

Will Turner CTSM Portfolio



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Hover over **BLUE TEXT** for inline definitions

Criteria 1

Vital Statistics

- **Bio**
 - Educational background
 - Industry career background
 - Current job responsibilities
 - Key staff with whom I interact
- **Company**
 - History
 - Size
 - Locations
 - Markets
 - Competitors
 - Products & Services

BIO

I was born and have spent my entire life in Cincinnati, Ohio. I grew up in Midwest suburbia during the seventies and eighties, and my early years passed uneventfully, as they do for many people, up through graduating high school.

After high school, I earned a bachelor's degree in marketing, and have accumulated almost forty years of experience in sales, marketing, and customer service across various industries. This variety of experience has taught me how to look at projects and problems from different perspectives, allowing me to come up with some unique solutions. It has shaped me into a more well-rounded problem solver, which has proven invaluable in the marketing world, with its short deadlines, last-minute requests, and frequent changes in direction that plague marketing departments everywhere.

My sales experience has taught me to ask a lot of questions of my stakeholders. I ask probing questions to identify and clarify their pain points and expected outcomes, as well as those of their stakeholders. Once I gain that information, my customer service experience enables me to 'make things happen'.

People in customer service are, often times, the unsung ground soldiers of a company. Their typical day is filled with receiving marching orders to fix problems, please customers, and a litany of other behind-the-scenes tasks that keep customers coming back, with little to no recognition.

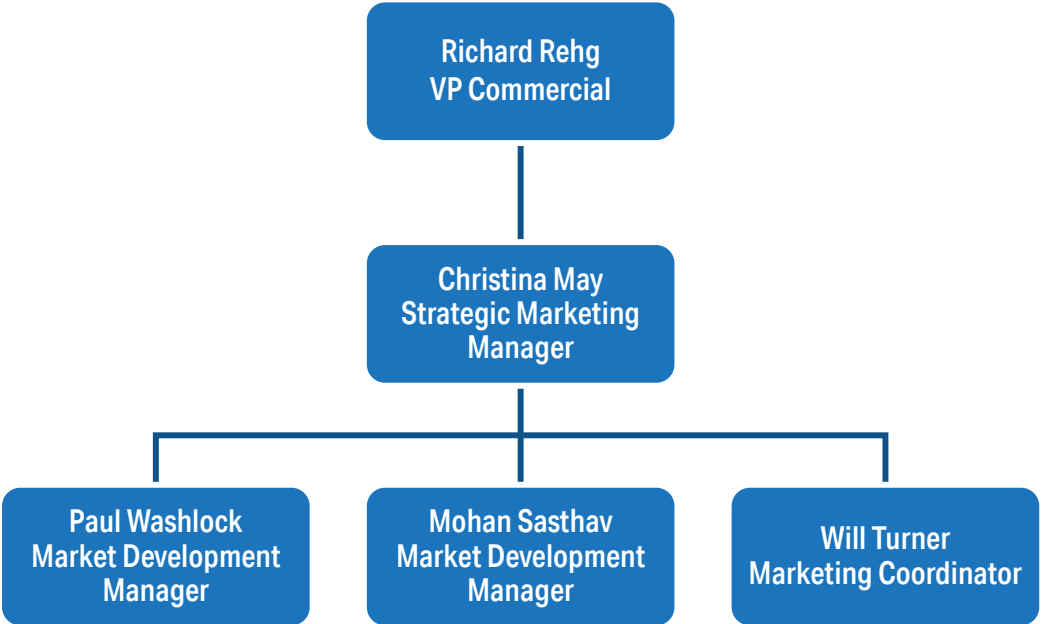
People who work in marketing also have customers, though they are more often called stakeholders, consisting of people and departments inside their organization. They too usually go unrecognized for their efforts, but a unique aspect of both customer service and marketing professionals is that recognition is a secondary driver for them. While recognition is nice and should be conveyed regularly by their stakeholders, those in marketing roles thrive more on seeing the results of their work. What are the stats on the last ad I created, or the last trade show I organized, or the last digital campaign I launched?

I joined Pilot Chemical Company in 2012 as a Customer Service Representative. At that time, it was a small to medium sized, family-owned company, where the Customer Service

department had four people, and the Marketing department had one person. Over the last decade, Pilot has grown to having eight people in Customer Service and four people in Marketing.

I am currently Pilot's Marketing Coordinator, and I am responsible for most of the day-to-day work of the department. In addition to owning all things related to trade shows, I am also responsible for the company's website, the intranet pages for the division I support, graphic design, digital marketing (Social media posts, Google ads, etc.), sourcing and purchasing branded items, and even trademark applications and renewals. It's a lot to keep up with, but over the years I have become proficient at prioritizing and organizing.

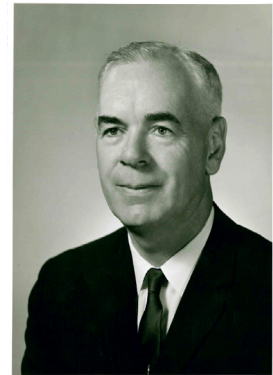
Having such a wide range of responsibilities, affords me the opportunity to work with every department in the company throughout the year. If I had to narrow it down, I work most closely with the Business Managers for our different product lines, the Technical Managers for those product lines, who are the main subject matter experts (SME), the Strategic Marketing Manager, who I report to, the Communications Manager, and the Communications Specialist. For trade shows specifically, I work with those people as well as the sales and technical teams. Pilot Chemical's marketing team is currently made up of four people (shown in the chart below) who report to the VP Commercial.



COMPANY

Pilot Chemical Company is a privately owned and independent global specialty chemical company headquartered in West Chester, Ohio that provides high quality products to the personal care (PC); household, industrial and institutional (HI&I) cleaning; metalworking and lubricants (MWL); oil and gas (O&G) harvesting; **emulsion polymerization (EP)**; and other chemical industries.

The original founder, John Morrisroe, was a chemist working for Dow Chemical in the late 1940's and beginning part of the 1950's. In 1951, John discovered a new process for a chemical operation known as **sulfonation** that utilized lower temperatures rather than the standard high temperatures, which resulted in sulfonates that were lower in color and higher in purity (for the non-chemically inclined readers, these are both good things).



John approached Dow about his discovery, but they were not interested in purchasing it from him, so in 1952, he left Dow, patented his process under the name Ice-cold Sulfonation, and started Pilot Chemical Company in Santa Fe Springs, California. From the one plant in California with a handful of employees, Pilot now has almost 400 employees around the globe staffing its **global operations**.

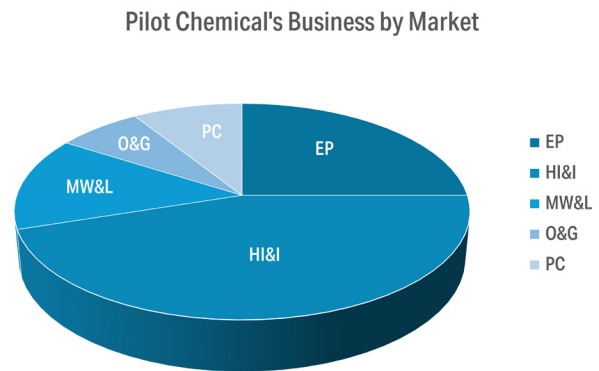
Over almost 75 years, Pilot Chemical has grown into a global leader in the manufacture and sale of surfactant chemicals. The word surfactant is a combination of the words Surface Active Agent. Surfactants alter the surface tension of liquids to accomplish different goals, like grabbing onto dirt to remove it from laundry, helping to recover more oil and gas from the ground, or acting as leveling agents in paints and coatings to make them look smoother. Surfactants can also cause things to create more foam or less foam depending on the application they're used in, like a hand soap vs. a latex wall paint.

Some of the surfactants Pilot makes are biocides, many of which are registered with the Environmental Protection Agency (EPA) to use in cleaning applications for being effective against

pathogens like the flu, and Sars-cov-2 (Covid), and in agricultural applications as herbicides (weed killers) and pesticides for crops. Some of Pilot's other biocides are accepted by the Federal Drug Administration (FDA) for use in cleaners used in food-processing plants to help keep people safe from illnesses and disease.

