

# CTSM Candidate Portfolio

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February 16, 2018

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# VITAL STATISTICS

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## Candidate Profile

When I reflect back on the path I've taken to get me to where I am today, I can't say that it really makes a lot of sense. I always had a messy room. I was a frequent procrastinator when it came to homework. I didn't particularly enjoy large events with lots of people. But on the flip side of that, I always knew where everything was in that messy room. I would give that assignment the best quality effort to get that "A" even though I'd wait until the last minute to get it done. I participated in school plays and acting competitions even though I didn't always enjoy being in front of lots of people. So you wouldn't expect that someone like me would love having a career that relies heavily on organization and planning skills to coordinate events for large crowds of people. But the truth is, I really do love it.

I wasn't one of those kids who always knew what they wanted to be when they grew up. But what I did know is I wanted to have a career that would allow me the opportunity to use my creative skills. I did have an interest in graphic design, as one of my high school jobs was as a graphic artist for a local newspaper. I designed the layout and ads for the weekly paper and really enjoyed it. So after high school I attended Kansas State University and graduated in 2005 with a Bachelor of Arts degree in mass communications with an emphasis in advertising and a minor in Spanish.

My journey on the path to become a tradeshow marketer began in 2011 when I took a major accounts and international accounts management role for a company that produced and sold kids meal accessories in the food service industry. One of my responsibilities in that job was to coordinate our annual participation in the National Restaurant Association (NRA) tradeshow. I was part of a small team that planned and coordinated our participation, and I was primarily in charge of logistical details like registration, travel accommodations and pre-show marketing. But I also attended the show to help with set up and dismantle, as well as actually working the show floor. I eventually realized that I really looked forward to planning and executing the NRA show each year and wondered if any jobs existed where that was the sole focus of the job – to coordinate tradeshows. So curiosity got the better of me and I set out to the internet to

look for such a thing. And luckily enough, there was a job opening right in my city that was looking for a tradeshow coordinator. I was fortunate enough to land the job and that is where I am currently employed, as a tradeshow and events coordinator in the marketing team at Bartlett & West.

My job responsibilities have grown and evolved during my nearly four years with the company, and there have been many changes to the tradeshow program, which I will go into more detail later in this portfolio. I was hired to handle all aspects of our tradeshow efforts throughout the company and I'm responsible for planning, executing and analyzing results of our participation at the more than 20 trade shows we exhibit at each year. In addition to that, I also help with other marketing duties on our team. I handle many of the graphic design requests that come through to our department, I coordinate company client events, and I help with conference presentation coaching and development. Bartlett & West went through a completely new rebranding effort in early 2016, so I'm still working on collateral and other tasks as a result of the rebrand. I do rely on help from my marketing teammates to accomplish all of these tasks that I handle, but ultimately the success of the tradeshow program is dependent on my management and coordination skills.

I am currently one of seven people within our company's marketing division. At the time of writing this portfolio, we experienced a change in marketing director who oversees our entire team. But during the execution of the conference that I'm focusing on for this portfolio, we had a marketing director, two managers, one research analyst, and four coordinators. I report directly to one of the managers, but I work closely with both of the managers when it comes to tradeshow planning. Each manager is responsible for multiple markets within the company, and I work with them to make sure our tradeshow efforts align with the overall plans for each market. The director would mainly provide input on larger initiatives and would not get involved in the day-to-day details of my job. The director would also meet with our company CEO to brief him on some of the major projects that our team was working on. Outside of the marketing team, I interact with a variety of people within the company, generally engineers or business development people for each specific market sector. For example, I interact with specific people within the rail group for their conferences and a different group of people for our regional water shows, etc.

## Company Profile

Founded in 1951 by Charlie West and Harry (Bus) Bartlett, Bartlett & West was a small but entrepreneurial firm whose success was tied to land development projects. The company worked on a portion of the Kansas Turnpike and were pioneers in rural water - designing the first rural water district in Kansas in 1956. Our firm has grown steadily from a small two-person partnership into the current multi-disciplinary engineering firm of more than 350 employees in 14 offices throughout the U.S. with our corporate headquarters located in Topeka, Kansas. Our company is 100% employee-owned with a rich mix of professional, technical, administrative, and support staff who provides professional services to governmental agencies, municipalities, private industry, and individual clients.

In addition to our corporate and regional offices in Kansas, we also have office locations in the following states: Montana, North Dakota, Oklahoma, South Dakota, Texas, Illinois, Iowa, and Missouri.

We primarily focus on the following markets: regional water, energy (oil and gas), tribal communities, state departments of transportation, local government, rail, and industrial. Within each of those markets, we offer our expertise in these core services: construction, design/build, geographic information systems (GIS) and technology, landscape architecture, mechanical/electrical/plumbing (MEP), planning/civil/site, right-of-way, structural, survey, water and wastewater treatment and design. Please reference pages 34-35 of the appendix to view our firm profile for a more in-depth overview of our services within each of these markets.

Regarding our competition and market share, it is difficult to pinpoint because we offer so many services in various markets, so really any engineering firm can be our competition. We also run into the situation where our competitors can also be our partner on a project if we team up with them as a subcontractor. I am unable to provide specific market share information comparing our performance to our competitors as we do not record that type of information. Our company has a research analyst who works together with our market leaders to research market trends as a whole, and they use that information to create action plans, both for the near term and long term.

So for the purpose of this portfolio, I will focus on a few competitors as identified during a third-party analysis of our brand assessment prior to the launch of our new website and brand. This analysis looked at how we stacked up against our competitors in terms of messaging, digital performance, and user experience. The analysis took into consideration the visuals, messaging, digital experience, and search equity of each firm's website. The competitors listed in this analysis included Burns & McDonnell, HDR, TranSystems, Venture, GBA, and JLL.

The results of this analysis showed we were lacking in search equity, meaning that we did not have a strong presence online for people searching for our services. One of the recommendations to come out of this analysis was to increase our thought leadership as a company, and that meant creating more relevant content to share on our site and to have other sites link to that information to build credibility. Presenting ourselves as thought leaders in the industry is an overarching theme that has carried over into all aspects of our marketing activities, including our tradeshow efforts.

Excerpts containing specific details from this third-party analysis can be viewed in the appendix on page 36.

## Project Photos

Below are a few photos from projects throughout our various market sectors.



# OVERVIEW/SHOW SCHEDULE

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Bartlett & West exhibits at anywhere from 25-30 shows each year throughout all of our market sectors. I am responsible for the entire tradeshow program company-wide, so I handle a variety of shows within any given market. In addition to the planning and execution of our exhibit presence, I also coordinate client events and speaking opportunities. I research each show to determine if there is a possibility to present, and if so, I reach out the appropriate people within our company to notify them of the opportunity so they can decide whether or not to submit an abstract. If they are selected to present, I will offer to help with coaching and design assistance. We place high value on presentations as it positions our company as a thought leader in the industry and it allows us to promote our presence in our pre-show marketing campaigns. If we decide to do a client event in conjunction with the conference we are attending, I also handle the planning and execution of the event. This includes research and contracting of venues and caterers, creating invitations and RSVP management, sourcing custom giveaways and occasionally attending and working the event.

## Major Changes to Program

Prior to my hire, Bartlett & West did not have a dedicated tradeshow coordinator. The person that handled the tradeshows was also in charge of proposal writing and other marketing tasks that would take up a significant amount of her time. Bartlett & West was looking for someone to focus on our tradeshow efforts as we invest a lot of time and money into our tradeshow participation and wanted to know if we were getting any return on our investment. I essentially had the opportunity to build our tradeshow program from the ground up, as there were no standard processes in place when I came on board. Our tradeshow program is still a work in progress, but I've made some significant changes since I was hired using many of the lessons I've learned during my studies in the CTSM program. The three main areas of change I would like to highlight are establishing goals/objectives, our exhibit displays, and our planning and tracking processes.

## Establishing Goals and Objectives

The first thing I did when I was hired was set up needs assessment meetings with 24 key stakeholders within the company. I have included a copy of the needs assessment questionnaire on page 37 of the appendix, but the overall goal from these meetings was to understand our current state and get feedback on things the stakeholders wanted to see changed within the tradeshow program. The most surprising result I found from these meetings was that very few people set goals or objectives prior to exhibiting at the conference (see appendix pages 38-44 for assessments results). In **Session 21315 - Beyond the Basics of Booth Selling**, I learned that it is important to have an understanding of why our company exhibits at a show and to create customer-centric objectives that drives our interactions with attendees. As a result, during each of our tradeshow pre-planning meetings, I always make a note to bring up the discussion of goals and objectives tied to the show we are attending. My purpose of doing this is to get our staff out of the mindset that we just have to be there because we're expected to be there. I ask follow up questions to understand why this is and what the potential consequences would be if we don't participate. I've found that usually leads to some more thoughtful answers from the staff that we could then use as a basis for establishing actual goals tied to the show.

## Exhibit Displays

I have also made significant changes to our exhibit displays. When I was hired, the only displays that were available were pull-up floor banner stands. There were multiple banners for each location and for each market focus. Some of the feedback from the needs assessments were that these banners were not showcasing our company to the best of our abilities. Specifically in the rail sector, they thought the banners were a hindrance as they looked inexpensive compared to other booths that were at the large national shows they attended. I was able to get approval to add to the marketing budget to purchase a modular 10' x 20' exhibit to use at our larger shows, and that structure also converts down to a 10' x 10' size to use at shows where we only purchase a single size booth space. Our displays have gone through a couple of design changes since they were first purchased. The first version of the modular booth used our old branding

and in late 2016 when the company went through a rebranding process, the graphics were updated to the new branding but used the existing hardware to save on costs. We also eliminated use of the floor banner stands and replaced them with a portable pop-up display using fabric graphics. This has been a successful change as we can use customized graphics to showcase our project photos that are specific to each market, as well as the convenience factor of having all display items available in the large rolling case that turns into a display counter. We still have a couple of generic company floor banners to use for limited local events, but we now have a variety of display options to choose from depending on the type of conference we attend: the modular booth for large national events; the portable pop-up display for regional events; and the banner stands for local community or charity events.

## **Planning and Tracking Processes**

Another major change that I've implemented is the planning and tracking tasks for our tradeshow efforts. Based on feedback from the needs assessments, there was a lack of preparation and no real means of results tracking. The extent of the tradeshow prep was to grab a few banners and giveaways, show up at the exhibit and call it a day when the show was over. Throughout my time here at Bartlett & West, I researched different methods of planning and tracking results. I would often run into barriers due to time, as my time would often be diverted to non-tradeshow related tasks, so some of the progress has taken more time than originally anticipated. Another challenge was finding the appropriate technology that would help us achieve our desired results, which was to track lead information gathered at the trade shows. After encountering some delays and dead ends, I've recently implemented a few changes to help with these processes.

One change is the use of the program "Smartsheet" to help me keep track of the many tasks that I handle for tradeshows and events. I was able to convert my Excel masterlist spreadsheet into this program, as well as creating new templates that I use for goals/objectives tracking and a marketing tactics schedule. This program allows me to collaborate with my team and even those outside the company to keep on top of tasks.

