

# A Tradeshow Checklist, born of experience

by Jason Cohen on January 25, 2010

My tips from running booths at dozens of tradeshows.



You can tell he's a "smart" bear because of the glasses.

A lot of tradeshows have been cancelled due to low attendance (which in turn is probably due to slashed travel budgets), but those which remain are that much more interesting.

It's easy to waste time and money at tradeshows. It's not just the booth (\$2k-\$20k) and travel expenses (\$1000/day including airline, hotel, rent car, shipping, and buying an extension cable at an outrageously overpriced convention center office supply center), it's the week of time spent at the show (including travel days) plus weeks of time spent preparing your strategy, crafting your sales pitches, organizing the booth crap, and chewing out the stoned guy at the print shop counter who claims to not see that the "red" in the color swatch is not the same as the "red" in your 6' x 6' banner.

Tradeshows are a combination of high-level strategy and low-level minutiae, so a checklist comes in handy.

## 3-6 months before the tradeshow

- **Have a goal.** Although there are many benefits of attending a show, you need a primary goal. A goal helps you make the decisions below and provides a

yardstick for whether the tradeshow was "successful," and therefore whether you should do more. Examples:

- Make a sale on the tradeshow floor
  - Get at least 20 genuine prospects
  - Talk with 10 industry leaders
  - Find 10 good recruiting prospects
  - Find 3 serious investors.
  - Ask potential customers 3 specific things (market research)
- **Schedule a vendor presentation.** Most shows allow vendors to give presentations, sometimes for a fee. *Always do this.* Even if just 20 people come to your talk, that's 20 people you get to talk to in depth for 45 minutes—far more valuable than talking to 100 of people at your booth for 5-60 seconds. I frequently get a few sales just from the presentation.
  - **Decide on your main message.** Just like your home page, you get 3 seconds to convince someone to stop at your booth. You'll need this message elsewhere (e.g. banner) so you need to decide what it is early on. Remember the goal is to get people to *stop*, not to explain everything about who you are and what you do! Boil it down to a single, short sentence.
  - **Pick your booth.** Booths go fast, and location *does* matter. Booths next to the bathroom are good even though they're "in the back" because everyone's going to hit the head. Booths near the front doors are good. Booths nearer to the center of the room are better than the ends. Booths at the ends of isles are good because you have a "corner" which means more traffic *and* your stuff can spill out over the edge.
  - **Design your banner and handouts.** Printing takes longer than you think because you'll need to iterate. I've never gotten the result I wanted from a print

shop on the first try. Never. The colors on your screen aren't the colors on their paper. The Pantone® colors you selected for your banner won't look the same as the samples. The sales guy you see at the counter screws things up. You need time to iterate and complain. And to find the right person:

- **Find the techie in the back of the print shop.** The first person you see at the sign shop is typically the sales guy, who knows nothing about Adobe InDesign, DPI, CMYK, vector vs. raster, or anything else important to making your stuff come out properly. Ask for the techie and talk to her directly.
- **Plan on at least 3 people.** You need two people at the booth to allow for busy times, to restock items, and to take breaks. Then you need another who can be walking around and going to meetings. Doesn't have to be a strict separation of powers, just need enough people to do all of the above simultaneously.
- **Finish all the travel arrangements.** Airplane tickets, hotels, rent cars. Fares are cheaper and there's no last-minute surprises with things being full.
- **Decide how your booth will be different.** Attendees will see a ton of booths, all essentially identical. A logo, a banner, some "clever" phrase, and 8 adjectives like "fast" and "scalable." Snore. You have to do *something* different. It doesn't have to be amazingly unique, just different.
- **Buy shirts and other swag.** With customization (i.e. your logo on a shirt), it can sometimes take a while, so get this done early. At least have a "tradeshow shirt." (It's the law.)

## 1 month before the tradeshow

- **Postcard mailers work!** I know, you thought "print media" was dead. Well not before a tradeshow, and not if you do it right. Best is to offer something cool/expensive at your booth, but only if they bring the postcard to you. This means they keep the post-

card handy starting now and even during the tradeshow, which means whatever else you put on there (marketing material) gets seen repeatedly. It also means they seek you out on the tradeshow floor. Then, because you collect the card, you have their contact info (their name, company, and address), so you get to follow up later. Don't forget to put your booth number on there! (Another reason to pick the booth early.)