Pilot Chemical does not sell finished products to the consumer or end-use market, it sells raw materials to formulators who combine them with other chemicals to make finished products, which are then sold to end users.

This graph shows the top markets Pilot sells into with the approximate share of Pilot's total business.



COMPETITORS

The surfactant chemicals industry is a crowded playing field made of both commodity and specialty manufacturers of all sizes. Pilot is a relatively small player on this field competing with some global powerhouses. According to information from a Kline Group report on the US surfactants market, here is the approximate market share by volume of Pilot and its top competitors.



Stepan	BASF	Solvay	Evonik	Clariant	Pilot Chemical	All Others
18%	17%	9%	4%	1%	1%	50%

PRODUCTS AND SERVICES

Pilot Chemical manufactures surfactant chemicals that are sold as raw materials to chemical formulators who make end-use products. You can't go to a store and find Pilot's products on the shelf, but many of the products in the personal care and household cleaning aisles are made with chemicals Pilot produces. The products Pilot manufactures are the behind-the-scenes workhorses not the spot lighters. These chemicals make end-use products look good and work harder.

Drums of Liquid Chemicals



"Super Sacks" of Dry Chemicals



Since the show I am focusing on is a personal care show with some crossover into household cleaners, those are the products I'm going to discuss here. Pilot's chemicals go into personal care products like shampoos, body washes, hand soaps, and hand sanitizers, as well as household cleaners, disinfectants, and sanitizers. Pilot Chemical's products can improve the cleansing, foaming, and conditioning properties of personal care products.

For services, Pilot Chemical offers start-to-finish product development. Pilot starts with a

customer's concept, develops it in the lab, moves it through **pilot-scale production**, and then to commercial-scale production. Pilot Chemical has two well-equipped research and development facilities that include labs dedicated to quality testing. It also has two pilot-scale plants.

Quality Laboratory



Research & Development Laboratory



Pilot-scale Plant



Criteria 2

Overview & Show Schedule

- **Introduction to Pilot's trade show program**
 - **Size and scope**
 - **Training**
 - **Events and other activities**
- **Changes to the program since taking over**
- **Annual schedule of major shows**

INTRODUCTION

I took over Pilot Chemical's trade show program in 2015 when I moved from being a Customer Service Representative to a Sales and Marketing Administrator. At that time, the head of the division, the Director of Commercial, felt that Pilot exhibiting at trade shows amounted to little more than "mini vacations on Uncle Paul", with Paul being the CEO and the son of the founder. This was the beginning of a shift in Pilot's trade show marketing efforts from zero accountability to being able to justify exhibiting at shows with measurable data.

For the past few years, Pilot Chemical has exhibited at around ten shows a year and sent people to about fifteen to walk the floor as attendees. This is small for many companies but is significant for a company Pilot's size of less than 400 people company wide, and a sales team of 10 people.

In 2024, Pilot is exhibiting at five shows and sending people to walk eighteen. This reduction in the number of shows Pilot is exhibiting at is due to a couple of factors. The first is the visibility I am beginning to bring to the program, which brought to light shows "we've always attended" but weren't a good investment for Pilot, and the second is 2023 was a terrible year for the chemical industry. The transportation industry was still trying to debottleneck supply channels caused by the pandemic; most chemical formulators were still working down their inventories from over purchasing during the initial slow-down in supply chains during the pandemic; and many companies implemented strong cost constraints, including travel bans, to offset the decreases in revenue. The reductions in revenue also caused some of the major players to resort to laying off hundreds of workers to make the end of the year look better. Pilot Chemical fared better than many chemical companies in 2023, but it realized its trade show program needed more accountability from Marketing regarding the shows at which it exhibits due to the investment involved.

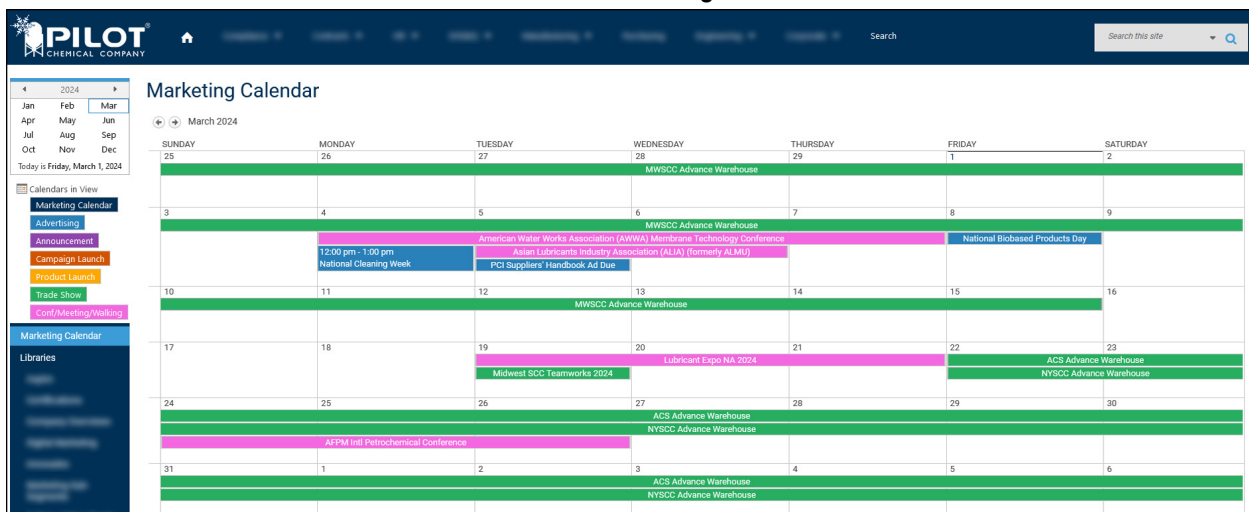
CHANGES TO THE PROGRAM

Recent data from *Exhibitor Magazine* shows that trade shows are rebounding well since the

pandemic, and chemical industry shows are no exception, though the rebound is a little slower than the average. I fully expect Pilot's trade show calendar to expand beyond pre-pandemic levels in the next year or two, but that growth hinges on being able to accurately measure our return on exhibiting at each show. To start that process, I used information I gained in session *1008R: How to Measure the Value of Trade Show Participation - Part I: Basic Concepts* and created a simple Excel spreadsheet to record all the costs associated with exhibiting at shows as well as all the activities that offset the expenses like badges scanned and the travel-cost avoidance from holding on-site meetings. At present, it is a rudimentary form that calculates an approximate return on investment (ROI), but it's a start, and it will be fine-tuned as I gather more data and establish baselines for the different markets in which Pilot sells its products. As the saying goes, "if data isn't visible it isn't measurable", and I am starting to make it visible. Until this form, Pilot Chemical had zero visibility into its trade show effectiveness. From this form, Pilot can evolve into an effective, efficient, and accountable exhibitor.

The spreadsheet was one of the major changes I have made to the program since taking it over. Another, as seen in the examples below, is creating an online promotional marketing calendar that includes all of Pilot's promotional marketing activities for the year. The calendar is broken into different categories that are color coded for easier viewing and can be isolated to view individual categories.

Ex. 1: Pilot's Promotional Marketing Calendar, March 2024



Ex 2: Pilot's Promotional Marketing Calendar Isolated to Trade Shows, March 2024

The screenshot displays the 'Marketing Calendar' for March 2024 on the Pilot Chemical Company intranet. The interface includes a navigation menu on the left with options like 'Marketing Calendar' and 'Libraries'. The main calendar grid shows events for each day of the month. Key events include:

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
25	26	27	28	29	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

The calendar lives on Pilot's intranet site and is accessible to everyone in the company, making it easy for them to see everything the Marketing department is working on from month to month. (See pages 12 and 13 for a full listing of Pilot's trade shows)

In addition to those changes, I have also instituted quarterly trade show meetings with stakeholders to make sure everyone is on the same page and we have the correct resources available at each show. Once the booth staff and show champions have been identified, I meet with the individual teams regularly leading up to the show, and I set up Teams in Microsoft Teams for each show to facilitate collaboration through instant messages and by storing pertinent files like the show's exhibitor list and floor map; travel and contact information to keep everyone connected; and a schedule to record booth duty, technical talks staff are attending, customer or prospect meetings, dinners, etc. All these changes have resulted in significant improvements in Pilot Chemical's trade show program.

