The Invisible Exhibitor

What Your Exhibitors Aren’t Telling You
(and Why That Matters for the Future of Your Show)

A MAYA® WHITEPAPER
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Executive Summary

Even if your show is profitable, it might be in danger. Almost everyone involved in the trade show industry can think of once successful and invincible shows that have disappeared without a trace. What makes the difference between shows that grow and survive long term and those that limp along or fade away?

One contributing factor might be how well components of a show (i.e., organizers, exhibitors, and attendees) function together as an ecosystem.

Show organizers who pay attention largely to quantitative factors might be unaware of qualitative problems with the exhibitor experience. These problems can be early indicators of imbalance that could affect the success and survival of their show.

Exhibitors want experiences, services, and tools that are efficient, reliable, and predictable, but they’re forced to use systems that seem set up to encourage failure.

They are forced to play by many different sets of seemingly arbitrary and constantly changing rules, plus foot the bill for errors and inefficiencies caused by other people.

Exhibitors feel taken advantage of, rather than valued, and would choose other ways of attracting customers and marketing products if they could.

Shows that do not provide a superior experience in the human dimension might become increasingly at risk as other venues make it easier for exhibitors to reach their target audience. These include online tools not only for advertising, but also for demonstrating products and forging communities and connections.

Knowing what to look for and pay attention to regarding the exhibitor experience, and knowing how to address breakpoints in that experience, can have an effect on the long-term viability of a show.
BACKGROUND

How Do You Know if Your Show is Healthy?

Show organizers depend on statistics as a way to evaluate their show’s performance. Such measurements can be simple (e.g., Is attendance higher or lower than last time?), but advancements in technology and data handling make it possible to collect more detailed statistics than ever before, such as tying highly specific information about an attendee to how much time they spent at a display in a booth.

Although the ability to measure more things gives organizers more data, the volume of this data doesn’t necessarily result in valuable information. Statistical, quantitative information about a show can help organizers tweak operational details, but it does not help them understand the undercurrents of the show. Think of a physician checking a patient’s temperature and other vital signs on a chart. What’s missing is deeper insight into the underlying experiences (e.g., marital stress, bankruptcy, a death in the family) that might have a significant role in the physical symptoms manifested closer to the surface.

The focus group is one common tool organizers use to overcome this lack of insight. They (or an outside consultant) convene randomly or carefully selected stakeholders in a room and lead them through a guided session designed to have participants voice their views on topics of interest to the organizer. Because real people are speaking, the output can be personal and vivid, but the structured nature of such sessions can restrict, steer, or otherwise skew the results. In addition, such sessions pull participants physically and temporally out of their regular work environments. This disconnection means that participants must rely on recollections that the researcher must accept without further evidence. Yet what people say or recall does not always match reality, so it is preferable to conduct research when the participants are in their native environments and engaged in their typical workflow.

This is the approach that MAYA Design, Inc.—a “human-centered” design consultancy—took when contacted by The Expo Group—a trade show contracting company—to explore and document the trade show exhibitor experience. The Expo Group wanted to gauge what was and was not working well in the exhibitor experience from a qualitative, rather than just a quantitative, perspective.

Behind the Research

MAYA spoke with more than 100 exhibitors in completely blind interviews, partly by phone and partly on-site at trade shows, over a six-month period. Although our research was co-funded by The Expo Group, we did not mention this to exhibitors. Any time we asked about an exhibitor’s experience with show contractors, we did so without mentioning the specific company names, or we mentioned the names of multiple contracting companies that exhibitors typically encounter.
Whom Did We Talk To?
The Expo Group provided contact information for all of the exhibitors at a major trade show for which they were the service contractor. We identified exhibitors on that list who also were exhibiting at another major show in the same industry, but which was serviced by a different contracting company.

MAYA researchers conducted telephone interviews with exhibitors that planned to exhibit at both shows. We visited both shows to talk to some of those same exhibitors. At the shows, we also conducted on-the-spot interviews with exhibitors we had not spoken to previously. In addition to conducting interviews, MAYA researchers spent time simply doing observation at the show sites, as well as limited interviews with attendees (the results of which are the subject of a companion whitepaper) and venue staff. Depending on the situation, we told interviewees that we were conducting research for MAYA or for the show organizers.

