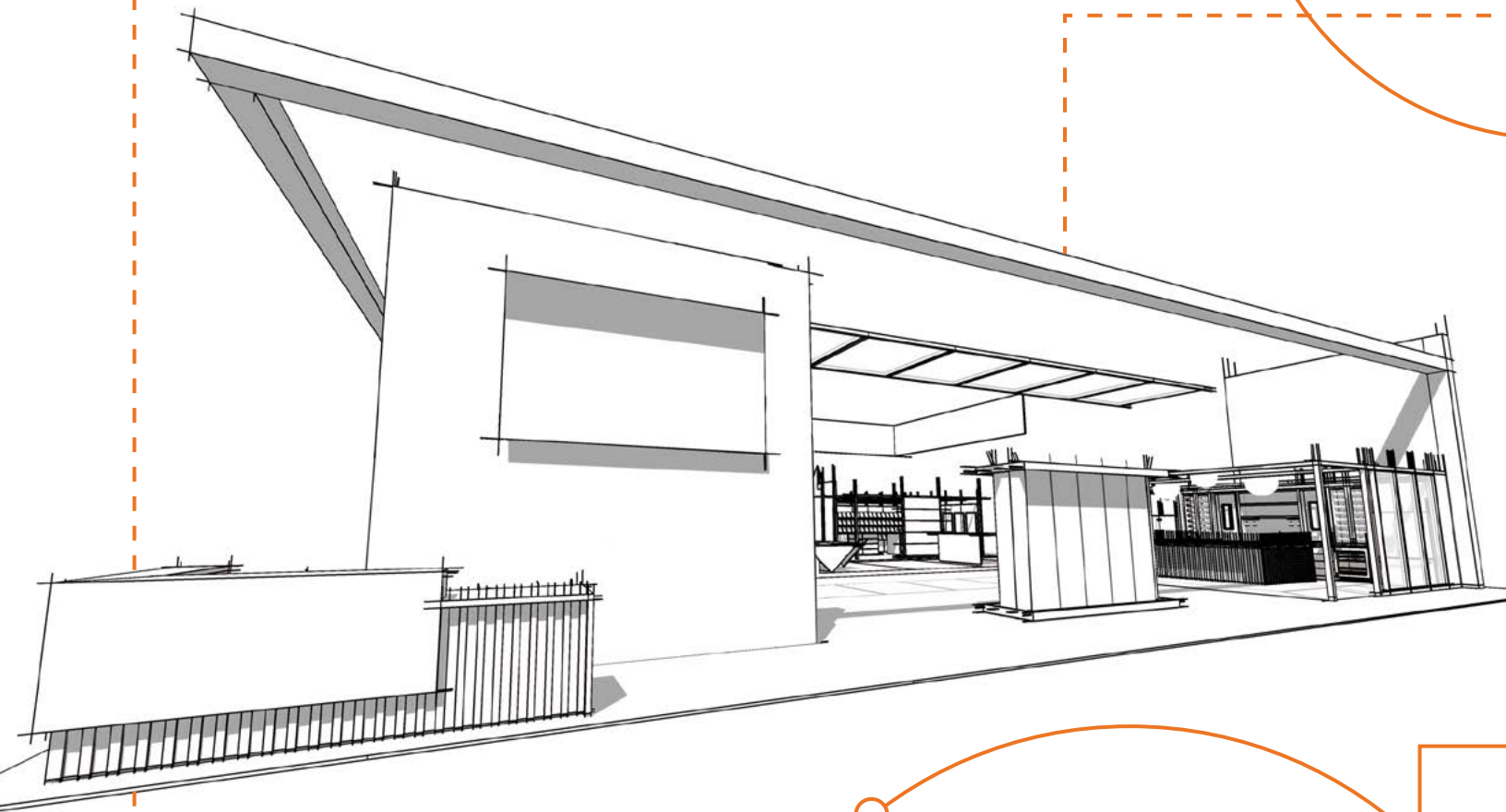
