

marketech

Marketech has been the industry leader in exhibit and event staff training, marketing and measurement since 1985. All Marketech programs are totally customized to meet individual client needs in a timely and affordable package. Our promise; with Marketech, you will

experience performance improvement.



the pre-show meeting guide on a disk

EASY • FAST • COMPLETE

Pre-show Briefing Outline
What Works and Doesn't Work
Pre-show Briefing Guide (survival guide) outline
Staffer checklist
Pre-show Coaching Guide
Generic Role-plays
Post Show Review Checklist (show and staff)

Created by: Marketech, Inc.

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Executive Summary

Marketech, established in 1985, specializes in exhibit and event staff training, marketing and measurement.

We are considered leaders in our industry, with a proven track record working with companies ranging from Fortune 100 companies to small entrepreneurial start-ups. Our products and services are applicable across a broad section of industries. We understand the issues and frustrations inherent in planning and executing successful and profitable events and can provide you with the information, skills and techniques you need to succeed in your own unique domain.

Marketech provides value-added services which will impact your bottom line. We believe in forming partnerships and strategic alliances in order to more effectively serve individual client needs.

Marketech consistently responds to market conditions by revising and refreshing training programs so they are relevant, innovative and unique. In 2002, the company created *Future Results*, a new division focusing on measurement for trade shows and events, in response to the growing demand for metrics which justify expenses and quantify company return on investment.

Meet the Staff



Marc Goldberg, CME, founded Marketech in 1985, drawing on years of management and strategic planning experience as Marketing Manager with Westinghouse Power Generation and as CEO of Morgan Pump and Flo-Bend, Inc.



Mim Goldberg, CME, *President*, brings over twenty years of experience as an educator, providing creative and innovative learning techniques and curriculum development.



Jerry E. Gerson, with over 25 years of experience in executive level management, and over a decade with Marketech, brings effective exhibit training from a sales and marketing perspective.



Jane Lorimer, CME, an associate since 2002, brings management and analytical experience from her executive positions with Coors Brewing, The Tradeshow Bureau and Exhibitgroup Giltspur.

Our staff provides a balanced and diverse set of skills to enhance your efforts. Marketech staff is on the faculty at Exhibitor Show, HCEA, and TSEA's TS2. They created and conducted Exhibit Management 2000 and the Exhibit Marketing Institute (EMI) for TSEA. Marketech also produces its own event—the *Event Measurement Conference*.

Awards and Recognition

Mim and Marc received their CME certification from TSEA in 1999. Marc received the President's Award in 1998 from TSEA for his contributions to the exhibit industry. Marketech's Trade Show and Event Calculator won the Buyer's Choice Award for best new product at the Exhibitor Show 2001 and 2003.

Articles written by Marketech staff appear regularly in industry trade press.

Introduction

Welcome to Marketech's newest tool to help you prepare for each show. *ez-briefing* contains templates you can customize for each show.

EVERY PRE-SHOW BRIEFING SHOULD CONSIDER THE 5 P's

Purpose - your strategy, tactics, objectives and messages

Press - how you promoted yourself

Property - your exhibit

People - the staff and staff development

Presentations – live presentations, demonstrations

The location and method of delivery are varied to suit you and your team's specific needs

At your location before the show

At show site - in a conference room, a restaurant, or in the exhibit

Intranet posting - on your own website available 24/7

E-document - transmitted electronically

Print newsletter - delivered as a printed pre-show briefing document

Webcast - live webcast/audio-netconference

Conducting the Pre-show Meeting

Objectives

- lead generate
 - introduce new product(s)
 - learn from others
 - conduct demos
 - sell to existing customers
 - use live presentations
 - find new prospects
 - press
 - position brand/ product
 - increase relationships
- Clear, written, quantifiable, measurable*

Message

- objectives of message points
 - message points- 2-3 key points
 - supporting points
 - special message (merger, news worthy issues, law suit, new product launch, etc)
-
- supplement with role play practice (see role play sheet)

Schedule

- event schedule
- show hours
- work schedules
- education programs
- special events
- hospitality events

Logistics

- bus service
- conference rooms
- office
- badges
- message retrieval
- personal belongings
- press interaction
- weather
- safety/disaster plan

Booth interaction

- demonstrations
- audio visuals
- team selling
- role of literature
- giveaway use
- promotions, contests and premiums
- lead cards

Staff education, motivation and refresher

- time and location
- being customer oriented
- engaging - proactive vs. reactive
- qualifying and communicating
- verbal and nonverbal communications
- closing on a commitment
- attitude and etiquette

Conducting the Pre-show Meeting (continued)

If conducting a live pre-show meeting, consider the following:

