

This template is designated to help you plan and manage every step of your trade show participation. Use it as a practical guide to stay organized, aligned, and focused on your trade show goals and objectives.

Pre-Event Planning

- ☐ Define trade show goals and measurable objectives
- ☐ Set a realistic budget (booth, travel, staff, marketing)
- ☐ Reserve booth space early
- ☐ Train booth staff on products and engagement techniques
- ☐ Promote your presence (social media, email, invitations)

On-Site Essentials

- ☐ Cleaning supplies and basic toolkit
- ☐ First aid kit and safety essentials
- ☐ Stationery: pens, markers, sticky notes
- ☐ Provide staff comfort items (water, snacks, shoes)
- ☐ Assign booth roles: greeter, demo lead, lead capture

Booth Design & Materials

- ☐ Plan booth layout and visitor flow
- ☐ Prepare graphics, signage, and branding
- ☐ Print brochures, flyers, and business cards
- ☐ Organize product samples and demo materials
- ☐ Plan giveaways and branded swag

Post-Event Actions

- ☐ Follow up with leads within 24–48 hours
- ☐ Send thank-you emails and nurture campaigns
- ☐ Debrief with staff to gather feedback
- ☐ Measure KPIs: leads, conversions, ROI
- ☐ Update checklist for future trade shows

Logistics

- ☐ Arrange booth shipping and track deliveries
- ☐ Book travel and hotel accommodations
- ☐ Plan local transportation for staff
- ☐ Test and pack technology (laptops, tablets, screens)
- ☐ Bring backups: chargers, cables, adapters