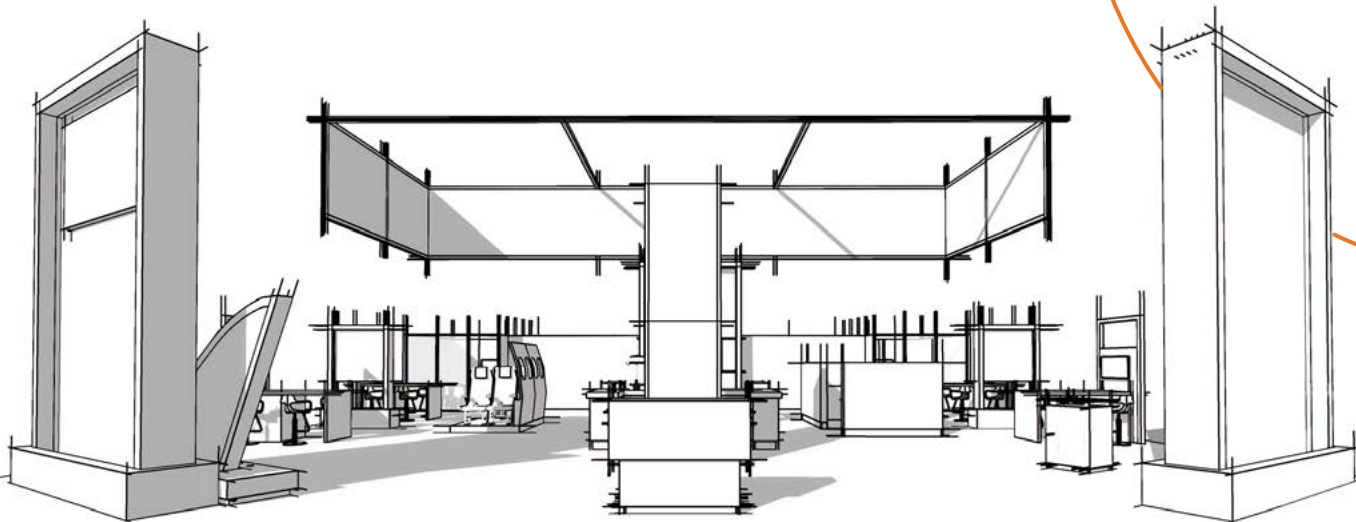