What Works

What Doesn't Work

- | | |
|-----------------------------------|---|
| Light Refreshments..... | Alcohol before/during the meeting |
| Opening by senior management..... | Lack of management involvement |
| Having a published agenda | Informal structure- no agenda |
| Set specific time frame..... | Rambling speakers |
| Handout with details | Expect the staff to remember
No handouts |
| Use visual aids..... | No visual aid use |
| Set high expectations | Apologize for taking their time |
| Make it mandatory..... | Making it optional |
| Booth tour or review..... | No booth walk through |
| Use a bit of humor | Bore them to death |

Pre-show Briefing Document or Survival Kit Outline

Event Overview at a Glance

- Exhibit Move-In
- Staff Arrivals
- Mandatory Pre-Show Briefing and Booth Tour
- Expo Dates and Hours
- Registration and badge pick-up
- Staff Departures
- Exhibit Move-Out
- Event Planning Calendar
- Show and Strategy Overview
- Show Objectives
- Show Overview and Demographics
- Prospect Profile- definition of your target audience
- Exhibit Messaging
- Accommodations, Transportation, and Weather
- Accommodations
- Transportation
- Weather
- Local Restaurants

Integrated Marketing Efforts

- Inviting Customers and Prospects
- Pre-set meetings
- Pre-Show Promotions
- Sponsorships
- Media Activities
- Advertisements
- Literature
- Premiums and Giveaways

Exhibit and Demonstrations

- Floor Plan
- Theatre Presentation
- Live Demonstrations

Lead Retrieval and Qualification

Staffing Schedule

Meeting Room Schedule

General Staff Preparation Info

Key telephone numbers

MANDATORY Pre-Show Briefing

- Exhibit Walk-Through
- Attire distribution if warranted
- Badge distribution
- Staffing Tips
- Dynamics of Working the Show & Exhibit Etiquette

Contact List

- Exhibit manager
- Off -site room
- Booth captains
- Technical support

Source: Kim Kee, Kee Consulting, with enhancements

If you do not have the ability to select staff yourself, consider sending this out to those individuals who will be providing staff to work your show.

- Necessary product knowledge
- Can communicate with most visitors
- Does not have a personal agenda

- Attended previous shows
- Good mentor for less experienced staffers
- Can create valuable leads and follows up afterwards

- Comfortable talking with strangers
- Understands the qualification process
- Outgoing and friendly
- Persistent and focused
- Assumes personal responsibility
- Team player
- Goal-setter
- Consistently courteous

- Well organized
- Able to listen and respond
- Extremely flexible
- Confident in one-on-one communications or in small groups

- Participates in training
- Is willing to accept and adhere to a schedule
- Understands role in achieving show objective
- Has done homework and briefed themselves
- Spends time greeting and talking with booth visitors - not other staffers

- Can endure, without complaining, aching backs, legs and feet

Compliments: Susan Letner, Schlumberger Oilfield Services

Staff Check Points

You can assess how well your staff are performing on the floor by observing the following (If you have the time, you can actually score performance of each of your staffers. If not, you can use this form for overall assessment throughout each day, each shift.)

Attitude

Do they show up on time?

What is their attitude?

- Excited
- Bored
- Rather be someplace else
- Involved and into it

Ability to engage

- Does the staff appear open, warm and approachable?
- Do they approach visitors in the aisle who look at and into the booth?
- Do they welcome visitors who make eye contact with a smile/handshake?
- Do they use open-ended questions?

Ability to qualify

- Do they qualify quickly and efficiently?
- Do they probe first to determine needs?
- Do they ask all the qualifying questions? (who, what, where, when, how much)

Ability to present solutions

- Do they understand the need first?
- Do they qualify first before conducting the demo?
- Are they taking too much time? How long is the typical interaction?
- Are they able to talk with multiple visitors at one time?

Ability to close and capture

- Do they articulate closing comments?
- Do they capture some type of commitment for follow-up?
- Are the lead forms completed, including comments?

Non-verbal skills

- Are staff members talking with each other?
- Are they eating, sitting, drinking, or using cell phones in the exhibit?
- Do they look professional?
- Do they look approachable?

General observations

- Are they using literature and promotional products properly?
- What about attire? - If it's business casual, do it follow what you laid out?
- Do they keep to booth schedules?
- Do they use the booth appropriately?

Pre-Show Staff Coaching Guide

<Fill in your show>

Consider sending this piece out to each staffer a week before the show to create *Top of Mind Awareness* of the upcoming event.

