

Marketing & Sales for the Market Research Firm:

THE EXHIBITOR'S WORKBOOK



**TIPS,
TRICKS
- AND -
CHECKLISTS
TO GUIDE
YOUR
SUCCESS**

A PUBLICATION BROUGHT TO YOU BY



HARPETH
MARKETING
THE COMPETITIVE ADVANTAGE.

Marketing & Sales for the Market Research Firm: THE EXHIBITOR'S WORKBOOK

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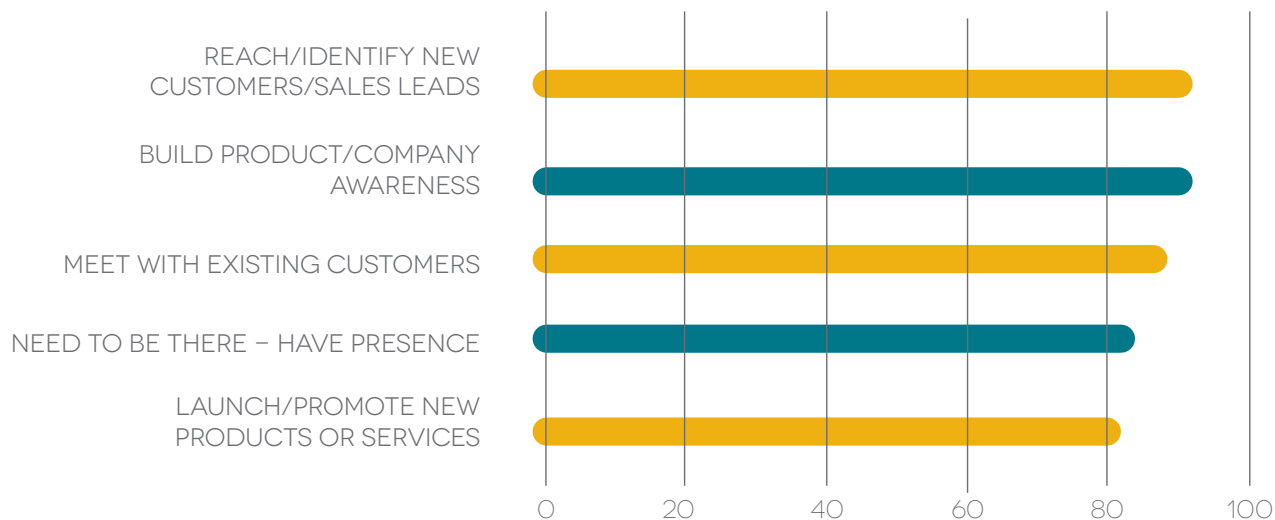
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THANKS FOR DOWNLOADING THIS WORKBOOK

The conference season will be here in a few months... ESOMAR, TMRE, QRCA, CASRO, etc. And many of you have committed to exhibiting at one or more of these events. I'm a big fan of exhibiting... done right, exhibiting can be an outstanding marketing vehicle and help you to generate highly-qualified sales leads, launch a new product or service, generate market awareness and support your association.

In fact, in a recent survey on exhibiting in B2B events – conducted by the Center for Exhibition Industry Research – they reported on [the Top 5 reasons why companies exhibit at events](#):



But it's not all happy news.

For one thing, with the cost of the exhibit space, travel and lodging, building or updating your booth, shipping, event marketing, etc., your firm's presence at an event could very well be *the single largest marketing expense you have all year*. Exhibiting is one of those things you must do really well to see a return on your investment.

In addition, because exhibiting is a little “old school” and because it’s not something most firms do on any sort of regular basis, most of us just haven’t learned how to be good at exhibiting... in fact, we’re down-right LOUSY at it! The worst thing you can do is just show up and *hope* it goes well... which is what a vast majority of exhibitors do!

As part of my 30-year career in marketing and sales, I spent almost seven years in the conference and trade show industry working for two of the nation’s top independent event producers. I’ve helped produce hundreds of B2B events – from a one-day, 20-booth expo to a five-day, 75,000-attendee trade show – and in doing so, learned a lot about exhibiting... which is why I created this Guidebook.



Use the checklists inside. Learn the process of exhibiting well. Take advantage of all the opportunities at an event. When you do, you’ll be better prepared, your on-site experience will be enhanced and you’ll be more effective at lead follow-up... all of which leads to increased revenue and maximizing your ROI from exhibiting.

