STRETCHLEARN · WORKBOOK

Trade Show & Conference Marketing — Workbook

This workbook turns the course into a working event plan you can run. You will size the budget and ROI, build the pre-show promotion cadence, design the booth and the on-floor playbook, and stand up the capture-to-follow-up engine that books pipeline. Fill every worksheet for one real show you plan to exhibit at, and you will finish with the numbers, scripts, and trackers a professional event needs.

The Event ROI Case: Budget, Targets, and Show Selection

Decide whether a show can pay you back, then choose shows on evidence instead of reputation.

Exercise: Set your four go/no-go numbers

Pick one show you are considering. Using rough but honest estimates from prior events or peer benchmarks, work out the four decision numbers from Module 1. Show your assumptions, not just the answers, so you can pressure-test them later.

• What is your realistic estimate of total badges scanned and your badge-to-qualified-lead rate, and therefore how many qualified leads?

• Given a draft all-in cost, what is your cost per qualified lead, and does it feel defensible to your finance team?

• Using your average deal value, gross margin, and close rate, how many closed deals are needed to break even?

• What pipeline does this produce, and does it clear the 5:1 pipeline-to-cost floor? If not, do you cut cost or raise leads?

Worksheet: All-in event budget builder

List a dollar figure for every line. Do not leave staff time or drayage blank or at zero. Add the subtotal and a 10 percent contingency yourself, then divide the total by your qualified-lead estimate to get the true cost per lead.

Floor space cost

Mandatory services (carpet, electrical, internet, cleaning)

Booth build or rental + graphics refresh

Furniture, monitors, and AV

Round-trip shipping

Drayage / material handling (per 100 lb)

Install and dismantle labor

Flights

Hotels (show block rate) and per diem

Staff days (count x loaded daily rate)

Pre-show advertising and email tooling

Printed assets and branded giveaways

Lead-capture license fees

Sponsorship / speaking package

Subtotal

Contingency (10 percent of subtotal)

Total all-in cost

Estimated qualified leads

True cost per qualified lead

Worksheet: Show selection scorecard

Score two or three candidate shows from 1 (poor) to 5 (excellent) on each factor. Weight audience fit and cost efficiency most heavily. Total the weighted scores yourself and rank the shows.

Show name

Audience fit: percent of attendees matching your ICP (score 1-5)

Decision-makers attend, not only practitioners (score 1-5)

Audience volume and realistic booth traffic (score 1-5)

Cost efficiency: cost per expected qualified lead (score 1-5)

Competitive presence: defend share or differentiate (score 1-5)

Beyond-booth opportunities: speaking, awards, press (score 1-5)

Timing fit with your buying season (score 1-5)

Peer reference: did leads close, would they return (score 1-5)

Weighted total score

Decision: commit, test, or pass

Checklist: Before you sign the contract

[ ] Obtained the show's audited attendee demographics from the media kit or prospectus
[ ] Calculated the share of attendees who match your ICP by title, company size, and authority
[ ] Called two to three past exhibitors and asked whether their leads actually closed
[ ] Built the full all-in budget including drayage, staff time, and a 10 percent contingency
[ ] Wrote down the target ROI, cost per qualified lead, break-even meetings, and pipeline target
[ ] Confirmed the show lands in your buying season
[ ] Capped the spend if this is a first-year test at a new show

Fill the Calendar: Pre-Show Promotion

Build the multi-channel cadence that books meetings before the doors open.

Worksheet: Six-week pre-show promotion calendar

For each week, write the specific actions, the channel, and the owner. Make late-week asks time-bound (book a slot) rather than vague (come visit). Set and record your pre-booked meeting target at the top.

Pre-booked meeting target (40-60 percent of capacity)

Week 6: target-account list, offer/hook, booth number, landing page + booking link (owner)

Week 4: announcement email, outbound to accounts, ad launch (owner)

Week 2: meeting-invite wave with time slots, LinkedIn posts, sales briefing (owner)

Week 1: booth-X reminder, confirm meetings, calendar holds, staff run-of-show (owner)

Day before / day of: where-to-find-us message, in-booth session times (owner)

Landing page URL and tracking (UTM) plan

Exercise: Design the irresistible booth offer

Write the single reason a target buyer would cross a crowded hall to see you. Reject anything that is just your logo or a raffle for a generic prize. Then draft the pre-show email that delivers that offer.

• What is the one concrete payoff of meeting you at the booth (a teardown, benchmark, live demo, or expert) stated in a single sentence?

• Write a subject line that is specific and personal, naming the show and the buyer's problem.

• Write the one-sentence ask with a frictionless next step (a booking link with visible time slots).

• Which 20-30 target accounts get the personal email-plus-LinkedIn-plus-video treatment instead of the mass send?

Worksheet: Audience segmentation and message map

For each segment, write the tailored offer and the channel. One generic email to everyone wastes your best asset, which is the relationships you already have.

Existing customers: offer and channel

Open opportunities (in sales cycle): offer and channel

Cold database contacts: offer and channel

High-value target accounts (ABM): offer and channel

Show's own channels to use (app, hashtag, sponsored email, attendee list)

Paid promotion plan (LinkedIn matched audience, geo-fence) and budget

Checklist: Pre-show launch readiness

[ ] Dedicated event landing page live with one reason to visit, booth number, map pin, and a single primary action
[ ] Booking link with visible time slots connected to the team's calendars
[ ] Unique tracking link or UTM per channel so booked meetings can be attributed
[ ] Target-account list finalized and assigned to owners for personal outreach
[ ] Email sends segmented for customers, open opportunities, and cold contacts
[ ] Paid campaign built from matched audiences and scheduled for two to four weeks out
[ ] Show hashtag identified and a posting plan set for before and during the event

The Booth and the Stage: Attract and Engage On-Site

Design for a three-second read, staff with a qualifying-first playbook, and turn speaking into leads.

