

The Complete Trade Show Planning Template

12-week countdown · budget worksheets · daily checklists
lead capture setup · post-show follow-up · ROI measurement

Everything you need to plan, execute, and measure
your next trade show — from booth booking to ROI report.

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12-Week Countdown Timeline

Your week-by-week action plan from booth booking to show day

Week 12 — Foundations

- Confirm booth size, location, and contract
- Set show goals (leads, meetings, demos, revenue target)
- Draft preliminary budget (see Section 2)
- Identify key team members and assign roles
- Research attendee demographics and target accounts

Week 11 — Design & Vendors

- Brief booth designer / select booth package
- Order branded materials (banners, tablecloths, displays)
- Book hotel and travel for the team
- Start pre-show marketing plan (see Section 3)
- Register for exhibitor portal / submit company profile

Week 10 — Content & Collateral

- Finalize booth layout and signage design
- Create demo scripts and product one-pagers
- Prepare digital assets (videos, presentations, QR codes)
- Design and order giveaways / swag
- Set up lead capture tool and test workflow

Week 8-9 — Marketing Push

- Launch pre-show email campaign (3-touch sequence)
- Post social media teasers (behind-the-scenes prep)
- Schedule meetings with target accounts via show app
- Publish blog post / press release about your presence
- Coordinate with partners co-exhibiting or speaking

Week 6-7 — Training & Rehearsal

- Train booth staff on lead qualification criteria
- Practice elevator pitch (30-second version)
- Run through product demos — handle common objections
- Test all technology (screens, tablets, WiFi hotspot, chargers)
- Confirm shipping logistics for booth materials

Week 4-5 — Final Prep

- Print name badges and staff schedules
- Pack booth kit (see packing checklist below)
- Finalize lead capture workflow: capture → qualify → CRM
- Prepare post-show follow-up email templates
- Confirm all vendor deliveries and timelines

Week 2-3 — Last Mile

- Send final pre-show email: 'Visit us at booth #___'
- Charge all devices, test lead capture app offline
- Review floor plan — locate competitors, partners, exits
- Prepare daily team briefing agenda
- Ship booth materials (allow 5+ days for freight)

Week 1 — Show Week

- Arrive early for booth setup — test everything
- Team briefing: goals, roles, lead process, daily schedule
- Capture every conversation — don't rely on memory
- Daily debrief: top leads, learnings, adjustments
- Tear down and account for all materials

PRO TIP

Don't wait until show week to test your lead capture. Run a mock session with your team at Week 6 — practice capturing, qualifying, and syncing leads to your CRM. The teams that rehearse capture 2-3x more qualified leads.

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Budget Planning Worksheet

Track every cost — know your cost-per-lead before the show ends

Category	Item	Estimated	Actual	Variance
Booth	Space rental			
Booth	Booth design & build			
Booth	Signage & graphics			
Booth	Furniture rental			
Booth	Electricity & WiFi			
Booth	Carpet / flooring			
Travel	Flights			
Travel	Hotel (__ nights x __ rooms)			
Travel	Ground transport			
Travel	Per diem / meals			
Marketing	Pre-show email campaign			
Marketing	Social media ads			
Marketing	Printed collateral			
Marketing	Giveaways / swag			
Technology	Lead capture software			
Technology	Monitors / screens			
Technology	WiFi hotspot / connectivity			
Staffing	Staff time (__ people x __ days)			
Staffing	Temporary staff / hostess			
Shipping	Outbound freight			
Shipping	Return freight			
Shipping	Drayage (show floor delivery)			
Other	Insurance			
Other	Show guide listing / sponsorship			
Other	Client dinners / entertainment			

Budget Summary

Total Estimated Budget: \$ _____
Total Actual Spend: \$ _____
Leads Captured: _____
Cost Per Lead: \$ _____

BENCHMARK

Average trade show cost: \$30K-\$50K for a 10x10 booth. Average cost-per-lead: \$150-\$400. If your CPL exceeds \$500, review booth traffic and lead capture effectiveness before your next show.