We also launched a pilot test of an application called “FatStax.” This app acts as a digital collateral library that you can customize and immediately send that information to prospects; it also has a forms function to capture lead information. The form function can work offline and integrates directly into our Hubspot CRM program. Both of those were huge selling points for use with our tradeshow program – the ability to work offline as connectivity at shows can be spotty at best and integration into our CRM to keep track of these touch points throughout the customer life cycle. The sales cycle for engineering services can take months or years, so the ability to track to see that a customer originated from a conversation at a tradeshow would definitely prove the return on investment for that particular show. Smartsheet, FatStax and Hubspot were first launched around the time of the tradeshow that I am focusing on for this portfolio, so I will provide more specific details on how I utilized these programs in upcoming sections.

Throughout this process, I have used what I've learned from **Session 324 - Drive Success through Sales, IT and Marketing Collaboration**. One of the key points from this course was that the customer is in control. We knew that the customer wanted customized information based on their needs and interests, and they wanted that information in a quick and easy format. So the fact that we are using CRM to track customer engagement and using an application to deliver timely, relevant information demonstrates this understanding of the customer being in control. The use of these technologies required collaboration between sales, marketing and IT. The sales team is the group who used these tools to interact with their customers, marketing is who provided the relevant content and graphics for the sales team, and IT is who helped provide assistance with the technical needs to launch these programs. I leveraged input from sales, marketing and IT throughout this testing phase of the different applications to ensure we were getting maximum value out of our investment.

## 2017 Bartlett & West Tradeshow Exhibit Schedule

Conference / Seminar	Booth Registered	Exhibiting	Presenting	Sponsor	Client Event	Start Date	End Date	Location	Exhibit Size
<b>■ Regional Water</b>									
KRWA Annual Meeting (Kansas Rural Water Association)	☒	☒	☒	☒	☒	03/28/17	03/30/17	Wichita, KS	10x30
MRWA - Annual Conference (Missouri Rural Water Association)	☒	☒	☒	☒	☒	02/28/17	03/01/17	Branson, MO	10x10
MRWA Office Professionals Seminar (Missouri Rural Water Association)	☒	☒	☒	☒	☒	10/24/17	10/25/17	Lake of the Ozarks, MO	10x10
MRWA - Fall Operations & Maintenance Conference (Missouri Rural Water Association)	☒	☒	☒	☒	☒	10/28/17	10/27/17	Lake of the Ozarks, MO	10x10
Montana Environmental Training Center Water School Vendor Show	☒	☒	☒	☒	☒	10/10/17		Bozeman, MT	10x10
North Dakota Rural Water Systems Association - Water Expo	☒	☒	☒	☒	☒	02/14/17	02/16/17	Fargo, ND	10x10
North Dakota Water Users Convention (Joint Water Convention)	☒	☒	☒	☒	☒	12/06/17	12/07/17	Bismarck, ND	10x10
Nebraska Rural Water Association	☒	☒	☒	☒	☒	03/13/17	03/15/17	Kearney, NE	10x10
New Mexico Rural Water Association	☒	☒	☒	☒	☒	04/03/17	04/05/17	Albuquerque, NM	10x10
Oklahoma Rural Water Conference - Annual Conference	☒	☒	☒	☒	☒	04/18/17	04/20/17	Norman, OK	10x10
Oklahoma Rural Water Conference - Fall	☒	☒	☒	☒	☒	08/30/17	09/01/17	Hulbert, OK	10x10
SDARWS - South Dakota Association of Rural Water Systems - Annual Technical Conference	☒	☒	☒	☒	☒	01/10/17	01/12/17	Pierre, SD	10x10
SDARWS - South Dakota Association of Rural Water Systems - Water Technology Expo	☒	☒	☒	☒	☒	04/26/17	04/27/17	Rapid City, SD	10x10
South Dakota Water and Wastewater Assn Annual Conference	☒	☒	☒	☒	☒	09/13/17	09/15/17	Sioux Falls, SD	10x10
The Bakken Conference & Expo	☒	☒	☒	☒	☒	07/17/17	07/19/17	Bismarck, ND	10x10
<b>■ Tribal</b>									
RES 2017 (Reservation Economic Summit)	☒	☒	☒	☒	☒	03/13/17	03/16/17	Las Vegas, NV	10x20
United Tribes: Leaders Summit & Tradeshow	☒	☒	☒	☒	☒	09/05/17	09/07/17	Bismarck, ND	10x10
<b>■ Transportation</b>									
TEAM Conference (Transportation Engineers Association of Missouri)	☒	☒	☒	☒	☒	03/22/17	03/24/17	St. Louis, MO	10x10
MACTO - Missouri Association of County Transportation Officials	☒	☒	☒	☒	☒	10/17/17	10/19/17	Columbia, MO	10x10
TxDOT Short Course - Fajita Fiesta (Texas Dept of Transportation)	☒	☒	☒	☒	☒	10/09/17		College Station, TX	10x10
<b>■ Municipal</b>									
APWA MidAm Expo (American Public Works Association)	☒	☒	☒	☒	☒	05/24/17	05/26/17	Overland Park, KS	10x10
North Dakota Recreation & Park Association	☒	☒	☒	☒	☒	09/12/17	09/14/17	Bismarck, ND	10x10
North Dakota Water & Pollution Control Conference	☒	☒	☒	☒	☒	10/17/17	10/19/17	Bismarck, ND	10x10
South Dakota Municipal League	☒	☒	☒	☒	☒	10/03/17	10/06/17	Rapid City, SD	10x10
<b>■ Rail</b>									
NRC - REMSA Exhibition (National Railroad Construction - Railway Engineering Maintenance Suppliers Association)	☒	☒	☒	☒	☒	01/08/17	01/11/17	Coronado, CA	10x20
ASLRRA 2017 Connections - Annual Convention (American Short Line & Regional Railroad Association)	☒	☒	☒	☒	☒	04/22/17	04/25/17	Gaylord National Harbor, MD	10x20
Railway Interchange	☒	☒	☒	☒	☒	09/17/17	09/19/17	Indianapolis, IN	10x20
<b>■ Industrial</b>									
Kan-Struct Exhibition	☒	☒	☒	☒	☒	02/02/17	02/02/17	Wichita, KS	10x10
SIOR - Society of Industrial & Office Realtors - Development Day	☒	☒	☒	☒	☒	09/21/17		Kansas City, MO	10x10



## Special Circumstances

It is important to note that one of the objectives for the show I am focusing on involves a special technology product that is co-owned by Bartlett & West and another company named RJ Corman. A new LLC was formed specifically for the purpose of promoting this technology to the rail sector, and the company is named BW&Corman Technologies. The product, CIM Car powered by IRIS, is best described in two parts. CIM Car refers to the container that is attached to a train, usually taking the rear caboose place on the train. IRIS is the technology housed inside the CIM Car that powers the real-time scanning abilities and data processing. It was decided that when we promoted this technology at the Railway Interchange show, that we had to refer to this product as "CIM Car Powered by IRIS" under the BW&Corman Technologies branding. The decision was made outside of marketing to not dedicate a booth solely for this purpose, but rather for both Bartlett & West and RJ Corman to promote this product within our individual company booths at this show. The rationale was that people were familiar with both companies but BW&Corman was a new endeavor and they wanted people to understand that both companies were collaborating together for this project, and that it wasn't an overall merger of the two companies.

# INTRODUCTION TO SHOW OF FOCUS & MEASURABLE OBJECTIVES

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## Introduction to Show of Focus

This portfolio will focus on the Railway Interchange show, which was held September 17-20, 2017 at the Indianapolis Convention Center in Indianapolis, IN.

This show was chosen because it was the premier rail show occurring this year, as it was a combination of technical and educational conferences from the following organizations: American Railway Engineering and Maintenance-of-Way Association (AREMA) and Coordinated Mechanical Associations (CMA) with the exhibits of the Railway Supply Institute (RSI), Railway Engineering-Maintenance Suppliers Association (REMSA) and Railway Systems Suppliers, Inc. (RSSI). This Railway Interchange conference is held every other year in odd years; whereas in even years each of these organizations hosts their own conference. The AREMA conference is always the must-attend show for us, so since they were not having their own show in 2017 we attended and exhibited at the Railway Interchange show.

According to the show website ([www.railwayinterchange.org](http://www.railwayinterchange.org)), the total registered attendees for the 2017 show was 8,150 and the total number of exhibits was 738. Their website also notes that "among those in attendance are representatives from North American and international Class 1 Railroads, Short Line Railroads, and mining concerns – a full 38.8% of which held the title of CEO, Executive, VP, or Manager. Purchasing professionals, specifying engineers, railroad employees, and other railroad influencers (e.g. other railroad staff, government regulators, representatives from municipalities, members of the trade press, university students) comprise the other portion of attendees, making Railway Interchange a focused, vibrant, engaged, and information-driven audience." (<http://railwayinterchange.org/about-ri/>)

Our target audience changes depending on the message or service we are trying to

highlight, so due to the fact that this show was a combination of different organizations with a wide range of attendees, it made sense for us to be exposed to the large audience that this conference attracted.

## Show Preparations

Preparations for this show included multiple pre-show meetings, and I used what I learned from **Session 20415 - Don't Skip the Meetings; Pre-, At-, and Post-: Guideposts to Success** to make sure these meetings were productive. According to the course, some of the reasons why pre-show briefings fail is because they are unstructured, focus too much on logistics, and provide no orientation to the exhibit elements. So for these meetings I made sure to include an agenda of items that were focused on topics such as goals and objectives, as well as spending time on orientation to the FatStax program that we were piloting during this conference. I did go over some of the logistical aspects of the conference during the pre-show meetings but I kept that information concise and sent out the pertinent details again in an email in the days leading up to the show so that the staff could reference it as needed while at the show.

The show staff consisted of five rail sector personnel and three marketing representatives – the marketing director, marketing manager, and myself. In these initial meetings, we discussed the key messages we want to get across, what a successful show looked like, and what specifically marketing could do to achieve these objectives. We identified four main objectives for this show:

- Reinforce our program management positioning. We refer to this internally as the “Circle of Leadership” using the tagline “Forging new paths, together.”
- Promote CIM Car Powered by IRIS (BW&Corman Technologies branding)
- Position Bartlett & West as a thought leader
- Build relationships with clients

There was a hierarchy for these objectives, with the most important objective being to reinforce our program management positioning as that is what we wanted people to

associate with Bartlett & West's rail services sector, and it was identified as something our customers were interested in when looking at engineering firms to partner with. Promoting CIM Car was important but it was noted that it should not overshadow our main Bartlett & West objective. The remaining two objectives (thought leadership and building relationships) are common objectives throughout all of our tradeshow efforts and are core components to our brand. For each of these objectives, I identified tactics on how we could support this messaging and I set specific, measurable goals tied to those tactics as shown in the chart on the next page.

