & Warehousing
- Lead Capture Software & CRM Integration
- Audiovisual Services & Management
- Exhibit & Event Staff Training
- Metrics, ROI Tracking & Post-Show Evaluation
- Budget Consultation & Development
- Hospitality Management
- Sustainability & Eco-Friendly Program Consulting
- Other (note below):

2. Goals & Objectives

The strategic solutions you receive will be driven by the goals and objectives you define here. Be as specific as possible. We will help you sharpen these during our discovery session.

Program Goals

Which of these goals are relevant to your program? Check all that apply.

- ROI and ROO defined, tracked, and reported
- Generate brand awareness and market positioning
- Nurture existing client and prospect relationships
- Scan and qualify leads
- Educate attendees about products, services, or innovations

- Increase dwell time and booth engagement
- Generate sales and accelerate the pipeline
- Host private or semi-private meetings
- Launch a new product, service, or brand initiative
- Recruit talent or partners
- Other goal: _____
- Other goal: _____

Measurable Objectives

- Specific targets: lead counts, meetings scheduled, demos delivered, pipeline value, etc.
- Identify how each goal will be tracked during and after the show.
- Define what “success” looks like 30, 60, and 90 days post-show.
- Identify who is responsible for post-show follow-up and within what timeframe.

Target Audience

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

Audience Segment	Title / Role	Reason for Attending	Key Takeaway	Follow-up Method

- Describe the ideal attendee (title, seniority, decision-making authority, personality).
- Do attendees typically visit exhibits solo or in groups? What does that mean for your booth flow?
- Define what a successful interaction looks like between a staffer and an attendee at each stage of the conversation.

Business Units, Divisions & Product Lines

For companies with multiple business units, divisions, or product lines exhibiting together, the percentage of space allotted is a critical decision. It drives brand hierarchy, creative direction, and pricing strategy.

- Describe your divisions, business units, and product lines.
- Note how these units impact your exhibiting strategy and space allocation.
- Confirm whether you plan to launch any new products or services at the show.
- Product or service 1: _____
- Product or service 2: _____
- Product or service 3: _____

3. Functional Needs & Design Requirements

The design of your exhibit, event, or branded space depends on how you need it to function, how you want to be perceived, and what success looks and feels like to you. Here we capture your preferred styles, specific functional needs, inspiration, and any constraints we need to design around.

Exhibit Properties & Materials

- Identify any show regulations or restrictions you are aware of (height limits, hanging signs, fire codes).
- Do you need a modular exhibit that can accommodate multiple booth sizes across different shows?
- Note all exhibit sizes the properties should be configurable to (10x10, 10x20, 20x20, island, etc.).
- Identify any additional uses for the exhibit after the show (proprietary event, showroom, office display).

- Confirm interest in an aluminum and fabric build, or note an alternative material preference.
- Note flooring preference: carpet, vinyl plank, raised flooring, or other.
- Confirm whether you have existing properties to reuse, refresh, or retire.
- Note preference for custom-built, rental, or hybrid components for new properties.
- Are eco-friendly and sustainability initiatives part of your CSR strategy? (See Section 6 for details.)

Design Style & Inspiration

- Preferred architectural style: angular / rectilinear, curvilinear / organic, or a mix?
- What exhibits or brand environments have you seen that resonate with you aesthetically?
- What do you want attendees to feel when they walk into your space?
- Are there colors, materials, or design elements you absolutely want to avoid?
- We will request your current Brand Guidelines and all related digital assets: logo files, brand colors, typography, photography, video content, and current campaign creative.

Experiential Marketing & Brand Activation

A brand activation transforms a space into an experience. Done well, it deepens connection, extends dwell time, and gives attendees something to talk about long after the show floor closes.

- In your opinion, what describes experiential marketing or brand activation for your brand?
- Are you looking for a new experiential concept, or a redeployment or evolution of an existing one?
- Describe any planned analog or digital engagement tactics (demos, games, sampling, VR/AR, contests).
- How do you want attendees to engage and what do you want them to remember?

Graphics & Visual Communication

- Note any specific branding requirements or restrictions from corporate guidelines.
- Identify the primary content to be communicated through graphics (brand message, product, campaign).
- Note preferred graphic design styles: bold and simple, image-driven, typographic, illustrative, etc.
- Confirm whether graphics will be printed, digital displays, or both.
- Do you own existing digital assets — videos, photography, animations — you would like to incorporate?
- Who owns final graphic approval internally, and what is the review process?