The next additions to the program I plan to implement are to begin establishing strategies, goals, and objectives (SGO's) before shows and developing a trade show training program. I learned the importance of establishing SGO's in *1009R: How to Measure the Value of Trade Show Participation - Part II: Practical Application* with regard to identifying strengths and weaknesses in the program and aiding in reporting show performance to senior management.

All the changes I have made to the program and the changes I plan to make will work to establish a strong foundation on which Pilot can build its trade show presence.

ANNUAL SCHEDULE AND MAJOR SHOWS

As stated earlier, Pilot is exhibiting at five shows this year and walking almost twenty more. The shows of note are listed below. At two of the shows where Pilot is sending people to walk, we are also presenting technical talks that spotlight Pilot's new **biobased surfactants**, which will help to position Pilot Chemical as a thought leader and cutting-edge innovative company.*

Midwest Society of Cosmetic Chemists (MWSCC) Teamworks

<https://teamworks-mainevent.com/>

Presence	Location	Date(s)	Details
Exhibiting	Donald E. Stephens Convention Center Rosemont, IL	3/19	10'x10' Inline, 5 staff (1 Mkt Development, 2 Sales, 2 Technical)
Ingredients and formulation event serving the cosmetics, personal care, and household care industry. Approximately 1000 attendees and 124 exhibitors.			

American Coatings Show

<https://american-coatings-show.com/>

Presence	Location	Date(s)	Details
Exhibiting	Indiana Convention Center Indianapolis, IN	4/30-5/2	10'x10' Inline, 6 staff (3 Sales/Mgmt, 2 Tech/Mgmt, 1 Intl Business Development)
Offers a comprehensive showcase of innovative products, technologies, equipment and services spotlighting paints and coatings raw materials; testing, measuring, laboratory, production, and packaging equipment; environmental protection and safety; and other services related to the paints and coatings industry.			

New York Society of Cosmetic Chemists (NYSCC) Suppliers' Day

<https://nyscc.org/suppliers-day/>

Presence	Location	Date(s)	Details
Exhibiting & Presenting	Jacob K. Javits Convention Center New York, NY	5/1-2	10'x20' Inline, 8 staff (1 Mkt Development, 3 Sales, 2 Technical, 1 Intl Business Development, 1 CTSM Candidate)
Ingredients and formulation event serving the cosmetics, personal care, and household care industry. Over 10,000 attendees and over 500 exhibitors.			

Society of **Tribologists** and Lubrication Engineers (STLE) Annual Meeting & Exhibition

<https://www.stle.org/annualmeeting>

Presence	Location	Date(s)	Details
Exhibiting	Minneapolis Convention Center Minneapolis, MN	5/19-23	10'x10' Inline, 6 staff (4 Sales/Mgmt, 2 Tech)
STLE's Annual Meeting & Exhibition is the industry's most respected venue for technical information, professional development and networking opportunities in the metalworking and industrial lubricants market with approximately 120 companies exhibiting.			

Cleaning Products Latin America (CPLA)

<https://www.cleaningproductsconference.com/cleaning-products-latin-america>

Presence	Location	Date(s)	Details
*Walking	Presidente Intercontinental Polanco Mexico City, MX	6/24	Walking but presenting a technical paper about a new product launch, 1 Attendee - Sales
Cleaning Products Latin America brings together leading manufacturers within the household and cleaning products market to discuss challenges and opportunities within the Latin American cleaning products value chain.			

Specialty & Agro Chemicals America

<https://www.chemicalsamerica.com/>

Presence	Location	Date(s)	Details
Exhibiting	Westin Savannah Harbor Convention Center Savannah, GA	6/25-27	Tabletop show, 4 staff (1 Intl Business Development, 2 Sales, 1 Production Planning)
Specialty & Agro Chemicals America features suppliers and buyers involved with the technologies, innovations, and process solutions that have applications specifically for the agrochemical and specialty chemical markets with almost 850 exhibitors.			

Cleaning Products US (CPUS)

<https://www.cleaningproductsconference.com/cleaning-products-us>

Presence	Location	Date(s)	Details
*Walking	The Westin Arlington Arlington, VA	9/25-26	Walking but presenting a technical paper about a new product launch, 1 Attendee - Technical
Cleaning Products US has been the industry's annual go-to conference in the United States, bringing together trusted experts and decision makers from across the supply chain to discuss recent trends, shared challenges, emerging growth opportunities, and new ideas that spur industry innovation and continued advancement in the marketplace for almost 20 years.			

Criteria 3

Introduction to Show of Focus & Measurable Objectives for the Show

- **Introduction to the show of focus**
 - **Why I chose this show as my focus**
 - **Demographics of the show**
 - **Who is the target audience**
- **Specifics about Pilot's participation at the show**
 - **Size**
 - **Show related activities**
 - **My role at the show**
- **Strategies and objectives**
- **The planning and preparation process**

INTRODUCTION

The show I chose for the focus of my portfolio is the New York Society of Cosmetic Chemists' (NYSCC) Suppliers' Day. It is a personal care and cosmetics show that has some overlap into the home care cleaning products market.

I chose this show because it is the largest event where Pilot exhibits, it has the most moving parts that need coordinated, and is where I have the largest role in ensuring a successful outcome.

In 2023, the show had 7800 attendees and almost 450 exhibitors. In 2024, the show is estimated to have over 10,360 attendees and almost 550 exhibitors. According to the show managers, approximately 87% of attendees and exhibitors are involved in research and development in the personal and home care cleaning products markets.

Historically, the personal care market has been one of Pilot Chemical's smallest markets where we mainly supply commodity chemicals, but Pilot recently acquired a company that manufactures under [current Good Manufacturing Practices \(cGMP\)](#) and can also manufacture [Active Pharmaceutical Ingredients \(API\)](#), both of which are important to the personal care market. With this acquisition, as well as developing lines of biobased surfactants, Pilot is making a push to make home and personal care (HPC) one of its major markets.

At this show, our target audience is comprised of research and development chemists, product managers, and people involved in raw material procurement who work at companies with approximately \$50 - 100 million in annual revenue. While we work with larger companies, which Pilot refers to as tier 1 customers, our focus is more on tier 2 and tier 3 companies. These are smaller companies that, often times, are below the radar of the larger companies, or they don't have the resources to do their own in-house product development.



SPECIFICS ABOUT PILOT'S PARTICIPATION AT THE SHOW

Historically, Pilot has always limited its booths to 10'x10' inline spaces. For this show, Pilot went a little bigger with a 10'x20' inline space that was designed for this show based on concepts I learned during CTSM sessions, like in Session *2008: Ten Strategies to Generate More Top-Quality Booth Traffic*, where I learned that having a table at the front edge of the booth acts as a barrier that can keep people from engaging more openly with you. For this booth, we got rid of the table opting instead for a credenza at the back of the booth with cabinets underneath for storage and space on top to display sales literature, demonstration props, and giveaways.

Session 6020R: *The @show Experience: Understand the Essentials of Exhibit Design* taught concepts about booth design that included adding elements for human interaction. For this show, that human interaction was having people wash their hands



Monsam NS-009S Portable Sink

at a portable sink we had at the booth so we could demonstrate the quality and benefits of our new CalCare™ biobased surfactant as the main ingredient in a foaming hand soap. While this may sound less than exciting for most people, for a chemist who formulates hand soaps for a living, the demonstration was a hit. With the sink in the booth, we were able to demonstrate the efficacy of the surfactant as well as speak to the sustainability benefits of it being biobased.