# 2017 Railway Interchange Objectives

Objectives	Tactics	Assessment Methods	Measurable Goals
Reinforce Program Management Positioning (Circle of Leadership) "Forging new paths, together."	Display Circle of Leadership slideshow on main monitor	Calculate estimated value based on gross & targeted impressions	Use results to create a benchmark for future tradeshows
	Email blast for conference attendee list	Send and track results through HubSpot	25% open rate, 3% click rate, 2 consultations scheduled
	Distribute printed collateral	Print a specific quantity and count remaining collateral post-show	Distribute 40 each firm profiles & rail sector profiles
	In-booth lead generation	Each booth rep to keep track of number of business cards collected	Scan 30 business cards
	Create a digital presence on B&W website	Track visitors through website analytics	10 landing page visitors
Promote CIM Car Powered by IRIS	Progressive Rail eNewsletter ad	Get open rates from advertiser	3% click rate
	Create in-booth display that complements our existing branding	Calculate estimated value based on gross & targeted impressions	Use results to create a benchmark for future tradeshows
	Distribute printed collateral	Print a specific quantity and count remaining collateral post-show	Distribute 10 of the CIM/IRIS handout
	Display CIM Car Powered by IRIS slideshow on secondary monitor	Calculate estimated value based on gross & targeted impressions	Use results to create a benchmark for future tradeshows
	Tie-in as featured video on "Forging New Paths" email blasts targeted to RSSI attendee list	Send and track results through HubSpot	3% click rate
Position Bartlett & West as a Thought Leader	Presentation by Jeff Jones w/KCS	Get attendance numbers from show organizer	30 people attend session
	Mention presentation in pre-show email blasts	Send and track results through HubSpot	25% open rate
	Leave-behinds at presentation	Print a specific quantity and count remaining collateral post-show	Distribute one per each attendee
	CTA on landing page for personal consultation	Track through landing page analytics	2 consultations scheduled
Build Relationships with Clients	Private dinners with select clients	Each rep to identify top two clients & take out to dinner or private meeting	5 rail reps @ 2 clients each = 10 clients total

# MANAGEMENT OF EXHIBIT DESIGN/PRODUCTION

As referenced earlier in the portfolio, Bartlett & West launched a rebrand in early 2016 and as part of that effort we purchased new graphics for our existing modular structure. So for this Railway Interchange show, we did not have a need nor the budget to re-do graphics for this specific show. However, one of our show objectives was to promote the CIM Car so we did need new graphics for this purpose. I did not go through an RFP process as I have a trusted relationship with my current exhibit house and wanted to keep my business with them. For the CIM Car display, we wanted something that would be visible but not overwhelming within our existing structure. Our modular in-line booth does have capacity for reconfiguration, so I discussed our options with my exhibit house to see what they recommended. We decided the best route to go was to purchase a new pull-up banner stand and rent a podium with custom graphics as this would accommodate a small monitor display. Our budget for this CIM Car display was only \$500 so I didn't want to purchase an expensive, permanent structure as we would likely only get one use out of this specific display.

## Graphics

When I designed and purchased new graphics for our booth as part of the re-brand, I referenced

**Session 61715 - Graphics Boot Camp.** Based on what I learned in this session, I placed our company logo big and high for easy visibility. I also incorporated our custom ampersand in our shade of bright green to help grab attention and to familiarize people with our new look. Bright green accents were used throughout the booth, such as the giveaways podium, and I used angled lines throughout the graphics. The angled lines are meant to reference the angle in the ampersand. We use these elements in all of our other branding materials,



CIM Car Powered by IRIS display

so our tradeshow booth needed to match the rest of our marketing collateral for brand consistency.

A challenge I encountered for this show that I noted in the special circumstances section of this portfolio was how to integrate the CIM Car into our Bartlett & West booth. CIM Car/IRIS is co-owned by Bartlett & West and RJ Corman, and is promoted under the BW&Corman branding. The same company that created our new Bartlett & West branding was also responsible for the BW&Corman branding, so they used a lot of the same elements in both brands – specifically the ampersand and the intersecting lines and angled graphic elements. So for the graphics for this display, I used the same angled graphics that are common between both brands but kept their own respective color profiles. So Bartlett & West graphics used the bright green and navy blue tones, while the BW&Corman display used the darker blue and red as their color accents. The idea behind this was to show cohesion between two connected but separate brands.

## Booth Setup/Technology

For this show, I incorporated more digital elements into our booth to help achieve a couple of our show objectives. For the program management objective, we utilized a 40" LED monitor with floor stand to display our looping slideshow to promote these services. For CIM Car, we used a smaller all-in-one computer monitor to display a video showcasing the CIM Car powered by IRIS. We used the larger monitor for program management as it was our main objective focus in the booth, so the CIM Car display used the smaller monitor as not to detract too much from the main monitor.

In addition to the monitor displays, we also piloted a new technology called FatStax. FatStax is an app for Apple or Android that can act as a digital collateral repository, and the app also has the capability for offline lead capture that integrates directly with our Hubspot CRM system.

So for this pilot I converted all of our existing printed collateral to a digital PDF format and built out some additional digital collateral to include in the app. The app was

used on an iPad and it acted as a digital catalog of information that was organized by specific category, and in this case, we set up the categories to support our program management offerings. We refer to these offerings inside our organization as the "Circle of Leadership." The categories included engineering, real estate, economic and industrial development, strategic leadership, field services, and data and technology (which is where we included information on the CIM Car powered by IRIS).

If an attendee had an interest in one or more of our rail program management offerings, we could easily select the appropriate collateral and create a "stack." This digital stack could then be sent immediately if connected to wifi, or if no connectivity was available, the stack would be sent as soon as the iPad was reconnected to wifi. In addition to the digital collateral capabilities, there was also a forms function that could collect lead information and send it directly to our Hubspot CRM system for processing.

At the time of the pilot, the CRM system was still being built out and not officially launched, but we were still able to track lead information entered and the information was shared with the appropriate sales person for follow up post show.

The booth was set up to have distinct focus areas for program management and CIM Car, and also enough open space to facilitate discussions with attendees. We did include one high-top table and two chairs for a conversation space. I selected a 10' x 20' space at the end of an aisle to have more of an open feel to the booth. I generally look for corner spaces for our in-line with the aisle to the right of our booth, as that tends to work best with our standard booth configuration.

The overall booth experience specifically tied back to our objectives as the graphics and technologies supported the objectives of reinforcing our program management positioning and promoting the CIM Car powered by IRIS.

## Budget

We do not track line item expenses for each show, so I have created a chart that lists our expenses for this show and how it compares to our overall show budget.

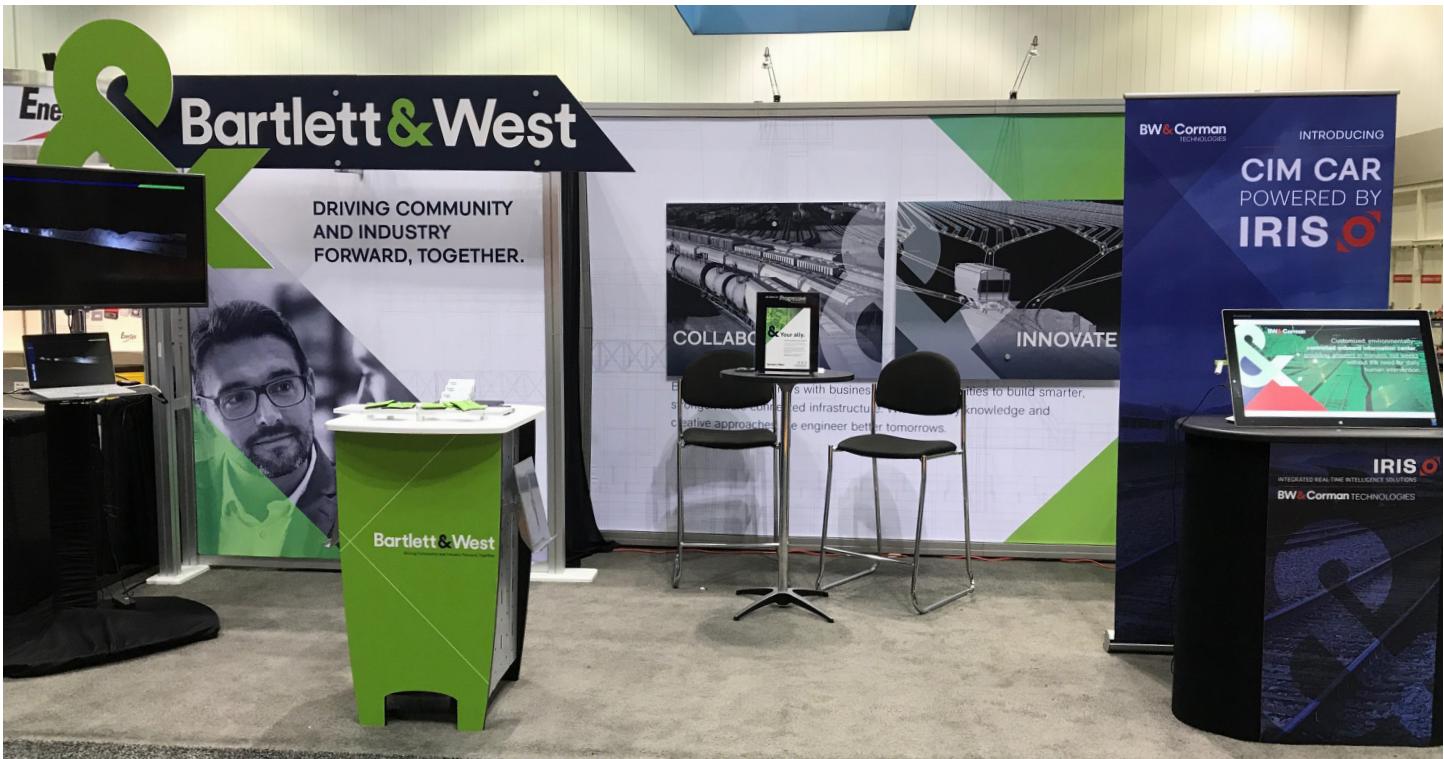
Item	Budget	Expenses	Variance
Booth registration	\$ 4,000.00		
Freight (round-trip)	\$ 1,764.00		
Exhibit house prep/inspection	\$ 360.00		
Installation & Dismantle	\$ 3,010.18		
Monitor Rental	\$ 795.70		
Carpet	\$ 350.00		
Electric	\$ 119.00		
Furniture	\$ 191.75		
CIM Car Display Items	\$ 500.00	\$ 545.15	\$ (45.15)
Material Handling		\$ 660.00	
General Services Contractor - Material Handling Refund		\$ (540.00)	
<b>Total</b>	<b>\$ 12,000.00</b>	<b>\$ 11,255.78</b>	<b>\$ 744.22</b>

I was able to negotiate a refund with the general services contractor as they misplaced our advance shipment crate which caused a delay in installation. This delay caused us to incur overtime charges from the third party installer, so I relayed my concerns to the general services contractor when they sent out their post-show survey and I asked them to contact me to discuss further. I spoke to one of their customer service representatives who was very helpful in rectifying the situation, which resulted in the refund to help us offset our additional costs.

