

Completing Your Portfolio: A Step-by-Step Guide

- **Start Early & Understand the Requirements:**
 - Immediately begin reviewing the [portfolio checklist](#).
 - Read through **sample portfolios** available on the [portfolio page](#) to understand what a completed portfolio looks like.
- **Set Up Your Document:**
 - Open a Word document and create your initial structure:
 - **Table of Contents**
 - **Criteria 1, Criteria 2, Criteria 3, Criteria 4, Criteria 5, Criteria 6, Criteria 7**
 - **References**
 - **Appendix**
 - Under each Criteria section, list every specific line item from the [portfolio checklist](#) (e.g., Personal Bio, Education, Industry and Career Background, Current Job Responsibilities, etc.). These will serve as sub-headers and reminders to address each point.
- **"Eat the Elephant" - Write in Chunks:**
 - Dedicate small blocks of time (e.g., 10-20 minutes) to write individual sections.
 - You don't have to write in order; focus on completing each required item.
- **Tackle Initial Sections:**
 - Write **Criteria 1 and 2 NOW**. These sections focus on your personal background, company, and trade show program—information you already know well.
 - Share these completed sections with your **mentor** for feedback.
- **Align with Your Show of Focus (6-3 Months Out):**
 - Focus on **Criteria 3** while you are planning for an upcoming show. This section covers determining your show of focus and how you'll measure its success.
 - If you plan to complete your CTSM sessions and exam within the next two years, the information you write now will remain relevant.
 - Aim to finish Criteria 3 a month or two before the show.

- **Commitment to the Process:**
 - Once you're confident you can finish within 365 days, pay your [portfolio registration fee](#).
 - If you have enjoyed working with your mentor, ask that they become your **advisor**, as they are already invested in your success.
- **During Your Show (3-0 Months Out):**
 - While preparing for and attending your show of focus, write **Criteria 4 (Planning for the Show)** and **Criteria 5 (Integrated Marketing Communications)**. These fit perfectly into that timeframe.
- **After the Show:**
 - **Criteria 6 and 7** will be much easier to complete after your show.
 - **Most importantly, report your results and formulate a plan to improve your program.**
- **Final Review and Polish:**
 - REMEMBER, there is a fee for multiple reviews, so dial it in and ask questions the first time around so you don't have additional fees and frustrations
 - Thoroughly **check all formatting**.
 - Run the entire portfolio through **AI to catch errors** you might have missed.
 - Verify your **Table of Contents and page numbers**.
 - Add **links to the TOC, Reference, and Appendix pages**.
 - Create an attractive **cover page** (do not include your phone number or email address).
 - Have your [advisor sign off](#) on the completed portfolio.
 - Submit the finished document via email to CTSM@exhibitorgroup.com. If the file is too large, email a link to a cloud storage link.