Traffic Flow & Attendee Journey

- Define the journey you want attendees to take when entering the exhibit or event space.
- How do you want them to feel as they move through the space?
- Identify products, services, or moments that should receive particular visual or spatial emphasis.
- Where do you want attendees to linger, and where do you want them to move through quickly?

Functional Space Needs

- Demo or sales stations needed: quantity and configuration.
- Presentation or theater area needed: capacity and AV requirements.
- Reception counter: lockable storage, branded graphic wrap needed?
- Conference rooms: private or open, quantity, seating capacity, AV, HVAC.
- Hanging sign needed: size, shape, single or double sided.
- Double deck structure needed: purpose and occupancy load.
- Storage and technical equipment needs.
- Hospitality space: seating area, food and beverage, branded environment.
- Charging stations, phone lockers, or other attendee amenity needs.

Supplemental Resources to Share

Providing the following deepens our understanding of your brand, products, and competitive context, and accelerates the creative and strategic process.

- Website and any relevant landing pages
- Brand guidelines and graphic standards manual
- Photos of existing exhibits or events (what you have done)
- Photos of exhibits or events you admire (what inspires you)
- Photos of competitor exhibits, if applicable
- Industry publications, trade show directories, or show floor maps
- Product specifications
- Current advertisements, campaigns, and promotional materials

4. Marketing Technology & Digital Assets

Your exhibit and event program does not live in isolation — it connects to your broader marketing and sales ecosystem. Understanding your current tech stack allows us to design an experience that integrates seamlessly with how your team captures, qualifies, and follows up on opportunities. We work with your existing tools, not around them.

Your Marketing Tech Stack

- CRM platform in use (Salesforce, HubSpot, Microsoft Dynamics, other):
- Marketing automation platform (Marketo, Pardot, HubSpot, Mailchimp, other):
- Event registration and management platform (Cvent, Eventbrite, Bizzabo, other):
- Lead retrieval system preference (show-provided badge scanner, third-party app, custom):
- Digital signage or content management system currently in use:
- Social media management tools and channels most active for your brand:
- Analytics and attribution platforms used to measure marketing ROI:
- Any proprietary platforms or custom tools we should be aware of:

Digital Engagement at the Show

- Do you want live social feeds, hashtag walls, or real-time content displays integrated into the design?
- Are you planning any digital demos, interactive kiosks, touchscreen experiences, or product configurators?
- Will you use QR codes for lead capture, content access, or attendee engagement?
- Is augmented reality (AR) or virtual reality (VR) part of your engagement strategy?
- Do you need live streaming or content capture for post-show use?
- Will you use gamification — digital or analog — to drive booth traffic and dwell time?

Lead Capture & CRM Integration

The most beautifully designed booth delivers zero ROI if leads fall into a black hole. We build the follow-up strategy into the program from day one.

- How do you currently capture leads at shows, and how quickly are they followed up on?
- Do you want lead data to flow directly into your CRM in real time or via post-show import?
- What lead qualification fields are most important to capture at the show (budget, timeline, decision authority)?
- Who owns the follow-up process — marketing, sales, or a shared workflow?
- Is lead scoring or segmentation part of your post-show process?

Digital Assets You Own

- Video content: brand films, product demos, testimonials, animations available for use?
- Photography library: product, lifestyle, team, event photography available?
- Presentation decks or digital sales tools currently in use at shows?
- Do you have an existing content library or asset management system we should access?
- Any content currently in production that will be ready before the show date?

Post-Show Digital Strategy

- How will you nurture leads captured at the show through email, ads, or sales outreach?

- Will show content be repurposed for social media, blog posts, or sales enablement materials?
- Do you plan to produce a post-show recap or ROI report for internal stakeholders?
- What metrics will be pulled from your digital tools to demonstrate program performance?

5. Staffing, Training & On-Site Experience

The best exhibit in the room will underperform if the team staffing it is unprepared, under-coached, or unclear on goals. Exhibit and event staff training is one of the highest-ROI investments you can make, and it is a D3 core competency. We can help you integrate staff preparation into the program from the very beginning.

Your Exhibit Staff

- How many staff members will be working the exhibit at any given time?
- What is the mix of roles; sales, marketing, product, executive, customer success?
- What is the experience level of your team at trade shows (first-timers, veterans, mixed)?
- Are there team members who are particularly strong at attendee engagement? Particularly challenged by it?
- Will executive leadership or C-suite be present? If so, for which shows or days?
- Do you bring in outside staff, brand ambassadors, or promotional talent? If so, how are they briefed?

