

Expo Planning Checklist

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Pre-event Setup

Task	Done?	Assignee	Due Date	Notes
6-8 Weeks Before the Expo				
Confirm the event date, booth location, and review event guidelines or regulations.	<input type="checkbox"/>			
Define clear outcomes for your participation, such as lead generation or brand awareness.	<input type="checkbox"/>			
Create a detailed budget for booth, equipment, transportation, and promotional materials.	<input type="checkbox"/>			
Finalize bookings for communication equipment, AV gear, and any other rentals.	<input type="checkbox"/>			
Plan booth design, including signage, branding, and overall layout.	<input type="checkbox"/>			
Understand the event's audience demographics and review competitor strategies for better positioning.	<input type="checkbox"/>			
Obtain quotes for booth construction, printing, and other event-related services.	<input type="checkbox"/>			
Confirm shipping logistics for booth materials and equipment to the venue.	<input type="checkbox"/>			
Start creating and scheduling email campaigns and social media posts to promote your participation.	<input type="checkbox"/>			

Confirm the number of staff required and outline their roles and responsibilities.	<input type="checkbox"/>			
Design and order promotional items like brochures, giveaways, and banners.	<input type="checkbox"/>			
4-6 Weeks Before the Expo				
Finalize and approve booth design, graphics, signage, and overall branding.	<input type="checkbox"/>			
Order promotional materials such as brochures, business cards, giveaways, and branded items.	<input type="checkbox"/>			
Confirm all vendor services, including power supply, internet access, furniture, and any specialized needs.	<input type="checkbox"/>			
Verify shipping logistics and delivery schedules for booth materials, communication equipment, and printed items.	<input type="checkbox"/>			
Launch digital marketing campaigns across social media, email, and website.	<input type="checkbox"/>			
Coordinate with staff members, confirm roles, and ensure they are well-prepared with the necessary training.	<input type="checkbox"/>			
Confirm set-up and tear-down times with event organizers, and ensure your booth and equipment are ready.	<input type="checkbox"/>			
Organize and confirm travel and accommodation arrangements for all event staff and exhibitors.	<input type="checkbox"/>			
Review and finalize all necessary permits, insurance, and legal documentation.	<input type="checkbox"/>			
Prepare and test any technology or equipment that will be used during the event.	<input type="checkbox"/>			
Schedule any pre-event meetings or webinars to engage potential attendees and promote your booth.	<input type="checkbox"/>			

2-4 Weeks Before the Expo

Confirm vendor services such as power, internet, catering, storage, and ensure contracts are in place.	<input type="checkbox"/>			
Verify shipping and delivery schedules for booth materials, equipment, promotional items, and signage.	<input type="checkbox"/>			
Test all equipment, including AV systems, Wi-Fi, lead capture tools, and any other communication devices.	<input type="checkbox"/>			
Finalize staff schedules, roles, and responsibilities for the event, ensuring all shifts are covered.	<input type="checkbox"/>			
Conduct staff training on booth operations, engagement strategies, product knowledge, and lead generation.	<input type="checkbox"/>			
Confirm booth design and layout, and ensure all branding materials and signage are printed.	<input type="checkbox"/>			
Review set-up and tear-down schedules with the event organizers to ensure smooth logistics.	<input type="checkbox"/>			
Ramp up marketing efforts, including social media posts, email campaigns, and targeted event promotions, to attract attendees.	<input type="checkbox"/>			
Finalize travel, accommodation, and transport arrangements for all team members attending the expo.	<input type="checkbox"/>			
Review legal documentation, including insurance, permits, and any necessary certifications.	<input type="checkbox"/>			
Confirm and test technology systems for presentations, demonstrations, and any virtual tools being used at the booth.	<input type="checkbox"/>			
Prepare promotional items such as brochures, giveaways, and business cards for distribution at the event.	<input type="checkbox"/>			
Create a checklist for final booth setup on the event day to ensure smooth assembly and operations.	<input type="checkbox"/>			

