

LeelinePromotion

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PLANNING RESOURCE

Event Merchandise Planning Checklist

A structured framework for planning, executing, and measuring your trade show and event merchandise programs. Built from real event program audits across 80+ conferences.

Phase 1 — Pre-Event Strategy (Weeks 12–8)

- **Define merchandise KPIs** aligned with event objectives: lead capture volume, brand recall, social engagement
- **Segment audience personas** and map product types to each attendee tier
- **Set per-unit budget ranges** based on audience tier: VIP vs. general attendee
- **Audit previous event performance:** retention rates, cost-per-lead, attendee feedback

Phase 2 — Product Selection & Design (Weeks 8–5)

- **Select 3–5 product categories** that match audience utility: tech accessories for SaaS, apparel for consumer brands
- **Develop creative concepts** aligned with brand guidelines, event theme, and audience preferences
- **Request physical samples** for all products; validate quality, color accuracy, and functional performance
- **Design packaging** aligned with event theme and brand guidelines for a cohesive unboxing moment

Phase 3 — Production & Logistics (Weeks 5–2)

- **Confirm final quantities** with 15% buffer for high-traffic scenarios
- **Schedule production** with milestone checkpoints and QC inspection dates
- **Coordinate shipping** to event venue or warehouse with labeled, pre-sorted pallets organized by booth zone or session
- **Prepare on-site inventory management plan:** restocking schedule, storage layout, distribution workflow

Phase 4 — Post-Event Measurement (Week +1–2)

- **Calculate merchandise cost-per-lead** and compare against other channels: digital ads, sponsorship
- **Survey booth visitors** on merchandise usefulness and brand recall (48-hour post-event window)
- **Document lessons learned**, vendor performance, and process improvements for next event cycle

Key Metrics to Track

- Cost per qualified lead from merchandise vs. other channels
- 48-hour and 30-day brand recall rates
- On-time delivery percentage (target: 99.8%)
- Social media mentions and UGC featuring branded merchandise
- Booth-to-pipeline attribution for merchandise recipients

LeelinePromotion — Cross-border promotional merchandise and supply chain partner

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