MAYA spoke with more than one hundred exhibitors spanning a variety of characteristics: small/medium/large, experienced/novice, exhibit frequently or infrequently.

We gained full and unrestricted access to the floor at each show during the setup period, the show itself, and the tear-down period in exchange for providing a report detailing findings specific to that show.

Figure 1. A trade show isn’t an isolated event. It’s an ecosystem that is successful only when all of its complex parts function together well.
We documented our work with photos, videos, and audio recordings. We promised a reasonable attempt at anonymity for the show and our interview subjects and sought releases as often as possible.

In only a few cases did exhibitors refuse to talk to us. Reasons they gave for this reticence included lack of time to devote to an interview, wariness about speaking out against a powerful show organizer, or a corporate policy that prevented them from speaking to anyone about matters such as this.

Most exhibitors we spoke to were quite willing to do so. Some were delighted that someone had taken an interest in them and expressed hope that their input or response would eventually inform improvements in the professional lives of all exhibitors.

What Did We Ask?
We began most conversations with general questions (e.g., “How long have you been doing this kind of work?”) that not only helped us to categorize the interviewee (e.g., First-time exhibitor? Veteran?) and ensure we had good coverage, but which also helped to establish rapport before we asked more difficult questions.

Our open-ended questions were carefully considered and worded so that we could obtain natural and true responses from people without leading them in one direction or another. The following are examples of the types of open-ended questions we asked:

- What do you wish show organizers knew about the experience of exhibiting?
- What has made a difference between shows that go well and ones that don’t?
- What is the most important warning or piece of advice that you would give to a new exhibitor?
- What’s the most time-consuming aspect of your job?
- Can you describe your experiences dealing with various services at a show site, such as material handling and electricians?
- Are there any general contracting companies that you’re familiar with?
- Have you worked with any of those general contractors? If so, can you describe any of those experience(s)?

What is an “Exhibitor”?
Our use of the term “exhibitor” applies both to the person in charge of making the exhibit happen as well as the person or persons who actually run the booth during a show. The exhibitor role is sometimes singular (i.e., one person in charge of everything and doing everything) or split between multiple people, such as an assistant who orders the services and takes care of the paperwork, and a different person who handles the setup and teardown of a booth, and yet another person who is in the booth during the show. Some mid-size and large exhibitors bypass some or all of the hassles related to exhibiting by employing third-party services to handle everything from ordering services to setting up the booth. Although offloading their frustrations might be convenient, it comes at a financial cost.
We did not always ask all of these questions, and we drew from a pool of others as well. Our intent was to make sure that everyone we spoke with had an opportunity to tell us about their experience as an exhibitor.

**BROAD FINDINGS**

After isolating all of our research documentation and media into individual images and clips, we clustered them in affinity group. We then further clustered those affinity groups into two larger sets: “Broad” findings that weren’t related to a specific task or service, and “Narrow” findings about something specific.

We categorized as broad any findings that did not pertain to any specific, narrow problem, and which almost every exhibitor mentioned in some way.

**Anxiety**

Exhibiting at a show requires attention to so many details and so much can go wrong that exhibitors feel vulnerable, especially when they work with organizers, contractors, or laborers who seem to put obstacles in their path. The first words one exhibitor spoke when we began asking her questions were, “They’re making my life hell!” Another exhibitor compared his experience to the feeling one would have about getting caught in public without pants. Because he had no guarantees or certainty leading up to a show, he could never be sure that he would not be in an equivalent position of risk when the show opened.

**Costs**

Exhibiting can be a costly venture. Travel, lodging, and shipping costs are high. Marketing expenses can add up. As costs increase, exhibitors have more at stake than ever, further increasing anxiety levels.

Exhibitors are aware that show organizers shift costs by passing some along to exhibitors in the form of markups. They find it galling that it costs them as much to have an item rolled from the loading dock to their booth as it does to ship it across the country, or more than purchasing the item new and bringing it in on their back.

They feel backed into a corner with costs because they have no way to control them aside from scaling down the size of their booth, or not exhibiting at all.

Further, because of the way most service relationships are structured, service providers have an incentive to perform work done well enough to avoid a revolt from exhibitors, but which creates delays or corrections that financially reward them when exhibitors are forced to pay for the additional costs. Often, this takes place in high-pressure situations during setup on the show floor when the exhibitor feels pressured to make any decisions necessary, no matter what the cost, just to avoid the risk of failure.
These high costs and additional charges vex exhibitors—even veteran exhibitors who view them as business as usual in the trade show industry.