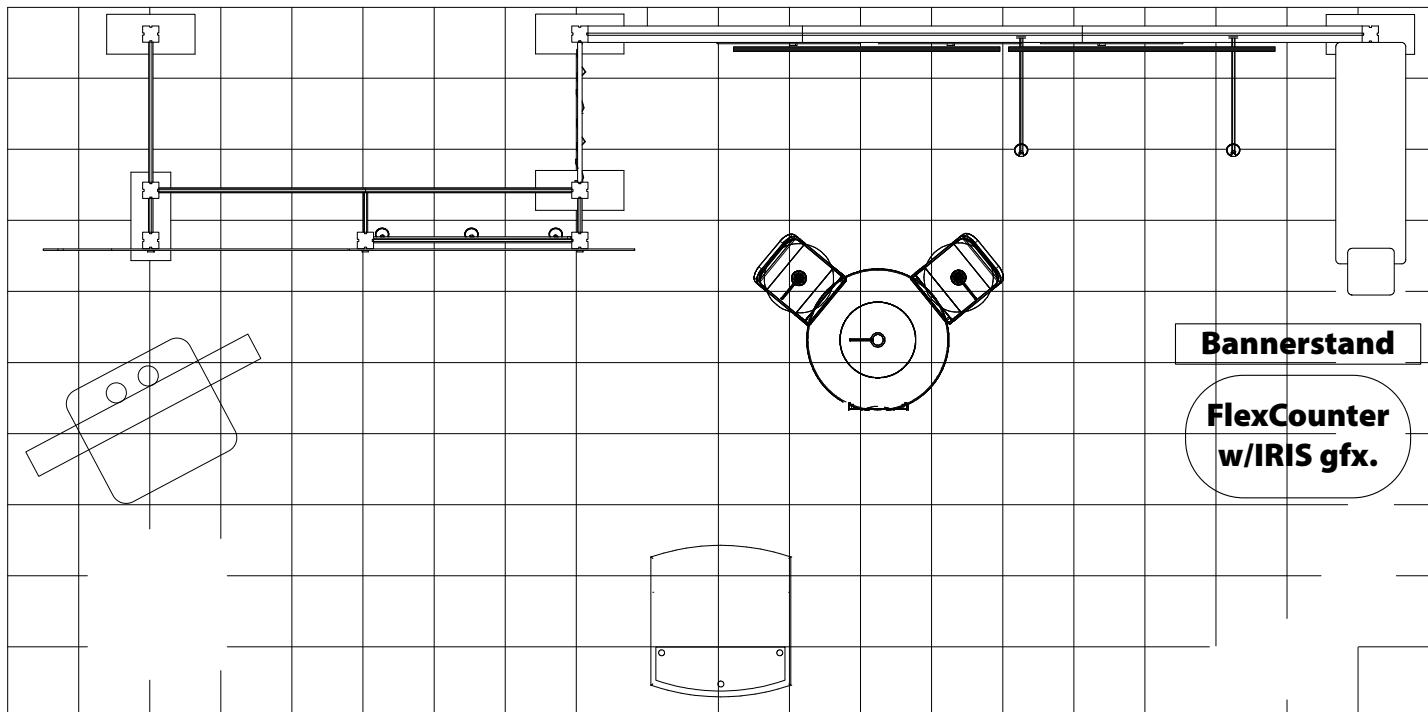
During this process, I was reminded of what I had learned in **Session 20915 Show Operations Basics - Part II: On-Site Implementation**, and that was to carefully audit the final show bill. I also used what I had learned from **Session 52115 - Negotiating Skills to Win** in my interaction with the general services contractor. The first three steps in the steps of principled negotiation are to separate the people from the problem, focus on the interest behind the positions, and invent options for mutual gain. The interaction I had was handled professionally by both myself and the contractor, and in the end I was satisfied with the result even though it didn't completely cover our overtime costs. I felt that their solution of refunding the total material handling costs for the crate shipment was fair as I couldn't attribute the entire overtime costs being as a result of the misplaced crate.

If I hadn't questioned the contractor on the situation that lead us to incur additional charges, then I likely would not have received the refund. This directly benefited the company as I was able to keep the show under budget and it demonstrated that I can manage show costs.

## Booth Pictures



Bartlett & West booth at Railway Interchange



Bartlett & West top view booth layout

# MANAGEMENT OF INTEGRATED MARKETING COMMUNICATIONS

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Referencing back to our overall objectives from Section 3, we had four main objectives:

- Reinforce our program management positioning. We refer to this internally as the “Circle of Leadership” using the tagline “Forging new paths, together.”
- Promote CIM Car Powered by IRIS (BW&Corman Technologies branding)
- Position Bartlett & West as a thought leader
- Build relationships with clients

Our measurable goals for these objectives were mainly dependent on our integrated marketing campaigns through the use of email, collateral, and digital marketing. The measurable goal for the building relationships objective was for the sales team to set up meetings or dinners with select clients, so we did not rely on marketing tactics for that objective.

I focused on each specific marketing tactic to define our audience and the specific messaging that we used to support our overall objectives, as learned in **Session 31515 - Integrated Marketing Communications**. We had different audiences that we would target depending on the message and marketing method. For example, to support the program management objective, we sent out an email to the Railway Interchange attendee list that would speak to our Circle of Leadership offerings. To promote the CIM Car powered by IRIS, we sent out a completely different email message to a different audience list that we had acquired from our business partner. The email that promoted our thought leadership objective went to a different audience list from a previous advertising campaign through a rail magazine (Railway Age), as that audience already demonstrated an interest in our white paper on a similar topic. So we had access to different mailing lists that we used to send targeted messages to support our overall objectives.

The tables on the following page show the marketing tactics used for three of the four show objectives.

Objective: Reinforce Program Management Positioning (Circle of Leadership) "Forging new paths, together."						
Method of Communication	Rationale	Target Audience	Measurable Goals	Assessment Methods	Results	Recommendations
Digital display: Circle of Leadership slideshow on main monitor	High in-booth visibility, easy to digest graphics/information	Railway Interchange attendees	Use results to create a benchmark for future tradeshows	Calculate estimated value based on gross & targeted impressions	Promotional value of \$4,384 based on gross & targeted impressions from exposure to our exhibit. This was estimated using the final attendee count of 8,150 and cost per impression figure from Progressive Railroading ad costs. Targeted impressions were estimated using Progressive Railroading's audit of qualified circulation data as it would be a similar audience to conference attendees.	The value is useful for future planning needs and to show that we can assign a dollar amount to impressions generated at tradeshows. Recommend to use this initial value as a benchmark for future shows.
Email: Forging New Paths Together	Cost-effective, reaches target audience	Railway Interchange attendees, in booth leads	25% open rate, 3% click rate, 2 consultations scheduled	Send and track results through HubSpot	Email 1: 22% open, 14% open, 0 consults Email 2: 16.4% open, 0% click, 0 consults	Continue to use email marketing, but develop a stronger call to action
Printed Collateral: Firm Profile & Rail Sector Profile	Takeaway information to have available post-show	Railway Interchange attendees	Distribute 40 each firm profiles & rail sector profiles	Print a specific quantity and count remaining collateral post-show	Did not use printed collateral, used FatStax pilot Total of 10 stacks w/generic content sent (out of 16 leads)	Received positive feedback for the digital collateral, continue to use this method
Social media post	Cost-effective, drive traffic to our booth to during the show and generate interest in meeting with our staff in attendance at the show	Facebook	10 likes, 2 shares	Track likes/shares one week following post	10 likes, 1 share	Keep using social media for future tradeshow marketing efforts
Website Landing Page & Form: Visit Our Booth/Schedule Consultation	Cost-effective, leverages inbound marketing capabilities	Website, linked into email campaigns	10 landing page visitors	Track visitors through website analytics	62 external visitors to landing page	Exceeded our goal, continue to use but re-think how to boost personal consultation numbers

Objective: Promote CIM Car Powered by IRIS						
Method of Communication	Rationale	Target Audience	Measurable Goals	Assessment Methods	Results	Recommendations
Advertising: Progressive Rail eNewsletter	Target audience, timing to generate interest prior to show	Progressive Rail subscribers, Railway Interchange issue	3% click rate	Get open rates from advertiser	Did not receive %, total number of 149 visits to our website	Good number of visits to our site, look for future ad tie-ins with upcoming conferences
In-booth display: Compliment our existing branding	Highlights new product without overshadowing primary positioning	Railway Interchange attendees	Use results to create a benchmark for future tradeshows	Calculate estimated value based on gross & targeted impressions	Promotional value of \$4,384 based on gross & targeted impressions from exposure to our exhibit.	Need to re-evaluate if we want to continue to promote CIM Car at future shows.
Printed Collateral: CIM Car Powered by IRIS	Focuses on the benefits of CIM/IRIS, takeaway information to have available post-show	Railway Interchange attendees	Distribute 10 of the CIM/IRIS handout	Print a specific quantity and count remaining collateral post-show	Did not use printed collateral, used FatStax pilot Total of 6 stacks w/CIM content sent (out of 16 leads)	Received positive feedback for the digital collateral, continue to use this method but re-evaluate promoting CIM Car
Digital display: CIM Car Powered by IRIS slideshow on secondary monitor	Focuses on the benefits of CIM/IRIS, high in-booth visibility	Railway Interchange attendees	Use results to create a benchmark for future tradeshows	Calculate estimated value based on gross & targeted impressions	Promotional value of \$4,384 based on gross & targeted impressions from exposure to our exhibit.	Recommend to use this initial value as a benchmark for future shows.
Email: CIM Car Powered by IRIS	Cost-effective, reaches target audience, introduces BW&Corman to audience who is already aware of B&W/RJ Corman	RJ Corman list - contacts categorized as "leads" or better	3% click rate	Send and track results through HubSpot	Email 1: 36% open, 6.85% open Email 2: 5.71% open, 0% click, 0 consults	Continue to use email marketing, but develop a stronger call to action

Objective: Position Bartlett & West as a Thought Leader						
Method of Communication	Rationale	Target Audience	Measurable Goals	Assessment Methods	Results	Recommendations
Email: Promote presentation	Cost-effective, can tie-in with other pre-show emails	Railway Age Webinar List	25% open rate	Send and track results through HubSpot	Email 1: 23% open, .6% click, 0 consults Email 2: 20% open, 2.67% click, 0 consults	Continue to use email marketing, but develop a stronger call to action
Printed Collateral: Leave-behinds at presentation	Reinforces our brand and positioning	Railway Interchange attendees	Distribute one per each attendee	Print a specific quantity and count remaining collateral post-show	Due to FatStax pilot, we did not provide printed collateral	Determine the need for specific collateral depending on the presentation topic
Social media post	Cost-effective, demonstrate thought leadership and drive people to our website to read the related white paper	Facebook	10 likes, 2 shares	Track likes/shares one week following post	18 likes, 0 shares	Keep using social media for future tradeshow marketing efforts
Website Landing Page & Form: Personal Consultation	Cost-effective, shows us as experts in the industry	Website, linked into email campaigns	2 consultations scheduled	Track through landing page analytics	0 consultations	Re-think how to boost personal consultation numbers

Below are visual examples of the emails that were sent out for each of the campaign objectives.

