

WRITING AN EXHIBIT RFP

If you don't ask, you won't get!

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You've finally convinced your management team that your booth is outdated and it's time for a new look and added functionality. You've got a budget – not as big as the one you asked for – but a budget, nonetheless. So what do you do next? Get out a sharp pencil and start compiling the information for a comprehensive Request for Proposal (RFP).

Before you can even think about putting an RFP together, you need to assemble your team of stakeholders – people who have a stake in the success of your exhibit and are willing to commit to discussing their upcoming needs and wants. Questions to address stakeholders' concerns will fall into categories including your corporate exhibit program, exhibit needs, budget and timeline. (See sidebar.)

Next comes the decision of how you will bid out your project. Do you want to hire an independent exhibit designer or design firm to achieve your final concept, and then have exhibit houses bid on its construction? With this scenario, you have upfront design costs, but you can compare the construction costs on an “apples-to-apples” basis. Or do you want to work on the creative concept with multiple exhibit houses that generally give away their design services in hopes of winning your business? This can be trickier for budgeting because you'll now be comparing the cost of “apples-to-oranges”.

Do your homework before determining who you will request bids from for your exhibit construction. Is it important to you to use a local exhibit house, or are you comfortable using the Internet to follow-up as your exhibit is built by an exhibit house cross-country? Ask your industry colleagues for recommendations and do site inspections of the exhibit house facilities. *Tip: During the exhibit house site inspections, I look for marked crates of other local companies (which may not appear on the exhibit house's reference list) and call to see if they are still actively using the exhibit house and what their experiences have been.* If you require a custom exhibit and they do not construct in-house, find out who their vendors are and where they are located. There may be extra mark-ups and chance for miscommunication in dealing with multiple vendors.

Finally, put yourself in the shoes of your designer or exhibit house. Think “garbage in, garbage out” when deciding how much detail to include in your RFP. The more information you provide them, the better their presentation of an exhibit to meet your needs. Many exhibit houses have compiled their own survey form that they'll share to make sure you cover what they would like included in the RFP. So let's start with the basic questions to answer in your RFP.

YOUR CORPORATE EXHIBIT PROGRAM

Shows, Schedules and Size

What are the debut show, exhibit size, and date? What other shows do you have scheduled where this property will be used and what size are your booth spaces at these shows? Does this exhibit need size flexibility to be used in a number of configurations? Include copies of any floor plans available to show your company's exhibit space and where you want the front and back of the exhibit.

YOUR EXHIBIT NEEDS

Company Background

The RFP should tell the exhibit designer about your company and its "feel". To convey this information, attach marketing materials to the RFP so your exhibit design integrates with the rest of your functional marketing plan including any upcoming initiatives that would affect the future look or use of the exhibit. These materials might include your company's latest annual report, marketing and sales literature, current advertising campaigns, press kit, and the URL to the company website. If your company has a style manual that calls out rules for logo, tag line, type font and color use, it should also be included.

Also of ultimate importance is a statement of the role trade shows play in the company's overall strategic marketing plan.

Market Information:

In order to position your company, you'll need to share marketing information including your company's market position, volume and share, and the trends affecting your market position. Who is your target audience and what are their demographics and psychographics? Does your corporate image need to change from show to show, depending on your target audience? To what industries and markets do you provide your products/services? Why do your customers buy from you? What is your company's sales cycle? What is the average sale made to a sales prospect, as lower cost products generally attract a higher number of attendees? What methods do you use to promote yourself to your target audience, both at the trade show and prior to attending? What differentiates you from your competitors and who are they? What is their market share? *Tip: Based on sharing confidential marketing and sales information, have your designer and/or exhibit house sign a Non-Disclosure Agreement (an NDA).*

Show Objectives:

Prioritize your objectives from the following list so the booth is designed to maximize your Return on Objective (ROO):

Sales Objectives: To generate immediate sales, develop quality sales leads, or recruit sales representatives.

Product Objectives: To introduce new product(s) or upgrades, to show the breadth of a product line, or run informal focus groups or surveys on product design and applications.

Communication Objectives: To spark product interest, educate, gain press or media coverage, or establish or enhance your presence.

Distribution Objectives: To recruit distributors or provide dealer support.

If there are any upcoming shows using this exhibit that have major deviations from your usual objectives, point them out. When the proposals come back to you, you should be able to evaluate each design based on how it supports your marketing objectives.