A danger point show organizers need to watch out for is when even the exhibitors who have reached a level of acceptance with price gouging begin to feel exploited, neglected, and unvalued. One of the largest “anchor” exhibitors we spoke to had reached this point because of work delays outside of their own control that led to large overtime charges. The exhibitor said they were considering pulling their sponsorship of the show unless the situation changed in the future.

As companies evaluate expenditures and look for efficiencies, such costs can become a target for cutbacks. If a third-party provider working for an exhibitor cannot control all costs (e.g., labor overtime) and passes overages along to the exhibitor, the exhibitor can face tense or job-threatening encounters with superiors regarding exceeded budgets.

Organizers who cannot provide exhibitors with transparency and reasonable costs, with no hidden surprises, will find increasing pressure to do so, or risk losing exhibitors who leave the show or downsize their presence.

Figure 2. That’s an expensive hand on that crate.
Busyness
Judging by the difficulties we experienced actually reaching exhibitors by phone, as well as by comments from exhibitors themselves, they are a busy lot pressed for time. Of course, this varied somewhat from exhibitor to exhibitor, but even exhibitors with only a few shows to worry about have full professional lives, and a show is only one component of many duties. At the extreme end among exhibitors we spoke to was one who was handling eight different shows within a single month.

Whether the exhibitors handling multiple shows were doing so concurrently, in quick succession, or spread out over the course of a year, it is important for show organizers to keep in mind that exhibitors have to keep track of a lot of things for a lot of different efforts. We found, however, that this does not appear to be a concern of show organizers or most service providers. Most procedures and requirements for a particular show tend to be unique for that show, so exhibitors are forced to learn and pay attention to what is unique about each show.

The exhibitors who felt like they had a handle on things were those who were exceptionally organized and detail oriented. They spent time making elaborately detailed calendars with key milestones and tasks for each show. But even they struggled with the lack of consistency from show to show.

Figure 3. Preparing for a single show requires attention from an exhibitor at many points throughout a year. Exhibitors who deal with multiple shows might juggle many different disjointed tasks concurrently, as represented by this “April slice” of an exhibitor’s life, full of separate tasks for different shows.
**Figure 4.** This is a view of the life of an exhibitor that organizers never see or consider. Exhibitors who handle multiple shows have an extraordinarily complex life in which they have to pay attention to the unique requirements and deadlines of each show and each task over time. Only those exhibitors who are detail oriented and adept at managing schedules have any hope of successfully avoiding disaster. Exhibitors do not believe show organizers and general contractors have respect for their time and that they devote no effort toward removing burdens and unnecessary details that contribute to the noise.
Confusion
Not all exhibitors were upset, but most of them were confused about something.

For some it was the exhibitor service manuals (ESMs) that they received prior to the show. These manuals are a combination of helpful information, useless information, and required information. Exhibitors expressed consternation with them because they required time-intensive effort on the part of the exhibitor to sort out what was important and what wasn’t. One exhibitor said, “Ninety percent of it should be thrown away, but you don’t know which is the ninety percent.”

After exhibitors have registered and ordered services, and they are lined up for the show, it is common for them to receive e-mail from the show organizer or the general contractor with updates about the show or changes to requirements and processes. Rather than being helpful, such messages added to confusion for exhibitors who now had to parse the information in the message to figure out what did and did not apply to them.

Confusion was compounded when multiple people were involved in a single exhibition “transaction,” such as when the person who ordered services was not the same person on the show site. Our researchers observed long and troublesome error correction on the part of the person on the show site because neither they, the service providers, nor the show organizer had access to accurate information about what the person who ordered services had done.

Confusion of any kind increases inefficiency and decreases satisfaction, resulting in a costly risk area for show organizers.

NARROW FINDINGS
Narrow findings are those clearly focused on a well-defined aspect of exhibiting at a show. This doesn’t mean they weren’t common. In fact, some of these concerns were shared by almost every exhibitor we spoke with.

