DWIGHT & COMPANY

SALES ENABLEMENT RESOURCE

# How to Generate SQLs at Industry Trade Shows Without a Booth

A field-tested, phase-by-phase playbook for account executives who are floor-walking and want to leave with pipeline.

**5** Action Phases

**18+** Tactical Steps

**1** Checklist

4 Weeks Before | 2 Weeks Before | Week Before | On-Site | Post-Event

## Contents

# What's Inside



Trade shows are among the most concentrated, high-intent environments in B2B sales. This guide breaks it down into five clear phases, from four weeks out through the following Tuesday. Follow the sequence and walk away with pipeline.

PHASE 01

4 WEEKS BEFORE THE EVENT

# Build Your Foundation

## 1.1 — Activate Known Contacts

Begin with warm outreach to existing contacts you have reason to believe will attend. A personal, specific message significantly outperforms generic event outreach.

- Identify known contacts in your CRM who are likely to attend based on their company, role, or past attendance
- Send a personalized message referencing the event and proposing a specific time and venue to meet
- Keep the ask simple: coffee, a 20-minute walking meeting, or a dinner invitation
- Aim to lock in at least 2–3 confirmed meetings from warm contacts before moving to cold outreach

## 1.2 — Build a Target Prospect List

Research companies that are likely to be represented at the event and identify the right individuals to pursue.

- Use the event's published attendee list, exhibitor directory, or sponsor page to identify target companies
- For each target company, identify 1–2 contacts by persona and title (e.g., VP Operations, Director of Logistics)
- Prioritize companies that match your ICP, focus on titles with buying authority or influence
- Use LinkedIn, ZoomInfo, or similar tools to find likely attendees if a roster isn't published
- Log all targets in CRM with event tag before outreach begins

### 1.3 — Coordinate Geo-Targeted Marketing Support

Work with Marketing to run a coordinated digital campaign that warms up your prospect list before you arrive.

- Submit your target prospect list to Marketing at least 4 weeks out
- Request a geo-targeted LinkedIn or display ad campaign focused on the event city and surrounding region
- Ads should target by company name, job title, and geography, ideally running 2–4 weeks before the event
- Coordinate messaging so your outreach and the ads reinforce the same value proposition

### 1.4 — Publish Your LinkedIn Attendance Post

- Post that you will be attending the event, naming it explicitly with the official hashtag
- Include a clear call to action: invite people to DM you to set a meeting or grab coffee
- Tag the event and relevant industry hashtags to increase reach

> **EXAMPLE FRAMING**
>
> *"Excited to be heading to [Event Name] in [City]. Reach out if you'd like to connect and compare notes on [relevant topic or challenge]."*

### 1.5 — Reserve Dinner & Happy Hour Venues

Popular spots near convention centers fill up quickly. Book now so you have a concrete, professional invitation to extend.

- Identify 2–3 dinner or happy hour spots near the venue appropriate for a business meal
- Make reservations with flexible guest counts if possible, or book a private/semi-private space

PHASE
02

2 WEEKS BEFORE THE EVENT

# Persist & Qualify

## 2.1 — Second Outreach Wave

Persistence is professional when the message remains relevant and personalized. Send a second touch to contacts who have not responded.

- Send a brief follow-up that references your first message and reiterates the ask
- Try a different channel, if the first attempt was email, try LinkedIn InMail or a connection request with a note
- Keep the tone warm and low-pressure, you are offering value, not chasing
- Update CRM with response status after each outreach attempt

PHASE
03

THE WEEK BEFORE THE EVENT

# Lock In the Schedule

## 3.1 — Build Your Meeting Schedule

Consolidate all confirmed meetings into a structured daily schedule so you can maximize your time on the floor.

- Create a day-by-day, hour-by-hour schedule in your calendar with names, titles, and meeting locations
- Block 15–20 minutes between meetings to allow for overruns and unplanned hallway conversations
- Prioritize morning slots for your highest-value targets, energy and focus are best early in the day
- Identify 2–3 "stretch" prospects to fill any slots that open up due to cancellations

### 3.2 — Third Outreach Wave: Final Attempt

- Send a final, brief note to all non-responders, 2–3 sentences, easy to say yes or no
- Accept non-responses gracefully; they may still be worth an in-person introduction on the floor
- Send confirmation messages to every confirmed contact with specific date, time, and meeting spot
- Include your cell number so they can reach you easily on-site

> **CONFIRMATION MESSAGE TEMPLATE**
>
> *"Looking forward to connecting Wednesday at 2pm. I'll meet you at [location/coffee bar near registration]. My cell is [number] if anything changes."*

PHASE **04**

ON-SITE AT THE EVENT

## Execute on the Floor

### 4.1 — Maximize Networking Time

Every minute at the event is an opportunity. Be present, approachable, and intentional.

- Attend every networking event on the official agenda: opening receptions, happy hours, lunches, closing events
- Arrive early to networking events, the first 15 minutes yield the most organic conversation
- Have a 30-second introduction ready that leads with the problem your company solves, not a product pitch
- Wear a clearly readable badge, if yours is hard to read, add your company name with a marker

### 4.2 — Nightly Dinners with Prospects

Dinners are the highest-quality conversations you will have at any event. Make them non-negotiable.