TRADE SHOW EXHIBIT PLANNING GUIDE





TRADE SHOW EXHIBIT PLANNING GUIDE ○

Efficient trade show planning begins with knowing what you want to achieve and communicating that with your exhibit house. As we work with you, we want to guide you through every step of the process – from exhibit ideation and final execution to post-show measurement and ongoing program management.

This comprehensive guide is meant to be the start of the planning process and doesn't have to be filled out completely. Focus on the sections most relevant to your program. Use it to direct conversation among internal stakeholders and to establish your needs, wants, and goals with your team at Derse.

COMPANY OVERVIEW & PROGRAM SCOPE

[Jump to Section](#)

GOALS & OBJECTIVES

[Jump to Section](#)

FUNCTIONAL NEEDS & DESIGN REQUIREMENTS

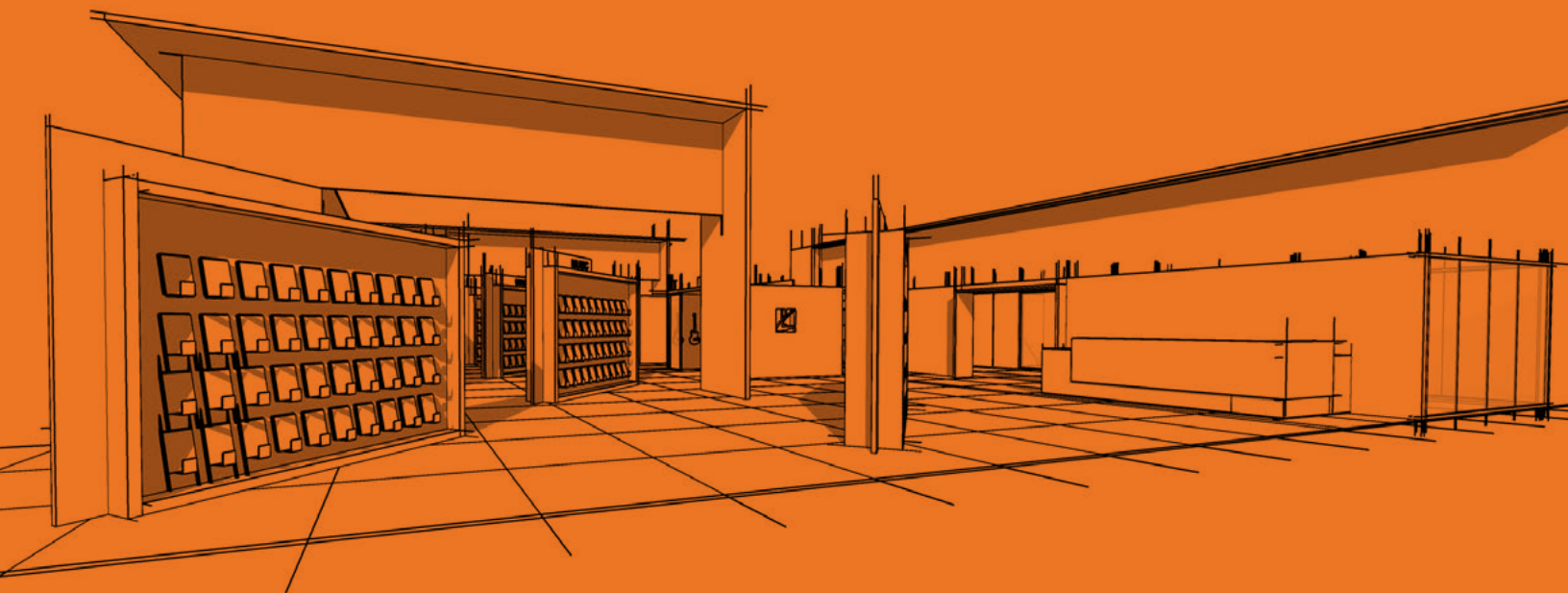
[Jump to Section](#)

BUDGET

[Jump to Section](#)

COMPANY OVERVIEW & PROGRAM SCOPE

While your exhibit partner can gather some of this information from a quick search online, it is often more productive when these details are articulated in your terms and contextualized within your trade show program.



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COMPANY OVERVIEW & PROGRAM SCOPE

Share an overview of your company including its overall business goals. As an organization, where are you looking to expand?

What are your company's vision and mission statements? How do these come to life when you are working with customers?

Provide context about your main competitors and the overall competitive landscape within your industry.

Outline your trade show presence and program in past years. How many years have you been exhibiting? How has your program evolved?



How have you measured success for your trade show program in the past? Did you achieve measurable success?

Looking at the prior year's trade show exhibit results: What worked? What didn't?

Are you making a change in your trade show schedule and/or exhibit size this year? If so, elaborate why.

What show are you targeting? Share an overview of your primary upcoming show(s) in the tables below. Include those details below. If you have a full show schedule, we recommend that you share it with your exhibit provider to help them make informed decisions regarding program management and creative solutions.

SHOW NAME

SHOW LOCATION

SHOW DATES

BOOTH NUMBER

BOOTH SIZE

COMPANY OVERVIEW
& PROGRAM SCOPE

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SHOW NAME

SHOW LOCATION

SHOW DATES

BOOTH NUMBER

BOOTH SIZE

SHOW NAME

SHOW LOCATION

SHOW DATES

BOOTH NUMBER

BOOTH SIZE

Additional show and program information:

