

# THE ULTIMATE GOAL SETTING WORK BOOK

*For Trade  
Shows, Expos  
& Events*



GET YOUR PHD IN ROI  
WITH **JIM CERMAK**  
[WWW.TRADESHOWU.BIZ](http://WWW.TRADESHOWU.BIZ)



## THE ULTIMATE GOAL SETTING WORKBOOK

THANK YOU for investing time in Setting Goals for your next Trade Show, Expo or Event! This is the first step which will lead to your success! I mean without goals, how do you even know if your trade show is a success??

With the Trade Show University podcast, my ultimate goal is to see you get the most out of every event you exhibit at, maximize your ROI, and Crush Your Show Goals!!

But you can't crush your show goals if you don't have show goals! And that's why I developed this Ultimate Goal Setting Workbook. Take the time to go through each step, set proper goals, and then go after them with all you have!

AND – The steps in this workbook will also work for Virtual Trade Shows, meetings and events. I also added a section of Must-Do's for Virtual events so be sure to check that out!

See you on Campus!

*Jim Cermak*

**Host – Trade Show University**

Without proper goals, you will never know if a show is a success. Use the SMART Goal setting process to set the right goals, and to maximize your success.

### **SMART Goals are:**

- S – Specific
- M – Measurable
- A – Achievable
- R – Relatable
- T – Time-based

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**SPECIFIC:** The who, what, when, where and why. What is your METRIC for success? In other words, what are you measuring? It will be different for different types of businesses. Think only about your business.

You can measure things like:

- Specific customers you want to engage with
- Measure Qualified Leads, orders or sales dollars
- Number of Demos given or scheduled
- Key is to be SPECIFIC

What I will be measuring (my metric) is/are:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Remember to go through the Exhibitor List for the show. Identify possible vendors or partners you want to begin discussions with. Identify your competitors and do competitor research at the show.

Can have team goals as well as individual goals. But they must be specific.

**M**EASURABLE: Well I know a few of my good customers will be there so I want to get with them. That's not a measurable goal! How about "build relationships"? There's no real way to measure that. You know what's measurable? Numbers! Measurable goals are things like...

- 25 new qualified leads
- Writing \$40,000 in orders
- Getting the name of the decision maker at a list of key prospects

Our Measurable Goals are (these should line up with your Metrics):

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

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5. \_\_\_\_\_

**ACHIEVABLE:** Is your goal actually achievable? Are you setting the bar so high that you can't possibly reach it? This can lead to discouragement. On the flipside - You don't want to set your goals too low just so you're sure to hit your goals. If goals are too low, you can find your booth staff taking off half the show after hitting the goals.

Look at your goals above, and answer these questions:

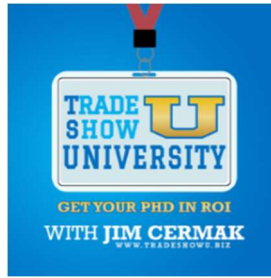
- Are your Goals Achievable? \_\_\_ Yes \_\_\_ Maybe \_\_\_ No
  - If you answered Maybe or No, then consider changing your goals. It's good to make your team stretch to reach a goal, but if you know it's definitely not attainable then lower it. You are setting everyone up for a let-down.
- Are your Goals too low? \_\_\_ Yes \_\_\_ Maybe \_\_\_ No
  - If you answered Yes or Maybe, go back and raise them! Never set a low goal just so you can say you hit it. Challenge yourself and your team!

**RELEVANT:** Are your goals Relevant? In other words - Do they make sense? Consider the following:

- Are your show Goals in line with company Goals? \_\_\_ Yes \_\_\_ No
  - Your goals need to line up with overall company goals - period
  - If your show goals do not line up with or support overall company goals – change them!
- Do your show Goals support your marketing strategy? \_\_\_ Yes \_\_\_ No
  - Your goals should match your marketing strategy. Make sure the information you are gathering will work with the marketing systems you have for effective follow up.
- Does your display or booth flow support reaching your show Goals? \_\_\_ Yes \_\_\_ No
  - Make sure your booth and display are leading people to your goal. Review the marketing messaging, displays, literature and lead capture methods.
- Are you staffed correctly to meet your Goals? \_\_\_ Yes \_\_\_ Maybe \_\_\_ No
  - The people staffing your booth should effectively help you reach your goals. If you have a sales goal, make sure your top sales people in the booth. However, if your goal is to give a number of demos of your product, staff with engineers or product specialists.
  - Do you have enough people working the booth to hit your goals?

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**TIME-BASED:** Your goals should have a time limit and also be timely.

**Pre-Show – my Pre-show Goals are:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

- If you're going to do some pre-show marketing (Social media, email, direct mail, ads, etc.) make sure you have the timing right for maximum effectiveness.