## Program Management Campaign

### Email #1



Dear Greetings,

Lasting partnerships and lasting impact—in the rail industry, which carved the footprint of the U.S., these things are expected. You have complex needs that require in-depth knowledge of your organization and processes. You also want innovative and safety-minded solutions that increase efficiency and keep an eye on cost to grow revenue.

**From field services to engineering, from real estate to technology-based services, Bartlett & West is committed to understanding all facets of the railroad industry and bringing you consistent, proactive and world-class solutions.**

Our experts will be at Railway Interchange in Indianapolis to listen to your needs and discuss how we can help you achieve the results you are looking for.

We look forward to seeing you there.

Doug Morrison  
Rail Market Leader



**Bartlett&West**

[Request your personal consultation](#)

Stop by our booth #1242 in the RSSI hall at Railway Interchange. We will be on site to talk to you and answer your questions.

[Schedule a Consultation](#)

### Email #2



Dear Greetings,

Interested in learning first-hand how a utility permitting and construction observation program can benefit your railroad?

Jeff Jones, P.E. at Bartlett & West, and Srikanth Honnur, P.E. at Kansas City Southern Railway, are sharing a presentation called "KCS Utility Permitting & Construction Observation – A Proven Process for Risk Mitigation & Safety" at Railway Interchange.

In this presentation at 2 p.m. on Tuesday, September 19 in the Track Functional Group Technical Sessions, they will share the following:

- The process and technologies KCS used for utility permitting and construction observation along its right-of-way
- Some of the field issues they encountered during the years
- Benefits of the KCS Utility Construction Observation process from the railroad's perspective

We look forward to seeing you there.

Doug Morrison  
Rail Market Leader



**Bartlett&West**

[Request your personal consultation](#)

Stop by our booth #1242 in the RSSI hall at Railway Interchange. We will be on site to talk to you and answer your questions.

[Schedule a Consultation](#)

### Email #3

Dear Greetings,

There is still time to set up a personal consultation.

**From field services to engineering, from real estate to technology-based services, Bartlett & West is committed to understanding all facets of the railroad industry and bringing you consistent, proactive and world-class solutions.**

Our experts will be at Railway Interchange in Indianapolis to listen to your needs and discuss how we can help you achieve the results you are looking for.

We look forward to seeing you there.

Doug Morrison  
Rail Market Leader



**Bartlett&West**

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Stop by our booth #1242 in the RSSI hall at Railway Interchange. We will be on site to talk to you and answer your questions.

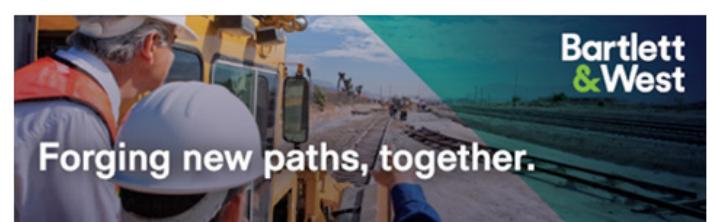
[Schedule a Consultation](#)

### Facebook Post



...

We're gearing up for Railway Interchange 2017 in Indianapolis. Our rail experts will be on hand to listen to your needs and discuss how we can help you achieve results. Be sure to stop by our booth, #1242. <https://hubs.ly/H08frfC0>



**Forging new paths, together.**

Like

Comment

Share

# CIM Car Powered by IRIS Campaign

## Email #1



Dear Greetings,

**With PTC regulations inching nearer and nearer, it's more important than ever to implement the latest technology. Let CIM Car powered by IRIS be your feet on the ground.**



The CIM Car powered by IRIS gives you the peace-of-mind you need. Real-time data ensures you are in better compliance with PTC mandates, which minimizes fines, increases safety and puts more money to your organization's bottom line.

Our experts will be at Railway Interchange in Indianapolis to listen to your needs and discuss how we can help you achieve the results you are looking for.

We look forward to seeing you there.

Doug Morrison  
Rail Market Leader



**BW&Corman**  
TECHNOLOGIES

[Request your personal consultation](#)

Stop by our booth #1242 in the RSSI hall at Railway Interchange. We will be on site to talk to you and answer your questions.

[Schedule a Consultation](#)

## Email #2



Dear Greetings,

Our experts will be at Railway Interchange in Indianapolis to listen to your needs and discuss how the CIM Car powered by IRIS is a proprietary PTC solution that can help you achieve the results you are looking for.

Request a personal consultation today.

[Schedule a Consultation](#)

We look forward to seeing you there.

Doug Morrison  
Rail Market Leader



**BW&Corman**  
TECHNOLOGIES

## Email #3

Dear Greetings,

There is still time to set up a personal consultation.

**Changes are coming down the tracks. Are you ready? Meeting ever-increasing regulations and maintaining world-class safety in your operations is no easy task, but the CIM Car powered by IRIS is here to help.**

Our experts will be at Railway Interchange in Indianapolis to listen to your needs and discuss how we can help you achieve the results you are looking for.

We look forward to seeing you there.

Doug Morrison  
Rail Market Leader



**BW&Corman**  
TECHNOLOGIES

[Request your personal consultation](#)

Stop by our booth #1242 in the RSSI hall at Railway Interchange. We will be on site to talk to you and answer your questions.

[Schedule a Consultation](#)

# Thought Leadership/Presentation Campaign

## Email #1



Dear Greetings,

Interested in learning first-hand how a utility permitting and construction observation program can benefit your railroad? Be sure to attend **Railway Interchange in Indianapolis**.

**Jeff Jones, P.E. at Bartlett & West, and Srikanth Honnur, P.E. at Kansas City Southern Railway, are sharing a presentation called "KCS Utility Permitting & Construction Observation – A Proven Process for Risk Mitigation & Safety."**

In this presentation at 2 p.m. on Tuesday, September 19 in the Track Functional Group Technical Sessions, they will share the following:

- The process and technologies KCS used for utility permitting and construction observation along its right-of-way
- Some of the field issues they encountered during the years
- Benefits of the KCS Utility Construction Observation process from the railroad's perspective

We look forward to seeing you there.

Doug Morrison  
Rail Market Leader



**Bartlett&West**

[Request your personal consultation](#)

Stop by our booth #1242 in the RSSI hall at Railway Interchange. We will be on site to talk to you and answer your questions.

[Schedule a Consultation](#)

## Email #2

Dear Greetings,

You learned about mitigating risk and increasing safety at utility crossings from Bartlett & West's [white paper](#) with Railway Age. Now you have the chance to hear about a railroad's utility construction observation program first hand.

Be sure to attend **Railway Interchange in Indianapolis**. Jeff Jones, P.E. at Bartlett & West, and Srikanth Honnur, P.E. at Kansas City Southern Railway, are sharing a presentation called "KCS Utility Permitting & Construction Observation – A Proven Process for Risk Mitigation & Safety."

In addition, to discuss how this program could be applied to your railroad, request a personal consultation at Railway Interchange.

[Schedule a Consultation](#)

We look forward to seeing you there.

Doug Morrison  
Rail Market Leader

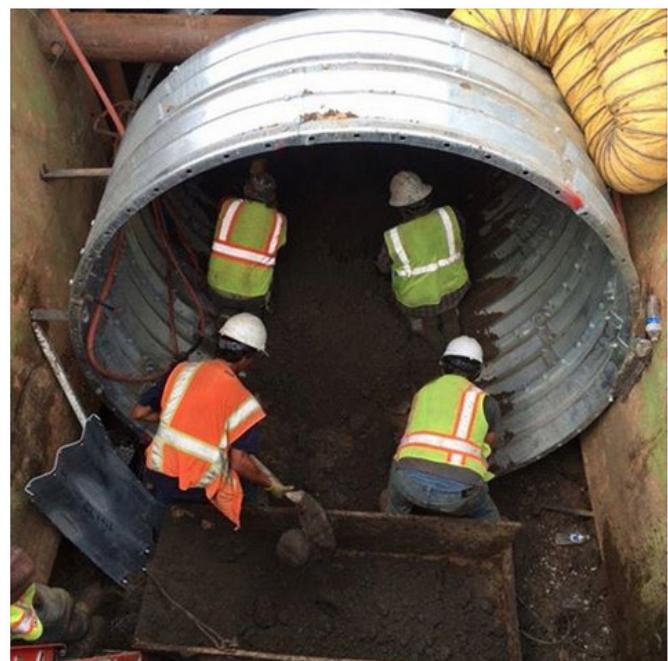


**Bartlett&West**

## Facebook Post



Jeff Jones, P.E. at Bartlett & West, and Srikanth Honnur, P.E. at Kansas City Southern Railway, are sharing a presentation called "KCS Utility Permitting & Construction Observation – A Proven Process for Risk Mitigation & Safety" at Railway Interchange. Be sure to attend their session, or find out more on this topic at <https://hubs.ly/H08qXnp0>.



[Like](#)

[Comment](#)

[Share](#)

## Results Assessment

For the majority of our marketing tactics, we were able to assess the results using digital tracking methods. All of the emails were sent out using our Hubspot marketing program, which was able to track the number of emails sent, the open rate, and click rate.

For our collateral, we ended up not using printed materials as we piloted the FatStax application during this show. So this meant we could track the number of pieces sent through this app and it also kept track of this information in Hubspot as there was a direct link between FatStax and Hubspot. Also included within the digital collateral tactics section were our looping videos we had playing on the monitors in our booth - both for program management and the CIM Car. To assess results from these videos, I referenced what I learned in **Session 112 - Effective Methods for Measuring Awareness**. I measured awareness using the impressions generated method. This was done by calculating gross and targeted impressions by finding cost per impression (CPM) from a full-page ad placed in Progressive Railroading magazine and applying that value to the gross audience information I received from the Railway Interchange organizers after the completion of the show. Progressive Railroading provided an audit of qualified circulation data for their magazine that closely mirrored the audience demographic at Railway Interchange, so I used that information to help calculate estimated targeted impressions. This was the first time I used this method of measuring awareness for our booth display, so this will help to be a benchmark for future tradeshow assessments.

Our website landing pages and forms were also tracked through Hubspot as it was able to show us the number of people who visited our page or clicked on our calls-to-action to schedule a one-on-one consultation at the show. Not only did it keep track of the number of people, but Hubspot also captured the visitor's details such as name, company and email address. More information could be gathered based on the user's email domain such as the company size and estimated company revenue.

All of this contact information captured in Hubspot is saved to that specific contact and is carried through to the CRM side for our business development team to reference as they continue to work the lead. So not only is this information valuable to show our marketing campaigns tactic's success, but it is valuable information for our business development team so they can understand how each specific contact has interacted with our company.