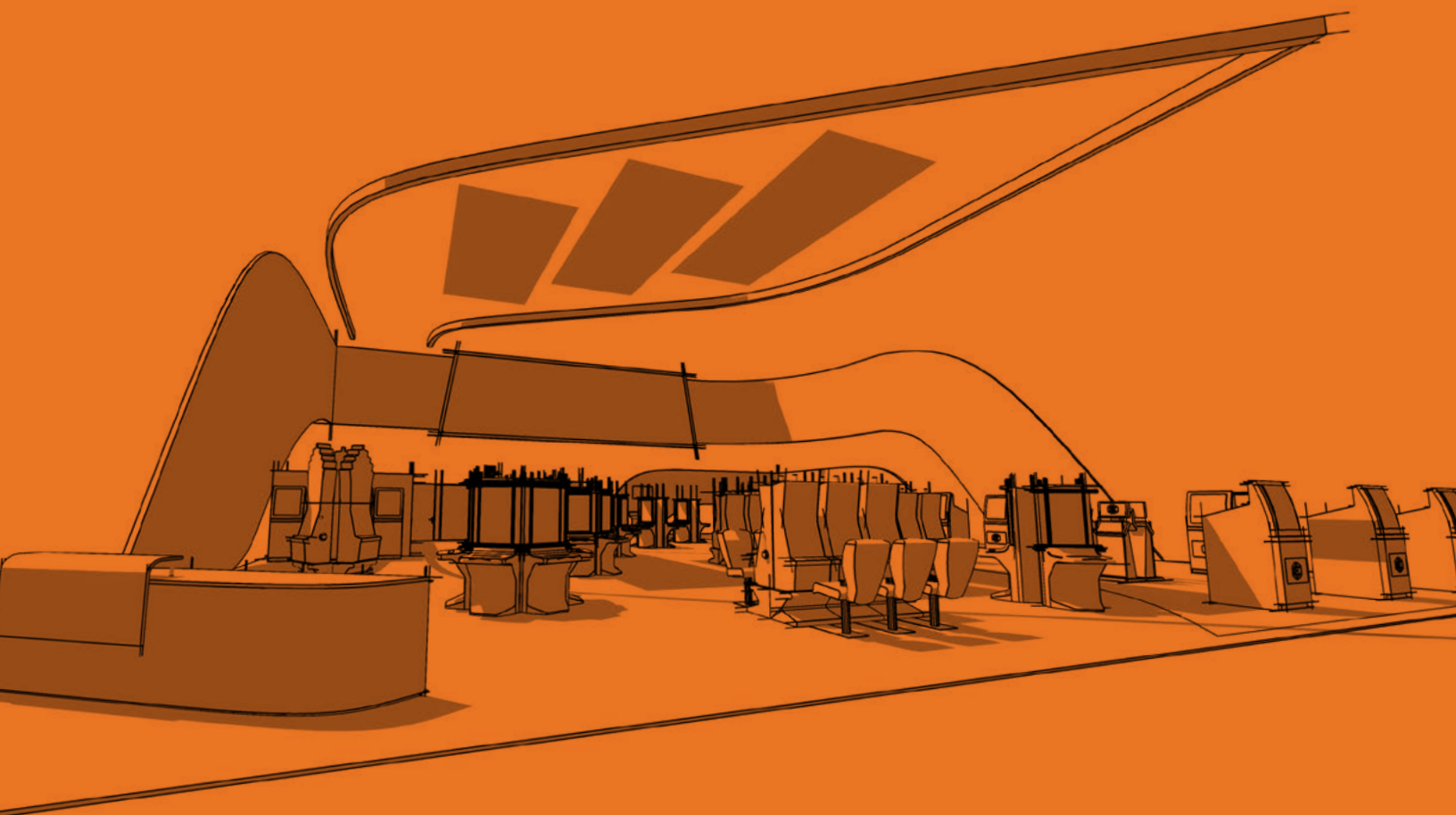
Indicate the services and offerings that require support for your trade show exhibit or overall program.

| | |
|--|---|
| <div><div>Exhibit Design</div><div>Exhibit Construction</div><div>Graphic Design</div><div>Graphic Production</div><div>Experiential Marketing</div><div>Show Services Management</div><div>Inventory Management & Warehousing</div><div>Installation & Dismantle Labor Management</div><div>Portable Program Management</div></div> | <div><div>Audiovisual Services & Management</div><div>Lead Capture Software</div><div>Booth Staff Training</div><div>Budget Consultation & Development</div><div>Metrics & Post-Show Evaluation</div><div>Housing & Registration Management</div><div>Hospitality Management</div><div>Event Planning</div></div> |
|--|---|

Additional Comments:

GOALS & OBJECTIVES

The exhibit solutions we provide for our clients are driven by the goals and objectives they identify for their programs. When we have a clear idea of what you are trying to achieve, our solutions will be relevant and support your goals.



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GOALS & OBJECTIVES

Do you have measureable goals and objectives set? If so, outline them below.