Lodging
Next to costs, lodging was the most frequently and immediately voiced concern expressed by exhibitors. Perhaps it was fresh in their minds because the timing of our research coincided with the phase of show preparation in which exhibitors had dealt recently with lodging, either by arranging for lodging or dealing with the aftermath after arriving on-site for setup.

The specific problems exhibitors had with lodging included the following:

- The “stampede” that resulted when rooms became available to all exhibitors at a specific date and time. This resulted in system slowness or crashes, or the depletion of all available rooms within just a few minutes after being open for reservations.

- Lack of flexibility when making changes later. Because lodging had to be reserved well in advance of the show, it’s not uncommon for an exhibitor who might have multiple
people at the show need to make changes to the lodging setup because of things such as staff additions or departures in the interval. Exhibitors said it was very difficult, if not impossible, to make such changes after the initial reservations had been made.

- Proprietary reservation-system interfaces that were not perceived to be as user-friendly as familiar travel interfaces people had used to book personal trips and lodging.

- “Crazy” rules that tied lodging options to other aspects of exhibiting not technically directly related to lodging at all, such as sponsorship or booth size or accumulated points, caused frustration and confusion. Exhibitors found it a hassle to have to deal with so many barriers to getting a room or blocks of rooms that they wouldn’t have if they were to make similar reservations outside of the realm of the show.

- Changes to a plan, especially if they were surprising and last-minute, cast a negative pall over the whole experience for some exhibitors. We spoke to one exhibitor who would otherwise have been pleased with their experience had they not had to end up sleeping on a cot in a conference room, despite having had confirmed reservations in a hotel.

Points
The complexity of unique requirements and lack of consistency from show to show manifests itself not only in forms, but also in quasi-systems such as the “point system” in which exhibitors are awarded points based on their booth size, how much they spend on sponsorship, how well they follow rules, and so on.

Exhibitors find points puzzling and bothersome. When we asked if they knew how many points they had, every exhibitor said they had no idea, nor how they stacked up against other exhibitors.

They do not know how many points they have, they’re not entirely sure how they’re awarded or calculated, and every show does it a little differently. So the whole concept of points adds up to another burden and obstacle for exhibitors, a game that alienates them rather than rewards them or encourages efficiency.

Forms
Exhibitor Service Manuals (ESMs) come stuffed with material, including large numbers of forms devoted to ordering individual show services (e.g., electricity, Internet, carpet cleaning) and other options (e.g., lists of attendee contact information). Considering forms collectively and individually, they seem set up for disaster. For example:

- It is typical for the provider of each service to provide their own form. This means that exhibitors have to interpret multiple designs and requirements so that they do not skip a critical detail that might result in an added cost. They also have to mindlessly complete redundant information, such as billing information or their booth number.

- Deadlines for ordering services, or for ordering at a discount, differ by vendor. Exhibitors have to find these deadlines and then keep track of them.
• Some forms are required, some are not, and it is not always clear which is which. Completing some forms triggers a requirement to complete other forms, and that is not always clear. It’s surprisingly easy to submit an incorrect or incomplete order.

• When depending solely on information included on the form to determine what they need when ordering complex services, exhibitors sometimes do not have enough guidance to make the decision most appropriate for them.

Ordering services online should present a solution to some of these problems, but great strides in the rapid evolution of e-commerce have not made their way to the world of ordering show services. Online forms are still rudimentary, or services are just as siloed as they are on paper forms, or they fall far short of the interaction standards that people have come to expect from their transactions on familiar commercial web sites.

Show organizers should keep pressure on providers of online services to improve the process of ordering services and achieve usability parity with other e-commerce sites.

Crates and Shipping
Next to lodging, one of the more frustrating problems for exhibitors once they arrive at the show site involves managing the arrival of their crate, whether during setup or tear down. In addition to believing there is no rational reason in the world for drayage charges to be as high as they are, exhibitors said the following:

• It is nearly impossible for them to control the timing of their crate arrival. Exhibitors trying to manage costs by using labor efficiently get stuck paying to have labor present but “sitting on their hands” while everyone waits for crates to arrive. Particularly for larger exhibitors, the order of arrival can be important if some crates cannot be unpacked before crates that contain materials needed first in the setup sequence.

