



Playbook/Worksheet: Expo Strategy Navigator How to Plan, Work, and Follow Up After a Business Expo

Booth Presence + Intentional Conversations + Consistent Follow-Up → Better Expo ROI

Most businesses judge an expo by traffic, foot volume, or how many business cards they collected.

Smart exhibitors judge success differently. They focus on:

- quality conversations
- qualified leads
- referral opportunities
- follow-up meetings
- new relationships
- brand visibility
- long-term results

Because traffic alone does not create return. Conversations do. Follow-up does. Strategy does.

The businesses that consistently win expos rarely “wing it.”

They prepare before the event.

They engage with purpose during the event.

They follow through after the event.

They know the expo itself is only part of the opportunity. Real ROI is created when preparation, presence, and post-event action all work together.

This Playbook gives you a practical framework to make your next expo worth the time, cost, and effort. It is built around a proven system for expo success:

Before: Plan with clarity.

During: Work with intention.

After: Follow up for results.



Part 1: BEFORE THE EXPO — PLAN TO WIN

Most expo results are determined before the doors open.

Many exhibitors spend time on banners, giveaways, and table setup—but never build a real strategy. The strongest exhibitors arrive knowing who they want to meet, what message they want remembered, and how they plan to follow up.

Define Your Target- Who do you most want to meet?

Potential categories:

- ideal customers
- referral partners
- vendors
- community leaders
- hiring prospects
- media / influencers

Ask Yourself:

- What industries fit me best?
- Who is easiest to help?
- Who could refer me repeatedly?
- Who do I want to leave knowing me?
- What conversations would make this expo a win?

Clarity changes everything. It shapes your booth message, your questions, and your follow-up priorities.

Clarify Your Booth Message

Can people quickly understand:

- What you do
- Who you help
- Why it matters
- Why they should care now

Use this formula:

We help _____ solve _____ so they can _____.

Examples:

- We help small businesses organize finances so they can grow with confidence.
- We help homeowners improve curb appeal so they can increase property value.

Simple beats clever. If people are confused, they move on.



Design a Booth That Invites Conversation

Your booth should feel welcoming, not overwhelming.

Avoid:

- clutter
- sitting behind table
- too much reading material
- confusing signage
- blocking access with furniture

Use:

- open layout
- clean visuals
- one clear headline
- approachable energy
- easy handout access

Your booth should make it easy to stop, understand, and engage.

Prepare Staff

Everyone at the booth should know:

- your core message
- 3 qualifying questions
- how to greet naturally
- how to capture leads
- how to transition conversations smoothly

Mixed messaging creates confusion. Consistency creates confidence.

Plan Promotion

Before the event, let people know:

- where your booth is
- what you're offering
- why they should stop by
- who should come meet you

Use:

- email
- LinkedIn
- chamber promotion
- client invites
- social media
- personal outreach

Do not wait for expo traffic alone. Bring people to you.



Part 2: DURING THE EXPO — EXECUTE WITH INTENTION

The expo is not a standing contest. It is an engagement opportunity.

Don't Wait to Be Approached

Use simple openers:

- What brings you to the expo today?
- What type of business are you in?
- Have you attended before?
- What are you hoping to find?
- What's been the best thing you've seen so far?

Natural curiosity works better than a sales pitch.

Focus on Quality, Not Quantity

You don't need 50 weak conversations.

You need:

- 5 strong prospects
- 3 power partners
- 10 memorable connections

A few real relationships outperform dozens of forgettable exchanges.

Capture Notes Immediately

Write down:

- name
- company
- need
- follow-up promise
- personal detail
- urgency level

Memory fades fast. Notes create better follow-up.



Stay Professional Until the End

- Do not mentally leave early.
- Do not pack up early.
- Do not sit scrolling your phone.

Late traffic often includes serious decision-makers, last-minute visitors, and people finally free to talk.

Walk the Expo Too

When possible:

- meet other exhibitors
- identify strategic partners
- study strong booths
- learn what others are doing well

Sometimes your best opportunity is outside your booth.

Part 3: AFTER THE EXPO — WHERE ROI HAPPENS

Most exhibitors lose here.

The expo introduces the relationship. The follow-up builds it.

Follow Up Within 72 Hours

Reference your conversation.

Bad:

“Nice meeting you.”

Better:

“Great meeting you at the expo. I enjoyed hearing about your expansion plans and would welcome a short conversation next week.”

Timely and specific wins.

Segment Your Follow-Up

Use different messages for:

- prospects
- referral partners
- fellow exhibitors
- vendors
- community contacts

One generic email usually underperforms.

Measure Results

Track:

- leads generated
- meetings booked
- sales closed
- referral partners gained
- revenue from expo
- lessons for next year

Many expo results happen later. Keep tracking.

Improve the Next Expo

Ask:

- What worked best?
- What questions came up repeatedly?
- Which promo items mattered?
- Was my booth message clear?
- What should I change next time?

Every expo should sharpen the next one.

Create Next Steps

Possible next steps:

- coffee meeting
- Zoom intro call
- proposal
- referral exchange
- site visit
- resource share

Always move toward a next action.

Review at:

- 30 days
- 90 days
- 6 months

Expo Scorecard (Rate 1–10)

Targeting _____
Booth Setup _____
Messaging _____
Energy _____
Lead Capture _____
Follow-Up _____
ROI _____

Lowest score = first improvement.