Select the goals relevant to your trade show program.



ROI and/or ROO

Additional Details:



Nurture Relationships

Additional Details:



Educate Attendees

Additional Details:



Generate Brand Awareness

Additional Details:



Scan Leads

Additional Details:



Dwell Time

Additional Details:

GOALS &
OBJECTIVES

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Generate Sales

Additional Details:



Host Meetings

Additional Details:



Other:

Additional Details:



Other:

Additional Details:

TARGET AUDIENCE

Please rank your target audiences in order of importance.

Target Audience #1

Key Attribute(s)

Reason(s) for Attending

What do you want this attendee to walk away knowing about your company?

Target Audience #2

Key Attribute(s)

Reason(s) for Attending

What do you want this attendee to walk away knowing about your company?

Target Audience #3

Key Attribute(s)

Reason(s) for Attending

What do you want this attendee to walk away knowing about your company?



GOALS & OBJECTIVES

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Describe your ideal attendee (title, personality, goals). Do they attend conferences and visit booths on their own or in groups?

What would a successful interaction look like between a booth staffer and an attendee?



BUSINESS UNITS OR PRODUCT LINES

Percentage of space allotted is an important distinction for companies with different business units, divisions, and product lines that exhibit together. This also translates to brand hierarchy. Often, these different units have different brands and budgets which impacts creative and pricing strategies. Please provide these details below and rank your product / service in order of importance as it relates to your trade show strategy.

Tell us about your company's divisions, business units, and product lines / groups. How do you expect these to impact your exhibiting strategy?

Do you have plans to launch products / services at your upcoming show(s)? If so, please elaborate.

Product / Service #1

Percentage of Space Allotted

Target Audience(s)

Key Message(s)

GOALS &
OBJECTIVES

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Product / Service #2

Percentage of Space Allotted

Target Audience(s)

Key Message(s)

Product / Service #3

Percentage of Space Allotted

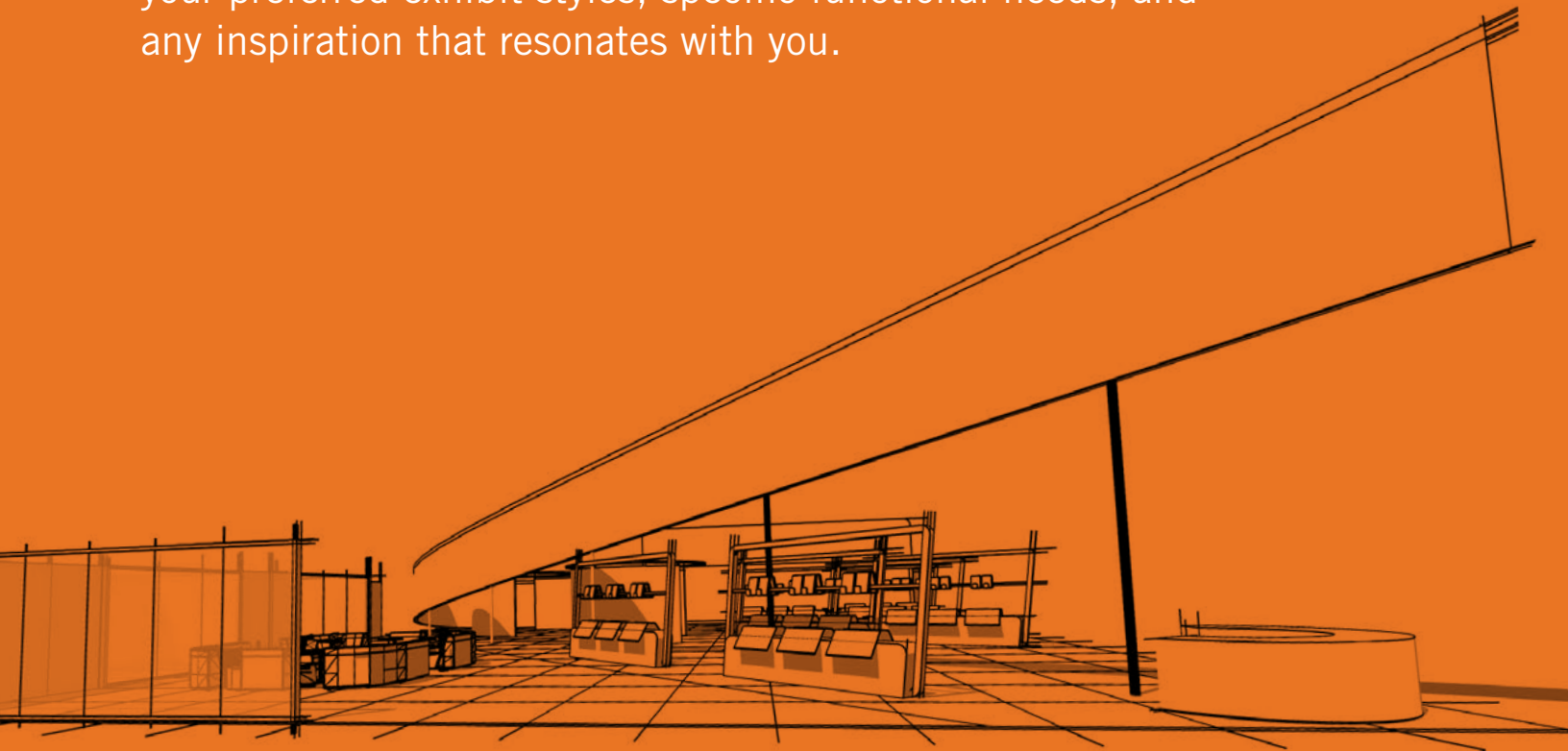
Target Audience(s)