- **Emails probably work.** Because you can use the tradeshow's name in the subject of the email, people will probably read your email blast.
- **Set up meetings. Yes meetings!** Tradeshows are a rare chance to get face-time with:
  - Editors of on-line and off-line magazines. Often overlooked, editors are your key to real press. **I've been published in every major programming magazine**; almost all of that I can directly attribute to talking with editors at tradeshows! It works.
  - Bloggers you like, especially if you wish they'd write about you
  - Existing Customers
  - Potential customers currently trialing your stuff
  - Your vendors
  - Your competition
  - Potential partnersProactively set meetings. Call/email everyone you can find. It's easy to use email titles which will be obviously non-spam such as "At [Tradeshow]: Can we chat for 5 minutes?" I try to get at least 5 meetings per day. Organizing dinner and/or drinks after the show is good too.

- **Promote the show.** You want people showing up and going to your booth, especially people who live in the area where attending the show just means getting half a day leave from work. Add a line to everyone's

email signature with the show info and your booth number. If you have a giveaway or something else interesting, say that too.

- **Box of everything.** I can't tell you how many times we've been saved by a box of stuff. A small, cheap plastic box from Walmart is fine. You won't use *all* the stuff *every* time, but I guarantee you will use an unpredictable subset *every* time. The box should contain:
  - pens (multiple, different colors)
  - Sharpie
  - Scotch tape
  - masking tape
  - extension cord
  - electric plug bar
  - post-it notes
  - rubber bands
  - tiny stapler
  - highlighter
  - paper clips
  - scissors
  - all-in-one tool (screwdriver, can opener)
  - medicine (Tylenol, Advil, Motrin, DayQuil)
  - zip-ties
  - Generic business cards (in case anyone runs out)
- **Comfortable shoes.** You'll be standing for much longer than you're used to; comfortable shoes are a must. Attendees can't see your shoes so sneakers or clogs might be OK; you can change into your pumps when you leave the booth. You can also bring floor pads designed for people who stand all day, or for a fee most venues can put padding under your booth's carpeting.

## At the tradeshow

- **A/B test your pick-up line.** This is no different than your landing pages! A tradeshow is a wonderful place to test attention-grabbers. What gets people to stop? To laugh? To say "OK, fair enough, tell me

more?" Test all show long. After the 100th pitch, you'll know exactly what gets people's attention—now **put that on your home page!**

- **Ask questions instead of pitching.** Everyone else "pitches at" people; be different and actually have a conversation. Good conversationalists are genuinely interested in the other person—what do they do, what are they interested in. If you start chatting they will actually *ask* you for a pitch as a form of reciprocation. Then you've got permission to "sell," and they're truly listening.
- **Don't ask how they're doing.** Your opening line should engage them with something *you specifically* have to offer. "Hello, how's it going" is not interesting or unique. Even just a simple "Are you interested in [thing you do]" is better, although still weak.
- **Ask questions, don't just transmit.** Sure you want to pitch your stuff, but **this is a fantastic opportunity for direct market research on your potential customers!** Come up with 3-5 questions that you're going to ask of people who walk by the booth, then ask away. No need to carefully record the results—the big trends will be obvious and the rest is noise.
- **Stand, don't sit.** Sitting looks like you don't want to be there. It's uninviting. The head-height differential is psychologically off-putting. I know your feet hurt; stand.
- **Get into the aisle.** Just because there's a table there doesn't mean you have to stand behind it. Break out of your 10'x10' prison and engage people in the aisle. Best is to have someone inside the booth to talk to folks who walk up and another in the aisle getting attention and directing folks inward. Especially during high-traffic, just being a barrier in the middle forces people to squeeze by your booth, which gives you a chance to engage. [Learn from the guy in the bear suit!](#)
- **Moving pictures rock.** When you're sitting at a bar and there's a TV behind the person you're talking to, it's really hard not to look, right? We tend to look at moving images, especially when they're bright. So

your booth should have a big monitor or better yet a bright projector. Don't just show a static screenshot or PowerPoint image, and don't leave it stuck wherever the last demo left off—get a demo movie going and catch some eyes. We did this at Smart Bear and I can't count the number of times another vendor said "OMG we have to do that next year."