Best of luck at the shows this year,
Steve Henke, Founder & President
Harpeth Marketing
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“ By failing to prepare, you are preparing to fail. ”

-BENJAMIN FRANKLIN



If there's one lesson to learn about successful exhibiting, it's this... *Don't wait until the last minute!* The success of exhibiting at any event begins months before the event actually takes place. Block off some time to effectively manage your pre-event activities. Preparation falls into two broad categories – Logistics and Marketing:

LOGISTICS

- ❑ MOST IMPORTANT: **Read the Exhibitors' Manual and review all of the forms...** everything you need to know is in there. Complete and submit the forms early – there is always significant dollar savings when you do (services ordered on-site are often twice the cost!). Make sure the shipping of your booth to and from the event is taken care of. Note: If the exhibits are on a cement floor – order carpet... your feet will thank you.
- ❑ **Selecting your booth location on the show floor** is always one of those things that people get worked up about... but the fact is, it really doesn't matter. The events in our industry are all small enough that every attendee who wants to see all the booths can easily do so. However, our one recommendation is... do not pick a spot near the food service area. While it will look busy, people go there to take a break & eat, not to talk business. Additionally, if they do show up in your booth, they will leave their dirty dishes in it.
- ❑ **Prepare your booth supplies** – make sure you've got plenty of pens, a couple of staplers, lots of business cards, note pads, sales literature, etc. I'd also suggest a 'lead form' for writing down notes about each person who comes to the booth (more on this later).
- ❑ **Staffing... who's going to go?** Our suggestion... do not staff your booth with rookies. Use the event to make your company shine; new employees can't do that. If you have to send a new employee, balance it with an experienced employee who can guide and mentor them.
- ❑ Don't forget **travel & lodging arrangements**. Check the exhibitor manual – the hotel that is the venue for the conference generally offers pretty good discounts for the conference participants.

CHECKLIST NO. 1, CONTINUED

- ❑ If your **booth/display** has been in hibernation for a while... pull it out, set it up and take a look at it. What kind of shape is it in? Do you need new graphics? Is the message up-to-date and consistent with your brand?
- ❑ **Be leery of the exhibit hall's internet connection.** Do you conduct software demos in your booth? If so – and if you require an internet connection to do it – please be careful. You need to think about what would happen if you lost your Internet connection mid-demo. Talk to your IT folks about setting up a virtual server and running the software from your laptop's hard drive instead.
- ❑ **Skip the giveaways** (frisbees, coffee cups, pens, etc.) – if the presentation and dialogue in your booth is not compelling, no amount of freebies is going to help. Use the money you save for other pre-show or at-show marketing.

MARKETING

It is in the event producer's own best interest to make sure that, as an exhibitor, you have a very successful event. They want (and need) your continued support and dollars. To that end, most event organizers will make available a number of resources to help you **promote your presence in the event**. It is up to you to take advantage of them and they could include:

- ❑ Your logo and company description on the **event's website**
- ❑ Your logo and company description in **pre-event mailings**
- ❑ Your logo and company description in the on-site **event program**
- ❑ Access to the list of pre-registered attendees for **pre-show communications**
- ❑ A special **discount code** to share with your clients
- ❑ The opportunity to be a **sponsor** – of the event itself or certain aspects of it (e.g. the food breaks, keynote address, literature bags, etc.)
- ❑ **Speaking** opportunities

Now on to your efforts... think through the kinds of things that you can do to promote your presence in the event...

- ❑ **Emails or direct mail** pieces to the names in your database; note: many event organizers make conference discount codes available to their exhibitors to share with their clients

- ❑ Posts/tweets/updates on your website and **social media pages**
- ❑ A note about your exhibit in every employee's **email signature**
- ❑ Salespeople and senior executives making **personal invitations** to key clients and prospects
- ❑ Pre-scheduling **in-booth presentations** – for specific clients at specific times
- ❑ A **gift/prize** for those who bring your pre-show post card or email to the booth
- ❑ A **banner on your home page** that reads, "Visit us in Booth 123 at the XYZ Conference"
- ❑ In all pre-show marketing, always **include event details** (dates, location and YOUR booth #).

Your pre-show marketing efforts may not bring any additional people to a particular event... but it will ensure that those who are coming include a visit to your booth in their plans.

One final note: Sit down with your booth team and set your goals for exhibiting... how many leads do you want to capture, how many demonstrations do you want to give, etc. Then work to achieve them.





- Get a business card from every booth visitor** but don't rely just on the card. Most booth workers will have a conversation with someone, collect a card and then [maybe] scribble a note on the back of it. Instead, create a small form to which you can attach the card and answer a few standard questions to help with follow-up (see sample on right).

You'll want to write down all of these important details at the event because there is no way you'll remember them days later. Once you complete a form, have a specific box or envelope into which it's placed. After the event, you can sort the leads and start following up.

Most firms have no idea how to effectively 'work a show.' They pop up their booth, set down a table and a couple of chairs, pull out some literature and think they're ready. Virtually no thought goes into getting set-up on-site, as well as how to create an experience inside the booth that generates a very positive perception in the eyes of everyone who visits.