For me, all shows start the prior year when I get all the stakeholders together for a meeting to look at the show calendar for the upcoming year. The meeting is held sometime during the fourth quarter, and we look at all the shows on the calendar for the then current year to decide things like whether to keep a show on the calendar for the coming year or drop it, do we need to change our attendance at the show (walking vs. exhibiting, bigger booth vs. smaller booth, more staff vs. less, etc.), what resources need to be reserved for each show (technical people, booths, booth equipment, etc.), and who the show captain and key staff will be. With that information, I

can begin making arrangements for some of the shows like reserving booth space and securing sponsorships. From there, I hold quarterly meetings to discuss the shows coming up in the next quarter where we nail down more details like what products we are going to push, deciding on our messaging, and flesh out who the team will be. Once the teams are defined, I can hold smaller meetings with each of them to make sure everyone is on the same page as far as show details, responsibilities, and schedules. Prior to me taking over the trade show program at Pilot, pre-show meetings didn't happen. Show planning and preparation were more siloed. After taking session 2004R: *Don't Skip the Meetings – Pre-, At- and Post-: Guidepost to Success*, I learned the importance of pre-show meetings, which is when I incorporated them into Pilot's trade show planning process. Everyone appreciates them and have remarked that they feel our show participation is more organized and they feel better prepared going into each show. At the shows I attend, I am responsible for overseeing booth installation and dismantle (I&D), setting up the booth with sales literature and swag, loading media for the monitor, and generally making sure everything is ready for when the floor opens. I also do the same for meeting rooms when we have one at the show. During the show, I float around scanning badges, add notes to the lead record in the badge scanning app, and basically watch to make sure everything is running smoothly. During slow times, I walk the shows to see how other companies approach exhibiting.

As Pilot's trade show program evolves, the emphasis on identifying and measuring strategies and objectives has increased. Gone are the days where the strategy was to talk to people who stop by the booth and the objective was to get them to buy chemicals from Pilot. Now, Pilot is looking closer at ways to increase the quality of the booth traffic and having the best resources at the booth to engage that traffic. Where Pilot, predominantly, only sent people from Sales to staff the booth, now, it also sends people from Technical, because after all, who knows surfactant chemistry better than a surfactant chemist. Likewise, the objective has changed from "SELL, SELL, SELL" to listening to what the prospect needs, hearing their pain points, and working with them to come up with solutions, thus, positioning Pilot as a partner and solution provider rather than just another vendor.

STRATEGY AND OBJECTIVES

The chart below and on the following page lays out the strategies Pilot used to make the 2024 NYSCC's Suppliers' Day a success. It incorporates a multi-pronged approach to increase brand awareness for both Pilot as a company and for our new CalCare™ biobased surfactant, position Pilot as a solutions provider, and gain information about our competitors and the personal care industry.

Strategies	Tactics	Assessment Methods	Measurable Goals
Increase Brand Awareness for Pilot	Social media posts about show & technical talk	Count number of impressions	2000 impressions per ad
	Hand out branded items	Quantity sent minus quantity returned	Distribute 100 items
	Present a technical talk on main stage	Count people stopping by the booth because of attending the talk	20 people stopping post-talk requesting more information
	Hand washing demos in the booth	Count people who washed their hands	Complete 40 demos
Introduce CalCare™ biobased surfactant	Distribute CalCare™ sales literature	Quantity of brochures sent minus quantity returned -Plus- number of QR code scans (QR code opens a digital copy of same brochure for download)	50 combined copies of paper and digital brochures
	Hand washing demos in the booth	Count people who washed their hands	Complete 40 demos
	Present a technical talk on main stage	Count people stopping by the booth because of attending the talk	20 people stopping post-talk requesting more information
	Hold scheduled meetings	Count number of scheduled meetings held during the show	Hold 20 meetings
Position Pilot as a 'Solutions Provider'	Present a technical talk on main stage	Count people stopping by the booth because of attending the talk	20 people stopping post-talk requesting more information
	Discussions with booth visitors	Learn visitors' pain points and highlight how Pilot's resources and capabilities can alleviate those pains	10 requests for follow-up meetings

Strategies	Tactics	Assessment Methods	Measurable Goals
Gather Industry Intel	Walk the show	Observe booth messages for common themes	Receive 8 post-show reports from the team
	Discussions with booth visitors	Talk to visitors about what they're seeing and hearing about the industry	Receive 8 post-show reports from the team
Gather Competitor Intel	Visit competitor booths	8 team members assigned a different competitor to visit	Receive 8 competitor reports from team
	Collect competitor literature	Collect literature from competitors booth	Acquire 4 pieces of competitor literature

THE PLANNING AND PREPARATION PROCESS

The process for planning this show was the same as for all of Pilot's shows. It starts at the annual 'Look Ahead' meeting where we decided the NYSCC's Suppliers' Day show was a good show for Pilot. From the information that came out of that meeting, the booth space was reserved and planning for building a larger booth started. At the 2024 Q2 Trade Shows meeting, the overarching message was identified, it was decided to pass on the available show sponsorships, and the team of attendees was finalized. After that, monthly meetings were held with the team to flesh out the messaging, get updates on the meeting schedule, and review the status of other details like the progress of the booth, procurement of the sink, and creation of the hand soap formulation. A final pre-show meeting was held to wrap up loose ends. As Pilot's program evolves, so will the planning process, which will allow Pilot to realize better results from our exhibiting efforts.

For future shows, I plan to incorporate concepts I learned in 3022R: *No Exhibit is an Island — Building a Bridge to Success* like creating a Stakeholder Questionnaire to gather the basic answers about our attendance at a show before our launch meeting. That launch meeting will also be evolving to include the agenda items from what this session calls Tradeshow 101.

Criteria 4

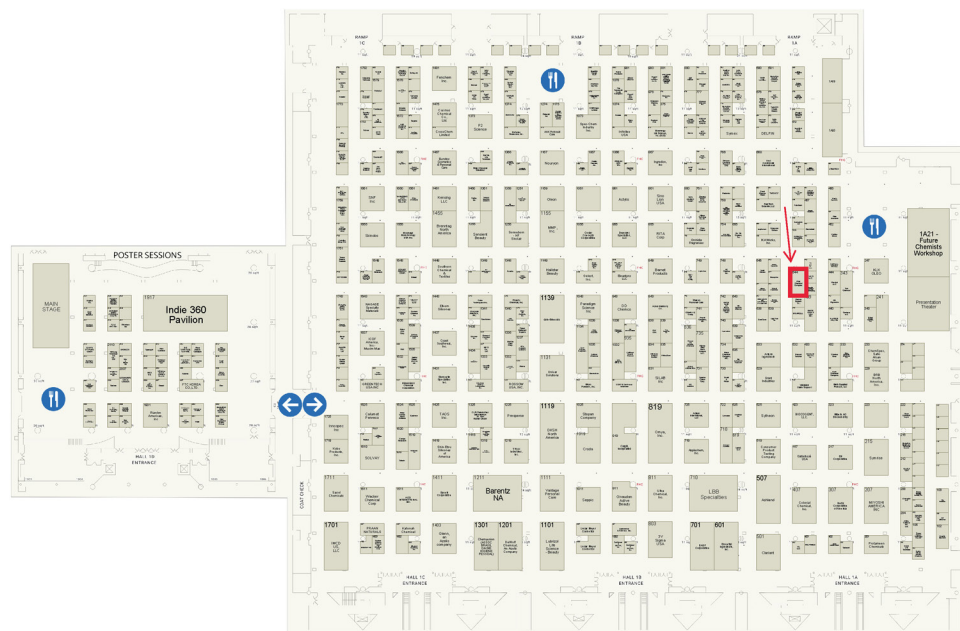
Management of Exhibit Design and Production

- Management planning for booth and booth space
- Booth selection process
 - Choosing the design partner
 - Interacting with the design partner
 - Needs list to meet design requirements
- Budget Plan/Actuals/Variations for exhibit
- Booth images

MANAGEMENT AND PLANNING FOR THE BOOTH AND SPACE

As mentioned earlier, Pilot Chemical has always exhibited at shows in 10'x10' booth spaces. With working toward making the Personal Care market one of our major markets and with needing extra space for the sink, it was decided to go with a 10'x20' inline for the NYSCC Suppliers' Day show. While this isn't much of an increase, Pilot decided to step up our Personal Care show presence in incremental steps. Also, this was a late decision with regard to the budget, and we didn't have much room to maneuver funds around to accommodate the additional spend.