**Post-Show – my Post-show Goals are:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

- The focus is on following up. Begin following up about 3-5 days after the show ends to give time to return to the office, and they still remember you. Go much beyond that and people will begin to forget about any impact you may have made.
- Don't forget to set a goal for when follow-ups will be completed.

**Other Areas to Measure/Goals to set:**

- **Competition** – which competitors will be there? How can you capture information about them?
- **Other Exhibitors** – look through the exhibitor list. Which do you want to meet and network with? Which can be potential customers, partners or vendors?
- **Customers** – do you have customers coming to the event? If so, do you have meetings set?
- **Industry Information** – which seminars or workshops will you attend? Who in the industry do you need to meet? What information would you like to gather?
- **OTHER** – be creative! What other goals would you like to reach from this show or event?

***REMEMBER – what gets measured gets accomplished!***

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## VIRTUAL TRADE SHOW & EVENT MUST-DO'S

### 1. Know your audience

- What are they looking for that you can offer?
- What are they going through? Especially now!
- Set the right time of day – is audience business or consumer? Local, regional or global?

My Audience Is: \_\_\_\_\_

This Industry is experiencing: \_\_\_\_\_

\_\_\_\_\_

What I Offer that Meets Their Needs: \_\_\_\_\_

### 2. Set your strategy

- Think about how you usually do trade shows. Or what your best trade shows brought. Make sure you try to work as many of these aspects into your virtual shows.
- One time live presentation or replays available?

I want people to leave with: \_\_\_\_\_

My Call to Action is: \_\_\_\_\_

### 3. Set goals

- What will equal success? What do you want to have happen afterwards?
- Don't just do something and say Yup! We had a virtual trade show! There's got to be something measurable.
- Use the beginning part of this workbook to capture your goals.

### 4. Promote! Promote! Promote!

- You may not have the luxury of having the trade show host doing all the marketing to get people to your event! You have to be more intentional.
- Social media, email, banner ads, direct mail, etc.
- Consider giving incentives for people to attend

My promotion and marketing will include: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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5. Get people to register for the event

- Whether free or if you charge, getting people to register ahead of time
- Allows you to manage expectations, plus they are more likely to show up

My registration method will be (software, website, email, etc.): \_\_\_\_\_

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6. Find Sponsors

- If you're doing this by yourself, reach out to a vendor or partner and get them to sponsor your event. Great promotional opportunity for them, plus their funding helps you do more. And they will help you promote it.
- Get creative with what parts of the event they can sponsor!

Companies I will reach out to become a Sponsor: \_\_\_\_\_

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Parts of the event to Sponsor: \_\_\_\_\_

7. Get interactive

- Interaction creates engagement, which will help you reach your goals
- Not just be interactive, but encourage engagement! Give opportunities!
- If you are planning on using the chat feature, make sure you have a moderator monitoring the chat to bring up questions and talking points - and call these people out.
- If your software allows, open up their mic for a discussion or bring them on screen.
- Run quizzes, games and polls to get people involved.

Ways I will make my event Interactive: \_\_\_\_\_

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8. Go through your presentation/event completely with your team ahead of time

- Don't have the first time you run through be in front of your live audience
- Work through any tech troubles you may have
- Are your slides or graphics easy to see and read? Less words per page, more pics
- Is your audience engaged or bored?

Date for my event run through: \_\_\_\_\_

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9. Know your tech!!

- What software or platform will you be using? What features are you planning on using?
- Understand not only what features are offered, but how to use those features quickly and effortlessly.
- Whatever you choose, make it super simple for your attendees to register, log in, interact, chat, network with each other, go from session to session – whatever you want them to do!

10. Incorporate other Fun and Memorable Ideas

- Did your company usually sponsor after hours networking events? You can still have one possibly for VIPs, or your best customers and prospects.
  - Send out a special box with a bottle of wine or beer ahead of time for them to enjoy during the event!
- If it's a longer all-day event, send out a boxed lunch to your attendees
- Send out some swag ahead of the event and have drawings for those who wear or display it during the event.
- If your event is going to be more than an hour or so, plan in for breaks! The last thing you want is your audience feeling trapped.
  - And make your breaks fun! Have live entertainment, run fun video clips or company videos, on screen quizzes, trivia, giveaways and more.
- Possibilities are endless!! Meet with your team – get creative!

The Unique, Fun and Memorable Ideas We Have are: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_





## SHOW GOALS SUMMARY

Show Name: \_\_\_\_\_

Dates: \_\_\_\_\_

Main Metric: \_\_\_\_\_

### Top 2 Pre-Show Goals:

1. \_\_\_\_\_
2. \_\_\_\_\_

### Top 3-5 Show Goals:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Individual Goals (Goals for each person working the show):

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Top 2 Post-Show Goals:

1. \_\_\_\_\_
2. \_\_\_\_\_

### Individual Goals (Goals for each person working the show):

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

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