# MANAGEMENT OF RESULTS REPORTING

Objectives	Tactics	Assessment Methods	Measurable Goals	Results	Recommendations
Reinforce Program Management Positioning (Circle of Leadership) "Forging new paths, together."	Display Circle of Leadership slideshow on main monitor	Calculate estimated value based on gross & targeted impressions	Use results to create a benchmark for future tradeshows	Promotional value of \$4,384 based on gross & targeted impressions from exposure to our exhibit. This was estimated using the final attendee count of 8,150 and cost per impression figure from Progressive Railroading ad costs. Targeted impressions were estimated using Progressive Railroading's audit of qualified circulation data as it would be a similar audience to conference attendees.	The value is useful for future planning needs and to show that we can assign a dollar amount to impressions generated at tradeshows. Recommend to use this initial value as a benchmark for future shows.
	Email blast for conference attendee list	Send and track results through HubSpot	25% open rate, 3% click rate, 2 consultations scheduled	Email 1: 22% open, 14% open, 0 consults Email 2: 16.4% open, 0% click, 0 consults	Continue to use email marketing, but develop a stronger call to action
	Distribute printed collateral	Print a specific quantity and count remaining collateral post-show	Distribute 40 each firm profiles & rail sector profiles	Did not use printed collateral, used FatStax pilot Total of 10 stacks w/generic content sent (out of 16 leads)	Received positive feedback for the digital collateral, continue to use this method
	In-booth lead generation	Each booth rep to keep track of number of business cards collected	Scan 30 business cards	Used FatStax pilot to collect lead info, total of 19 leads captured. Staff post-show survey indicated 32 overall leads captured, so some must have been collected manually.	This method of digitally capturing leads that integrates into our CRM was very successful, need to continue for future shows
	Create a digital presence on B&W website	Track visitors through website analytics	10 landing page visitors	62 external visitors to landing page	Exceeded our goal, continue to use but re-think how to boost personal consultation numbers
Promote CIM Car Powered by IRIS	Progressive Rail eNewsletter ad	Get open rates from advertiser	3% click rate	Did not receive %, total number of 149 visits to our website	Good number of visits to our site, look for future ad tie-ins with upcoming conferences
	Create in-booth display that complements our existing branding	Calculate estimated value based on gross & targeted impressions	Use results to create a benchmark for future tradeshows	See results from Circle of Leadership slideshow	Need to re-evaluate if we want to continue to promote CIM Car at future shows.
	Distribute printed collateral	Print a specific quantity and count remaining collateral post-show	Distribute 10 of the CIM/IRIS handout	Did not use printed collateral, used FatStax pilot Total of 6 stacks w/CIM content sent (out of 16 leads)	Received positive feedback for the digital collateral, continue to use this method but re-evaluate promoting CIM Car
	Display CIM Car Powered by IRIS slideshow on secondary monitor	Calculate estimated value based on gross & targeted impressions	Use results to create a benchmark for future tradeshows	See results from Circle of Leadership slideshow	Recommend to use this initial value as a benchmark for future shows.
	Tie-in as featured video on "Forging New Paths" email blasts targeted to RSSI attendee list	Send and track results through HubSpot	3% click rate	Email 1: 36% open, 6.85% open Email 2: 5.71% open, 0% click, 0 consults	Continue to use email marketing, but develop a stronger call to action
Position Bartlett & West as a Thought Leader	Presentation by Jeff Jones w/KCS	Get attendance numbers from show organizer	30 people attend session	At least 30 attended based on feedback from presenter, did not receive official count	Continue to present at tradeshows as opportunity arises
	Mention presentation in pre-show email blasts	Send and track results through HubSpot	25% open rate	Email 1: 23% open, .6% click, 0 consults Email 2: 20% open, 2.67% click, 0 consults	Continue to use email marketing, but develop a stronger call to action
	Leave-behinds at presentation	Print a specific quantity and count remaining collateral post-show	Distribute one per each attendee	Due to FatStax pilot, we did not provide printed collateral	Determine the need for specific collateral depending on the presentation topic
	CTA on landing page for personal consultation	Track through landing page analytics	2 consultations scheduled	0 consultations	Re-think how to boost personal consultation numbers
Build Relationships with Clients	Private dinners with select clients	Each rep to identify top two clients & take out to dinner or private meeting	5 rail reps @ 2 clients each = 10 clients total	Scheduled two separate dinners for one rep; 8 people per dinner (approximately 16 people)	More frequent reminders to sales team to reach out personally to key clients

When reviewing results for the objectives that were set for this show, I think we accomplished many of the things we set out to do. We had our four main objectives that focused on reinforcing our program management capabilities, promoting CIM Car powered by IRIS, positioning ourselves as a thought leader, and building relationships with our clients. The measurable goals and tactics were built out to support these objectives.

I referenced what I had learned from **Session 20215 - Basic Project Management and Reporting Skills** to understand what types of information to include in the post-show report. Some of the key elements included review of performance against our goals as well as summaries of what went right, what went wrong, and recommendations for change for the future.

In addition to the results shown on the previous chart, I also sent out a post-show survey to all of our staff who attended so I could get their honest feedback on various aspects of the show. I compiled these responses to discuss during our post-show debrief meeting. The intent of doing the survey first before the meeting was to look for any consensus on key issues so we could spend our time discussing the pertinent issues of the show. The survey also allowed me to collect key data to save for future reference and to compare those results against other shows that we exhibit at. A sample of the survey questionnaire and results from this show can be seen on pages 45-48 of the appendix.

The overall feedback I received from both the post-show survey and debrief meeting is summarized as follows:

**Audience:** There was an even mix of new business prospects, current customers, and contractors looking to us for partnership.

**Suggestions for changes:**

- Move our booth to REMSA section of the floor as our services would be better suited to be displayed in that area.
- Look at updating booth graphics to make the circle of leadership information and rail engineering services more captivating.
- CIM Car should be in a separate booth, not in the B&W booth moving forward

as it detracts from our services.

- Fewer staff members attending and working the booth.

### **Ways the show was successful:**

- Leads generated and tracked through FatStax application that integrated directly to our Hubspot CRM database.
- Customer dinner meetings were valuable, clients enjoyed the atmosphere.
- The CIM Car video and display were well received by attendees, perhaps so much so that it overshadowed our other services.

**Overall show value:** This show has considerable value, participation is highly recommended. Next year is solely AREMA; Railway Interchange to return in 2019.

My recommendations based on the feedback and the results of the measurable goals:

- **Develop stronger content offers** and calls-to-action for our email campaigns to increase our click-through rates.
- **Reduce the number of staff** working the booth for this show. While I did create a booth schedule for our staff to help control the number of people in the booth at any given time (see example of booth schedule on page 49 of appendix), I'm not sure that it was adhered to or perhaps was still too crowded at times even if the correct staff were present. There were also a couple of unplanned, last-minute attendees from our company who attended the show which likely contributed to the crowded booth.
- We should **review how we promote CIM Car** in our Bartlett & West booth. Even though the promotional efforts were successful, there was feedback that it perhaps overshadowed our other services. This is a conversation that needs to be held with the rail market leader to understand how he intends to market CIM Car moving forward.
- Continue our efforts with offering **digital collateral and in-booth lead tracking capabilities**. The feedback surrounding the FatStax pilot was very positive and the app was used successfully at the show. At the time of writing this portfolio, we are in negotiations with FatStax regarding pricing and licensing availability, so whether or not we continue with them is yet to be seen but we will look for ways to continue to provide these services at our tradeshows moving forward.

The results reporting was shared with multiple people within our company. I began with sharing the results with the staff that attended, and in this case, this staff included my manager, the director of the marketing team, and our rail market leader who also holds a position on our Board of Directors. From there, this information was passed along to our CEO by the marketing director during their regularly scheduled one-on-one meetings. Key performance indicators (KPIs) from the tradeshow are also tracked in an overall marketing department report that is viewed by the company leadership team and CEO. The main KPI from tradeshows that they are interested in is the number of leads generated at each show, so this Railway Interchange show had a significant increase in the number of leads captured as we had a new means of automatically tracking them rather than the old method of manually tracking them and trying to capture that information in our post-show debrief meetings.

# CONCLUSION

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Back in late 2016 as I was reviewing and preparing the schedule for the 2017 tradeshow year, I knew I wanted to use the Railway Interchange show as my benchmark to apply the things I had learned during my CTSM coursework and to use as the focus of my portfolio. It made the most sense in terms of timing as I had completed my comprehensive exam at ExhibitorLIVE 2017 and our company was going through a rebranding effort in late 2016/early 2017. So I set a goal for myself to get a lot of the practices and processes in place to use at the Railway Interchange show in September 2017, as that was a realistic deadline for me.

During the time between when I started the CTSM courses and the Railway Interchange conference, I was using the information I learned and incorporated it into my every day work with the idea of building up our tradeshow program to be a focused and data-driven sector of our marketing team. I wanted to transform the program from a reactive state to where we just do things based on a gut reaction with no real means of analyzing data, to a proactive process of planning, goal setting, and tracking results to be able to make informed decisions for our future tradeshow participation.

I referenced what I had learned in **Session 30715 - Creative Thinking to Reinvigorate Your Program**, specifically where it mentions that you can only do the same thing so many times as that really resonated with me when I thought about ways to improve the program. A lot of new processes and ideas were implemented for this show. Not only from a tactical perspective with the launch of Hubspot email campaigns and the digital collateral and lead tracking application called FatStax, but I initiated new planning and tracking methods that we have not used previously. A conscious effort was made to identify show objectives and then set measurable goals to support those objectives. I documented each of our goals to show how each directly supported the objectives we set to achieve. I used new technologies to help me implement and track our marketing efforts: Smartsheet for planning and collaborating, Hubspot for our digital marketing efforts (email campaigns, landing pages, and fillable forms), and FatStax for digital collateral sharing and in-booth lead tracking.

Overall I think there were many more positives than negatives that I experienced during this process. I intend to continue many of the processes I put into place for each show moving forward: setting objectives and measurable goals, integrated marketing campaigns, lead tracking and results reporting, for example. I expect that each show, no matter the market sector, will have objectives tied to thought leadership and relationship building as those are core values to our brand and are overarching themes across all of our markets.

During both the show itself and the process of writing this portfolio, I do acknowledge that both were a learning process and there is still room for improvement. I am happy with how the tradeshow program has progressed from when I first started at Bartlett & West, and now it is a matter of fine-tuning some procedures to create a set of best practices to adhere to. I intend for many of the processes that I implemented for Railway Interchange to be the standard for each show moving forward and I will continue to learn and improve the process every step of the way.

I would like to acknowledge the support I have received from my teammates during this process. I am very fortunate to work for a company that values professional development. This CTSM program has truly been a valuable experience for me to elevate my role within the company and bring more value to our company's tradeshow program.

# SESSION REFERENCES

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Session	Title	Page
21315	Beyond the Basics of Booth Selling	6
324	Drive Success through Sales, IT and Marketing Collaboration	8
20415	Don't Skip the Meetings; Pre-, At-, and Post-: Guideposts to Success	12
61715	Graphics Boot Camp	15
20915	Show Operations Basics - Part II: On-Site Implementation	18
52115	Negotiating Skills to Win	18
31515	Integrated Marketing Communications	20
112	Effective Methods for Measuring Awareness	25
20215	Basic Project Management and Reporting Skills	27
30715	Creative Thinking to Reinvigorate Your Program	30

# APPENDIX

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Pages 36, 47, and 48 have been removed due to company confidentiality.



## Driving community and industry forward, together.

Bartlett & West exists for one reason – to work with businesses and communities across the nation to make people's lives better. It is a shared goal with our clients.