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Pre-Show Marketing Checklist

Drive booth traffic before the doors open

Email Campaign (3-Touch Sequence)

Email 1 — 6 weeks out

Announce your presence. Booth number, what you're showing, why they should visit.

Email 2 — 3 weeks out

Offer meeting scheduling. Include calendar link. Tease exclusive demo or giveaway.

Email 3 — 3 days out

Final reminder with floor map, your booth highlighted. Create urgency.

Social Media Plan

- Post 'We're exhibiting at [Show Name]' announcement with booth #
- Share behind-the-scenes booth prep photos / videos
- Create event-specific hashtag and use the show's official hashtag
- Run a pre-show contest: 'Visit our booth to win ___'
- Tag speakers, partners, and target accounts in posts
- Go live from the show floor (Day 1 energy, product demos)
- Post daily recap stories with top moments and key quotes

Meeting Scheduling

- Export attendee list from show organizer portal
- Identify 20-50 target accounts from attendee list
- Send personalized meeting requests via LinkedIn / email
- Book meetings in 30-min slots with 15-min buffers
- Log all confirmed meetings in shared team calendar
- Prepare a 1-page brief for each scheduled meeting

Content & PR

- Publish a blog post: 'What we're bringing to [Show Name]'
- Submit press release to industry publications
- Prepare talking points and FAQ for media interviews
- Create a shareable digital brochure (PDF, not just printed)

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Booth Design & Setup Checklist

Everything you need on the show floor

Booth Layout

- Confirm booth dimensions and setup/tear-down times
- Create a floor plan sketch (product display, meeting area, storage)
- Plan traffic flow: entry points, demo stations, exit to aisle
- Position key visuals at eye level facing highest-traffic aisle
- Designate a private meeting corner for qualified leads

Signage & Branding

- Main header banner with company name + tagline (readable from 20 ft)
- Product/service benefit statements (3-5 key points)
- Pricing hidden — use 'Ask us' or 'See demo' prompts instead
- QR code linking to landing page / lead capture form
- Consistent brand colors and fonts across all materials

Technology Checklist

- Tablets / iPads (charged, apps installed, offline mode tested)
- Portable monitor / TV screen for demos or looping video
- WiFi hotspot (don't rely on show WiFi — it always fails)
- Power strips and extension cords (6+ outlets minimum)
- Phone chargers for the team
- Lead capture app installed on all devices, tested offline
- Backup: paper lead forms + business card bowl (just in case)

Packing Checklist

Category	Items	Qty	Packed
Signage	Banner stands, posters, table wraps		
Collateral	Brochures, one-pagers, business cards		
Technology	Tablets, monitor, cables, chargers		
Swag	Giveaways, branded items, prize wheel		
Tools	Tape, zip ties, scissors, toolkit		
Supplies	Pens, notepads, mints, hand sanitizer		
Furniture	Tablecloth, chair cushions, rug		

Personal

Comfortable shoes, snacks, water bottles

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Staff Training & Roles

Every team member should know their job, their pitch, and how to capture leads

Role Assignments

Role	Person	Primary Responsibility	Backup
Booth Captain		Overall coordination, schedule, escalations	
Demo Lead		Product demonstrations, technical Q&A	
Greeter		Engage passersby, qualify, route to demo	
Meeting Host		Scheduled 1:1 meetings, senior prospects	
Lead Manager		Capture, qualify, tag all leads in real-time	
Social Media		Live posting, photos, stories from floor	

Elevator Pitch (30 seconds)

Every team member should memorize and practice this structure:

- Hook (5 sec)** — A surprising stat or question that stops them
- Problem (10 sec)** — The pain point you solve — make it specific
- Solution (10 sec)** — What you do differently — your unique angle
- CTA (5 sec)** — What you want them to do next (see demo, scan card, schedule call)

Write your pitch below:

Lead Qualification Criteria (BANT)

- Budget:** Do they have budget allocated for this type of solution?
- Authority:** Are they a decision-maker or influencer?
- Need:** Do they have a clear pain point you solve?
- Timeline:** Are they buying within 3-6 months?

