

# CU Trade Show Event Guide

**Engagement marketing:** View this more as an opportunity to engage in live conversations and less as a brochure distribution event.

Prepare	Attend	Follow Up
<p><b>Determine your goal:</b> Tie your main objective to one product or strategic goal. New Members? Loans? Home Mortgage? Create your theme to match the event.</p> <p><b>Be aware of logistics.</b> Know the location and size of your booth, parking, set-up time and rules that the event organizers have put into place. Plan to arrive early to set up.</p> <p><b>Supplies:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Table/Chairs (Are these provided?)</li> <li><input type="checkbox"/> Table Cover</li> <li><input type="checkbox"/> Banner</li> <li><input type="checkbox"/> Print Material and Acrylic Holder</li> <li><input type="checkbox"/> Promo Items</li> <li><input type="checkbox"/> A way to collect information / sign ups</li> <li><input type="checkbox"/> Business Cards</li> <li><input type="checkbox"/> Pens</li> <li><input type="checkbox"/> What other items will you need?</li> </ul>	<p><b>Appearance:</b> Have staff prepared with talking points and dress appropriately. Clearly communicate the goals, talking points and activities. Recommend appropriate clothing for the event. You want to look professional, industry-appropriate and approachable. Remember to wear comfortable shoes!</p> <p><b>Engage.</b> The goal is to engage in live conversations. (See attached doc for table engagement ideas)</p> <p><b>Be Human.</b> Be friendly and approachable. Stand up and encourage interaction.</p> <p><b>Collect</b> contact information for follow up.</p> <p><b>Take photos</b> to share on social media.</p> <p><b>Thank the organizers</b> in person and introduce yourself to other vendors.</p>	<p><b>Follow up:</b> Did you collect email addresses? Follow up accordingly with a message to attendees. (See attached follow up template).</p> <p><b>Handwritten Thank You.</b> Thank the organizers and vendors with a hand written thank you.</p> <p><b>Make notes for progress.</b> While fresh in your mind, make a note of what could have been done better for next time. Make note of what worked well and areas needing improvement.</p>

# Trade Show Activity Ideas:

Plan an icebreaker activity to get the attendees attention and start a conversation.

<b>Trivia</b>	Create a simple interactive game where winners who answer correctly receive a prize (such as a small promo item). A brief “True or False” quiz relating some statistical trivia about credit unions, or specific to your credit union. Or... Have a short “Test Your Knowledge” quiz. Make the quiz match the theme of the event. For instance at a Home Show, you might ask “Homeowner Trivia”. Here’s an example: <b>Q:</b> For some a red door is just a red door. In Scotland, however, what does a red front door signify? <b>A:</b> The homeowner has paid off their mortgage.
<b>Change Jar</b>	Have a jar of change and have attendees “guess the value”. Winner takes the prize at the end of the day (random drawing if more than one hits the right answer). Entries will help you gather contact info and give a great conversation piece on financial education while they are at your table.
<b>Survey</b>	Simply ask attendees for their participation in a brief survey in exchange for a small promotional item. The survey should be no longer than 10 questions focusing on potential needs that your products can address.
<b>Raffle</b>	Oftentimes, the event will sponsor a general raffle. Be sure to know if your booth is required to make a contribution to the collective contribution.
<b>Other Ideas</b>	Check with staff about their ideas and observations. Never forget to take notes or jot down observations from each event, not only for follow up purposes, but to be even better prepared next time. There is always room for improvement, and don’t underestimate the input of those attending these events or working with your products every day.

# Talking Points & Follow Up

People do not buy products; they buy solutions to their problems. How will this impact what you say at the event?

## Solve Problems:

Focus your questions on potential problems that your products solve.

Anticipate needs of attendees and how you can meet those needs. Focus on solutions your product can provide, such as cost savings to members. Who doesn't want to save money? Have answers to frequently asked questions ready to relate in a clear and concise manner.

For example, people often ask the difference between a CU and bank. Your products solve financial problems and often, those problems occur as people move through various life events (attend college, get married, have kids, retire, etc). Get them talking about their lives and you'll discover any issues or challenges you can address.

## Talking Points

Start with a warm greeting. >Smile. >Are you familiar with the benefits of joining a credit union?" Engage in activity. >Request information. >Recommend a product that solves a problem. Be prepared with answers to most commonly asked questions.

## Email Template:

Did you collect contact info that included emails at the event? Why not follow up with a friendly message.

Hi <lead name>,

I hope you enjoyed <trade show name>, it was nice to meet you! Thanks for stopping by our booth and learning about <your credit union name.>

It was nice to discuss <reference conversation/ services that you may have discussed> with you, and I thought it might be helpful to send along some digital resources to answer any further questions <links to relevant resources on your company's website.>

I would love to set up a quick call with you to chat about this further! Do you have any free time within the next week for a 15-minute call?

Thank you,  
<Your Name> <Contact Info>