From water systems to railroads to public spaces, we use **ENGINEERING AND TECHNOLOGY** to solve problems for real people, their communities, and their businesses. We help companies produce and deliver. We help cities create jobs and grow infrastructure. We help people and goods get where they need to go, safely.

Using the knowledge gained since Bartlett & West started in 1951, we partner with public and private clients to build and maintain stronger, smarter, more connected infrastructure. We are an ally in orchestrating change. We listen to your needs and collaborate to bring forth solutions.

### CORE SERVICES

Construction Phase  
Design/Build  
Energy Services  
GIS & Technology  
Landscape Architecture  
MEP  
Planning/Civil/Site  
Rail  
Right-of-way  
Structural  
Survey  
Transportation  
Wastewater  
Water

### CONTACT

The experts at Bartlett & West work in a fully-integrated network of offices to deliver our clients' solutions. Talk to us.

[www.bartlettwest.com](http://www.bartlettwest.com)  
(888) 200-6464

## CORE MARKETS

We provide innovative technology and engineering solutions to clients nationwide. With deep industry knowledge and a passion for creative problem solving, we engineer better tomorrows.

### RAIL

Bartlett & West partners with rail clients to deliver innovative, technology-based services through market understanding, commitment to quality, and safety-minded solutions. We are dedicated to being a long-term ally who understands all facets of the railroad industry and brings you world-class solutions. We help rail clients drive the industry forward and overcome shared regulatory challenges.

### WATER

Founded in 1951 as a rural water firm, Bartlett & West's water-focused services (rural, municipal, industrial, and wastewater) have been core markets for the company ever since. In fact, we are nationally ranked as a top water engineering firm.

For rural water districts and municipalities, Bartlett & West is a trusted consultant who is constantly looking out for our clients' best interests. We serve as a part of our clients' teams and help to develop solutions that meet the needs of our communities. We deliver customized solutions that are budget sensitive and on time. Our professionals provide consistent communications regarding our understanding of the client and system needs and manage those needs accordingly.

### TRIBAL

For tribal communities, Bartlett & West plans, designs, and constructs water systems that deliver clean, safe water for a variety of purposes. Bartlett & West is known for its top-tier engineers and more than six decades of experience in developing reliable water systems, while helping tribal clients navigate through regulatory and funding agency red tape. In addition, Bartlett & West's irrigation and transportation planning and engineering solutions help bring tribal communities together.

### DOTs

Bartlett & West has a rich history of partnering with departments of transportation providing safe and efficient solutions for the traveling public. Our engineers are respected for their in-depth knowledge of best practices, regulations, and new technologies. Our best-in-class transportation solutions promise to drive community and industry forward, together across town, the state, and across the country.

### LOCAL GOVERNMENT

As an ally in delivering infrastructure solutions that transform communities, Bartlett & West has a core commitment to building a better tomorrow with every city or county with which we work. Whether providing water, transportation, site planning, outreach, or any other service, we are dedicated to being responsive, reliable, and value-minded.

### INDUSTRIAL/INSTITUTIONAL

From renovating a single structure to designing and building an entire site, Bartlett & West's planning, design, and construction services will get your project off the ground and through to completion.

### ENERGY

Our energy-focused services meet the industry's demanding and ever-changing needs, from facility and site planning support to adept navigation through the regulatory and permitting process.



### TECHNOLOGY & INNOVATION

Bartlett & West is committed to helping clients build stronger, smarter, more connected infrastructure. We invest in and leverage our own technology to solve problems and deliver innovative solutions that meet our clients' needs.

## Needs Assessment

- What are your primary objectives at the tradeshow?
  - What goals do you set for the show?
  - What message(s) are you trying to convey to potential clients through your participation at the show?
  - How would you describe your past experiences at tradeshows?
  - What have you liked best or valued most regarding your tradeshow experience?
  - What have you not liked or valued least about tradeshows?
  - What changes would you make to help enhance the effectiveness of your tradeshow goals?
  - What kind of help will be most important to you?
  - What are your expectations of me as a tradeshow coordinator?
- 
- What do you do to engage a potential lead?
  - Do you feel you are hitting the right target audiences at the shows?
  - What factors do you consider when deciding whether to exhibit or attend a show?
  - What types of display items/collateral would you like to see utilized?
  - What changes would you make to the types of giveaway items that we provide?
  - Are there any types of premiums that we haven't done before that you would like to see used?
  - How do you handle the leads that you acquire at the show?
  - Would a lead management system be beneficial to you for reaching potential clients post-show?
  - Which shows do you consider to be your most important in terms of prospecting and gaining exposure?
  - Would you be interested in expanding into different markets with regards to tradeshow opportunities?
  - Would you like to be involved with more program/presenting opportunities at shows?
  - Do you think pre-show communications would improve your exhibit/presentation attendance?

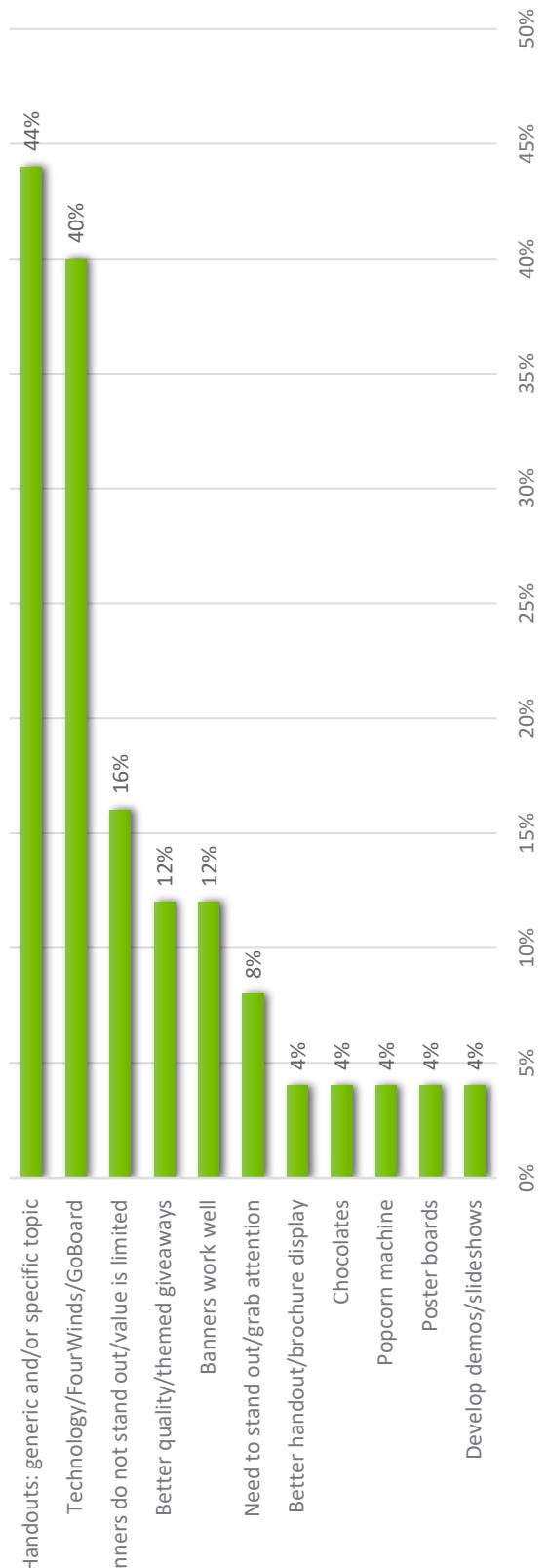
## **How do you handle leads that you acquire at the show?**



## **What changes would you make to the types of giveaway items that we provide?**



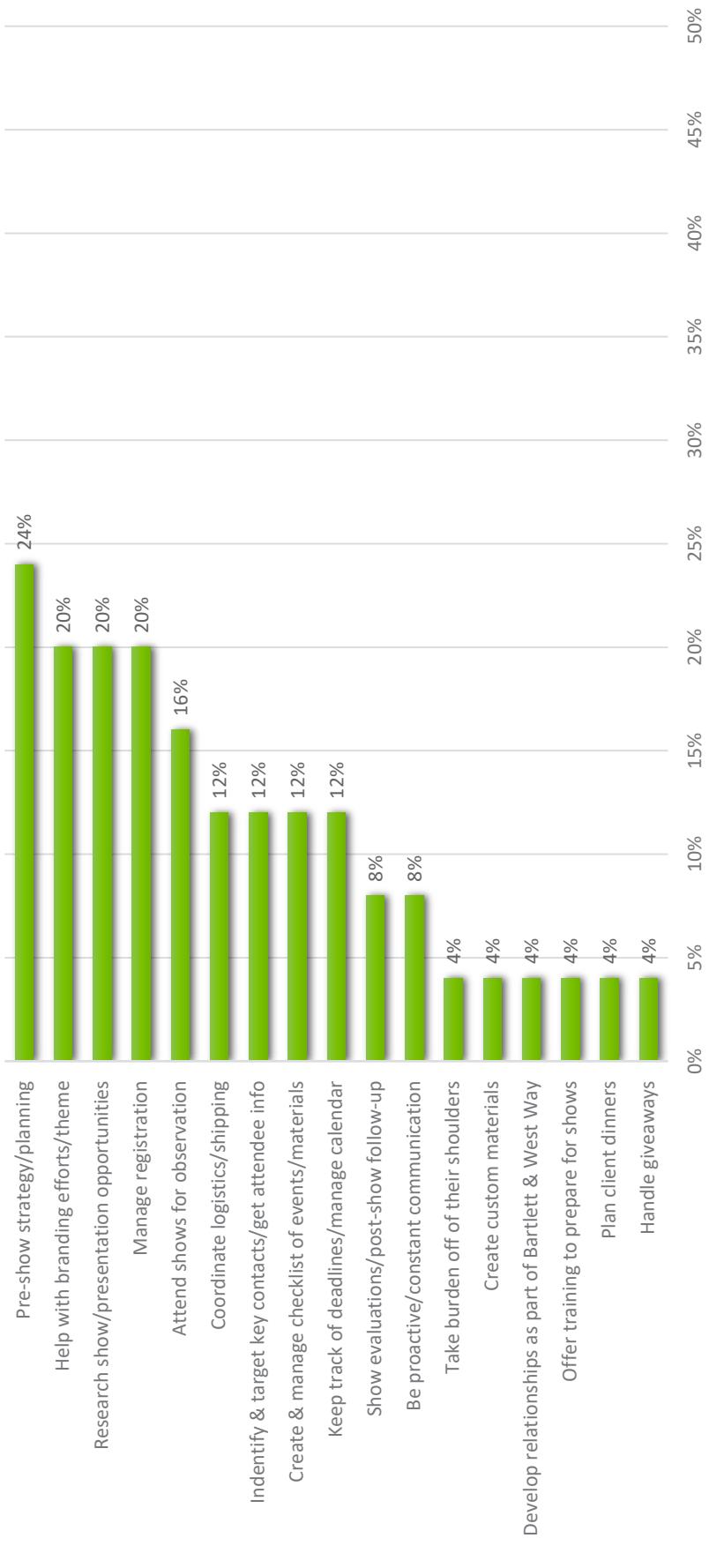
## **What types of display items/collateral would you like to see utilized?**