- Host or attend at least one dinner with a prospect every evening of the event
- Use dinner invitations as a close for any meetings that go well earlier in the day
- Aim for 4–6 people, ideal for conversation depth without losing intimacy
- The goal of the dinner is relationship advancement, not a formal pitch

### 4.3 — Booth Visits & Suitcasing Rules

> **KNOW BEFORE YOU GO**
>
> "Suitcasing" refers to non-exhibiting companies soliciting business on the show floor. This violates the terms of most major trade shows, including PACK EXPO and MODEX, and can result in removal from the event. **When in doubt, move the conversation off the floor.**

| ✓ Permitted | ✗ Not Permitted |
|---|---|
| Walking the floor and visiting booths as an attendee | Soliciting sales from non-exhibiting attendees on the show floor |
| Exchanging business cards and making introductions | Setting up an impromptu demo or presentation area |
| Attending all sessions, keynotes, and networking events | Distributing marketing materials in bulk on the floor |
| Having natural conversations that lead to a business card exchange | Intercepting attendees in front of exhibitors' booths |
| Inviting a contact to meet off the floor (lobby, coffee bar, dinner) | Representing yourself as an exhibitor when you are not one |

### 4.4 — Always Set Next Steps Before Parting

A great conversation has no value unless it produces a defined path forward. Before every meeting or encounter ends:

- Propose a specific next step: a follow-up call date, a product demo, or an introduction to a technical team member
- Confirm their email address or preferred contact method and enter it into your CRM that evening
- If the prospect isn't ready, ask what would need to change, this surfaces timeline, blockers, and decision criteria
- Even a "not now" deserves a clear follow-up trigger: "Would it be okay if I reached out in Q3 when you're evaluating vendors?"

### 4.5 — Post Daily on LinkedIn

- Post at least once per day during the event: a key insight from a session, an observation, or a networking photo (with permission)
- Tag the event and relevant industry hashtags in every post
- Engage with others' event posts, commenting creates visibility with their network
- Avoid overly promotional posts; thought leadership and genuine observations perform far better

PHASE

05

POST-EVENT FOLLOW-UP

# Convert Conversations to Pipeline

## 5.1 — Follow Up the Following Tuesday

**WHY TUESDAY?**

*The Monday after an event is universally chaotic. People are catching up on email and not yet mentally available. Tuesday is the optimal day to re-engage.*

- Send personalized follow-up messages to every person you met or had a meaningful conversation with
- Reference something specific from your conversation, this signals genuine attention and differentiates your message
- For contacts with defined next steps: confirm the agreed action (send the calendar invite, share the resource, book the demo)
- For contacts who were not ready to commit: keep it warm and non-pressuring, remind them of the problem you discussed
- Log all follow-up activity in CRM with event tag and outcome status

## 5.2 — Update CRM & Report Out

All activity from the event must be captured in CRM within 48 hours of returning.

- Update or create contact records for every new connection
- Tag all opportunities with the event name and source
- Log meeting notes, next steps, and qualification signals for each prospect
- Share a brief event debrief with your manager or marketing team: meetings held, SQLs generated, notable companies met, competitive intelligence gathered

# Quick Reference Checklist

Print this page and bring it to the event. Check off each item as you complete it.

## 4 WEEKS BEFORE

- [ ] Reach out to known contacts to set meetings
- [ ] Build target prospect list by company and persona/title
- [ ] Submit prospect list to Marketing for geo-targeted campaign
- [ ] Post on LinkedIn announcing attendance with call to action
- [ ] Reserve dinner and/or happy hour spots near the venue

## ON-SITE

- [ ] Attend every official networking event on the agenda
- [ ] Host or attend at least one prospect dinner each evening
- [ ] Visit booths professionally: no suitcasing, no bulk solicitation
- [ ] Set a specific next step before every meeting ends
- [ ] Post on LinkedIn at least once per day
- [ ] Log new contacts and notes in CRM each evening

## 2 WEEKS BEFORE

- [ ] Send second follow-up to all non-responders
- [ ] Try alternate channel (LinkedIn vs. email) for persistent non-responders
- [ ] Update CRM with response status

## POST-EVENT (TUESDAY)

- [ ] Send personalized follow-up to every meaningful contact
- [ ] Confirm all agreed next steps (demo invites, resources, calls)
- [ ] Update CRM with all contacts, notes, and opportunity status
- [ ] Share event debrief with manager/marketing team

## WEEK BEFORE

- [ ] Build day-by-day meeting schedule in calendar
- [ ] Send third and final outreach to non-responders
- [ ] Send confirmation + date/time/location reminder to all confirmed meetings
- [ ] Include your cell number in all confirmation messages

WORK WITH DWIGHT & COMPANY

# Want a Trade Show Strategy Built for Your Team?

We help automation companies design and execute event playbooks that generate real pipeline, from pre-show targeting to post-event follow-up.

Let’s get in touch:

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