

48-hour trade show follow-up checklist

Purpose: a printable plan to follow up every trade show lead within 48 hours, from the planning stage to the 180-day report.

Tick each line as it's done. Start the 48-hour clock when the show closes, unless someone at the office can send emails during the show. On a multi-day show, upload and grade every night.



1. Before the show 2-4 weeks before, and bump-in day

- ☐ Follow-up steps, owners and deadlines written into the trade show plan
- ☐ One follow-up owner named, from show night to the 180-day report
- ☐ A, B and C lead grades agreed with sales (see the grades below)
- ☐ One capture form, app or scanner for every staff member, with the same fields every time
- ☐ Fields set up: contact details, interest (dropdown), grade, notes, next step offered and consent
- ☐ Consent wording and collection notice approved by your privacy or legal team
- ☐ One email template per interest category and grade, with space for a personal line
- ☐ Templates offer more than one next step, such as a demo, a download or a meeting
- ☐ Any offer or announcement made at the show included in the templates

Bump-in day

- ☐ Capture form or app tested on the venue connection
- ☐ Staff briefed on grades, notes and the consent question

Owner: marketing lead with sales manager; stand manager on bump-in day

Lead grades agree yours with sales

	Example definition	Follow-up
A	A clear need, budget or timeframe and a request for contact	Personal email on day 1, phone call on day 2
B	Real interest but no timeframe	Personal email on day 1, second contact in week 1
C	General interest only	Information for their interest category on day 1 (no meeting request), nurture emails in weeks 2-6 if they consented

2. On the stand during the show

- ☐ Every lead captured with a grade, notes and the next step offered
- ☐ Useful notes ("wants pricing for 12 sites, decision in Q3"), not "interested"
- ☐ Express consent asked for, not assumed from a scanned badge or a business card
- ☐ Consent logged: who agreed, when and how
- ☐ Visitors who ask for a call marked on the capture form
- ☐ Multi-day show: leads uploaded and graded every night

Owner: every staff member on the stand

3. First 24 hours show night and day 1

Show night (hours 0-4), before anyone leaves the venue

- ☐ Every lead from every device or app uploaded to the CRM, tagged with the show name and date
- ☐ Duplicates merged and obvious email typos fixed
- ☐ Grades checked; any A lead with no notes completed by the person who captured it
- ☐ Each lead assigned to a named salesperson, matched by region or product
- ☐ Existing customers and open opportunities flagged for their account manager

Day 1 (hours 12-24)

- ☐ A short, personal email to every graded lead from the person who will look after them, not a newsletter from a no-reply address
- ☐ A line that shows you remember them: the product they looked at or the problem they described
- ☐ The promised next step delivered: price guide, case study, demo link or two times for a meeting
- ☐ Your name, title and direct contact details
- ☐ A and B grades sent first; C grades get the information for their interest category, without a meeting request

Owner: follow-up owner on show night; assigned salespeople on day 1

4. 24-48 hours day 2

- ☐ Every A-grade lead called, referring to the email and the conversation on the stand
- ☐ Aim for a booked meeting, demo or quote
- ☐ Outcome and next date logged in the CRM the same day
- ☐ Telemarketing rules followed where they apply (see the box below)

Owner: assigned salespeople

Show details

Show name and dates _____

CRM tag (show name and date) _____

Follow-up owner _____

Grades agreed with sales on _____

Consent wording approved on _____

5. The following week and beyond week 1 to day 180

- ☐ Week 1: second contact to B grades with something new, such as a case study or an invitation to your showroom
- ☐ Weeks 2-6: nurture emails to C grades by interest category, if they consented
- ☐ Unsubscribe requests honoured within 5 working days
- ☐ 30, 90 and 180 days: leads, meetings, quotes and sales, and their value, reported against the show
- ☐ Results used to judge which shows earn their budget, and in next year's discussion with the organiser

Owner: follow-up owner; marketing lead for reports

Results against the show

	Leads	Meetings	Quotes	Sales	Value
30 days					
90 days					
180 days					

Owner: marketing lead. Count leads, meetings, quotes and sales, and their value.

Consent, calls and privacy

Spam Act 2003 (ACMA): If a follow-up email promotes your products or services, treat it as a marketing message. ACMA's guidance on the Spam Act 2003 says: "If you plan to send marketing messages or emails, you must first have consent from the person who will receive them." ACMA also says "it's up to you to prove that you have a person's consent", so log who agreed, when and how. You cannot send an electronic message to ask for consent, "because this is a marketing message". Every message must identify you, include contact details and offer an unsubscribe that is honoured within 5 working days.

Telemarketing calls (ACMA): If your calls count as telemarketing, ACMA's rules apply. ACMA says anyone making telemarketing calls must "say who it is as soon as the call starts", "say why they are calling" and end the call immediately if the person asks or indicates they want it to end.

Privacy: The OAIC describes the private sector organisations covered by the Australian Privacy Principles as "all businesses and not-for-profit organisations with an annual turnover of more than \$3 million and some small businesses". For covered organisations, APP 11 requires reasonable steps to protect personal information "from misuse, interference and loss, and from unauthorised access, modification or disclosure". That matters when lead lists sit on tablets and laptops on a show floor.

This is a summary, not advice. Check with your privacy or legal team before the show.

Want a lead capture point designed into your stand? 1300 240 250 | sales@displays2go.com.au | displays2go.com.au

The full article: displays2go.com.au/blog/2017/may/follow-up-on-leads-its-worth-it