PRE-TRADE SHOW STRATEGY

CHECKLIST

GOALS

- Create a Budget
- Define Booth Goals
- Assign and Brief Sales Team
- Define Target Audience

MARKETING & BRANDING

- Create pre-show social media marketing content
- Engage with attendees and vendors on social media before event
- Design the booth/table layout
- Select, design, and print handout materials
- Order business cards and branded SWAG

LEAD STRATEGY

- Define clear method to capture attendee details and interaction notes
- Prepare questions to determine target audience
- Build lead funnel and define your hot-warm-cool leads
- Finalize Post-Show Follow-Up Strategy

TRADE SHOW STRATEGY

CHECKLIST

CONNECT

- Follow the show's official #hashtags and social profiles
- Tag the event and your location in posts - include booth number
- Share "live" content (photos, booth moments, audience reactions)
- Repost or comment on other vendors/attendees to build visibility

ENGAGE

- Ask prepared questions to identify if booth visitors are part of your target audience
- Keep convo starters ready (products, brochures, books, etc. - whatever fits the vibe)
- Track common interests or recurring themes to reference in follow-up

LEAD STRATEGY

- Capture names, contact info, and quick notes about each booth visitor
- Offer a mini opt-in incentive (sticker, raffle, digital freebie) to encourage signups
- Use vendor or attendee lists from show organizers (if available) to identify warm leads
- Note top contacts for high-priority follow-up

REVIEW & REVISE

- Adjust follow-up language based on booth traffic, interests, and common questions
- Swap out or highlight materials that get more attention
- Modify your lead categories if needed to reflect the actual crowd
- Prep for post-show actions while insights are still fresh

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POST-TRADE SHOW STRATEGY

CHECKLIST

WHO & HOW TO FOLLOW UP

- Assign who is responsible for follow-ups
- Determine when to start
- Define method(s) to be used

OUTREACH

- Confirm Consultations / Meetings scheduled during show
- What outcomes are you looking for? Meeting? Downloads? Likes? Followers?
- Determine how to measure results
- Sort leads: Hot - Warm - Cool
- Define number of times to reach out before moving lead to inactive

REVIEW

- Outline how results will be measured
- Review follow-up progress weekly to ensure consistency
- Update lead statuses based on engagement:
  - Active – Ongoing communication or booked next step
  - Warm – Interest shown, but needs continued outreach
  - Inactive – No response after defined follow-up attempts
- Move Active leads into your regular client communications
- Mark Inactive leads as complete or archive for future campaigns
- Continue nurturing Warm leads with targeted follow-ups