Five Thoughts for Exhibiting at <fill in your show>

1. **Time Poverty is everyone's competitor**

This show is only open (x) hours, total. Attendees spend about 9 hours on the show floor. It might be in one day or over several days. Because time is an attendee's greatest competitor at a show, they plan their visits. Over 75% of visitors to shows preplan which exhibits they will visit. They will only visit 25-31 exhibits and 2/3rds of those visited have been determined before they arrive at the hall. Attendees have specific goals and do not wander aimlessly. A current trend is that attendees may fly in for the day only, and catch a late flight home. Be prepared to meet their time objectives when visiting with show visitors.

2. **The phenomenon of Buying Teams is alive and well**

There is more than one buyer in any situation. You may be visited by a technical buyer (decision influencer or recommender) first, followed by a financial buyer (decision maker) second. Be prepared to talk on several levels in order to meet their varying needs.

3. **Attendees want a Consultant, not aggressive sales personnel**

They want to have a dialog. They want you to engage them, to welcome them and find out what is on their agenda. They don't want to be pressured. They are looking to make buying decision. They do not want to be sold. Attendees would rather talk at length with someone that is tuned into their needs, not to one that is focused solely on his/her own products or services. Conversations and demonstrations need to be focused on the attendee's needs. There will be ample time to tell the corporate story if their needs are met first. Sales hype doesn't work with today's more sophisticated buyer. They are savvy and come armed with knowledge about (your company/product) and its offerings. Get attendee's into the flow, assess their needs and then guide them to the appropriate location in the exhibit that can meet those needs with solutions.

4. **Quality buyers count more than the Quantity of contacts**

Years ago the success of events was measured by the numbers of attendees that stopped by the exhibit, the amount of literature that was dispensed, or the number of promotional products that were given away. In today's environment it is the quality of the visitors that we call a lead; not the raw quantity of contacts. The mission is to increase your share of customer as well as seeking new customers. The economics are with us to work harder to gain more sales with existing customers since they are already sold on (your company/products). The challenge is to find new applications for existing products and new opportunities for additional products they are not currently buying.

5. Use all the tools available

When working an event like (your show) you have a variety of tools available to you to support you in your mission to communicate with the audience.

- Your theme is an important tool that helps create memorability - they will see it in your graphic and headers and they need to hear it from you to make it memorable - (insert your theme or tagline)
- The exhibit is your best tool - its graphics help you reinforce your messages.
- Your lead card or lead retriever that show management provides is another. It can act as a guide for communicating as well as a tool to record the results of your interview. Without the key information generated in the discussion you have no more than a contact. You do not have a qualified lead.
- Demonstration/presentations bring your products and services to life. They provide proof and benefit as long as they are customer focused.
- Collateral material helps reinforce your verbal messages.
- The lead form is the bridge between the show and the sale, so get familiar with all the tools that are at your disposal at (your show).

Booth Captain Trade Show Check List

If you cannot be present at each show, you can designate a booth captain to assume your role. Use the following to inform them of their expected duties in terms of preparing staff, executing at the show, and all other details.

- Review Objectives
- Review expectations and evaluate if they were met
- Expense report reminder
- Closing booth
 - Store literature
 - Store leads sheets
 - Store giveaways
 - Remove unnecessary trash
 - Lock cabinets
 - Collect completed leads
- Address staff and visitor needs, issues and questions
- Coordinate collection of competitive information
- Make notes of exhibit issues that need to be address and communicate to convention services

Booth Captain Show Evaluation Check List

This piece is designed for Booth Captain use to provide input and insights regarding the staff's effectiveness in working the event.

Number of Staff

- Adequate Too few Too many

Was a staffing schedule used?

- Yes No

If no, how well did the staffing schedule work?

- Very well Sufficiently well Did not work

Was the booth adequately covered during:

Peaks in attendee flow? Yes No

Lunch breaks? Yes No

How well did the staff work together?

- Very well Sufficiently well Did not work well together

Did the staff transition visitors to other parts of the exhibit?

- Yes No

Did they engage proactively?

- Yes No

If no, why not? _____

Were they able to overcome territorial issues?

- Yes No

Did they introduce themselves before prospecting?

- Yes No

Did they qualify the visitor before communicating to determine needs?

- Yes No

Did they communicate information related to the visitor's needs?

- Yes No

Did they capture key points discussed on a lead form for future follow?

- Yes No

Booth Captain Show Evaluation Check List (continued)

Did they use the lead retriever system?

Yes No

Did they give promotional products as opposed to let visitors take promotional products?

Yes No

Did they thank the visitor for stopping at the end of the communication?

Yes No

Did non- verbal communications indicate a lack of interest by staff?

- Talking with each other
- Detail stations not staffed
- Staff on cell phones
- Staff chewing gum
- Staff drinking coffee
- Staff sitting down
- Staff standing behind detail stations making themselves less approachable
- Staff standing on the interior of the exhibit rather than in the aisle

Would you recommend this staffer to work this show again?

