
Trade Show Preparation Checklist: 2 Months Out

OPERATIONS + LOGISTICS

- 1 **Sign up for the show and secure your booth**
The earlier, the better for a prime booth location (or for competitive shows, a spot at all).
- 2 **Book flights and hotels**
If your trade show isn't local, you'll need to make travel arrangements. Book early, because hotel rates near convention centers skyrocket during trade show time.
- 3 **Design your booth**
Whether you're renting a booth or creating one from scratch, booth design will be your biggest opportunity (and the bane of your existence).
- 4 **Coordinate shipping**
Chances are you'll need to ship samples, giveaways, and any custom booth materials. Given the potential weight of your booth components, you'll likely have to palletize via UPS or Fedex.
- 5 **Hire and/or train internal or external staff**
Ensure your sales reps (or new or external reps) are familiar with your sales process and know your product line - particularly new items that are debuting at the show.
- 6 **Set up appointments with major retailers and key customers**
Coordinate ahead of time with your key accounts and new potential customers. This ensures you get dedicated time, and that they won't have to wait on you at the show.

ORDER WRITING + PRODUCTS

Non-digital solutions:

- 7 **Update line sheets, catalogs, and order forms**
Line sheets, catalogs, and forms should be updated to reflect your recent product line.
- 8 **Secure order forms, clipboards, pens, etc.**
Have enough supplies ready to go given your number of sales reps, the size of the trade show, and any informed assumptions you can make about potential demand at the show.
- 9 **Secure product samples**
Make sure you have your product samples, especially new items, ready to go.

ORDER WRITING + PRODUCTS (CONTINUED)

Online order taking solutions:

- 10 **Get your tech ready**
Make sure your sales team is equipped with the tablets, mobile phones, and laptops loaded with online order writing software. Gather your barcode scanners, chargers, and extension cords as well.
- 11 **Update or upload digital catalog**
If it's your first time using a digital solution, you'll need to upload images and descriptions for all your products. Otherwise, upload any new products or pricing changes since your last update.
- 12 **Update customer information**
Your customer contact info, payment and shipping preferences should be up to date so you don't waste your buyer's time with mundane details on the trade show floor.

MARKETING

- 13 **Get your digital press kit together**
Your digital press kit should include press links, line sheets and product imagery. This should be on flash drives or distributed via email to press and buyers at the show.
- 14 **Shoot for "featured product" status**
Trade shows often give more visibility to specific products during a show (usually on display in prominent areas of the floor). This is a great opportunity for your product line to shine.
- 15 **Secure interviews, speaking opportunities, or participation in breakout room discussions**
Many shows offer selected companies the opportunity to be interviewed, give talks on relevant topics, or participate in breakout room discussions. These are all huge visibility opportunities for your brand.
- 16 **Build hype and make connections on social media**
Announce your presence & connect with potential customers over Twitter ([see more here](#)) Facebook, LinkedIn and Instagram. Keep it relevant with the *official* show hashtag!

ABOUT HANDSHAKE

Founded in 2010 and headquartered in New York City, Handshake is the leading sales order management platform for wholesale, supporting both global distributed sales teams and small to medium sized businesses. Handshake has raised \$9.5 million to date from notable investors including Emergence Capital and SoftTech VC.