LEAD SCORING

Hot (A): has all 4 BANT criteria → follow up within 24 hours. Warm (B): has 2-3 criteria → follow up within 48 hours. Cold (C): has 1 or fewer → add to nurture sequence. Tag every lead as A/B/C before leaving the booth.

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Lead Capture Setup Guide

Capture every conversation, not just every badge

Lead Capture Workflow

Design your capture flow BEFORE the show. Every team member should follow the same process:

- 1. Engage** Greet the visitor, ask an open-ended question, gauge interest.
- 2. Qualify** Run through BANT criteria (mentally). Determine A/B/C lead.
- 3. Capture** Record the conversation — name, company, pain points, next steps.
- 4. Tag** Mark lead as Hot (A), Warm (B), or Cold (C) immediately.
- 5. Note** Add context: what they care about, objections, specific requests.
- 6. Sync** Ensure lead data syncs to CRM within 24 hours (automated if possible).

What to Capture for Every Lead

Field	Example	Priority
Full name	Jane Smith	Required
Company	Acme Corp	Required
Title / Role	VP of Sales	Required
Email	jane@acmecorp.com	Required
Phone	+1-555-0123	Nice to have
Pain point	Losing leads after trade shows	Critical
Current solution	Using spreadsheets	Important
Budget range	Looking to spend \$5K-\$20K	Important
Timeline	Buying Q3 2026	Important
Next step agreed	Schedule demo next Tuesday	Critical
Lead score	A (Hot)	Required
Conversation notes	Key quotes, specific interests	Critical

EXPORB TIP

Traditional badge scanners capture WHO you met. But they miss WHAT you discussed — and that's what closes deals. Exporb records booth conversations, scans business cards, and uses AI to extract pain points, buying signals, and follow-up actions automatically. Your team captures context, not just contacts. Try it free at exporb.com.

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Show Day Checklists

Daily routines for a smooth, productive show

Morning Opening (30 min before doors)

- Arrive 30 minutes before show floor opens
- Turn on all screens, charge devices, test WiFi / hotspot
- Verify lead capture app is running and syncing
- Restock brochures, swag, business cards
- Quick team huddle: today's goal, scheduled meetings, key targets
- Clean booth — tidy cables, wipe surfaces, straighten signage
- Check competitor booths — any new messaging or offers?

Mid-Day Check (lunch break rotation)

- Review leads captured so far — are you on pace for daily goal?
- Quick lead quality check: how many A-leads today?
- Rotate staff — send 1-2 people to lunch, keep booth covered
- Walk the floor — visit partners, check competitors, network
- Post a social media update from the floor
- Charge devices, restock supplies

End of Day Debrief (15 min after close)

- Count leads captured today: __ Hot, __ Warm, __ Cold
- Review top 5 leads — assign follow-up owners
- Send 'same-day' follow-up emails to Hot (A) leads
- Share key learnings: what messaging resonated? Common objections?
- Secure booth: lock valuables, cover displays, charge devices overnight
- Set goals for tomorrow — what to improve?

Daily Lead Tracker

Day	Target Leads	Hot (A)	Warm (B)	Cold (C)	Total	Meetings
Day 1						
Day 2						
Day 3						
Day 4						
TOTAL						

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Post-Show Follow-Up Timeline

The 48-hour rule: speed wins deals

Within 24 Hours

- Export all leads from capture tool to CRM
- Send personalized follow-up to ALL Hot (A) leads
- Reference specific conversation topics ("You mentioned you're struggling with...")
- Include a clear next step: schedule a call, send proposal, share case study
- Connect with A-leads on LinkedIn with a personalized note

Within 48 Hours

- Send personalized follow-up to all Warm (B) leads
- Include relevant content: case study, whitepaper, or blog post
- Propose a specific meeting date/time (don't say 'let me know when works')
- Internal debrief meeting: what worked, what didn't, key learnings

