Trade show planning checklist

Start with the organizer's deadlines, then work backward from show day. Use this checklist as a starting point and adapt it to the venue, event and your team.

1. Define the event

[ ] Confirm event dates, venue, participation and the reasons your team is attending.

[ ] Set objectives and decide what results you will record.

[ ] Review the prospectus, exhibit rules, floor plan and organizer deadlines.

[ ] Assign a planning owner and set an initial event budget.

2. Reserve the booth and services

[ ] Confirm booth location, dimensions, reservation status and payment schedule.

[ ] Identify electrical, flooring, internet, furnishings and other required services.

[ ] Record vendors, order deadlines, invoices and deposits or balances due.

[ ] Check organizer-specific requirements, including insurance documents when required.

3. Plan people and travel

[ ] Choose attendees and confirm registration, ticket types and references.

[ ] Record flights, lodging and ground transport with the people covered by each booking.

[ ] Confirm arrival and departure times, time zones and transfer time.

[ ] Assign booth duty, demos, meetings and preparation activities; review overlaps.

Trade show planning checklist - continued

4. Prepare assets and shipments

[ ] Reserve displays, equipment and other reusable assets for the checkout period.

[ ] Allocate collateral and giveaways, checking available inventory.

[ ] Confirm destination instructions, receiving windows, carriers and tracking.

[ ] Plan return shipping, storage and who will record returned quantities.

5. Review before departure

[ ] Confirm floor hours, move-in, move-out and the team's agenda.

[ ] Review open tasks, unpaid commitments and readiness requirements.

[ ] Check that invoices, confirmations and organizer documents are easy to find.

[ ] Share personal team briefs and confirm the team knows where to get help.

6. Run the show and close it out

[ ] Record changes, customer interactions and outcomes against your objectives.

[ ] Capture unexpected expenses and save receipts as they occur.

[ ] Check returns, giveaway usage and remaining stock after the show.

[ ] Reconcile final costs, review results and record what to repeat or change.

A completed checklist is useful only when it reflects current records. Recheck organizer requirements and confirm details with the people responsible.

Adapt this resource to your event organizer requirements and organization policies.