Key Message(s)



FUNCTIONAL NEEDS & DESIGN REQUIREMENTS

The design of your exhibit depends on how you need the booth to function, how you want to be perceived, and what your perception of a successful exhibit is. In this section, share your preferred exhibit styles, specific functional needs, and any inspiration that resonates with you.



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FUNCTIONAL NEEDS & DESIGN REQUIREMENTS

While we want to accommodate for your design requests, every show has different regulations and restrictions that may influence the design and configuration of your booth. If you know of any regulations and restrictions, please share them below. If not, no worries, that's what your Derse team is for.

EXHIBIT PROPERTIES AND MATERIALS

Do you have any existing properties you plan to use? If you need new booth properties, do you have a preference for [custom or rental components](#)?

Do you need a modular exhibit to accommodate multiple booth sizes? If so, what exhibit sizes should the properties be configured to? Do you have additional uses in mind for your exhibit after the show (proprietary event, show room, etc.)?

To minimize transportation costs, it is common for exhibits to be made with aluminum and covered in fabric. Are you interested in an aluminum and fabric exhibit, or do you have something else in mind?

What flooring do you prefer for your exhibit (carpet, vinyl, other)?

DESIGN STYLE AND INSPIRATION

Of the options listed below, which is your preferred architectural style?

Angular



Rectilinear



Curvilinear



What have you seen or experienced on the trade show floor that resonated with you?

TRAFFIC FLOW

Upon entering the exhibit, is there a specific journey you want attendees to go through? Should there be a particular emphasis on a product, experience, or anything else?


GRAPHICS

If you are looking for graphic design support, will these graphics be printed, digital, or both?

Do you have any specific branding requirements, content, or preferred graphic design styles you would like included in the design?

FUNCTIONAL NEEDS

Do you need **demo / sales stations**? Provide details regarding the type, function, and quantity you need.



Do you need **presentation or theatre areas**? Provide details regarding the type and quantity you need.

Do you want a **hanging sign**? If so, elaborate on preferences and/or specifications.

Do you need a **reception counter**? Please elaborate on your specific needs and requirements.

Do you need **conference rooms**? Provide details of whether they should be private or open, the number of conference rooms, the number of people to accommodate per room, and any requirements for AV or HVAC.

Do you need a **double-deck structure** in your exhibit? If so, what purpose does the double-deck structure serve?









Do you need **storage** or have other technical equipment needs? Please elaborate on your specific requirements.

Do you need space allocated for **hospitality**? If seating is needed, elaborate on your specific seating needs.

