



QUICK START TRADESHOW PLANNING CHECKLIST

1. Set Objectives

- ☐ Define success metrics (leads, brand awareness, partnerships)
- ☐ Align goals with sales and marketing strategy
- ☐ Determine target audience and key messaging

2. Select and Register for the Show

- ☐ Choose the right event (industry fit, audience)
- ☐ Reserve booth space and review sponsorship options
- ☐ Note important deadlines (early bird pricing, paperwork, etc.)

3. Budget and Timeline

- ☐ Establish overall budget (booth, travel, giveaways, etc.)
- ☐ Create a timeline with milestones and deliverables
- ☐ Assign team roles/responsibilities

4. Booth Design and Logistics

- ☐ Finalize booth layout/design
- ☐ Order or produce booth materials (signage, backdrops, counters)
- ☐ Arrange shipping to/from venue
- ☐ Order utilities (electricity, internet, cleaning services)

5. Marketing & Promotion

- ☐ Develop pre-show email/social campaign
- ☐ Book meetings in advance with prospects/clients
- ☐ Update website/events page
- ☐ Prepare press releases or media kits (if applicable)



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6. Lead Capture & Sales Enablement

- ☐ Choose lead capture method (scanners, app, manual forms)
- ☐ Train staff on pitch, messaging, and demo scripts
- ☐ Prepare collateral and giveaways (brochures, business cards, swag). Challenge: do e-brochures & e-business cards, this gives you a direct touchpoint after the show, saves on printing, shipping, and restocking costs

7. Staffing & Travel

- ☐ Confirm booth staff and schedule shifts
- ☐ Book travel and lodging
- ☐ Schedule team training/presentation

8. Onsite Execution

- ☐ Install booth and test equipment
- ☐ Take pictures/video of the setup
- ☐ Set up product demos or interactive displays
- ☐ Hold a team huddle each morning for alignment
- ☐ Take pictures/video of booth interactions and the overall event

9. Post-Show Follow-Up

- ☐ Collect and organize leads
- ☐ Send follow-up emails or schedule meetings within 1 week
- ☐ Create a sizzle reel of the event (social posts, pictures, video, etc.)
- ☐ Debrief internally: what worked, what didn't
- ☐ Analyze ROI and share results

Get expert guidance on selecting high-impact third-party events.