Level 1



Floor Map of the 2024 NYSCC Suppliers' Day showing Pilot Chemical in booth 544

We have an expo house that we partner with, 20/20 Exhibits, so we didn't put out an RFP where we had to review bids and decide on a vendor, which made the process easier. 20/20 warehouses the booths we have and our larger trade show items like literature racks, tables, and digital kiosks. Plus, they take care of managing I&D. I keep all of our sales literature and promotional giveaway items at our headquarters with me.

BOOTH SELECTION PROCESS

Reserving booth space at the NYSCC Suppliers' Day happens long before the show happens, with reservations for the next-year's show being secured even before the current show is over. In Pilot's case, we reserved a 10'x10' inline at the 2023 show for the 2024 show not anticipating a change in our focus towards the personal and home care markets. Then, early in 2024, the leadership at Pilot Chemical decided to make the personal and home care markets growth targets. With the 2024 show only a few months away, the team had to act quickly to revise the strategy for the show, which included upgrading from a 10'x10' to a 10'x20' booth, extending the current 10'x10' booth and creating new graphics to fit the larger space, and purchasing a sink. This pivot could have caused me a lot of stress due to the added workload, short deadlines, and the high expectations company leadership had for the show, but thanks to information I learned in session 7058R: *Thrive Under Deadlines: Strategies for Success*, I was able to keep the team focused on the end goal and meet all of the new deadlines. The session provided tools for turning pressure into motivation, emphasized the importance of identifying and understanding how I work best, and the necessity of making time to recharge my emotions.

BUDGET: PLAN, ACTUALS, AND VARIANCES FOR EXHIBIT

The booth ended up coming in approximately 3.5% over budget. This was due in part to increased fuel costs driving up freight and underestimating the costs of the plumbing services for the sink. As far as the design, we knew we needed a 10'x20' booth, we wanted a credenza so the storage could be in the back of the booth, and we wanted the booth to have a touch screen monitor. Pictured on the next page is the final result, which I believe turned out well considering the short turnaround time and budget constraints. For the next increase in footprint, we will switch to an RFP approach to make sure we're getting the best value for our spend, and we'll make sure to have the quotes ready in time to add to the following year's budget discussions.

Expense	Budget	Actual	Variance
Booth Space	\$6,000.00	\$6,000.00	\$0.00
Booth Build	\$16,000.00	\$16,332.12	(\$332.12)
Booth Services	\$5,000.00	\$5,435.85	(\$435.85)
Freight	\$6,000.00	\$6,509.26	(\$509.26)
Install & Dismantle	\$8,000.00	\$8,167.86	(\$167.86)
Totals:	\$41,000.00	\$42,445.09	(\$1,445.09)

The team engaged in good conversations with the sink at the ready

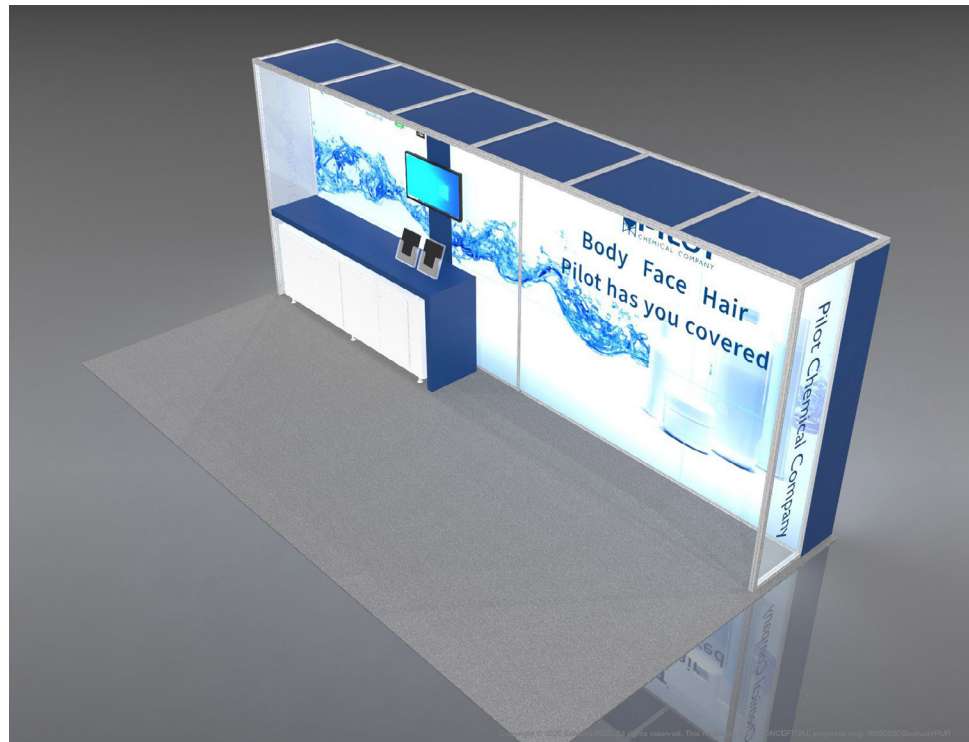


Industry Association Icons: (Left to Right)

American Chemistry Council® Cleangredients® Responsible Care® RSPQ ISO 9001



Final mock-up of booth



Criteria 5

Management of Integrated Marketing Communications

- **Planning and goals for each method**
- **Selection rationale for each media source used**
- **Measurable objectives and strategies for each method of communication used**
- **Visuals with captions demonstrate message integration**
- **Assessment measures for each marketing goal**
- **IMC results for each method with recommendations for improved marketing efforts in the future**

PLANNING AND GOALS FOR EACH METHOD

Pilot Chemical has never had a strategy for marketing communications. It's always been a knee-jerk or "yeah, that seems about right" approach with no consideration given to putting together a concerted strategy for getting unified messages in front of our ideal customers using different channels where they can be met. We decided to use information I learned at a FastTrak to start changing that. In Session 3015R: *Integrated Marketing Communications*, I learned that email and social media are good pre-show channels for meeting the objectives of awareness and action, which were two things we wanted to accomplish. Our goals were to raise awareness about the new biobased surfactant we were launching and to drive traffic to our booth following the technical talk we were giving. The session also taught that live presentations are a good at-show channel for raising awareness and comprehension, and for that, we had the hand washing station. For post-show communication, we are relying on the sales team to follow up with everyone who's contact information we captured at the show. Initial feedback is that the conversations are developing well, with people requesting samples and showing interest in our next-generation offerings we are currently developing. Finally, at the post-show debrief meeting, we committed to be better prepared for our 2025 shows.

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Email signature applied to all emails from Pilot show attendees

Pilot Chemical Company
12,397 followers
4mo • 🌐

The Pilot team will be at NYSCC's Suppliers' Day next week. Stop by booth 544 to say hi and to learn more about our CalCare™ biobased surfactants for Personal Care formulations!
[#PilotChemical](#) [#NYSCC](#) [#SuppliersDay](#)

29 1 comment · 8 reposts

Like Comment Repost

Organic impressions: 1,178 Impressions Preview results

LinkedIn post to raise awareness about Pilot's new biobased surfactant and a call to action to stop by the booth to learn more.

LinkedIn post to raise awareness about the technical talk Pilot was giving at the show and a call to action to stop by the booth afterwards to learn more.