Exhibit House Service Requirements

What services are you looking for in an exhibit house? Services available through full-service exhibit houses include: design, construction, in-house graphics production, turnkey services (including completion of exhibitor guide forms and ordering of services, handling the subcontracting of I & D services and specialized trade show transportation, and 3rd party payment of contracted pre-show and onsite services, usually for a pre-determined percentage of mark-up), on-site supervision by your account executive or construction supervisor (which is generally included in the cost of the exhibit's debut set-up), material handling while in their warehouse, rental of ancillary furnishings, exhibit property inventory control and storage. Some exhibit houses sell system properties, and outsource the building and maintenance of custom exhibits or customizing your system property to other exhibit houses. Ask what is handled in-house versus subcontracted. *Tip: Ask for a rate sheet of the pricing structure of the exhibit house's services of which services are billed at a flat rate, hourly rate, percentage mark-up, or by weight or volume.*

Historical Perspective

What were the strengths and weaknesses of past exhibits? Should your exhibit's past history dictate future direction? Decide how much of your "been there, done that, and don't want to do it again" to share to avoid making the same mistakes again!

Alternative Uses:

Will the exhibit be used in any other settings, such as in your corporate lobby, at shareholders meetings, hospitality events, or sales meetings?

Exhibit Requirements

There will always be physical requirements and limitations imposed by show management and are often based on type of venue (i.e. ceiling height, electrical, fire, and lighting codes, and sightline rules). Become familiar with the industry standards in Guidelines for Display Rules and Regulations that have been set by the International Association for Exhibition Management (IAEM) and can be purchased on their website at www.iaem.org for under \$20.

Request an explanation of the basic structure, outside skin, mode of fasteners, and any creative features used in the construction of your exhibit. What type of materials and finishes will be used in constructing the exhibit? What are their weight, durability and appearance? Will they stand up to repeated uses or need constant refurbishment?

What is the emotional style of the booth? What adjectives describe the feel you want attendees to have when they see your exhibit? The architectural form of your exhibit should support the emotion you want your visitors to feel. The shape, colors and materials used in your exhibit will be the first impression on your audience and convey your company's image. Do you want sharp and angular forms that say "I'm strong and stable" or soft and curved shapes that say, "We're friendly; come on in!"? Do you want an open feel or the mystique of a more closed environment

that makes visitors wonder, “What’s the movement behind that frosted glass?” Don’t forget to include your preferences for flooring type, color, and pattern and if you want to use floor space to display corporate or product logos (either cut into the carpet or using gobos) or messaging.

And, do you have any existing properties that you’d like to integrate into a new design? A hanging sign that still works to identify your company? A reception counter that you love the design of that might be relaminated? Many exhibit houses are masters of disguise and can save money by upgrading pieces of your current exhibit.

Products/Services Displayed:

What products and/or services do you show? What is their size, type, number, and interaction with or protection from visitors? Are they grouped or shown singly on a wall or in a showcase? Do they require power or network connectivity to work? Based on their value, is security required to keep them from “walking off”? If your company doesn’t sell actual products, how do you convey your intangible idea or service to your audience?

Demonstration Areas: Are demonstration kiosks required? Are workstations or counters required for computers, other product or equipment, or as work areas? How are your products demonstrated? Does the equipment you’re demonstrating need special cooling with fans or air conditioning, extra power, special racks, accessibility for use or repair during the show? Give size parameters for the estimated size needed at each area. Do your presenters require microphones and small speakers at their demo stations?

Live Presentations : Will you have formal presentations or corporate theater that require a stage and seating? If so, is it a live stage presentation, video, or a small group demo? What type of A/V is required, and will you need a raised stage and background props? How many attendees will need seating? If you distribute giveaways during your presentation, where will they be stored? How will you convey your ongoing schedule of presentations?

Traffic Patterns:

Are there traffic patterns in your exhibit that need to be taken into consideration, such as prospects sitting through a live presentation, then being routed to a lead gathering site to scan their badge or receive a giveaway, and then released into the general demo area?

Conference/Closing Rooms:

Are conference or sales closing rooms required? How many people attend meetings and how many conference rooms are required simultaneously? What furnishings need to be in the conference rooms, such as conference tables, chairs, sofas and coffee tables, graphics, equipment, hospitality? Do you need private rooms to conceal the identity of attendees, semi-private with low partitions, or tables and chairs in the open? Do you need a lounge area for visitors and staff who are waiting for meeting room space? *TIP: If you want visitors to lounge in your exhibit for extended periods in a home-like setting, use loveseats and coffee tables; if you want to do business and have them move on, stick with straight, less comfortable chairs and conference tables.*

Lead Gathering:

Where are leads gathered? Is there equipment to be housed to gather or maintain leads and if so, what are the size, power and networking requirements, and location of this equipment? Do you need “drop slots” in countertops to collect hard-copy leads or raffle entries?

Literature Distribution:

Do you distribute literature? Where and how will it be distributed, such as at a central rack, controlled handout in meeting rooms, at the demonstration kiosk of each product, or by personnel at the Information Counter? What is the size/type, and approximate quantity used at an average show? Where is excess literature stored during the trade show?

