Trade Show Booth Preparation Checklist

1.0 Policy Objective & Scope

The objective of this policy is to provide a standardized, repeatable checklist for the preparation of trade show booths. This ensures all marketing materials, product displays, and staff resources are coordinated efficiently, minimizing last-minute errors and maximizing return on investment. This policy applies to all employees involved in trade show planning, including the Marketing Department, Sales Team, Logistics Coordinator, and any external contractors engaged for booth setup.

2.0 Roles & Responsibilities

- **Marketing Manager:** Oversees the entire trade show strategy, approves booth design, and ensures brand consistency.
- **Sales Team Lead:** Coordinates staff schedules, prepares lead capture tools, and briefs sales representatives on product highlights.
- **Logistics Coordinator:** Manages shipping of booth materials, inventory of promotional items, and on-site setup logistics.
- **IT Administrator:** Ensures all digital displays, tablets, and network connectivity are tested and functional before the event.

3.0 Core Rules & Guidelines

- All booth materials must be approved by the Marketing Manager at least 30 days before the event.
- Promotional items must comply with Canadian advertising standards and be culturally appropriate.
- Staff attending the trade show must complete a mandatory briefing session 7 days prior to the event.
- All electronic devices used at the booth must be wiped of sensitive data and configured with a secure guest network.
- Travel and accommodation expenses must be pre-approved by the Department Head and adhere to the corporate travel policy.

4.0 Step-by-Step Procedure / Workflow

1. Confirm trade show registration and booth space assignment with the event organizer at least 60 days in advance.
2. Schedule a kickoff meeting with the Marketing Manager, Sales Team Lead, and Logistics Coordinator to define goals and budget.
3. Design and order booth graphics, banners, and signage, ensuring they align with current brand guidelines and are submitted for approval.
4. Select and order promotional giveaways and product samples, verifying inventory levels and lead times.
5. Coordinate shipping of all booth materials to the event venue or a designated warehouse, using a trackable courier service.

6. Prepare digital assets: load product videos, presentations, and interactive demos onto tablets or laptops; test all equipment.

7. Create a staff schedule for the event, ensuring adequate coverage during peak hours and assigning specific roles (e.g., lead capture, demo specialist).

8. Conduct a pre-event briefing for all booth staff covering key talking points, lead qualification criteria, and emergency procedures.

9. Pack a backup kit including extra cables, power strips, business cards, and a first-aid kit.

10. On the day before the event, perform an on-site walkthrough to verify booth setup, test all electronics, and confirm inventory.

5.0 Documentation & Compliance

1. Maintain a centralized digital file in the SwitchDesk admin portal containing all trade show contracts, invoices, and shipping receipts.

2. Log all staff travel and expense claims in the corporate expense system within 5 business days of the event.

3. After the event, compile a post-show report including lead counts, ROI analysis, and lessons learned; store in the shared marketing drive.

4. Conduct a quarterly audit of all trade show materials inventory to ensure accuracy and plan for future events.