- **Always be able to demo.** Nothing is more sticky than a live demo. Not swag, not brochures, not clever phrases, not raffles. That other stuff is good—both for getting traffic and as a reminder—but you need a demo to make the experience memorable. I prefer demoing on a projector so it's big and passers-by get hooked as well, but a large monitor works too. *Large.* Not your laptop screen.
- **Make notes on business cards.** You'll talk to hundreds of people; you'll never remember what one guy said or what he wants. Always write it down on *their* business card. If they have one of those silly cards where you can't make notes (why people, why?), use a post-it from your box-o-stuff to keep notes together with the card.
- **Sales people aren't enough.** Most attendees don't want to talk to sales people anyway; if they're interested at all they want to geek out with their peers. Air out some of those folks who typically don't get to go on sales calls.
- **Build your own happy hour party** Rent a room at or near the conference site with wine, beer, and basic food. Pass out invites at the show and on your pre-show mailers. Who can resist free booze and free food? It's cheaper than you think and you get to pitch people in a relaxed atmosphere. People are willing to talk about your product to reciprocate.
- **Don't depend on the Internet.** Tradeshow Internet is spotty at best. Your demos and note-taking *must* operate without being online.
- **Use LinkedIn every night.** Most people will accept, especially if you add the contact the same day and reference the conference. Take advantage of this opportunity to significantly expand your online network.
- **Walk the floor and talk to everyone.** As a fellow vendor, you can commiserate about how the show is going and how it compares to other shows. Try to think of a way your two companies could work together; usually it doesn't work out but the discussion helps them remember who you are. Try to skip past their salespeople. Meet the founder if she's there.
- **Note the jokes.** People will make fun of you. Actually, if they don't, maybe that's a bad sign because they can't figure out what you do. Usually you get some wise-cracks. That's interesting, right? Could be a good thing, could be a bad thing.
- **Free food.** Works better than almost any other free thing. The more "real" the food is (i.e. not just candy) the better. Cookies are good. Put it at the center of your booth so it's harder for someone to take without talking.
- **Raffle something.** I'm not a fan of raffles as a way to get sales, but I do like them at tradeshow because it gets a crowd to appear at your booth. Crowds make other people think your booth is interesting. We've seen people stop by our booth a day after a big crowd saying "I didn't want to stop yesterday because you guys were swamped, but I guess whatever you're doing is interesting!" Make sure you have to provide contact info to enter (fill form, scan badge, drop business card). Those leads won't be particularly qualified but it's better than nothing.
- **Take names instead of pushing brochures.** Attendees get dozens of pieces of paper pushed into their hands and pre-filled in their tote bags. Even if yours is clever, funny, and useful, it's still going to be lost. Instead of hand-outs, scan their badge or get a business card, and *mail* them something. It will be waiting on their desk one morning without all the distraction of a tradeshow.
- **Quality not quantity.** It's cliché, but it's better to have six solid conversations with people who will buy your software than to give away 200 pieces of branded swag to people who can't remember who you are.

## After the tradeshow

- **Follow up!** Attendees are saturated with presentations and vendor pitches, so there's a 99% chance they've forgotten about you. Yes, even if they took your oh-so-memorable swag or your fabulously-designed brochure. It's up to you to follow up and remind them who you were, and take them up on their offer to get a demo, trial the software, or look at a draft of an article you want published.
- **Apply what you learned about selling.** You talked to hundreds of people, pitching a hundred different ways, with mixed results. What did you learn? Some questions to get you started:
  - Which one-liners got people's attention, and what did people not relate to?
  - How can you incorporate the successful one-liners in your home page?
  - What new AdWords text do you want to try?
  - How should you change your 2-minute demo?
  - What were people saying about your competition? What were your best retorts?
- **Apply what you learned about your software.** Having to demo the product 50 times always uncovers invaluable product information. Some questions to get you started:
  - What features did people ask about which you already have, but it wasn't obvious?
  - What features did people keep asking for which you *don't* have?
  - What part of your demo seemed to drag because your workflow wasn't easy enough?
  - What part confused viewers because the interface wasn't obvious?
  - What terminology made no sense to newbies?
  - What did people hate about your competitors, and how can you maintain that advantage?
  - What did people love about your competitors, and how can you close that gap?

Have fun! It's fun too.

---

Printed from: *A Smart Bear*  
<https://longform.asmartbear.com/tradeshow-tips-checklist/>  
© 2007-2024 Jason Cohen  @asmartbear