



# Trade Show Exhibitor Software Checklist

Check out our companion blog post:

[“Which trade show exhibitor software is right for you?”](#)



## Overview

If you're in charge of trade show exhibits at your company, you may be wondering: how should I manage all of those exhibitor logistics and deadlines?

Sure, spreadsheets, calendar invites and email may have worked for colleagues in the past, but if you're anything like me, you'd rather not have to update all three every time an exhibitor deadline changes, which is often! With tech like mobile apps and Slack chats to automate so many tasks these days, isn't there a better way?

You bet there is! This Trade Show Exhibitor Software Checklist breaks down all the options for trade show exhibitor software that can help you automate tons of those mindless, redundant data-entry tasks that so often come with managing trade show exhibits.

## But first...

If you haven't already, read ["Which trade show exhibitor software is right for you?"](#) to narrow down what you're looking for based on your role as an organizer or exhibitor, as well as how many trade shows are in your yearly portfolio.

Then, when you're ready, use this checklist to sort through a list of trade show exhibitor software features and refine your personal list of requirements, compared with what EventGeek and other exhibitor softwares offer.

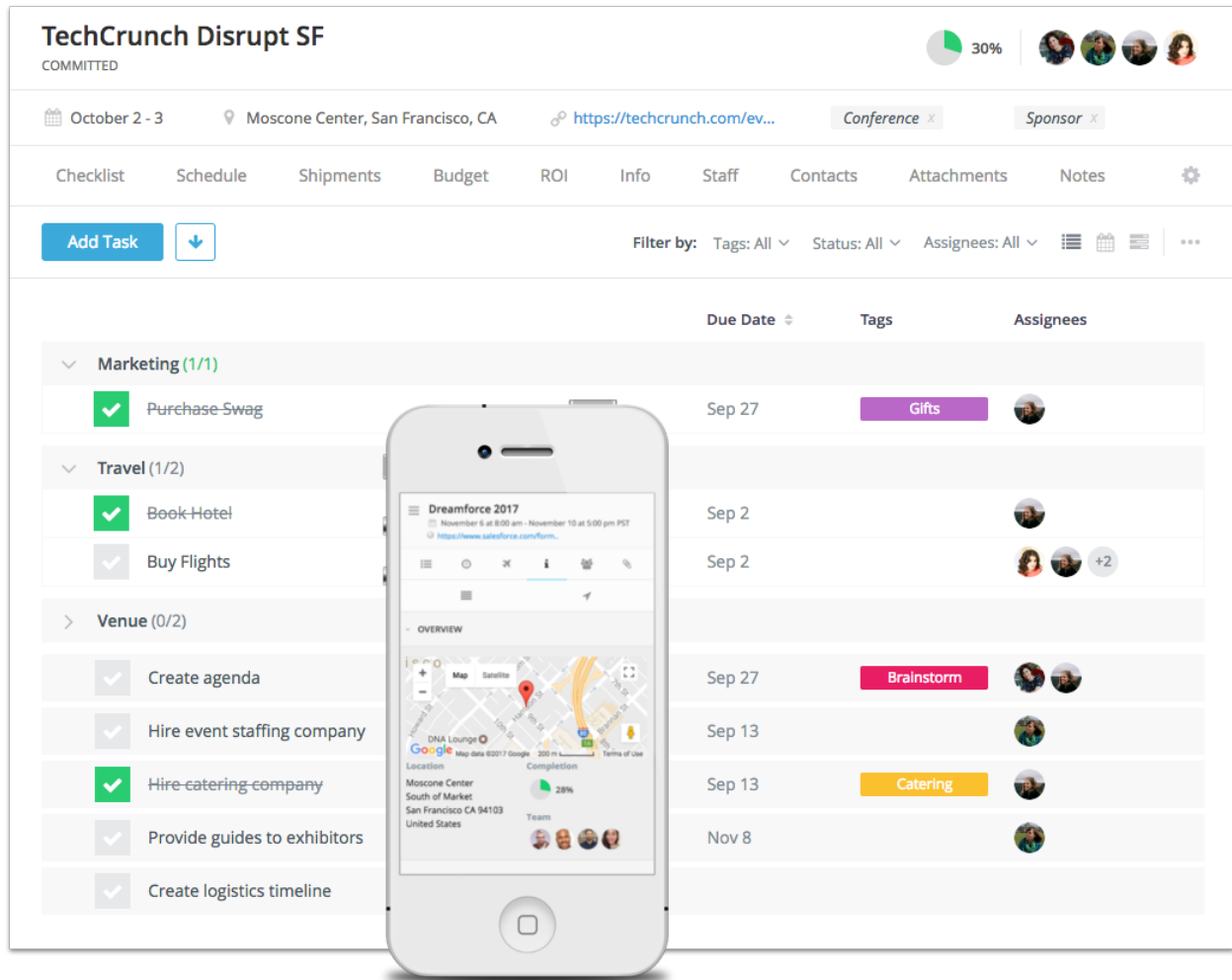
	<b>Do I need this feature?</b> <i>(Check the boxes next to the features you need.)</i>	<b>Does this trade show exhibitor software provide this feature?</b> <i>(The EventGeek column is pre-filled. Write in the names of other software you are considering in the Software 2 and Software 3 columns and check off features they offer.)</i>		
		EventGeek	Software 2	Software 3
<b>Checklists</b>				
Task delegation		x		
Automatic reminder notifications		x		
Checklist templates		x		
<b>Inventory</b>				
Inventory tracking		x		
Shipment tracking and status updates		x		
Scheduling new shipments				
<b>Travel</b>				
Travel booking				
Tracking travel information (i.e. flights, hotels, reservations, etc.)		x		
<b>Schedules</b>				
Personalizing schedules for team members with travel and meetings		x		
Creating booth schedules		x		