• Despite sometimes complex and detailed labeling schemes, including barcodes, exhibitors sometimes have no idea where a crate is located. For the most part, tracking is low-tech or nonexistent, which means that it is easy for crates to disappear or be misdelivered. The chaotic atmosphere of larger shows can lead to crates of one exhibitor getting mixed up with crates of another exhibitor. Our researchers witnessed situations in which crates that were tracked, signed for, and accounted for disappeared. We spoke with one exhibitor—one of the largest and biggest sponsors of the show—as she was driven around on the show floor on the back of a cart so that she could look for a wayward crate.

• A lost crate might seem like a minor detail for a huge show. In fact, a floor manager from one of the most respected contracting firms in the country told us that, with the volume of crates at a big show, it is “natural for a small percentage of them to go missing.” That cavalier, rather than can-do, attitude maddens exhibitors, for whom every crate they have sent to the site is vital and valuable. A lost crate can be devastating for an exhibitor, particularly for those like the ones who told us that they had “staked everything” on a particular show. With technology-centered shows, crates that contain
Figure 5. Precious cargo made vulnerable out on the loading dock. Look closely at the stack of boxes toward the left and you’ll see one that is easy pickings, loose atop its wrapped companions.

Figure 6. An important exhibitor with one of the largest booths at this show gets carted around in a hunt for a missing crate.
high-tech and high-value items can be tempting targets for theft. We heard anecdotes from exhibitors about specific instances in which crates containing things such as plasma televisions went missing. By the count of one exhibitor, they experienced theft at about half of the shows at which they exhibited. Our researchers took photos of crates and other boxes left sitting out on loading docks and, in one case, materials that had been bundled together with plastic wrap now separated and vulnerable.

- Care and storage of filled or empty crates varies by venue and contractor, but thoughtlessness can add up to big problems for exhibitors. Exhibitors described instances that included crates being stored uncovered outside during rainy weather and having crates and other materials ruined.

Exhibitors have no choice but to put their assets in the hands of contractors, shippers, and laborers. When it does not go well, or exhibitors experience a loss (or multiple losses), they begin rethinking how much it is costing them in direct loss or increased risk to participate in the show. Organizers who cannot guarantee a similar level of service that people come to expect when using commercial shipping services such as FedEx and UPS will sooner or later find exhibitors voting with their wallets not to return.

**Labor**

Our researchers witnessed some remarkable feats of skill on the part of labor, particularly talent in the forklift ballet during setup. But exhibitors traditionally have an adversarial relationship with labor. A lot of their money passes through the hands of labor, and they do not think the service they receive in return matches the costs they’ve been charged.

Exhibitors see this as something almost completely out of their control. In their experience, labor quality and attitudes vary from city to city. They might rarely experience problems in one city, but always experience problems in another city. What kinds of problems? In addition to costs, mentioned previously, exhibitors mentioned the following:

- **Retribution:** Exhibitors who violate either the published or the unofficial rules of dealing with labor report having materials disappear, or forklift blades pushed through crates, or deliberately slow service.

- **Bribes:** Not just limited to border crossings in lawless nations, bribery exists on the show floor in some cities according to a few exhibitors who felt that they put their booth at risk if they didn’t pass around a few twenties, or slip the foreman a hundred bucks.

- **Attitude:** Exhibitors voiced displeasure at having to tiptoe around testy workers who had no interest in interacting with exhibitors civilly.

- **Timing:** Adhering to strict work-rule schedules meant that exhibitors trying to make up for time lost to delays in getting freight delivered or services installed experienced additional delays because labor was not available to work outside of prescribed hours.
• **Expertise:** Although highly skilled laborers are available on every show floor, temporary workers abound, particularly with drayage. Exhibitors felt that temporary labor had little motivation and also presented an additional security risk.

Our researchers saw evidence that problems with labor had reached a serious enough point that organizers, general contractors, and venues were making a point of addressing them, rather than risk a blowup or lost business.

**Services**

In addition to problems with labor and costs, exhibitors experienced problems with services they had ordered. Examples include the following:

- **Timing:** Exhibitors needed installation of specific services completed in stages or by specific times because subsequent setup or installation of other services depended on it. Most exhibitors said that they had experienced delays in getting services installed that caused a chain reaction of further delays and additional costs.

- **Status:** Exhibitors had no indication as to when a service they had ordered might be installed, or how they were faring in comparison to all other exhibitors. “Am I the last one to get Internet installed, or is everyone having this problem?” We observed that this lack of visibility lead to long and unpleasant encounters with show personnel and immense frustration on the part of exhibitors.

