

The Trade Show



Planning Checklist

Everything You Need to Do Before, During, and After the Show —
So Nothing Slips Through the Cracks.

Get the Most Out of Your Investment

Trade shows are one of the highest-investment, highest-potential activities in marketing. But without a clear plan, they're also one of the easiest places to waste money. This checklist walks you through every stage—from picking the right show to following up with the right people after it's over.

1 Year Out

Y N ?

1. Tradeshow booth space can book up early. It is not uncommon for the show organizers to take reservations for next year at this year's show. To get the best spot, you may need to commit ahead of time.
2. Set your budget: booth, travel, materials, sponsorships, pre/post marketing.

4–6 Months Out

Y N ?

1. Define your goals (brand awareness, leads, partner meetings, press coverage?).
2. Review your budget: booth, travel, materials, sponsorships, pre/post marketing.
3. Confirm your booth space and review event logistics.
4. Identify which team members will attend and assign roles.
5. Choose your key message and what you're promoting or launching at this show.
6. Plan your pre-show outreach campaign (email, social, personal outreach).
7. Define core messaging, talk tracks, and call to action for the booth.

12 Weeks Out



1. Finalize booth design and order graphics/signage.
2. Develop all printed collateral (one-pagers, brochures, sell sheets).
3. Create a leave-behind piece prospects will actually keep.
4. Build your giveaway/swag strategy (tied to your brand, not just tchotchkes).
5. Write and schedule your pre-show email campaign to current prospects and clients.
6. Brief your booth staff: talk tracks, qualifying questions, what to do with a lead.

1–2 Weeks Out



1. Confirm all logistics: shipping, set-up schedule, AV needs.
2. Load up your CRM or lead capture tool.
3. Brief the team one more time: know the top 3 things you want every visitor to walk away knowing.
4. Set up appointments with key prospects in advance.
5. Finalize post-show follow-up email sequences (write them now, while you still have time).

At the Show



1. Capture leads consistently and add context notes in real time.
2. Take photos and video for social content.
3. Attend sessions or networking events that matter.
4. Check in with your team daily and adjust if something isn't working.
5. Assign leads before you leave the show.
6. Don't forget to eat. (Seriously).

Within 1 Week After

1. Send your first follow-up email within 48–72 hours.
2. Segment leads by temperature (hot, warm, cold) and assign hot leads to sales.
3. Review what worked and what didn't while it's fresh.
4. Pull your metrics: booth traffic, leads captured, meetings held, pipeline generated.
5. Debrief as a team.

Not Sure Where to Start?

A checklist gets you organized, but strategy gets you results. Ocean 5 helps B2B and GovCon companies plan, execute, and measure trade show investments so they actually move the needle. Let's talk about your next show.

[Schedule a Free Consultation](#)



About Ocean 5

Ocean 5 is a growth-driven marketing agency for government contractors.

The five most common problems we solve are:



Messaging is outdated, vague, or too technical.



Website/digital presence is stale.



Messaging is inconsistent across business development and marketing materials.



Not seeing ROI on trade show activities.



We need the flexibility to pivot and re-prioritize our marketing activities.

Our GovCon support services include:

- Strategic planning workshops
- Website design and development
- Content
- Graphic design
- Social media
- Email marketing
- Public relations
- Search engine optimization
- Digital marketing/advertising
- Marketing automation



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