LOGISTICS

- Don't wait until the last minute to **set-up your booth** – even with a simple little “pop up.” Build in some time to fix any problems that might occur... because they will.
- Know the exhibit hours.** Be in your booth before the doors open and stay until they close.
- Silence your cell phone.** You do not want a good conversation with a prospective client to be interrupted. Check your messages during a break.

BOOTH LEAD CAPTURE FORM

Event: _____ Date: _____

Staple business card here or complete:

Name: _____

Title: _____

Company: _____

City: _____ State: _____

Phone: _____

Email: _____

Type of company: _____

Size of company: _____

What products/services interested them?

Service 1 Service 2 Service 3
 Service 4 Service 5 Service 6

Timing: Urgent Soon No rush

Follow-up plan? _____

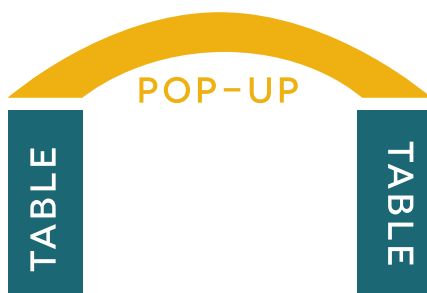
Notes: _____

Rate them: Hot Warm Cold

Booth rep: _____

CHECKLIST NO. 2, CONTINUED

- ❑ **No chairs allowed!** Never sit. When sitting, you look lazy and uninterested – and prospective clients will sense this and walk on by. Yes, you'll get tired but you'll survive. If you need a break, leave the booth and go sit in the lobby or the food court. To help with the fatigue, make sure your booth is always carpeted.
- ❑ **No eating or drinking in the booth** – it looks unprofessional and you certainly don't want to spill your drink. Leave the booth if you need to, but keep all food and beverages out of the booth. No chewing gum either. Fresh breath is a must so get a supply of mints.
- ❑ **Never leave the booth unattended** – ever! The way to make sure that never happens is to have two people working your booth (assuming you have an 8-10 ft. space). If one needs a break, the other can stay behind.
- ❑ Never – and I mean never – **put a table across the front of your booth**. This is the cardinal sin committed by most firms that exhibit in small booths with a pop-up backdrop. The trouble with the table is that it creates a barrier between you and a prospective client – and why would you want that? Instead, try the “friendly” layout shown below. It's open, has plenty of table space (use *tall* tables so you have ample storage underneath) and provides an unobstructed view of your booth.



- ❑ Finally, **never break down early**. If the exhibits close at 5pm, wait until 5:01pm (even if the other exhibitors have already started). There are always a number of attendees who save their walking-around-the-exhibits for the end of the last day. If you break down early, you miss them.



MARKETING

- ❑ “More imagery – less words” is the proper guideline for **booth design**. The goal for your booth is that it act as a “visual train wreck,” literally stopping people in mid-aisle to take a look at it.
- ❑ **Activity/motion** in the booth will draw attention. At the very least, have a laptop running a looping PowerPoint presentation or company video.
- ❑ **Have both good literature and cheap literature**. Many visitors to your booth will not be qualified or ready to talk about purchasing decisions. No need to give them your very expensive, glossy corporate brochure. Instead, give them a nice, little (but still professional) overview sheet and save the good literature for the ‘hot’ leads.
- ❑ **Consider a uniform...** maybe have the entire booth team wear polo shirts in the corporate colors and with a logo. Not only do you want to reinforce your brand while in the booth but also while walking around the hotel.
- ❑ To engage visitors, **stand at the front of the booth** where your space meets the aisle. Maintain an open and relaxed position (no crossed arms, hands out of pockets), smiling and making eye contact with passers-by.

- ❑ **Ask the right questions.** As you're standing in your booth, smiling, the one question you should never ask but almost everyone does is, "Can I help you?" Almost everyone will reply, "No, thanks. Just looking." (Others might ask, "How are you today?" The response to which is, "Fine, thanks.") Your goal is to engage passers-by in some sort of conversation that then leads to a business discussion. Try, for example, "Hello, John, what's brings you to the conference this year?" or "Good morning, Mary, do you do much online qualitative research at [insert company name from her name tag]?"
- ❑ Remember the old joke: How do you get to Carnegie Hall? Answer: **Practice, practice, practice.** The same goes for your booth presentation. Whether you just have some key talking points, a PowerPoint presentation or a software demo, practice it often so you're as polished as you can be when it's 'show time.'
- ❑ **Don't spend all of your time in the booth.** Where appropriate, take advantage of all that the conference has to offer: attend sessions; check out other exhibitors – particularly your competitors; attend social events; network in the hallways; take clients out to dinner; etc. And remember to have a little fun while you're at it!