EXPERIENTIAL MARKETING

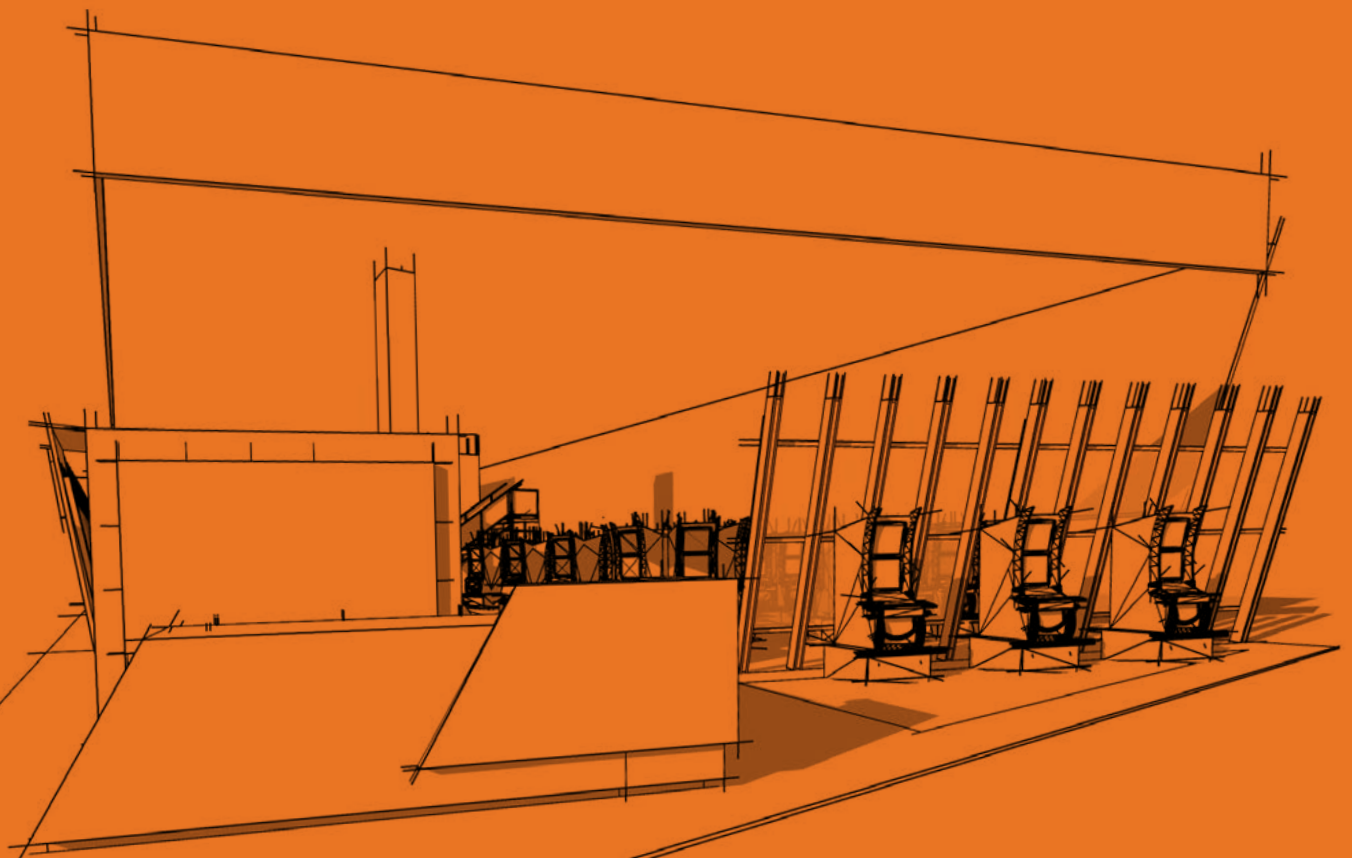
Are you looking for a new experiential engagement or a redeployment of a previously used experiential engagement? This can include any number of features that utilize [analog or digital engagement tactics](#). If you are interested in having experiential marketing in your exhibit, please share what you have in mind.