Sales Conversation Training

How your team opens a conversation, qualifies an attendee, and advances to a next step is the difference between a badge scan and a pipeline opportunity. D3 offers customized booth staff and sales conversation training at all levels.

- Does your team currently receive any pre-show training or briefing?
- What are the most common challenges your team faces at shows (opening conversations, qualifying, staying energized, handling objections)?
- Do you want a formal training session pre-show, a brief at the show, or both?
- Should training include messaging alignment, conversation flow, qualification criteria, and follow-up protocols?
- Are there specific talk tracks, demos, or product stories the team needs to deliver consistently?

On-Site Experience Standards

- What do you want every attendee to feel within the first 10 seconds of entering your space?
- What is your standard dress code or brand appearance expectation for exhibit staff?
- How do you handle VIP attendees, key accounts, or executive-level visitors differently?
- What hospitality or concierge experience do you want to offer within the exhibit?

6. Budget & Financial Planning

Budget clarity is essential to strategic partnership. We know you need to understand what things cost, and we are experts at budget development, management, and accountability. Without clear parameters, we cannot design to your reality. We bring full financial transparency to every program we manage.

Understand the Cost Types

- Professional Services: account management, creative and exhibit design, strategy, on-site support, logistics coordination.
- Production & Fabrication: physical properties, raw materials, panels, graphics, signage, crating, flooring.
- Managed Services: transportation, material handling (drayage), installation, dismantle, AV, rigging, electrical, cleaning.
- Training & Coaching: pre-show staff training, messaging workshops, sales conversation coaching.
- Technology & Digital: lead capture software, digital signage, CRM integration, interactive experiences.
- Determine whether a turnkey or rental budget makes the most sense for your program scope and frequency.

Key Cost Drivers

- Exhibit space: size, location on the show floor, and island vs. inline configuration.
- Exhibit structure: panels, furnishings, flooring, technology integration, and fixtures (owned, rented, or hybrid).
- Logistics: transportation and material handling from warehouse to show floor and back.
- Show services: power, data, plumbing, refrigeration, food and beverage.
- Show fees: post-COVID fees, permits, required insurance certificates, architectural stamps on drawings (city and convention center specific).
- Rigging: engineer approvals, hanging sign permits, and additional planning time.
- Association deadlines: early-order discounts, late fees, and mandatory regulations in the Exhibitor Services Manual.
- Onsite labor: weekday vs. weekend rates, holiday rates, overtime, and double-time implications.
- Geographic differences: local taxes, union labor regulations, and service rates vary significantly by city.
- Experiential marketing: activations, gamification, hospitality, premiums, gifting, and sampling programs.
- Sustainability initiatives: eco-friendly materials, carbon offset programs, reusable or recyclable components.

Total Cost of Ownership

A single show budget is only part of the picture. We help you plan for the full lifecycle of your exhibit investment.

- Account for purchase costs and ongoing storage, maintenance, and warehousing costs.
- Account for multiple deployments and per-show shipping across your full show schedule.
- Account for graphics refreshes, structural upgrades, and refurbishing over a 3–5 year lifecycle.
- Evaluate rental vs. ownership based on show frequency, geographic spread, and brand evolution cycle.

Financial Planning & Transparency

- Establish financial accountability and budget reporting cadence for the program.
- Confirm who is responsible for scope of work approvals and change order authorization.
- Identify all decision makers and stakeholders who need to be aligned on financial parameters.
- Confirm whether you need support defining, projecting, or presenting the budget internally.

Budget Details

- Total new properties budget defined (fabrication and design):
- Total managed services budget defined (logistics, installation, show services):
- Training and coaching budget defined:
- Technology and digital integration budget defined:
- Experiential marketing and hospitality budget defined:
- Additional details, constraints, or assumptions:

Ready to Build Something Exceptional?

Trade shows and live events are among the most powerful — and most resource-intensive — marketing investments your brand makes. When strategy, design, and execution align, the results are measurable, meaningful, and repeatable.

D3 brings founder-level attention, 20+ years of real-world expertise, and a trusted production network to every program. You get senior leadership on your account — not a junior team. You get accountability, not hand-offs.

Let's schedule a discovery session and build your program together.