*Figure 7.* This exhibitor spent more than an hour getting bounced around as he looked for anyone who could help him with a service that he was sure he had ordered but was missing from his booth.
• **Attribution errors:** The relationships and responsibilities of the show organizer, the general contractor, and the labor and service providers all blended together for exhibitors. Exhibitors often did not know whom to blame or whom to turn to for help in resolving a problem.

**Position**

Exhibitors expressed concern about their position or placement on the show floor. Except for last-minute exhibitors, this is something that usually gets worked out well in advance of the show—sometimes a year in advance—so one would think there would be few surprises. In addition to standard concerns about traffic and proximity to competitors and annoying neighbors (e.g., loud sound systems or piercingly bright lights), specific problems included the following:

- **Awareness:** Most show floors include a “you are here” map that matches an alphabetical listing of exhibitors to booth numbers. We found that attendees were not always able to locate an exhibitor by name either because of disorientation on a large show floor or because of a merger or acquisition in which a once familiar name had become a subsidiary of a larger company. A related problem occurred when an attendee looked for a product of a particular type and could not tell which exhibitor(s) handled that type of product, or they were looking for a product with a specific brand name that had no correlation to the name of the company that made it or the exhibitor(s) on the floor that carried it.

- **Emphasis:** Most exhibitors would argue that they had something new to show. Smaller exhibitors, in particular, claimed that they had developed something innovative, but that the traditional way of planning the floor layout or awarding positions favored older products or technology. By being relegated to the outer perimeter of the show, or similarly unfavorable positions, they felt that attendees were losing out on encountering them, and show organizers were losing an opportunity to draw in more attendees by attracting them with clearly new things, rather than things they expect to see.

**See (and Hear) for Yourself**

Sample audio and video excerpts from our conversations with exhibitors:

http://www.maya.com/invisible/

**Information Handling**

The trade show industry seems to be more than a step behind other businesses in implementing technology that is commonly expected for information access and sharing.

To be sure, changes have taken place and more is happening online, but as mentioned previously with ordering show services, exhibitors feel like the burden for inefficiencies and deficiencies has been placed on them. For example, exhibitors must keep track of multiple user names and passwords, sometimes for a single show. They might have been promised “online forms” only to discover that PDFs of paper forms have been posted online and the exhibitor still has to print them out to submit them.
We found that most exhibitors saved copies of forms and other information from prior years to serve as templates. However, they can rarely or without difficulty use information from prior years in a way that prevents them from having to write, type, and enter the same or similar information all over again for their next show.

**Predator vs. Partner**

The overall experience for exhibitors gives them the sense that organizers take advantage of them rather than treat them as a business partner. Exhibitors feel the weight of costs and inefficiencies shifted to them, and receive little value or attention in return for the sums they have paid.

When they seek help from the larger general contracting companies, they “never speak to the same person twice” in the words of one exhibitor, and do not get the sense that anyone understands their needs or cares about them.

Even when show organizers have provided feedback opportunities such as focus groups and surveys, exhibitors say they do not see any response or change.
Recommendations

Exhibitors who expressed the most satisfaction were those who had dealt with a general contractor that:

- Provided a single point of contact at the show site and when ordering show services.
- Visited them personally on the show floor to see how things were going.
- Tracked what they had done from year to year.
- Made it easy to get help and retrieve information.
- Gave them advice on how to save money and optimize their activities.
- Flipped the tables so that service providers are rewarded for achieving efficiencies rather than perpetuating inefficiencies.

In addition to working with a general contractor who can guarantee that kind of service, organizers should do everything possible to:

- Understand exhibitor needs in the context of their entire professional life.
- Treat exhibitors as business partners whose success is tied to their own.
- Remove the information-tracking burden from exhibitors.
- Reduce the number of times exhibitors have to re-enter data.
- Eliminate unique or confusing requirements and systems (e.g., points).
- Model best practices from other industries and domains (e.g., e-commerce), especially when they set performance and transaction standards that exhibitors expect.
- Communicate precisely and appropriately.
- Aim for transparency in terms of ordering, costs, billing, and status.
- Consider everything they do with exhibitors in light of whether or not it is “human-centered,” rather than system-centered or process-centered.