Exercise: Pass the three-second / squint test

Draft your booth's far-distance message and check it the way a passer-by would. The eye-level headline must say what you do and for whom in a handful of words.

• Write your one far-distance headline (a handful of words) that says what you do and for whom.

• What is the mid-distance benefit statement and the focal point (demo or screen) that gives a reason to step in?

• Stand across an aisle and half-close your eyes: does the headline still read, and is the contrast strong enough?

• Where is the front edge open, and where do staff stand so they invite rather than barricade?

Worksheet: Booth staffing plan and shift schedule

Assign roles and shifts so the booth is always covered by fresh, qualifying-ready people. Set an individual qualified-lead target per shift and schedule breaks so nobody works the aisle hungry or exhausted.

Greeter(s): names and shift times

Demo specialist(s): names and shift times

Closer / senior contact for hot leads: name and availability

Individual qualified-lead target per shift

Daily morning huddle time and owner

Break rotation schedule (who is off and when)

Booth conduct rules (no sitting, phones, food; face the aisle)

Exercise: Write your openers and qualifying script

Replace can I help you with openers that start a real conversation, then map your fast qualifying questions to the fit, need, timing, authority, and next-step framework.

• Write two open-ended openers tied to your headline or to a pain attendees are wrestling with this year.

• What single question fastest reveals fit (right role, company, and need)?

• How will you politely disengage from a clearly out-of-ICP visitor to protect staff time?

• What are the standard next steps a staffer can book on the spot (demo, meeting, send a resource)?

Worksheet: Speaking slot pursuit and session plan

Plan how you will win a slot and how you will convert the room. Track the call-for-proposals deadline and design the talk around the attendee's problem with a measurable call to action.

Call for proposals / speakers deadline and link

Proposed talk title (specific, outcome-driven, not a product overview)

Speaker (credible practitioner or customer) and proof of past speaking

Fallback route if the call is closed (sponsored session, panel, partner)

One genuinely useful takeaway the audience leaves with

End-of-talk call to action and capture mechanism (link or QR to a resource)

How the session lead source will be tracked separately (scans, clicks)

Capture, Follow Up, and Prove the Return

Capture context, score and route leads, run a tiered follow-up cadence, and report honest ROI.

Worksheet: Lead-capture and scoring setup

Define how you will capture and qualify every lead before the show opens. Configure the custom fields on your scanner or capture app so no lead is just a name and email.

Capture method (show scanner, capture platform, CRM mobile app)

Custom fields: product of interest

Custom fields: use case or pain

Custom fields: timeline (now / later / curious)

Custom fields: A/B/C rating set by staffer

Custom fields: reason they stopped (one sentence)

Custom fields: promised next step

Custom fields: staffer who spoke with them

Source tag (walk-up / booked meeting / from session)

Daily CRM sync owner and the event tag applied to every record

Worksheet: Tiered follow-up cadence and ownership

Write the exact touch at each step and who owns it. A leads hear from a human in 24-48 hours; nobody falls between sales and marketing. Reference the captured conversation, not a mail-merge.

A-lead first touch within 24-48 hours: action and owner

B/C-lead thank-you within 24-48 hours: action and owner

Days 3-5: deliver promised resource / confirm demo times: action and owner

Week 2: value-add touch (case study, answer, webinar invite): action and owner

Weeks 3-4: soft check-in, switch channel for stalled A leads: action and owner

Beyond week 4: move non-responders to marketing nurture: owner

Deadline for first touch and where the shared follow-up tracker lives

Exercise: Build the one-page ROI report

After the show, compare reality to the four numbers you set in Module 1. Pull lead-to-revenue data from your CRM by event tag and report on the right clock for your sales cycle.

- What were total leads, qualified leads, and the qualification rate versus your target?
- What is your actual cost per qualified lead, and how does pipeline sourced compare to the 5:1 goal?
- At which intervals (for example 30/90/180 days) will you revisit closed revenue and final ROI, and why?
- Which channels and activities (booth, speaking, ABM, paid) produced the most qualified leads?

Checklist: Post-show debrief and close-out

- [ ] Synced all leads to the CRM with the event tag and scored A/B/C
- [ ] Sent A-lead personal follow-ups within 24-48 hours referencing the conversation
- [ ] Enrolled B and C leads in their nurture sequences with clear ownership
- [ ] Held a team debrief within a week capturing keep, fix, and drop
- [ ] Recorded which messages, openers, giveaways, and location helped or hurt
- [ ] Produced a one-page event report with cost per lead and pipeline sourced
- [ ] Set the revenue-reporting checkpoints that match your sales cycle
- [ ] Captured the go/no-go recommendation for this show next year

Your Action Plan

1. Choose one target show and build the all-in budget, then write down your target ROI, cost per qualified lead, break-even meetings, and pipeline target.
2. Score your candidate shows on the weighted scorecard and call past exhibitors before committing the spend.
3. Stand up the event landing page and booking link, and set a pre-booked meeting target of 40-60 percent of capacity.
4. Launch the six-week promotion cadence across segmented email, ABM outreach, paid, organic social, and the show's own channels.
5. Design the booth for the three-second read and lock the booth staffing plan, openers, and qualifying script.
6. Pursue a speaking or panel slot, build a value-first session, and instrument its lead capture separately.
7. Configure lead capture with qualification custom fields and an A/B/C scoring scheme, with a daily CRM sync owner.
8. Run the tiered follow-up cadence with explicit ownership so A leads are contacted within 24-48 hours.
9. Hold a debrief within a week and produce the one-page ROI report comparing results to your pre-show targets.
10. Revisit closed revenue at 30, 90, and 180 days and decide whether to return to this show next year.