Budgets & Reporting				
Tracking expenses		<b>x</b>		
Create budgets with planned vs. actual		<b>x</b>		
Automated post-event reports		<b>x</b>		
Automated quarterly reports		<b>x</b>		
Access Control				
Choose what information you share with each team member, based on role		<b>x</b>		
Tracking Leads and Meetings				
Leads scanner		<b>x</b>		
Add meeting notes to leads		<b>x</b>		
Automatic CRM sync		<b>x</b>		
Tracking deals after the event		Use a separate CRM system for sales reps to track activity (and track the results in EventGeek)		
Collaboration				
Create and share customizable event request forms		<b>x</b>		
Create and share customizable event briefings		<b>x</b>		
Automatic sync with Outlook and Google calendars		<b>x</b>		

## Wrap Up

Now that you've read "[Which trade show exhibitor software is right for you?](#)" and compared the features you need with the features provided by EventGeek and other exhibitor softwares using this checklist, you're ready to test exhibitor software out for yourself.

Here's a screenshot of EventGeek's customizable checklists, which allow for task delegation, automatic reminder notifications, and integration with expenses and travel.



The screenshot displays the EventGeek interface for a trade show event titled "TechCrunch Disrupt SF". The event is marked as "COMMITTED" and is scheduled for October 2-3 at the Moscone Center in San Francisco, CA. The interface includes a navigation bar with tabs for Checklist, Schedule, Shipments, Budget, ROI, Info, Staff, Contacts, Attachments, and Notes. A checklist of tasks is shown, categorized into Marketing, Travel, and Venue. A mobile app interface is overlaid on the checklist, showing a map of the Moscone Center location and a completion percentage of 28%.

Task	Due Date	Tags	Assignees
Marketing (1/1) ✓ Purchase Swag	Sep 27	Gifts	[User]
Travel (1/2) ✓ Book Hotel	Sep 2		[User]
Buy Flights	Sep 2		[User], [User], +2
Venue (0/2) ✓ Create agenda	Sep 27	Brainstorm	[User], [User]
✓ Hire event staffing company	Sep 13		[User]
✓ Hire catering company	Sep 13	Catering	[User]
Provide guides to exhibitors			
Create logistics timeline	Nov 8		[User]

If you're curious about seeing for yourself how EventGeek can "check all the boxes" for streamlining your specific workflows as a trade show exhibitor, sign up for a free, no-obligation demo & trial at [eventgeek.com/demo](http://eventgeek.com/demo).

See for yourself why EventGeek is the software that trade show exhibitors love.