Pilot Chemical Company
12,397 followers
4mo • 🌐

Come listen to Jeff talk about the benefits of biobased surfactants at the NYSCC's Suppliers' Day on Wednesday, 5/1, at 10:30am. After his talk, visit the Pilot team at booth 544 to learn more about our new CalCare™ biobased surfactants.
[#PilotChemical](#) [#NYSCC](#) [#SuppliersDay](#)

37 1 comment · 5 reposts

Like Comment Repost

Organic impressions: 1,409 Impressions Preview results

Communication Method	Rationale	Target Audience	Measurable Goals	Assessment Method	Results
LinkedIn Post 1	Announcement about new product. Call to action to visit the booth Free advertising	LinkedIn Followers in the personal care industry	Achieve 2000 organic impressions	LinkedIn Analytics of organic impressions	1174 organic impressions
	Recommendations: Increase frequency of posts & stagger times. Try using more hashtags				
LinkedIn Post 2	Announcement about Jeff speaking. Call to action to visit the booth. Free advertising	LinkedIn Followers in the personal care industry	Achieve 2000 organic impressions	LinkedIn Analytics of organic impressions	1400 organic impressions
	Recommendations: Increase frequency of posts & stagger times. Try using more hashtags				
Email Signature Banner	Announcement about attending the show. Call to action to visit the booth.	Email Recipients of booth staff	Did not measure	Did not measure	Did not measure
	Recommendations: Continue to include banners in signatures to increase awareness. Try adding links.				
Sales Literature	Printed and digital information promoting Pilot's personal care products. Digital copies are made available through QR codes.	Show Attendees	Receive back 1/3 or less of what was sent.	Subtract number returned from number sent.	Received back about 1/4 of what was sent.
	Recommendations: Continue to send small quantities for people who prefer hard copies. Continue to provide QR codes with measurable links for people who prefer digital copies.				
Lead Retrieval	Collection of leads for sales follow-up and to add to drip marketing campaigns.	Personal care industry experts	Collect 50 qualified leads	Count leads added to Salesforce from lead retrieval app.	52 leads collected at the show
	Recommendations: Emphasize importance of scanning badges of people of interest, or at least get business cards.				

Criteria 6

Management of Results Reporting

- Assessment measures for obtaining results
- Overall results tied back to original objectives
- Review results and measurable strategies and objectives
- How results were reported and to whom

ASSESSMENT MEASURES FOR OBTAINING RESULTS

Historically, Pilot Chemical has not done a good job of communicating about trade shows, whether it be conveying expectations before the show starts or results after the show is over. Typical pre-show communications were limited to 1). Defining who from Pilot is going to the show, 2). Who we expect to see attending the show, and 3). What Pilot-branded shirt and what color pants booth staff are wearing on each day, with the attire usually receiving the most consideration. A typical post-show communication usually sounded like:

Leadership Team (LT) Member - "So, how did the show go?"

Marketing Manager (MM) - "Everyone said it went pretty good."

LT Member - "Did they have a lot of people stop by the booth?"

MM - "It was probably about like last year."

LT Member - "Did we get any good leads?"

MM - "I don't know. I'll have to see how many business cards got collected."

LT Member - "Should we attend again next year?"

MM - "Oh yeah, we always attend this one."

As a result, the marketing department and the trade show program had very little credibility with the leadership team, and somehow, that approach to exhibiting was tolerated until that manager left and the department was infused with some new blood. Now, Pilot is beginning to take a more strategic approach to exhibiting at trade shows. Building accountability into the trade show program is increasing marketing's credibility through building a pre-, during-, and post-show meeting schedule, and through gathering and analyzing key show metrics. Credibility is one of the key attributes needed for having productive conversations according to Pete Smith in *Session 4005R: Conversations That Matter: Know Precisely What to Say to Manage Up — and Down*. In the session, we learned that great conversations, when managing both up and down, require being personable, credible, and believable. Pilot's marketing team is definitely a personable lot, and now, with showing that we're taking trade shows seriously, we are gaining credibility and believability.

Below, is the chart from Criteria 3 with columns added for Results and Recommendations

Strategies	Tactics	Assessment Methods	Measurable Goals	Results	Recommendations
Increase Brand Awareness for Pilot	Social media posts about show & technical talk	Count number of impressions	2000 impressions per ad	Ad #1 - 1178 Impressions Ad #2 - 1409 Impressions	Post ads more often and at different times of day. Encourage staff to like, comment, and repost ads.
	Hand out branded items	Quantity sent minus quantity returned	Distribute 100 items	127 items distributed	Find items that better connect people to who Pilot Chemical is.
	Present a technical talk on main stage	Count people stopping by the booth because of attending the talk	20 people stopping post-talk requesting more information	Accurate number not collected - From post show meeting discussions, we may have hit the mark.	Do better job of emphasizing the importance of capturing results during show training
	Hand washing demos in the booth	Count people who washed their hands	Complete 40 demos	Accurate number not collected - From post show meeting discussions, we didn't come close.	Booth was too small & crowded to make good use of the sink. Need bigger booth with better flow.
Introduce CalCare™ biobased surfactant	Distribute CalCare™ sales literature	Quantity of brochures sent minus quantity returned -Plus- number of QR code scans	50 combined copies of paper and digital brochures	21 paper copies distributed & 31 digital copies viewed	Continue to offer both paper and digital options for now. For documents associated with product launches, consider linking to landing pages instead of static documents.
	Hand washing demos in the booth	Count people who washed their hands	Complete 40 demos	Accurate number not collected - From post show meeting discussions, we didn't come close.	Booth was too small & crowded to make good use of the sink. Need bigger booth with better flow.
	Present a technical talk on main stage	Count people stopping by the booth because of attending the talk	20 people stopping post-talk requesting more information	Accurate number not collected - From post show meeting discussions, we may have hit the mark.	Do better job of emphasizing the importance of capturing results during show training
	Hold scheduled meetings	Count number of scheduled meetings held during the show	Hold 20 meetings	19 meetings held (sooo close!)	Consider securing dedicated meeting space. Start compiling target list earlier.

Strategies	Tactics	Assessment Methods	Measurable Goals	Results	Recommendations
Position Pilot as a 'Solutions Provider'	Present a technical talk on main stage	Count people stopping by the booth because of attending the talk	20 people stopping post-talk requesting more information	Accurate number not collected - From post show meeting discussions, we may have hit the mark.	Do better job of emphasizing the importance of capturing results during show training
	Discussions with booth visitors	Learn visitors' pain points and highlight how Pilot's resources and capabilities can alleviate those pains	10 requests for follow-up meetings	3 confirmed. Some leads were passed to distribution partners where we lose visibility. Follow up ongoing	Work with distribution manager and distribution partners on better communication.
Gather Industry Intel	Walk the show	Observe booth messages for common themes	Receive 8 post-show reports from the team	Received all 8 reports from team members	Continue with this exercise and expand it to other shows
	Discussions with booth visitors	Talk to visitors about what they're seeing and hearing about the industry			
Gather Competitor Intel	Visit competitor booths	8 team members assigned a different competitor to visit	Receive 8 competitor reports from team	Received all 8 reports from team members	Continue with this exercise and expand it to other shows
	Collect competitor literature	Collect literature from competitors booth	Acquire 4 pieces of competitor literature	6 pieces collected	Consider if we need to up this for next year, or if this is a realistic number

REVIEW RESULTS AND MEASURABLE STRATEGIES AND OBJECTIVES

This is the first time Pilot has tried to measure the results of exhibiting at a trade show, so we have no baseline to compare against. I believe we did a good job of identifying appropriate strategies and breaking down those strategies into measurable tactics. I also believe we did a fairly good job of setting target results. While the results look pretty lackluster, it's a start, and more importantly, it's a baseline. From here, we can identify ways to improve.

While we missed some of our goals, and struggled to accurately measure others, I cannot call these losses since we can learn valuable lessons from the exercise. As I stated earlier, if data isn't visible, it isn't measurable. Now that we have visibility, we can make changes to our program enabling us to do a better job of measuring show performance, and thereby, reaching higher goals which will improve our return on exhibiting.