In addition, it may be helpful to provide your exhibit house with these supplemental resources to learn more about your brand, products, and services:

- | | |
|---|---|
|  Brochures, product literature, and product specifications |  Photos of your existing exhibit(s) |
|  Advertisements and catalogues |  Photos of exhibits you like |
|  Website |  Photos of your competitor's exhibits, if applicable |
|  Brand and graphic standards manual |  Industry publications, for reference |

BUDGET

Budget information is essential to strategically partner with your exhibit house. When you don't set clear parameters, expectations, and details regarding what your budget includes, you run the risk of receiving exhibit design renderings that exceed your budget.



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TYPES OF COSTS

First, it is important to understand the different types of costs that make up a trade show project or program. These include:

Professional Services

These costs include the time required to successfully plan, execute, and manage the day-to-day needs of clients' programs. This includes but is not limited to account management, creative design, on-site support, and logistics management.

Production

These costs include the physical properties and fabrication required to build your trade show booth. This includes but is not limited to raw materials, wall panels, graphics, signage, crates, and flooring that are constructed for use in your trade show booth(s).

Managed Services

These costs include the support needed to effectively execute your trade show booth leading up to the event, on show site, and afterward. This includes but is not limited to transportation, material handling, installation, dismantle, audiovisual, rigging, electrical, and cleaning.

Turnkey or rental exhibit budgets include all costs of the project from start (design, planning, production) to finish (install, dismantle, transportation, services).

COST DRIVERS

Next, when calculating your budget, it is essential to consider the cost drivers among production and managed services. Common cost drivers include but are not limited to:

Booth Space: The size and location of your booth within the convention center directly impacts costs.

Exhibit Structure: The panels, furnishings, flooring, technology, and fixtures may be owned or rented, or even a combination of the two—all directly impacting production and service costs as well as total cost of ownership.

Logistics: This includes transportation from warehouse to show site as well as the expense for bringing your properties from the dock door to the show floor itself (material handling).

Show Services: Each exhibit comes with specific power and data needs. Plumbing, refrigeration, food and beverage, and other services may be necessary—all impacting your budget.

Rigging: Regulations require rigging to be approved by an engineer. This leads to additional time needed for planning as well as money to get the necessary approvals.

Association Deadlines: Every show's Exhibitor Services Manual (ESM) will contain details about costs owed to the association, discount deadlines, and mandatory regulations that can and will play a role in your budget allocations.

Onsite Labor: The ESM will outline the dedicated move in and move out schedules for installation and dismantle. These days sometimes fall on week days, but can also be on weekends or holidays that could lead to overtime or double time; therefore, affecting your show costs.

Geographic Differences: Different cities have different taxes, services rates, and union regulations. Generally, exhibits located in the American West, Midwest, and Northeast are more expensive than the American South.

Experiential Marketing: In-booth activations, gamification, hospitality, premiums, and sampling may all be part of your strategy. Investing in the right pre-, at-, and post-show initiatives impacts your budget and your outcomes.

Also, the total cost of ownership (TCO) will uncover all the lifetime costs of owning and utilizing your booth. Exhibit ownership brings purchase costs, of course, but owning also brings costs such as storage, multiple deployments, shipping, upgrading, and maintaining / refurbishing the exhibit assets over time.

If your budget is pre-determined, please provide available details below. If you need help defining your budget or better understanding how to identify a number that is feasible for your program needs, we can gladly help you.

Total New Properties Budget:

Total Managed Services Budget:

Additional Details:

FINANCIAL PLANNING AND TRANSPARENCY

Lastly, we often hear a common challenge among clients where a lack of aggregated data makes it nearly impossible to understand a program's financial health, to identify positive or negative trends across investments, and have a level of financial accountability. This lack of organization drove the implementation behind Derse's financial reports that outline per show and programmatic investment trends to identify areas of opportunity for cost savings. Through this system, we aggregate data on all service and production line items to create an enterprise view of clients' program financials. As a result, these reports allow us to effectively evaluate clients' trade show investments to make economically sound decisions about client programs.

If you need help with budget projection and identifying cost allocations and trends, Derse has the tools to help you get a better understanding of what your budget is now and where it could be in the future.



TRADE SHOW EXHIBIT PLANNING GUIDE

**Ready to discuss your
trade show plans with us?**

Reach out to your Derse account lead
or contact us at derse.com/contact



To stay up to date with Derse insights,
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