Yes No

If no, why not? _____

Role Plays

Role-plays in advance of the show can enhance show performance by providing practice, familiarity with key messages and engagement techniques. The most effective way to use this tool is to establish groups of 3's. Designate one staffer to be the attendee, one to be the booth staffer and one to be the observer and provide critique and feedback for performance improvement. Then switch assigned roles so that everyone has the opportunity.

You are an attendee. Please select one of the roles below and gear your questions and responses accordingly. Being a role-play, you need to be creative in your interaction. Think about situations you have encountered and use them as the foundation.

1. You have a specific need, but don't want to be engaged, only want to look.
2. You have no specific need, but thought the equipment, product or demonstration looked interesting.
3. You are a technical person with many, many questions.
4. You are decision-maker who controls the budget but has little technical knowledge
5. You are on a tight time schedule and don't have the time to test the equipment, but are interested and want a rep to call on you.
6. You are the competition

Role Plays Check List

When role playing, it is best to provide the 3 person teams (one attendee, one exhibit staffer and one observer) with an evaluation checklist so they can provide feedback to one another with some consistency.

Role play checklists *(rate 10-1, with 10 being best)*

Observations

- _____ smiles
- _____ makes eye contact
- _____ introduction
- _____ handshake
- _____ uses a Great Beginning (opening line) to get the visitor talking
- _____ listens before talking

Disengagement

- _____ gets commitment - an action or a reaction
- _____ asked sufficient questions to know the next step-generates a next step action
- _____ departing handshake
- _____ thanks the attendee for stopping

Exhibit Manager's Trade Show/ Event Evaluation

1. Did we identify the market accurately for this show?

Yes No

Comments _____

2. Did we showcase the products and services our prospects wanted to see and buy?

Yes No

If No, what could we have done? _____

3. Were we prepared to help them solve their problems?

Yes No

How so? _____

4. Do we understand our visitor's changing needs and can we respond quickly?

Yes No

Comments _____

5. Did our customers and prospects know we would be exhibiting at this show?

Yes No

How did they know? _____

6. Did we give them a compelling reason to come visit our booth?

Yes No

What was it? _____

7. Did we mail letters, postcards, invitations, or email key people, followed-up by a phone call or visit?

Yes No

Comments _____

8. Did we schedule appointments with key clients and prospects at our booth or off-site?

Yes No

Comments _____

9. Did we use show management promotional materials to publicize our show presence?

Yes No

Is so, what? _____

10. Were our staff members adequately trained and prepared for this event?

Yes No

How so? _____

Exhibit Manager's Trade Show/ Event Evaluation (continued)

11. Did staff understand show objectives and also have pre-specified personal objectives?

Yes No

What were they? _____

12. Were all staff members familiar with the products and services to discuss or demonstrate them adequately?

Yes No

Is no, what were the problems? _____

13. Was a cross product training session conducted or were staff members provided with cross product pocket information to use in the booth?

Yes No

14. Were there adequate technical support staff available to answer those tough technical questions that prospects come to ask?

Yes No

15. How would you rate the quality of your leads?

Excellent Good Fair Poor

Is your lead form working for your

Yes No

If No, what changes should be made? _____

16. How would you rate the success of this show?

Excellent Good Fair Poor

Should you continue to exhibit in this show?

Yes No

If No, why not? _____

Staff Evaluation of an Event

Name of the Show: _____

Location: _____

Number of Events Your Worked this Year: _____

Number of Hours Worked - this event: _____

1. What do you think our primary objective was for exhibiting in this event?

In you opinion, was the objective(s) achieved? Yes No

If "No", why not? _____

Do you think we met our goal of meeting with existing customers? Yes No

If "No", why not? _____

2. Approximately how many total prospects did you engage in a dialogue in our exhibit? _____

Was the quality of the audience: Excellent Good Fair Poor

3. Did you have an opportunity to invite customers or prospects, important to you, to the show through a mailing, phone conversation or personal invitation? Yes No

If "Yes", how many came to the booth? _____

4. Did you feel the booth was:

Understaffed Adequately staffed Over staffed

Please rate the exhibit relative to ease of access, egress, flow and being customer friendly:

Excellent Good Fair Poor

5. How many leads did you complete? _____ How many were "hot prospects"? _____

6. Did you feel the booth adequately represented our company, its products and services to those who visited it? Yes No

If "No", why not? _____

7. Rate our booth's effectiveness compared to our competition:

Excellent Good Poor Inadequate

8. What suggestions do you have to improve our presentation and participation at future events?

Source: Concepts for this survey came from both ADP & Griffith Labs