The social media posts did "ok". Meeting a little over half of the goal for the first post and about 40% of the goal for the second. I feel that we can improve these results by repeating the same posts more often and staggering the times of day when the posts land. Impressions is a good marker if you're measuring brand awareness but we can also incorporate other metrics like including links to measure click through rates (CTR) and number of downloads to gain insight into engagement.

Handing out branded items is always a challenge for Pilot due to the nature of the chemical industry. Handing out branded items is great for brand awareness, but it can be short lived. It's easy to slap a logo on a nifty little tchotchke, but not so easy to find items that 1). connect people with the "type" of chemicals Pilot Chemical sells, and connect it to the market of the show, and 2). make it relevant enough that it stays with the attendee rather than ending up with their child, shoved in a drawer, or eaten. We exceeded this goal with a small variety of items, like note pads that chemists use in their day-to-day activities, and we should continue to look for other good options for brand-awareness give-aways.

In the chemical industry, as well as many others, there are two types of talks you can give, Technical Talks and Commercial Marketing Forums (CMF), and both are good for raising brand awareness. With tech talks, the discussion cannot mention or promote a company's brand or product, or otherwise directly promote the company. If a company wants to get on stage and sell their product, they can do that in a CMF. Pilot's tech talk, which focused on the increasing interest around biobased surfactants, was considered a success, and we know that it drove traffic to the booth of people who wanted to continue the conversation, we just can't quantify how many. I still consider this a win because we learned that we need to find better ways to collect

and measure this information so that we can make adjustments to improve the results as well as measure those results against other opportunities, like CMF's.

The hand washing station is a good idea, and can add a lot of value to the booth, but more thought needs to go into the logistics for it. It allowed us to raise awareness about our new product and demonstrate its benefits, but the booth was much too small for this type of setup. While the sink itself isn't that big, it was competing for space with other discussions going on in the booth. Moving forward we need to add dedicated space for demonstrations when considering the size of the booth space we use.

The tactics for gathering both industry and competitor intelligence were successful. This is the first time Pilot made a concerted effort to collect and report on what is going on in the industry and with competitors. Each member of the booth staff was assigned a competitor to check on as well as keeping their eyes and ears open about industry happenings (common themes on the floor, companies who are absent or increasing/decreasing their presence, are common themes from last year that seemed important as important this year, etc.). They then had to submit reports on their findings which were discussed with the group, and then consolidated into one overarching report for the leadership team.

HOW WERE RESULTS REPORTED AND TO WHOM

About a week after the show, I held a post-show debrief meeting with the team where we discussed things I learned in 2004R: *Don't skip the Meetings - Pre-, At- and Post-: Guidepost to Success* like the event and audience quality; what worked and what didn't; recommendations for future shows; and industry and competitor highlights. The consensus was that the show went well and there were some good opportunities that came out of it. Everyone thought the industry and competitor reports were a good addition, and that we should consider expanding the booth size for future shows.

Additionally, the booth staff all submit call reports on any meetings they had, which are distributed through our Salesforce CRM system to many people in different departments

throughout the company. Higher level and more confidential information is conveyed outside of these reports in emails directly to the leadership team and other pertinent individuals. General information about the show, industry insights, and competitor insights, which was consolidated during the post-show debrief meeting was included as part of a slide deck presented at the monthly leadership team meeting. Also included in the slide deck was a copy of the ROO form I created showing, financially, how we did at the show.

Show Name _____
 Location _____
 Dates _____

Market:

Expenses		Attending	\$	-
Exhibiting				
Booth Space				
Booth Supplies				
Carpet				
Electric				
Elec Labor				
Furniture				
Trash Bin				
Booth Shipping				
Booth Handling				
I&D				
Sales Lit/Swag Shipping				
Sales Lit/Swag Handling				
Sponsorships				
Booth Staff				
Number				
Cost per				
Other Expenses				

Savings			
Meetings	\$		-
	Traveler 1		Traveler 4
# of Meetings			# of Meetings
Travel Expense			Travel Expense
# Customer Dinners			# Customer Dinners
Total Savings	\$ -		Total Savings
	Traveler 2		Traveler 5
# of Meetings			# of Meetings
Travel Expense			Travel Expense
# Customer Dinners			# Customer Dinners
Total Savings	\$ -		Total Savings
	Traveler 3		Traveler 6
# of Meetings			# of Meetings
Travel Expense			Travel Expense
# Customer Dinners			# Customer Dinners
Total Savings	\$ -		Total Savings

Opportunities			
\$		-	
	Opportunity 1		Opportunity 4
Potential Ann Rev		Potential Ann Rev	
Probability of Close		Probability of Close	
Value	\$ -	Value	\$ -
	Opportunity 2		Opportunity 5
Potential Ann Rev		Potential Ann Rev	
Probability of Close		Probability of Close	
Value	\$ -	Value	\$ -
	Opportunity 3		Opportunity 6
Potential Ann Rev		Potential Ann Rev	
Probability of Close		Probability of Close	
Value	\$ -	Value	\$ -

New Leads	
Leads Captured	
Value of new lead	
Total	\$ -

Travel		\$	-
Traveler 1 Name:			
Airfare			
Hotel			
Cost per night			
Room Nights			
Rental Car			
Cost per day			
# of days			
Non-customer meals			
Cost per meal			
# of meals			
Traveler 2 Name:			
Airfare			
Hotel			
Cost per night			
Room Nights			
Rental Car			
Cost per day			
# of days			
Non-customer meals			
Cost per meal			
# of meals			
Traveler 3 Name:			
Airfare			
Hotel			
Cost per night			
Room Nights			
Rental Car			
Cost per day			
# of days			
Non-customer meals			
Cost per meal			
# of meals			
Traveler 4 Name:			
Airfare			
Hotel			
Cost per night			
Room Nights			
Rental Car			
Cost per day			
# of days			
Non-customer meals			
Cost per meal			
# of meals			
Traveler 5 Name:			
Airfare			
Hotel			
Cost per night			
Room Nights			
Rental Car			
Cost per day			
# of days			
Non-customer meals			
Cost per meal			
# of meals			
Traveler 6 Name:			
Airfare			
Hotel			
Cost per night			
Room Nights			
Rental Car			
Cost per day			
# of days			
Non-customer meals			
Cost per meal			
# of meals			

Total Debt **Total Credit** **ROO**
 \$ - \$ - 0.00

ROO Template being used for each show

Criteria 7

Conclusion

- **Assessment and wrap-up of event**
- **Recommendations for changes/improvements to Pilot's trade show program**
- **Strategy plan in place to support the recommended changes**
- **Review of the CTSM learning experiences and writing the portfolio**

ASSESSMENT AND WRAP-UP OF EVENT

Pilot Chemical's presence at this year's NYSCC Suppliers' Day was a success, and a bigger success than in past years. We didn't meet all of our goals or get all of the metrics right, but this is the first year we set actual goals and committed to measuring key metrics so we can establish baselines to measure future years against. In addition to helping improve our performance at the shows where Pilot exhibits, it also helps the marketing department establish credibility within Pilot as being experts in trade show exhibiting and not just providing administrative support.

Prior to beginning my CTSM journey, and under Pilot's former marketing management, Pilot's trade show program was, as stated earlier, little more than "mini vacations on Uncle Paul". Now, even though we're not getting everything right, we're doing better. We're building a training program for booth staff, we're starting to establish goals for the shows and the teams that goes to them, and we're reporting actual numbers, good and bad, to the leadership team.

We know that, for this show in particular, if we are going to make Personal Care a target market for Pilot's growth, we're going to need to make a bigger impact than we did this year, and we can use what we learned from this year to help do that.

More frequent and effective meetings are going to be important for helping to accomplish our goals. Not more meetings for the sake of having another meeting or to say to management, "we're doing great, we've already had X meetings just for this one show", but meetings with solid, meaningful agendas that work to improve our return on exhibiting. Meetings like Trade Show Audits outlined in 3022R: *No Exhibit is an Island — Building a Bridge to Success* to review shows we currently participate in, used to participate in, and shows to consider participating at to make sure we're investing our trade show budget wisely.