1 Week Before the Expo

Double-check all deliveries and shipments for booth materials, promotional items, and equipment.	<input type="checkbox"/>			
Confirm set-up and tear-down times with event organizers and ensure access to booth space.	<input type="checkbox"/>			
Review final staff schedules, ensuring each shift is covered and all team members are prepared with their assigned roles.	<input type="checkbox"/>			
Ensure all booth materials are ready for transport, including signage, promotional items, brochures, giveaways, and business cards.	<input type="checkbox"/>			
Prepare a detailed booth setup plan, including a timeline for when staff should arrive and the order of operations.	<input type="checkbox"/>			
Confirm transportation logistics, ensuring that booth materials, equipment, and staff travel arrangements are set.	<input type="checkbox"/>			
Finalize engagement strategies for staff to interact with attendees to ensure they are prepared for demos, pitches, and lead collection.	<input type="checkbox"/>			
Ensure back-up equipment such as extra cables, batteries, and chargers is packed, and establish an emergency contact list.	<input type="checkbox"/>			
Review travel and accommodation details for staff, confirming transportation to the venue and hotel bookings are in place.	<input type="checkbox"/>			
Organize staff briefings to cover booth duties, product knowledge, and attendee interaction guidelines.	<input type="checkbox"/>			
Check final marketing materials for print or digital formats and do any last-minute adjustments.	<input type="checkbox"/>			

Showtime (Event Day)

Pre-event

Arrive early to ensure enough time for booth setup and troubleshooting.	<input type="checkbox"/>			
Set up the booth following the pre-planned layout, ensuring all equipment, signage, and promotional materials are in place.	<input type="checkbox"/>			
Test all equipment one last time, such as AV systems, Wi-Fi, lead capture tools, and any other technology.	<input type="checkbox"/>			
Coordinate with event organizers for any last-minute changes or venue-specific requirements.	<input type="checkbox"/>			
Prepare staff uniforms and name tags, ensuring they are ready to represent your brand professionally.	<input type="checkbox"/>			
Display promotional materials such as brochures, business cards, and giveaways in an easily accessible area.	<input type="checkbox"/>			
Set up a lead capture system and ensure staff are trained on its use.	<input type="checkbox"/>			

During Event

Engage with attendees actively, demonstrating products and services and answering questions.	<input type="checkbox"/>			
Collect leads and contact information from interested attendees through your lead capture system.	<input type="checkbox"/>			
Maintain booth appearance throughout the event to ensure materials stay neat, clean, and well-organized.	<input type="checkbox"/>			
Monitor communication equipment to ensure smooth interactions with attendees and staff.	<input type="checkbox"/>			

Network with other exhibitors and potential partners for future collaboration.	<input type="checkbox"/>			
Adjust your pitch based on audience interest, using personalized messaging to match attendee needs.	<input type="checkbox"/>			
Manage team rotations to ensure proper breaks and to keep the booth fully staffed throughout the event.	<input type="checkbox"/>			
Track engagement by recording key metrics such as the number of leads, meaningful interactions, and overall booth traffic.	<input type="checkbox"/>			
Wrap-up				
Tear down the booth carefully, ensuring all materials, equipment, and promotional items are packed securely.	<input type="checkbox"/>			
Confirm all equipment is collected and make sure nothing is left behind or damaged.	<input type="checkbox"/>			
Thank attendees and staff for their time and engagement.	<input type="checkbox"/>			
Collect feedback from staff on what went well and areas of improvement for future events.	<input type="checkbox"/>			
Network one last time with organizers, potential partners, and fellow exhibitors before leaving.	<input type="checkbox"/>			
Ensure transportation arrangements for booth materials, equipment, and staff.	<input type="checkbox"/>			
Document insights from the event, including what worked and what can be improved for future expos.	<input type="checkbox"/>			

Post-expo (1-6 Days After)

Follow up with leads within 1-2 days, sending personalized emails or LinkedIn messages to thank them.	<input type="checkbox"/>			
Sort and organize leads based on priority, interest, and potential to convert into clients.	<input type="checkbox"/>			
Gather feedback from staff on event performance, booth design, and customer engagement.	<input type="checkbox"/>			
Return rented equipment, such as communication devices or furniture, on time and in good condition.	<input type="checkbox"/>			
Verify that all booth materials, signage, and promotional items have been collected or returned.	<input type="checkbox"/>			
Evaluate event performance by reviewing goals and objectives to assess whether they were met.	<input type="checkbox"/>			
Analyze the quality of leads and brand visibility.	<input type="checkbox"/>			
Review marketing efforts and identify the most effective channels that drove traffic to your booth.	<input type="checkbox"/>			
Follow up again with leads who have not responded to initial outreach, politely offering additional value.	<input type="checkbox"/>			
Assess booth materials and determine what worked best in terms of engagement.	<input type="checkbox"/>			
Prepare a comprehensive post-event report, including performance analysis and areas for improvement.	<input type="checkbox"/>			
Follow up with the most promising leads to schedule meetings or calls and continue the conversation.	<input type="checkbox"/>			
Maintain ongoing communication with leads through newsletters, updates, and valuable content.	<input type="checkbox"/>			
Update your CRM with accurate lead information and set reminders for follow-up tasks.	<input type="checkbox"/>			