## **What are your primary objectives at the tradeshow?**



## **What are your expectations of me as a tradeshow coordinator?**



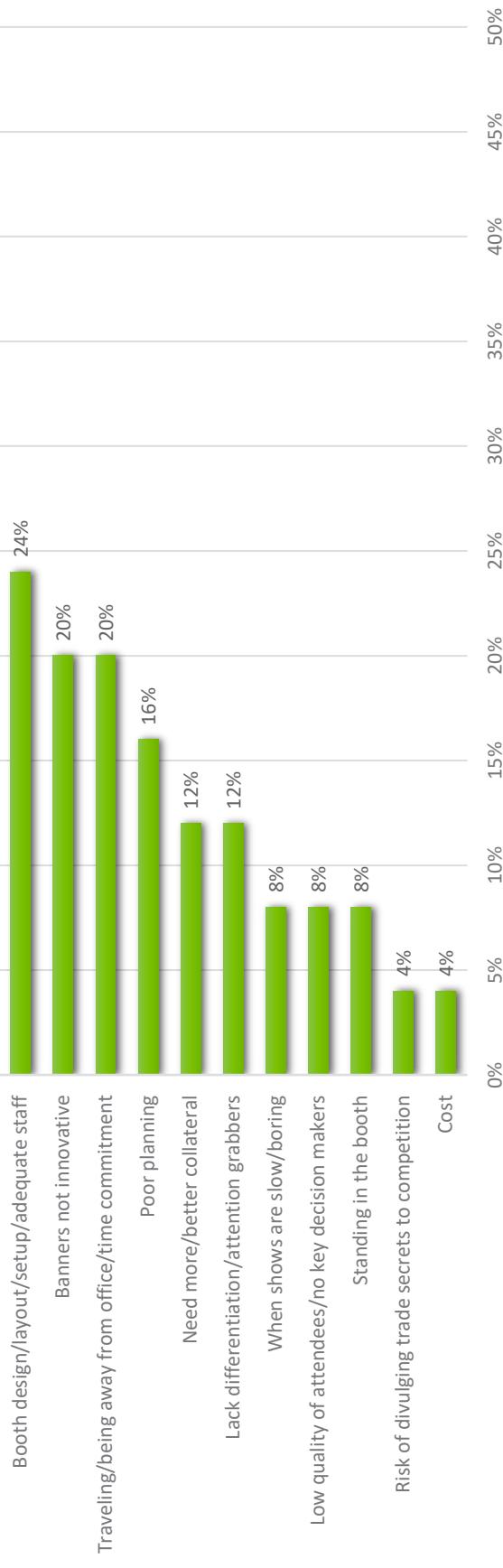
## What kind of help will be most important to you?



## What changes would you make to help enhance the effectiveness of your tradeshow goals?



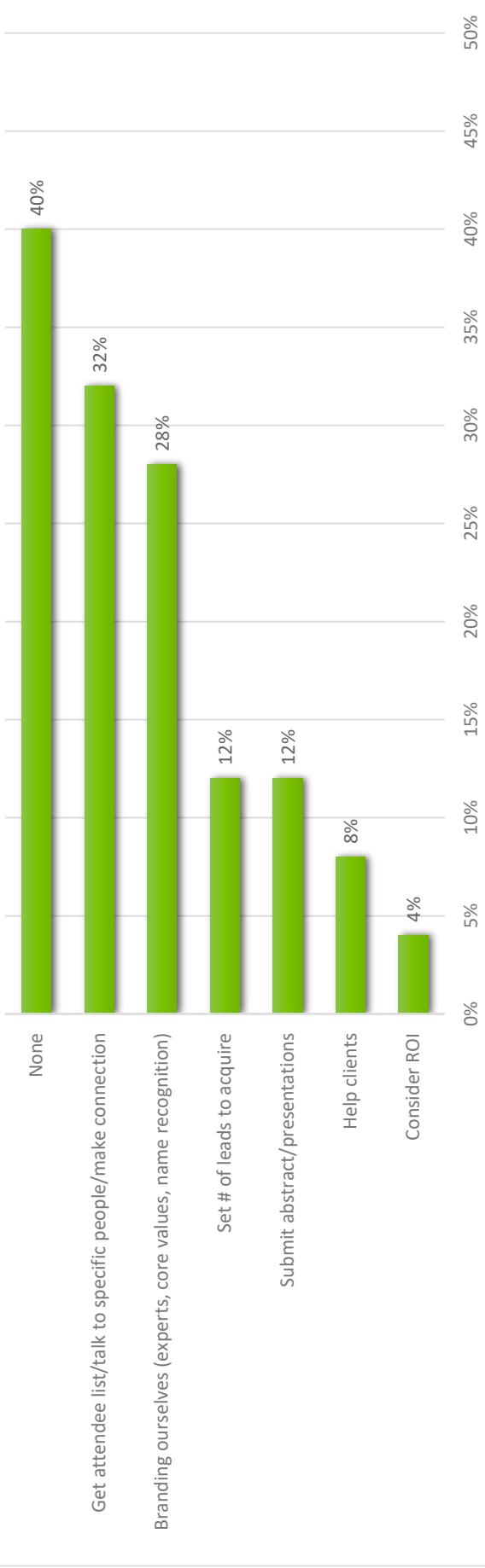
## What have you not liked or valued least about tradeshows?



## What have you liked best or valued most regarding your tradeshow experience?



## What goals do you set for the show?

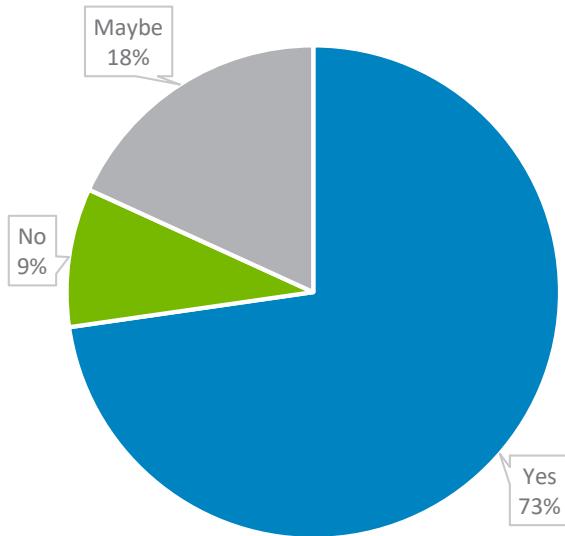


## What message(s) are you trying to convey to potential clients through your participation at the show?

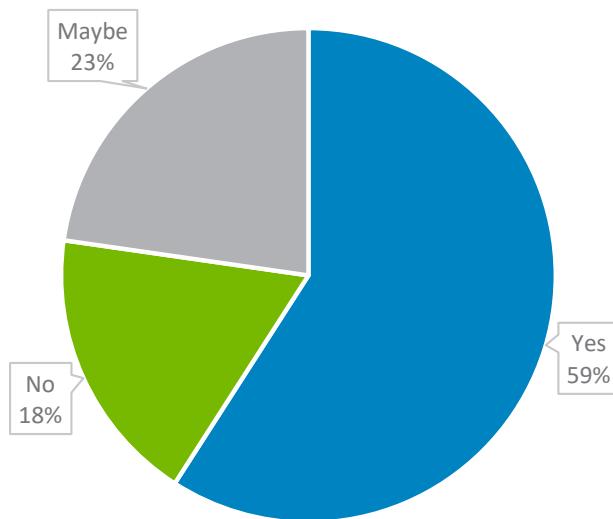


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**Would a lead management system be beneficial to you for reaching potential clients post-show?**



**Do you think pre-show communications would improve your exhibit/presentation attendance?**



\* 1. Your Name

\* 2. Conference Name

\* 3. How many leads did you collect as a result of exhibiting at this conference?

4. How would you categorize the majority of the attendees you interacted with on the show floor?

- Current customers
- New business prospects
- Vendors
- Other (please specify)

5. What level of participation would you recommend we do for this show in the future?

- Larger presence
- Same level as this year
- Smaller presence
- No presence/do not participate again

Comments/Suggestions

6. Was staffing adequate to meet the needs of attendees visiting our exhibit?

- Yes
- No

If "No," please explain.

7. Was the exhibit's design effective in showcasing our services?

- Yes
- No

Comments/Suggestions

8. If you had the opportunity to visit our competitors' exhibits, what positively differentiated their exhibit from ours (i.e. staffing, attire, demos, product display, giveaways, etc.)?

**9. Did you or another person from Bartlett & West lead a presentation at this conference?**

- Yes, I presented
- Yes, another Bartlett & West employee-owner presented
- No
- Not sure

If yes, please provide name of presenter

**10. Would you recommend that you or someone from Bartlett & West submit to present at this conference in the future?**

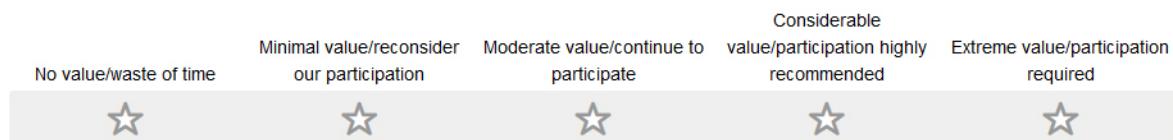
- Yes
- No

Please explain.

**11. In what ways was the show successful?**

**12. What were some areas that needed improvement?**

**\* 13. What is your overall rating for your experience at this show?**



**14. Additional comments**

Sunday Sept 17                    1-5 pm  
 Monday Sept 18        9:30 - 6:00 pm  
 Tuesday Sept 19      8:00 am - 3:00 pm

**Please mark in red the times you are UNAVAILABLE to work in the booth**

Sunday Sept 17	1-2 pm	2-3 pm	3-4 pm	4-5 pm
Amber Larson	X	X		
Beth Lynn				
Charlotte Muller	X	X		
Doug Morrison	X	X		
Jeff Jones				
Marc Schrader			X	X
Mark Holder			X	X

Monday Sept 18	9:30-10:30 am	10:30-11:30 am	11:30-12:30 pm	12:30-1:30 pm	1:30-2:30 pm	2:30-3:30 pm	3:30-4:30 pm	4:30-6 pm
Amber Larson	X	X		X	X		X	X
Beth Lynn			X	X		X	X	
Charlotte Muller			X	X				
Doug Morrison	X	X			X	X		X
Jeff Jones	X	X						
Marc Schrader		X	X	X		X	X	
Mark Holder	X		X		X		X	X

Tuesday Sept 19	8-9 am	9-10 am	10-11 am	11-12 noon	12-1 pm	1-2 pm	2-3 pm
Amber Larson	HDR w/ BNSF	X	KLU w/ Mt. Rail	X		Jeff's Presentation	
Beth Lynn	X	X			X	X	
Charlotte Muller			X	X	X	1:30 PM	
Doug Morrison	X		X	X		X	X
Jeff Jones	X	X					
Marc Schrader			X	X	X	X	X
Mark Holder	X	X			X	X	