Improved training is also going to be critical. Unfortunately, just because someone has been exhibiting at shows for 20+ years doesn't mean they're good at it. Session 2072: *How To Train Your Booth Staff: A 3-Step Process For Inspiring And Firing Up Your Booth Staff* did a good job of outlining a framework I can use to build our program that includes the pillars of Make Them Care, Make Them Aware, and Make Them Do Their Share.

Social media messaging is another area we identified as an opportunity for improvement. We have always posted about going to upcoming shows, but we have never set goals around the results or considered it anything more than a box to check. While we missed the goals we set for impressions, the results made us aware of our shortcomings in this area and our need to focus more attention in this area if we want to use our social presence to drive more traffic to our booths.

Overall, this was the best year we've had out of all the years we've been exhibiting at this show, and everyone is confident that, with the insights we gained this year, future years will be even better.

RECOMMENDATIONS FOR CHANGES/IMPROVEMENTS IN PILOT'S TRADE SHOW PROGRAM

It has been said, "you don't know what you don't know", and that's an excellent way to describe where I was at with regard to trade shows before I began the CTSM program. The journey has shined a light on things I haven't been doing that I should be doing and things I am doing but can be doing differently for better results. As such, my recommendations for improvements to Pilot's trade show program follow.

Communications - This one takes many forms including meetings with a structured purposeful agenda, conveying expectations for each stakeholder, external messaging, and reporting.

Everyone at Pilot is busy and many are just outright overworked. The last thing they need is another meeting for the sake of having a meeting, but successful trade show planning requires meetings as well as other forms of communication to keep everyone on the same page, focused, and accountable for fulfilling their responsibilities related to the show. Having a clear and relevant agenda, as well as sticking to that agenda, makes the meetings more efficient and, ultimately, reduces the number of meetings needed to accomplish our objectives.

Trade shows have many stakeholders outside of the people attending the show. There's data support from people in Supply Chain, getting buy-in from management, the expo house

responsible for shipping assets, the installation & dismantle team, show organizers, carriers, and many others all responsible for doing their part to make exhibiting at a show a success. Providing them with clear expectations about their roles and ensuring they received and understand those expectations, helps to ensure a smooth progression from the first launch meeting to the last post-show meeting.

External messaging is another area where I can improve our program. There are channels in Pilot's marketing that are currently siloed. Email marketing, social media marketing, and trade show marketing immediately come to mind while I'm writing this. For the email marketing, as it relates to trade shows, Pilot has never done more than adding a banner ad to people's email signatures, yet we have industry-specific contact lists from marketing campaigns we run that we could be using for targeted email blasts about attending shows. Likewise, we can be doing more on social media to target and promote our attendance, which will increase visibility and can raise interest to help drive booth traffic.

Reporting is another area where, historically, Pilot has been weak. The focus show of this portfolio is the first show we've done where reporting the results up to leadership was organized and directed rather than being a casual water-cooler discussion. By putting together and delivering these reports to leadership, we not only increase the program's accountability, thus driving improvement, but we also increase the marketing department's credibility as experts.

Another area where Pilot's trade show program can stand to improve is with measuring and analytics. Three sessions in particular that provided a lot of good information in this area were 1008R: *How to Measure the Value of Trade Show Participation - Part I: Basic Concepts*, 1009R: *How to Measure the Value of Trade Show Participation - Part II: Practical Application*, and 1014: *You Know What To Measure - But How Do You Actually Measure It?*

All three of these sessions emphasized the importance of putting together a good strategy that has realistic goals and objectives, and that measuring those goals and objectives helps to shed light onto the program's strengths and weaknesses. As mentioned through out this paper, Pilot's trade show program has never had a strategy let alone goals or objectives. With these

sessions, as well as others that I took, I now have the knowledge and the tools to develop the strategy that Pilot's trade show program needs to be successful.

STRATEGY PLAN IN PLACE TO SUPPORT THE RECOMMENDED CHANGES

This section is currently being developed and has been placed on the back burner, momentarily, while we focus on some more immediate projects like two new product launches, onboarding a new vendor who will help us with our promotional marketing and do the heavy lifting on our website, and preparing for the beginning of our 2025 budget discussions which start in October.

This does not mean that nothing at all is being done right now. Pilot Chemical's marketing department is small and spread thin. I am the only person in the department dedicated to promotional marketing. My supervisor helps out a lot, but she is also helping the other two team members, as well as focusing on her primary role. That said, there are a couple of projects we are working on that will support our trade show strategy and the recommended changes outlined on the previous pages.

I am creating one calendar that includes everything related to promotional marketing like trade shows, email campaigns, social media posts, digital campaigns, newsletters, etc. This will help to remove the silos we currently navigate with our promotional marketing efforts and enable us to make the individual parts more interconnected. This calendar will live on our SharePoint intranet site so everyone can access it and I will be responsible for keeping it updated. It will replace the calendar mentioned earlier due to the current one being separate calendars with a consolidated view that isn't user friendly and difficult to keep up with.

Pilot is also onboarding a third-party marketing company to help with our promotional marketing, which will free up some of my time to focus on fleshing out Pilot's trade show strategy. We are confident this will be a great help once they are fully in place, but teaching a group of people who don't have chemistry backgrounds learn how to speak intelligently to the chemical industry is going to take a while.

Ultimately, our strategy for improving Pilot's trade show program is to keep chipping away at it as time allows until this current wave of 'too much to do with too few resources' passes. The information I have brought back from the sessions I've attended along with the improvements I've been able to put in place has lit a spark in Pilot's trade show stakeholders and given them a glimpse into what the program can become.

REVIEW OF THE CTSM LEARNING EXPERIENCES AND WRITING THE PORTFOLIO

It seems odd to be writing a conclusion about something that is only just beginning. From my first eTrak session in March of 2022 until now, I have learned an incredible amount about exhibiting, and I am excited about continuing to apply that information to improve Pilot's trade show presence. The CTSM program has delivered more than I thought it would, again, because you don't know what you don't know. How much can there be to learn about trade shows? Turns out, there is quite a bit, and everyone at Exhibitor has done an incredible job of gathering, organizing, and presenting that information. I am looking forward to attending ExhibitorLive 2025 and other learning opportunities to revisit some of the courses I've already taken and to see what new classes are available to continue my learning journey.

Pilot Chemical has been in business for over 70 years and probably exhibiting at trade shows nearly as long. Until I entered the CTSM program, Pilot's approach to trade shows lacked strategy and structure. I'm sure our journey has been similar to many other companies, progressing slower than some and faster than others. A short time ago, Pilot didn't know what it didn't know about exhibiting at trade shows. Now, through the sessions I've taken on the road to earning my CTSM designation, we are looking at trade shows much differently. I am grateful that Pilot allowed me to enter the CTSM program, and I am excited to watch the changes to how Pilot exhibits at trade shows.

Sessions Referenced

Click on the page number to view the reference. Click on [SR](#) to return to this page.

Required

Session #	Title	Page(s)
1008R	How to Measure the Value of Trade Show Participation - Part I: Basic Concepts	10 40
1009R	How to Measure the Value of Trade Show Participation - Part II: Practical Application	11 40
2004R	Don't skip the Meetings - Pre-, At- and Post-: Guidepost to Success	17 34
3015R	Integrated Marketing Communications	26
3022R	No Exhibit is an Island — Building a Bridge to Success	19 38
4005R	Conversations That Matter: Know Precisely What to Say to Manage Up — and Down	30
6020R	The @show Experience: Understand the Essentials of Exhibit Design	16
7058R	Thrive Under Deadlines: Strategies for Success	22

Elective

Session #	Title	Page(s)
1014	You Know What To Measure - But How Do You Actually Measure It?	40
2008	Ten Strategies to Generate More Top-Quality Booth Traffic	16
2072	How To Train Your Booth Staff: A 3-Step Process For Inspiring And Firing Up Your Booth Staff	38

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