Information/Reception Center:

Is an information center required? What functions will be centered in the information center (a.k.a. reception counter): information dissemination, staff tracking, giveaway distribution, sales lead gathering? Is there a particular side or corner of the exhibit where traffic will naturally flow and the reception counter should be located?

Storage:

Will you need storage in your exhibit for literature, giveaways, product samples, hidden demo equipment, A/V, and exhibit staff personal items? Do they need to be in locked storage?

TIP: Ask the exhibit house if the locks they use are one-of-a-kind, or do they use one key for all exhibits they manufacture.

Corporate identity:

Provide your exhibit house with logos, tag lines, exact fonts and PMS colors required when used in your corporate identity.

Graphics and Signage:

Do you want a hanging sign above your exhibit, to display your corporate logo or for changing projected images? Which types of graphics do you think best fit your corporate image: color prints, large format murals, fabric banners, transparencies or changing billboards? Are your graphics bold and vibrant or detailed and technical? Will the graphics be one-time use or work for multiple shows by keeping the graphic and just changing the copy? Can your selected font be easily read? *TIP: Always have the exhibit house include in their proposal when rush charges will apply to graphics production..*

Lighting

There are a number of types of specialized trade show lighting including overhead theatrical lighting, spot lights, wall washers, moving lighting, and projected images. Will you want certain elements of your booth highlighted for emphasis? Do you want to use lighting to lead attendees through your exhibit?

Crating:

Will the exhibit require crating or cases for shipping? Will the crates have reinforced exteriors and fitted and padded interiors to protect your exhibit during shipping and material handling?

Will they be fitted with forklift skids? Can they be shipped standing up or laying on their side? How will the crate doors fasten: wing nuts, wood screws, locking hasp and hinge? Are they

standard size to avoid extra costs of shipping? How many crates will be built to house your exhibit and what is their average weight? *TIP: The average cost of a standard exhibit crate is approximately \$1,000. Be sure to have this line item added as part of your exhibit cost if you'll want crating.*

Exhibit Set-up:

In order to calculate the long-term costs of the proposed exhibit design, request an estimate of the total number of hours for installation and dismantle labor. In addition, there may be specialized labor and equipment hours (such as rigging and forklift) to consider.

Exhibit Transportation and Material Handling (Drayage):

Do you have a preferred mode of transportation for your exhibit that requires special packaging? If you're exhibiting at hotel shows, are smaller cases with wheels a good idea based on elevator access? Are your shows back-to-back where shipping your exhibit by airfreight is a necessity to meet deadlines?

BUDGET

There are multiple schools of thought on providing exhibit houses with your budget parameters. Some believe this gives them free reign to go hog wild up to this budget number. Other believe that the exhibit house, who will become one of your critical show team members, needs all the information they can get to do a good job for you.

There is no 'right' answer, but I lean more toward full disclosure of budget information (or at least giving a 90% figure so I still have a few pennies left for last minute requests and upgrades) and then requesting a line-item budget based on the areas below to make comparison between the proposals easier. Include information to the exhibit house regarding the flexibility of the budget. Is it all-inclusive and there's not a penny more to be had in your corporate piggy bank, or is there a budget range (\$40,000-\$50,000)? Also let them know if your analysis and decision to choose a proposal is more design- or cost-oriented. You'll also want to know their payment terms and when deposits and progress payments will be due.

Budget line items to request the exhibit house include in their proposal:

- Exhibit design, production of drawings, construction (including all labor, materials, fees, and taxes), drawings and set-up instructions, exhibit preview, project management fees
- Graphics
- Lighting
- Audio-visual equipment
- Computer equipment
- Furnishings including tables, chairs, stools
- Flooring
- Crates or cases
- Gang box and supplies
- Ongoing cost of ownership, including general maintenance, sometimes called refurbishment, storage, graphics upgrade, flexibility to different configurations.

You'll also need to determine the ownership option that's most advantageous. Options include renting at approximately 1/3 of the cost of owning for one-time use (plus the cost of graphics), negotiating for multiple uses with an ownership option after a pre-determined number of uses, to lease it, or to purchase it outright. *TIP: Your accounting department will be able to guide you through this part of your RFP, depending on whether they want to capitalize the exhibit properties or expense them. If capitalized, you'll need to work with accounting to determine the "life" of your exhibit for depreciation purposes, which is usually either 3 or 5 years.*

TIMELINE

Include a timeline of upcoming dates that you may already have, including the date the proposals are due and who completed proposals are to be returned to, dates for exhibit house presentations, decision date for choosing the proposal winner, contract negotiations and sign-off, project progress meeting dates, final walk-through date, estimated ship date, show set-up dates, and show dates and hours.

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