Within 1 Week

- Add Cold (C) leads to nurture email sequence
- Create an internal show report: leads, meetings, pipeline generated
- Share top wins and learnings with leadership
- Thank partners, booth neighbors, and show organizers
- Post a 'show recap' on social media with photos and key takeaways

Within 1 Month

- Follow up again with leads who haven't responded
- Move stale leads to long-term nurture
- Calculate preliminary ROI (see Section 9)
- Decide: should we exhibit at this show next year?
- Book early-bird booth for next year (if yes)

Follow-Up Email Template

Subject: Great meeting you at [Show Name] — [specific topic]

Body: Hi [Name],

It was great connecting at [Show Name] yesterday. I really enjoyed our conversation about [specific pain point they mentioned].

As promised, here's [the resource/link/info you discussed].
 Would [specific date/time] work for a 20-minute call to explore how we can help with [their specific challenge]?

FOLLOW-UP DATA

Generic 'nice to meet you' emails get a 5-15% response rate. Personalized follow-ups that reference specific conversation details get 40-55% response rates. This is why capturing conversation context matters more than capturing badge data.

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ROI Measurement Worksheet

Prove the value of every dollar spent

Input Metrics

Metric	Value	Notes
Total show investment	\$ _____	From Section 2 budget
Total leads captured	_____	All A + B + C leads
Hot (A) leads	_____	Ready to buy
Warm (B) leads	_____	Interested, need nurturing
Meetings booked at show	_____	Scheduled during event
Meetings booked post-show	_____	From follow-up
Proposals sent (within 30 days)	_____	Direct result of show
Deals closed (within 90 days)	_____	Attributed to show
Revenue from closed deals	\$ _____	Actual revenue
Pipeline generated (total)	\$ _____	All open opportunities

Calculated Metrics

Cost Per Lead (CPL)	Total investment ÷ Total leads = \$ _____
Cost Per Qualified Lead	Total investment ÷ Hot leads = \$ _____
Cost Per Meeting	Total investment ÷ Total meetings = \$ _____
Lead-to-Meeting Rate	(Meetings ÷ Leads) × 100 = _____%
Meeting-to-Proposal Rate	(Proposals ÷ Meetings) × 100 = _____%
Proposal-to-Close Rate	(Deals closed ÷ Proposals) × 100 = _____%
ROI	(Revenue - Investment) ÷ Investment × 100 = _____%
Pipeline Multiple	Pipeline generated ÷ Investment = _____x

Benchmarks: How Do You Compare?

Metric	Poor	Average	Good	Excellent
Cost Per Lead	> \$500	\$200-\$500	\$100-\$200	< \$100
Lead-to-Meeting Rate	< 10%	10-20%	20-35%	> 35%
Meeting-to-Close Rate	< 5%	5-15%	15-25%	> 25%
ROI	Negative	0-100%	100-300%	> 300%

Pipeline Multiple	< 3x	3-5x	5-10x	> 10x
Follow-up Response Rate	< 10%	10-25%	25-40%	> 40%

10 Notes & Contacts

Space for on-show notes, key contacts, and action items

Key Contacts Met

Name:	Company:	Title:
Email:	Score: A / B / C	
Notes:		

Name:	Company:	Title:
Email:	Score: A / B / C	
Notes:		

Name:	Company:	Title:
Email:	Score: A / B / C	
Notes:		

Name:	Company:	Title:
Email:	Score: A / B / C	
Notes:		

Action Items

Key Learnings & Ideas for Next Show



Stop losing trade show leads. Start capturing conversations.

- ✓ Record booth conversations with one tap
- ✓ AI extracts pain points, buying signals & next steps
- ✓ Business card scanning with instant enrichment
 - ✓ Works offline — no show WiFi needed
 - ✓ Sync leads to your CRM automatically
 - ✓ Free tier — no credit card required

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