



Instructions:

Please review each section carefully and initial the provided blank to confirm that you have addressed and completed those specific items in your portfolio. Your initials certify that that requirement has been reviewed, included where applicable, and completed to the best of your knowledge before submission.

Important Policies & Deadlines

Incomplete Submissions: Portfolios submitted with missing checklist may be returned for correction before the formal review process can begin.

Included Revisions: The portfolio registration fee includes one round of revisions, which are due within 30 days of receiving your initial feedback.

Subsequent Revisions: If any further revisions are requested beyond the first round, an additional fee of \$150 is required, and the next version of the portfolio will be due within 30 days.

Portfolio Criteria Requirements

Criteria #1: Vital Statistics _____

Personal & Professional Background: Includes a personal bio (not a resume, maximum 2 pages), and educational background outlining your CTSM journey, and an industry career background explaining how you became a trade show professional.

Current Role & Team: Details your current job responsibilities and identifies key staff members, their interaction with your program, and excludes last names unless permission was granted.

Company Profile: Includes an original company bio (not copied and pasted from the website) covering corporate history, organization size/metrics, locations/remote status, active markets, competitive landscape, and products or services.

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Criteria #2: Overview / Show Schedule _____

Program Scope & Schedule: Introduces your overall program size, scope, and activities. Includes a 1 to 2 page major show schedule with explained acronyms, dates, locations, and booth sizes (full schedule placed in appendix if larger)

Program Context: Identifies any major changes made since taking over the program and outlines any applicable special circumstances.

Criteria #3 Show Focus & Measurable Objectives _____

Show Selection & Strategy: Introduces the focus show, selection rationale, event demographics, target audience, specific participation activities/sponsorships, and a detailed list of event strategies.

Objectives Table & Preparation: Features a four column table mapping out Strategies, Tactics, Assessment Methods, and numerical Measurable Goals, alongside an explanation of the show preparation process.

Criteria #4: Management of Exhibit Design / Production _____

Design Partner & RFP: Explains the space RFP/selection process, choice of design partner, and interaction workflows (or a list of needs meeting design requirements if no RFP was used).

Production, Budget & Visuals: Details production responsibilities, provides a numerical chart of planned vs. actual budget variances (or percentages if confidential), and includes clear, captioned visuals.

Criteria #5: Integrated Marketing Communications (IMC) _____

IMC Strategy & Evaluation: Details communication methods with selection rationales and incorporates a comprehensive 7 column table tracking: Method of Communication, Rationale, Target Audience, Measurable Goals, Assessment Method, Results, and Recommendations for Improvement.

IMC Results & Visuals: Provides summary recommendations for future marketing efforts accompanied by clear, captioned visuals demonstrating message integration.

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Criteria #6: Management of Results Reporting _____

Analysis & Reporting: Explains overall findings (+ or -) regarding strategies and objectives and outlines how and with whom results are shared.

Results Chart: Replicates the Criteria #3 table and appends two additional columns on the right: “Results” and “Recommendations to Improve Marketing”.

Criteria #7: Conclusion _____

Program Wrap Up & Strategic Plan: Provides a final assessment of the program, outlines future strategic plans and changes to support recommended improvements, and details the personal learning experience and value gained from EXHIBITOR Learning Events, CTSM, and writing the portfolio.

Document Formatting & Style: _____

Preparation & Tone: Confirms review of online portfolio examples and the official [Reviewer Checklist](#). Maintains a formal, professional, and visually pleasing tone and layout throughout.

Required Core Pages: Includes a title page (with a full name, submission date, “CTSM Portfolio”, photo/headshot, and optional company name/confidentiality notation; no email or phone numbers), a verified Table of Contents with section links and page numbers, simple section header pages, and necessary reference/session reference pages.

Cross Linking: Integrates functional links within the portfolio body pointing to the Appendix and Reference pages, as well as working links back to the portfolio body from those sections.

Session References: Explicitly bolds the session number and session name for at least 8 required and 2 elective CTSM sessions throughout the body, clearly detailing the learning objectives and practical application.

Visuals & Assets: Ensures all charts use the same font as the body text. Verifies consistent font sizing across headers, body, captions, and lists. Images are high quality, clearly legible, and include captions.

Spelling & Grammar: Confirms the document is completely free of typos, punctuation, and grammatical errors after being verified by an AI proofreader, colleague, friend, or family member. Abbreviations are spelled out upon first use, and "trade show" is formatted as two words.

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Final Submission Steps:

File Assembly: Combined all portfolio sections into a single PDF or PowerPoint document.

File Naming: Saved as a PDF or PowerPoint (Last Name_First Name_CTSM Portfolio *i.e.* Stewart, Martha CTSM Portfolio) with “Confidential” included in the title AND on the cover page, if necessary.

Advisor Sign Off: Sent combined sections digitally to the advisor for final review and secured the required [Advisor’s sign off form](#) before the official submission.

Final Delivery: Emailed the completed portfolio and a professional headshot to ctsm@exhibitorgroup.com & chris.bruce@exhibitorgroup.com (or provided a cloud based link if the file size is too large).

Candidate Certification

By signing below, I certify that I have reviewed the CTSM Portfolio Checklist in full and have addressed each required item in my submitted portfolio.

I understand that my initials throughout this checklist and my signature below confirm that, to the best of my knowledge, all required portfolio elements have been included, completed, and reviewed prior to submission.

I also understand that missing or incomplete items may delay the portfolio review process and may require corrections before my portfolio can move forward.

Candidate Signature: _____

Date: _____

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