Does this sound familiar? You're excited about all of those new sales leads you've gathered in your booth... then you head home, get sucked back into your back-to-normal business routine (staff meetings, client calls, piled-up emails, etc.) ... and before you know it, that pocketful of business cards representing all those warm leads now has a thin layer of frost on it. And the opportunity has passed.

There really is only one thing to worry about after an event... **sales lead follow-up!** That's it. Here are some proven ideas to help get you started on the right path...

- ❑ Immediately after you get back to the office, gather the booth staff to **review every lead from the booth...** one by one. If you used a booth lead form to capture info on each visitor (see page 7), most conversations should be pretty easy to recall... helping you decide the best way to follow-up.
- ❑ Don't forget about **all those people you met outside of the exhibit hall** – during sessions, at the social events, etc. Follow-up with them in exactly the same way as the booth leads.

- ❑ As soon as possible, make sure every name is entered into your **in-house sales database/CRM** for future marketing... and tag the 'source' as "XYZ conference, 2014."
- ❑ **Sort all leads into Hot – Warm – Cool**, assign each lead to the person responsible for follow-up then create a follow-up plan for each group. As an example... *Hot* leads get a phone call within the first two days; *Warm* leads are sent a thank you note and receive a call within two weeks; *Cool* leads go into the database and receive monthly emails.
- ❑ **You want your sales leads to remember you.** So, when you follow-up, cite something specific from the booth conversation. Instead of "John, thanks for stopping by our booth at the CASRO conference last week," try something like, "John, I enjoyed chatting with you in our booth at the CASRO conference last Wednesday. I hope our conversation about how bulletin boards can help with your new product launches was beneficial."
- ❑ Did you agree to **schedule a follow-up appointment** with any of your booth visitors? Don't delay... respond to those right away.



Whatever your follow-up plan calls for, know that it will take more than one or two touches for it to convert to new business. Build in a lead nurturing plan that keeps you, your firm and your services top-of-mind until the prospects are ready to buy.

DEBRIEF ABOUT THE OVERALL EXPERIENCE

Beyond sales lead follow-up, one of the questions you'll need to answer is, "*Should we exhibit there again next year?*" For this, also gather the booth team together to review the overall experience, beyond just the leads gathered. Discuss things like:

- ❑ What went right?
- ❑ What went not-so-right?
- ❑ Thoughts on the conference – right kind of attendees, right kind of speakers, etc.
- ❑ How was support from the event organizer?
- ❑ Any changes to make to the booth itself?
- ❑ Any changes to make to our booth presentation/dialogue?
- ❑ Any changes to the way we staff the booth?
- ❑ Any ways to enhance our pre-event marketing?
- ❑ What did we learn that will make us better exhibitors next time?



MEASURING YOUR ROI

As we started out saying, 'exhibiting' may be your largest single marketing expense all year... and the one who signs the checks at your firm will want to know if you're getting a return on that significant investment.



Exhibiting ROI should be divided into two parts:

1. Immediate.

Did you achieve the goals you set before you left for the show?

- A. How many leads (hot/warm/cool) did you come home with?
- B. How many 'serious' conversations did you have?
- C. How many demonstrations did you give?
- D. What did you learn about your competitors?

2. Long-term.

Did the leads you came back with generate any bid opportunities and revenue?

- A. Because sales cycles are fairly long in our industry, you'll want to track this for 12-18 months after an event.
- B. For each lead you track, monitor the number of bids over time, the number of bids won and the revenue generated.

FINAL COMMENTS...

All the paperwork, dealing with the booth, traveling, living out of a suitcase, surviving on hotel food and standing on your feet all day. Make no mistake about it... **exhibiting is hard work!**

But if you plan *meticulously*, work the booth *aggressively* and follow-up *diligently*... the goals of new bids, new clients and new revenue will ultimately be achieved.

So, the next time someone comes up to you while you're at a conference and asks what time it is, your response is easy... "It's Show Time!" Good luck!



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ABOUT HARPETH MARKETING

At Harpeth Marketing, we help firms in the market research industry that are having trouble achieving their revenue goals by putting in place marketing & sales programs and systems. We do this through a variety of outsourced marketing services, consulting programs and training workshops.

Our [Outsourced Marketing Services](#) are designed to build awareness, generate and nurture leads and differentiate firms in the marketplace. They include email marketing, social media marketing, telephone sales, graphic design and content development (blog posts, articles, case studies, eBooks, webinar decks, etc.). We work with you to plan the efforts, then we execute & manage them and report back to you on a monthly basis – in essence, serving as part of your Marketing Department.

When outside expertise and experience is necessary, we provide a full range of [Consulting Services](#) that are tailored to meet your specific needs... from fullblown marketing & sales plan development to audits, competitive analyses and ongoing coaching.

Offered twice each year, the [MIR Marketing Workshop](#) is a 6-week online program that teaches participants the process of marketing & sales and walks you through the creation of your own, customized business development plan.

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